

QUARTER

03

July 2010

QUARTERLY-  
NEWSLETTER  
FOR OUR SAGE  
CUSTOMERS

# The Advisor



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## Help Us Reduce Our Paper Use

**Invoices:** Starting July 1, we are sending out our invoices by email rather than by hardcopy. If you haven't already, email Kristen (Kristen@gilbertassociates.com) with the name of the person(s) at your company that should receive your invoices.

**Newsletter:** We currently send out both a hard copy and electronic copy of our quarterly newsletter. You can now opt-in to just receiving an email copy of the newsletter. Opt-out of hard copy newsletters by visiting <http://www.Swiftpage7.com/survey/Advisor>



## The Paperless Office

The average worker uses 10,000 sheets of paper per year. That's about 1 sheet of paper every 10 minutes. After reading statistics like this, we decided it was time to switch to paperless invoicing. This change will save us time and money and help reduce our paper consumption. It got us thinking, what else can we do around our office to help lessen our environmental impact and keep the Pacific Northwest beautiful for generations to come? A bit of research led us to a few suggestions we found worthy of sharing with you.

Careless use and disposal of office paper and office supplies is rapidly clogging landfills, contributing to greenhouse gas emissions, depleting natural resources, contributing to air and water pollution, and wasting energy. The amount of copy paper alone used in the United States in one year consumes 15.8 million tons of wood, enough to build 1 million US homes. Here are a few suggestions to reduce your paper use:

- **Use two-sided printing** whenever you can, consider making it your default setting.
- **Make recycling convenient**— give each employee a recycle basket or box.
- **Switch to recycled paper.** Your best environmental choice is a paper with a high percentage of post-consumer content, 30 percent or greater.
- **Send your invoices via email** rather than snail mail. When you print your accounting documents, software like PDFBlaster will automatically create a PDF file, preaddress them to the recipient data stored in Sage Pro, and then deliver the document via email. This could turn your tedious \$3/document process into an automated, two-click, pennies-per-dollar job.
- **Implement a document management system.** Store copies of documents on your server rather than hard copies in files. Paper takes up physical space, and most

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## The Facts:

A typical business will produce 1.5 lbs of paper waste per employee per day.

If the United States cut office paper use by just 10% it would prevent the emission of 1.6 million tons of greenhouse gases -- the equivalent of taking 280,000 cars off the road.

With all the office paper we waste every year we could build a 12-foot high wall of paper from New York to California.



## Into the Blogosphere

**In past editions of The Advisor, we let you know about learning opportunities offered to you by Sage and Gilbert & Associates. In the past few months, we have rolled out another exciting resource: The Advisor– Blog Edition. Take a look at it and let us know what you think! Visit [www.GilbertAssociates.com/blog](http://www.GilbertAssociates.com/blog) to check it out!**

**Here are a few other resources that you might want to take a look at:**

**Sage University:** [www.sageu.com/pro](http://www.sageu.com/pro)

Sage U offers a variety of learning options including convenient internet-based recordings that are available from the comfort of your own office and that are ready when you are.

**Gilbert & Associates Customer Portal:** <https://www.autotask.net/ClientPortal/Login.aspx?ci=4979>

Our Customer Portal offers you access to your service tickets, past invoices, and our knowledgebase. We archive all of our tips and tricks and newsletter articles in this searchable knowledgebase so you can easily find them. Email Kristen ([Kristen@gilbertassociates.com](mailto:Kristen@gilbertassociates.com)) to get your login information.

**Gilbert & Associates Online Document Library:** [www.GilbertAssociates.com/Docs](http://www.GilbertAssociates.com/Docs)

This is our online document library. You can find brochures, whitepapers, success stories, and past newsletters archived for your convenience. Take a look. Let us know if there is something you would like to see and we will do our best to find it for you.

*Paperless Office continued from Page 1*

businesses have more paper than they have space to store it, so documents have to be sent off-site, where they are less accessible and incur storage charges. Disk storage takes dramatically less space than paper and the ever falling costs of media make documents even cheaper to store online. A document management system can integrate with your ERP system so users can look up supporting paperwork for a financial transaction recorded in their ERP system without leaving their desk.

These are just a few suggestions and offer you a few to think about. Why not implement one of the first few in your office today? Consider a document delivery system or document management system, how much money could your business save by reducing your paper consumption? Equisys offers a handy ROI calculator that you can use to calculate how much money and time a document management system like Zetadocs could save you in a year. [http://equisys.com/products/zetadocs\\_for\\_nav/calculator\\_zetadocs\\_NAV.html](http://equisys.com/products/zetadocs_for_nav/calculator_zetadocs_NAV.html) Try it out, you might be surprised by the results.

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## How Well Do You Know Your Business?

### A Brief Look at Data Cubes

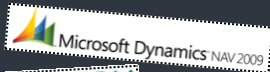
A large percentage of the phone calls and requests I receive are from clients asking me how to get a certain report or specific metrics out of their ERP system. Many times, this phone call turns into a request to create a new report. Although the reports that come bundled with most ERP systems provide a broad overview of the status of your business, just about every organization has unique needs that cannot be anticipated by an out-of-the-box solution.

You have probably encountered one or more of the following buzzwords thrown around in recent years: business intelligence, dashboards, reports, pivot tables, data warehouses, data cubes. These tools and the technology behind them have been floating around the business world for some time, but because of the complexity involved, reporting solutions have either been too expensive or too confusing to gain any traction in all but the largest of organizations.

Historically, users of accounting systems have either been limited to the reports that are available from within their ERP application or have had to turn to ad-hoc report builder tools. In many cases, these options are far too limiting; the built-in reports do not provide enough flexibility and the ad-hoc tools are either too difficult to really get the results you are looking for, or they just take a long time to generate the data.

You have invested heavily in the design of your ERP system. Each day it is capturing critical information about your business -- what you are selling, who you are selling it to, where the product is ending up, what your profit is on that sale, what customers used to buy from you but have recently tapered off, etc. All of this information is available to you already, but it can take weeding through pages of printed reports or Jedi-like Excel skills to see a clear picture of the events that are taking place.

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## Did You Know?

Gilbert & Associates offers expertise in Sage Pro ERP and other business systems. In addition to Sage Pro, we sell and support Sage CRM and Microsoft Dynamics NAV .

Microsoft Dynamics NAV is a complete and customizable business management solution that helps your people work faster and smarter.

Want to know more? Visit [www.GilbertAssociates.com](http://www.GilbertAssociates.com).



## Sage Pro ERP Tips & Tricks: Purging Data

There may come a time when your database has grown too large and you need to purge some of your old data. Sage Pro has a function to delete permanently remove data from your archive (history) files. While it is good practice to keep your database clean and optimal, there are a few things we recommend doing before purging data:

- Verify with your CPA what data you can purge, and how far back you need to retain history
- Make a full backup of your database and store it somewhere safe. We recommend a safety deposit box at a bank, or a fireproof safe. It is always good to be able to back to that data if you need it.
- Understand that you will no longer be able to generate reports for the dates that are purged.

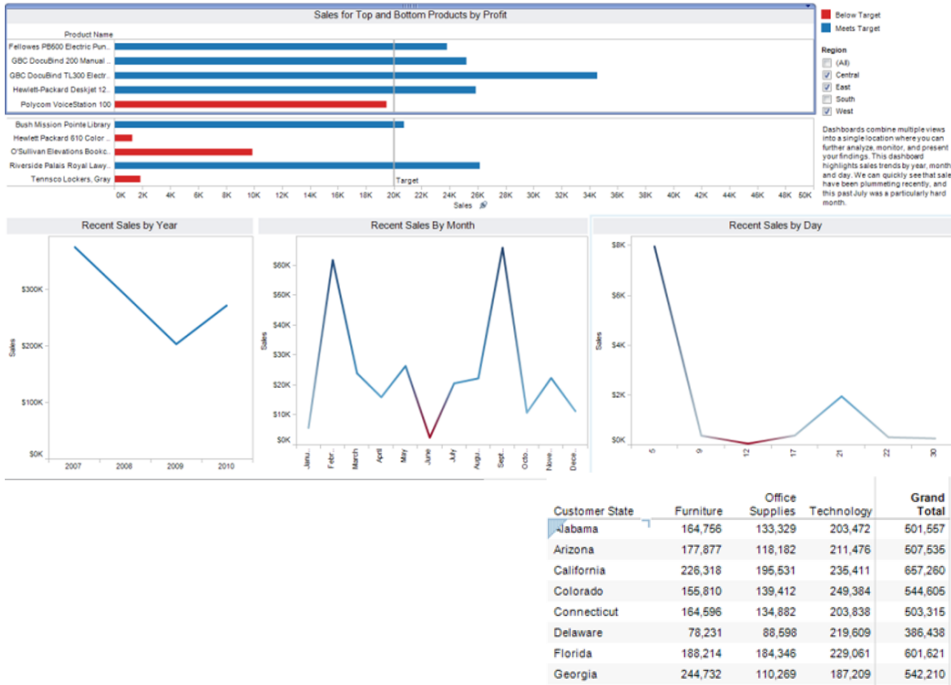
You can select which modules and date ranges you want to purge. To purge data, all users must be out of the system.

1. Go into System Manager and click Transaction → Purge Transactions from Archive
2. Select the company from which you want to purge data
3. Enter your cutoff date (Data will be deleted that is older than the date you select)
4. Check the boxes for which modules you want to purge from
5. Click OK
6. Depending on how much data there is to delete, this may take a little time

The benefits to purging data are that your backups will be smaller, and historical reports will run faster.

Check out past tips and tricks online at [www.GilbertAssociates.com/doc.html](http://www.GilbertAssociates.com/doc.html)

Data Cubes, continued from Page 3



A Brief Look at Data Cubes

Data Cubes are a great answer to these challenges as they allow for near-instantaneous analysis of a database without being an expert in relational databases or SQL queries. Simply put, a data cube stores and presents your data in plain English terms. All you have to do is click on the information you want and a report is built. The interface for building reports is simple and un-daunting and a user can be trained in just a few short hours. You can generate charts, graphs, maps, or spreadsheet-style reports and publish them in minutes.

This technology is powerful for visualizing and tracking trends within your organization. They differ from traditional reporting in the sense that each user can create and run their own reports whenever they want. Report layouts can be shared within the organization, but each user has all of the tools they need to answer any questions they might have about the status of the business.



Sage Pro 2010

Have you seen the updates that Sage Pro 2010 offers? If not, check out the Sage Pro 2010 Webcast, or the What's New in Sage Pro 2010 document on our website.

Learn what new features and improvements will be released with Sage Pro ERP 2010 and how you can benefit from upgrading to the latest version.

Register for the What's New in Sage Pro 2010 Webcast by visiting our website at [www.GilbertAssociates.com/events.html](http://www.GilbertAssociates.com/events.html)



Read this edition of The Advisor, then:

- Update your Newsletter Preferences at <http://www.Swiftpage7.com/survey/Advisor>
- Check out our blog at [www.GilbertAssociates.com/blog](http://www.GilbertAssociates.com/blog)

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## A New Look

If you haven't taken a look at our website recently, you should check it out! We just finished our redesign and would love to hear your feedback.

Go to [www.GilbertAssociates.com](http://www.GilbertAssociates.com)

If there's something you want to see, let us know and we will work to put it on the site.

## Sage Pro Online User Group

### Coming Soon!

Our Sage Pro User Group is just around the corner! Watch your email for invitations coming mid-February for our next User Group.

## Introduction to Sage CRM for Sage Pro ERP Customers

- Available on Demand go to [www.GilbertAssociates.com/events.html](http://www.GilbertAssociates.com/events.html)

Get enterprise wide access to vital customer information— anytime, anywhere. SageCRM integrates with Sage Pro ERP to provide centralized access to key information like order statuses, pricing discounts, inventory counts, credit records, and purchase histories: precisely the type of rich knowledge sales and service professionals need to work more strategically.



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