

QUARTER

02

MAY 2009

QUARTERLY
NEWSLETTER
FOR OUR NAV
CUSTOMERS

The Advisor



Microsoft's Business Ready Flexible Pay helps new Microsoft Dynamics NAV customers with reduced upfront investment through predictable and affordable annual payments.

With Business Ready Flexible Pay you can:

- Get affordable and predictable payments
- Realize rapid return on investment
- Increase productivity today

This promotion is available to new Business Ready Licensing customers including 3 years of the Business Ready Enhancement Plan and is available until December 23rd, 2009. Minimum purchase \$30,000 USD.

Want to know more? Give us a call



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Riding Out Tough Economic Times

Adapted from an article by Frank J. Gnisci

Increasing productivity does not mean working harder. Chances are you're already doing that. Increasing productivity means working smarter. Here is a short list of smart strategies that will help you ride out the difficult times.

Your Customers Shape Your Business

To attract more customers, you have to go beyond merely satisfying your customer- but delighting them with your products or services. Find out what makes your customer tick-determine their wants, their needs, their cares, and what objectives they are trying to achieve. Refer to information organized and stored in your Customer Relationship Management (CRM) software, and keep the information up to date so you can communicate effectively with your customers.

Take Advantage of Tough Times

Tough times are good times to get noticed. At times like these, the field gets smaller as your competitors

make themselves invisible. Use quality, cost-effective marketing as a tool to help take market share away from businesses that are not marketing themselves. Track the effectiveness of your campaign in CRM, use the leads you glean, and learn from the campaign successes and failures.

Introduce New Offerings

What better time than when business is slow to take a look at your current offerings and evaluate how to expand and evolve your area of operation. Take a look at the information in your ERP system, examine which products are thriving and which are struggling. Look for ways to expand your profitable products and adapt struggling products to fit customer needs.

Accelerate Collections

While everyone knows that bad debts cost money, some small business owners are reluctant to go after their slow paying and deadbeat customers. To minimize receivables, the first step is to streamline your

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Check it Out!

We are in the process of redesigning our website to include more resources and content that is valuable to you.



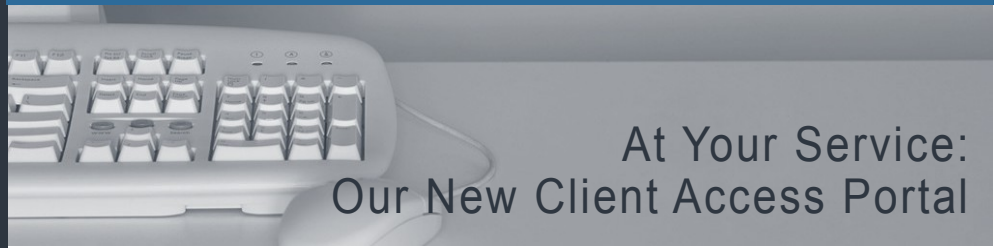
In the last month we've added new webcasts and Tips & Tricks. Keep your eyes open for even more new content pertaining to you and your business.

And while you're at it, let us know what you think of GilbertAssociates.com. What would you like to see on the website? We would love to hear your feedback!

Learn NAV at Your Pace with E-Learning

If you are a Microsoft Dynamics customer enrolled in the Business Ready Enhancement Plan you have unlimited access to E-Learning for Microsoft Dynamics at no additional charge.

Visit <https://www.microsoftelearning.com/dynamics/> for more information.



At Your Service: Our New Client Access Portal

Ever wanted to know the status of your support request when no one at Gilbert & Associates was available to help? Our new Client Access Portal allows you to check the status of your service requests and much more at your convenience.

Our goal is to offer you the best support possible. We realize that sometimes your support needs don't always correspond with times that we are available. We recently launched a new Client Access Portal as a way for you to communicate with us. Don't get us wrong,

we love to hear from our customers, and don't mind a phone-in support request. This is not meant as a replacement, but an additional avenue for support when we are unavailable.

Anytime you call us with a software issue or request, we create a service ticket in a program called AutoTask that we use to manage our support. Our new Client Access Portal is linked to these tickets. This means if you want to check the status of a request, you can log in to the portal and check it at your

convenience. You can also submit your own service requests online and access our knowledgebase (introduced in last quarter's edition of *The Advisor*).

All active Gilbert & Associates customers should have received an email in late March containing their username and password as well as a link to login to the portal. Please contact Kristen (206.285.4348) if you need help accessing the Client Access Portal or would like to schedule a demonstration.

Tough Economic Times, cont'd from page 1

Spread the Word About Your Business

You can have the best product or service in your industry and still go out of business if people don't know you exist. Keep your company in the public eye by developing an effective advertising campaign. Talk to other business owners and find out what works for them. Talk to your customers and find out what kind of advertising appeals to them. CRM can help you track this information for later use.

Don't Waste Time

Time is money. Studies show that most businesses waste 25 to 50 percent of the time it takes to procure a product or unit of service. Even the best companies spend a significant amount of time performing tasks that add no value to their end products or services. Time management is a relatively easy concept to grasp and exploit and will enable you to fuel new product development and new technology. Times savings don't have to be difficult. For example, our list of hot-keys on page 3 is a great way to save time in NAV by saving keystrokes.

Tough times require you to make the most of what you have and make smart decisions about what you don't.

Read more strategies in the full article at www.GilbertAssociates.com/doc.htm

A Day in the Life of an Implementation Specialist

When Michael was asked to describe his typical day as an Implementation Specialist for Gilbert & Associates he replied, "I don't think I can describe a typical day, maybe a typical week would be more accurate." Let's just say, there is no typical day in the life of Michael Martin, at least as far as work at Gilbert & Associates is concerned.



Michael exhibiting his latest adventure: fire breathing

Monday he may be onsite at a client office doing an install of NAV or Sage Pro. Later in the week he may be called in to a client for a few hours to observe and look for inefficiencies in business processes, and Friday he may be in the office doing support for a manufacturing question for an hour followed by support for a payroll question that takes ten minutes.

The variety of tasks and clients keeps the job entertaining. "I get to interact with lots of different people doing both implementation and a bit of programming. I deal with about 40 different clients a week." These clients represent multiple industries each with a unique business model and unique needs.

Prior to work at Gilbert & Associates, Michael's experience was as a Gilbert & Associates client working with the Sage Pro. When he took on the job, the student became the teacher, and he had to quickly adapt to a new role as the software implementer. There was plenty of room for learning in his early days with Gilbert & Associates, but now it comes in the form of new challenges daily learning client business models and finding solutions to fit their specific needs. There are not a lot of jobs where there is

constant learning followed by the challenge to put that knowledge to practice in a business setting, but this is a large piece of Michael's job description as an Implementation Specialist.

He said the biggest challenge of the job is also one of his favorite parts- making sure that everyone is taken care of. It takes careful prioritization to ensure client

needs are met. "Our clients are awesome, and a lot of fun. They are number one and it's our goal to keep them all happy."

At the end of the day, when his job at Gilbert & Associates is done, Michael finds a way to unwind. Lately, this comes in the form of his newfound hobby capturing life through the lens of the camera. Other places you might find him after a long day's work include trying out a new recipe, fire breathing, reading a good book, or enjoying a nice pint. And the breakfast of champions? That would be the 3-hour Starbucks Iced Mocha. How he gets it to last so long is a mystery to everyone else at the office.



From Michael's recent trip to Napa Valley, California

See the full-sized pictures at GilbertAssociates.com/TheTeam.htm

Microsoft Dynamics NAV Tips & Tricks

Saving Keystrokes is Saving Time

It is easy for NAV users to forget the hot keys for NAV, there are actually quite a few of them. With this in mind, we thought it was time to put together a list of some of our favorite shortcuts to help save you time. Go to www.GilbertAssociates.com/doc.htm for a complete list of hot keys.

Dates:

- Enter "T" in any date field and it will put in today's (system) date.
- Enter "W" in any date field and it will put in your work date. (Note: From your menu, Use Tools/Work Date to change your work date)
- Enter the first two letters of the day of the week (MO, TU, WE...) and it will calculate the correct date for you.

Hot Keys:

- Ctrl-F6: Cycle through different windows.
- F7: Set a field filter. Select any field on a card or list, and it will automatically filter all records on that field.
- F8: Copy any field from the line above.
- F1: HELP. This is one of our favorites, and it could be your favorite too. There's lots of information here, though admittedly hard to find. Be creative in your searches, it's usually in there.



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3 Reasons to Read This Edition of
The Advisor:

1. Get a few strategies for riding out tough economic times
2. Learn about our new Client Access Portal
3. Experience a day in the life

The Advisor | Quarter 02 | May 2009



Jet Reports is offering 5 user licenses for the reporter or viewers for the price of 2. That's 3 free users, and 3 free annual updates (first year only)!

Jet Reports can report on any data in Dynamics NAV, leaving no more gaps between data and reporting capabilities. Jet Reports allows users:

- Pull data from anywhere in your system
- Create and customize Excel Reports
- Schedule and send reports as needed

Offer expires June 30, 2009. Contact

Client Access Portal Demo

• How to Streamline Your Customer Support from Gilbert & Associates

Learn how to use our new Client Access Portal to submit and view your service requests. Contact Kristen (Kristen@gilbertassociates.com) to schedule your demo.

Excel 2007- The Basics And Beyond

• Coming May 2009

Whether you are a novice or expert Excel 2007 user, this hands-on learning is for you. Microsoft Office Excel is a powerful program that helps you analyze, share, and manage information to make informed decisions. This course is meant to get you up to speed not only with the basics, but a few advanced features as well.

View the flier on the course at www.GilbertAssociates.com/events.html.

