

QUARTER

02

April 2010

QUARTERLY-
NEWSLETTER
FOR OUR SAGE
CUSTOMERS

The Advisor



this issue

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HIRE Act

A few weeks ago, President Obama signed into law the Hiring Incentives to Restore Employment (HIRE) Act. The law includes several new major tax provisions designed to promote job growth.

You can find answers to many of your questions regarding the HIRE Act at the IRS HIRE Act FAQs page [FOUND HERE](#).

Will your business be taking advantage of the HIRE Act recently signed into law by Congress? If so, your payroll reporting may be affected. Please contact our office for further information.



Your Ruby Slippers

you miss the power you hold within yourself and within your technology.

Like Dorothy in the Wizard of Oz, she knew her Ruby Slippers were magical, but had no idea what specific powers they held. We find this many times in working with our clients, they underestimated the powers of Sage Pro. Frequently we will receive a call from a company asking for a solution to a business problem they have been trying to resolve. They have spent countless hours working with Excel spreadsheets, clipboards, paper forms or whiteboards. They become so exasperated that finally they give us a call to ask for a solution. It gives us no greater joy than to direct them to a function within Sage Pro that they have owned all along. It cost them no more than a phone call. What they received back was priceless in their eyes. In other words, you have had the power the whole time.

At Gilbert & Associates, we feel bad that these companies were going through all these patchwork solutions, when a well-thought out procedure in Sage Pro was right under their nose. Was it a flaw in our training process? Was it a lack of discovery that should have

been done in a pre-implementation analysis? Or was it simply a process that suddenly reared its head as one of the most important issues currently confronting that company, simply a blip a few months ago? At that point, it was too late to raise these questions. But both parties are happy that the problem is resolved, and they can move on to the next big issue.

Take for example one company that called us a while back. They felt frustrated that their customers had seemingly recently begun to use them as a bank. Collection calls were running higher, payments were coming in later and later, resulting in this particular company to start drawing more on their own lines of credit. Discussing this with them, we asked if they were using the finance charge functions and dunning letter capabilities in Sage Pro. They were completely unaware of this functionality prior to our conversation, and we are happy to say it's serving them well.

Another manufacturing company was challenged with complex configurations on their products, with each

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Time-Saving Cities: Seattle Ranks #1

A recent Real Simple article ranked Seattle as the most efficient city in the US. This was based on a survey that ranked dozens of large American cities on criteria such as ease of getting around, health and safety, information and technology, green time-savers, and lifestyle.

With extensive public transit, one of the country's most on-time airports, and 50 miles of new bike lanes in the last two years, our winning city, Seattle, is an icon of urban efficiency. It has more Wi-Fi hot spots and more coffee shops (no shocker there) than any other U.S. city and impressively short waits for a doctor's appointment.

[CLICK HERE](#) for the rest of the article.



Dear Sage Partner,

April is a time for spring cleaning, a time to check in on your new year's resolutions and goals for the year, and perhaps revamp your strategy for the months to come. Here at Gilbert & Associates we took time this past week to look at our goals and revise our strategies to increase productivity. We decided with nearly a quarter of 2010 under our belt, it is time to take a look at ways to save time and increase productivity. We hope you enjoy this time saving edition of The Advisor and find a few takeaways to help you save time and increase efficiency in your business and while using Sage Pro ERP.

Regards,

The Team at Gilbert & Associates

Learn to Use Data Drillers- Lunch & Learns

Using DataDrillers in Sage Pro ERP (Part 2)

May 18, 2010| 10:00am-11:00am PST | FREE | [REGISTER HERE](#)

See how custom Data Drillers can be used to get your data when you want it. Learn how to create new Data Drillers and Super Drillers. Learn how to use Advanced Filters for Data Drillers. Learn how to join and extract data from multiple tables.

Using DataDrillers in Sage Pro ERP (Part 3)

June 15, 2010| 10:00am-11:00am PST | FREE | [REGISTER HERE](#)

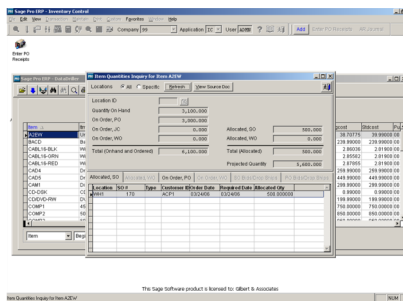
Learn how to create and assign Drilldowns to fields. Use advanced filters and expressions in Data Drillers. Design custom reports that may include calculated fields and reformat report layouts.

Sage Pro ERP Tips & Tricks

One of the biggest requirements of any information system is to allow the user to quickly access information. Sage Pro has been providing more and more tools with every release. Here's a great trick to add item quantity inquiry to any item code lookup or data driller. This suggestion works with versions 7.4 and forward.

Let's say you are entering a sales order, and want to inquire on details of the current availability of an item. This would mean you need to easily view open sales orders (customer demand), open purchase orders (current supply), or open work orders (internal supply and component demand). With drill-down to the item master, you can see each of these with a separate inquiry. Sage Pro now has the Item Quantities View. Here's how to attach to a data driller or item field.

- Load Sage Pro ERP and go to System Manager,
- Load Drill Down screen (SM / Maintain / Drill Down)
- Select ITEM drill down
- Click on Assign Task
- Click on Select and add a new task
- Seq No – 6
- Description – Quantity Inquiry
- Type – Form
- Application – IC
- Copy & Paste the following script in the Setup Script and save the details



```
LPARAMETERS pc_compid, pc_applid, pc_itemno
WITH g_newobj("cntCallIcqinq", "ic\icbase")
.m_Reset()
```

```
*-- Set parameter values
.pc_item = pc_itemno
```

```
.pc_title = "Item Quantities Inquiry for Item " + pc_itemno
.pn_helpTag = SY_M_ITEM
.sl_modal = .t.
.sc_applID = "IC"
.sc_compID = gc_compID
```

```
.m_Run()
ENDWITH
```

Now go to any screen that uses item (Sale Order, AR Invoices, Change Void SO, etc) and after selecting the item:

- Right click Item (text box)
- Select Drill Down
- Notice the new Quantity Inquiry option and click on it.



Improve Profits & Meet Your Strategic Goals with ERP

Did you know Gilbert & Associates offers expertise in Sage Pro ERP and other business systems too 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? We are holding a NAV event for manufacturers and distributors on how ERP can help you achieve your strategic plan. Join us!

Tuesday, May 11, 2010

10:00am-12:00pm

Bellevue Microsoft Civica Building

[REGISTER HERE](#) or Visit [www.GilbertAssociates.com/onestepahead](http://www.GilbertAssociates.com/) for more information and registration or send [Kristen an email](mailto:Kristen@gilbertassociates.com).




Ruby Slippers continued from Page 1

product sold having to go through a strict and time-consuming order entry process. Not only that, it required a very convoluted spreadsheet to configure the product, requiring maintenance on this spreadsheet, as well as double entry on the part of the salesperson. This was prone to lots of costly errors and required lengthy training sessions with new hires. A quick conversation allowed us to suggest the use of their product configuration capabilities in their manufacturing modules. The sales order process is able to use this even without manufacturing needs. The sales person was presented with all the options at the time of order entry and only had to enter the order once.

And a favorite story of mine is one of our larger customers who called us saying they had budgeted \$250,000 for a new system that would effectively handle returns. When we dove into the problem, we found out they were completely unaware of the returns capabilities of Sage Pro, and had been using a spreadsheet to manage returns. This spreadsheet was in use by the salespeople, the warehouse and the accounting people, and had over \$750,000 of returns on it that they had determined would never show up in their warehouse. They determined this would pay for a new system. They had suffered for several years with this home-grown system.

I bet you never thought of Sage Pro as your pair of Ruby Slippers, but the lesson for all of us is to realize that we probably already have the capabilities we need out of our system. Sage Pro is considered in the top tier of its competitors when it comes to functionality, containing most features available in its competitors combined all in one package. If you're struggling with an issue that presents a threat to your business goals, we invite you to take a "fresh eyes" review of Sage Pro. Here's how:

- Take a tour of the Transaction, Maintain and Print menus in each application. If you are unfamiliar with one of the options, press F1 once in the option, and it will give you an overview of its features.
- Open the DocOnDisk  icon on your Sage Pro Desktop, and review the major topics in each Table of Contents.
- Check out the What's New in DoconDisk (or check them all out [HERE](#) under Sage Pro, Brochures) If you have recently upgraded, you may not even be aware of some of the new features.
- Feel free to simply click your heels three times and repeat "There's no place like home", Oh wait! That's Dorothy! As usual, just give us a call. We love talking to our customers.

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If you thought the pictures (with the exception of the Ruby Slippers) in this edition of The Advisor were stock photos, think again! They are original creative works by our very own talented Michael Martin. The pictures are from a recent trip up north to the Tulip Festival. Great job capturing the beauty of the Pacific Northwest Michael!



7 Ways to Increase Efficiency in the Workplace

By Brian Middle

1. Establish step by step milestones. When working towards a goal, having small steps to accomplish before reaching the goal is critical. such as, if you wish your sales team to create 30 contacts over their workday, show them that they just have to make five contacts each hour. This makes the goal more sizable and easier to grab and hold.
2. In instances where there is lots of time being wasted doing things that must not be done, such as browsing the internet, take away the risks. such as, you have a presentation to finish but you keep discovering yourself browsing online. Instead of doing that, get down to the park to work. There is no Internet and you can get the project done.
3. Tackle the hardest tasks first. That way, there is no worry about procrastinating with them and instead, they are done and taken care of leaving more time for the necessary tasks.
4. There will be days when there just isn't enough time. What must be done? increase efficiency by focusing on the most necessary things. Keep in mind the Pareto principle that 80 percent of the value of any event will come from the 20 percent effort that's put towards it. Concentrate on that 20 percent.
5. Stay organized and get rid of clutter. Cluttered spaces often means cluttered minds. It will hold you back from achieving your unsurpassable purpose.
6. Offer rewards to those who accomplish the purpose. These do not have to be big things but they must be something that they wish. such as, if a team is working on a big project, offer to take them to lunch if it's completed prior.
7. Use resources. If the team has the necessary resources on hand to finish the task, they are more likely to be able to do just that. Encourage them to do this to increase their efficiency.

These are several tips that you can incorporate into the day to day tasks to accomplish your purpose. Ultimately, by increasing the ability to perform the task at the best level will enhance the ability of the workers to do well in the long term as well as the short term. That means benefits for everyone.

Provide a Referral, Get a Reward

Do you know of a company that is struggling with their business information systems, not getting enough support with their current system, or both?

Let your colleagues know that Gilbert & Associates is available to assist them and that we would be honored to have an opportunity to earn their business. Our customers get personal attention, prompt support and solutions that match their needs. We can save the day and you can be a hero! Plus, there's a little something "extra" special in it for you too!

For your first referral that turns into a new customer, we will send you a \$500 Visa Gift Card.

For the second referral that turns into a new customer, we will send you a \$1,000 Visa Gift Card.

For the third (fourth, fifth, and so on) referral that turns into a new customer, we will send you a \$2,000 Visa Gift Card.

Now, wouldn't that be useful for that new workstation you've had your eye on? Contact us for more information or to make an introduction to someone you know with business automation needs.



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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

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

Sage Pro Spring User Group

Coming Soon! Our Sage Pro User Group is just around the corner! Watch your email for invitations for our next User Group.

Learn to Use DataDrillers

Read more inside! Sage University is offering free lunch & learns on using DataDrillers in Sage Pro.

Introduction to Sage CRM for Sage Pro ERP Customers

- Available on Demand go to 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.



Authorized Partner