

QUARTER

01

January 2010

QUARTERLY-
NEWSLETTER
FOR OUR SAGE
CUSTOMERS

The Advisor



this issue

Windows 7 P.1

Sage University P.2

Sage Pro Tips & Tricks P.4

Questions for Your CRM Vendor P.5

Did you know?

Some versions of Windows qualify you for the Windows 7 Retail box upgrade. To qualify for the Windows 7 Retail Box upgrade, your computer must have a full license to Windows XP (any edition) or Windows Vista (any edition). If you only have a license for any version prior to Windows XP, then you do not qualify for the Windows 7 Retail Box upgrade and would be required to purchase a Full Windows 7 license to run Windows 7 on your computer legally.

Read more on the Blog for the Microsoft SMB Channel Community at www.mssmallbiz.com



Windows 7 & Sage Pro

It's only natural with all of the press that Windows 7 has been receiving lately that businesses of all sizes have been considering an upgrade. The switch may be natural for your home PC, but what about at the office? While some analysts argue that it is inevitable for businesses if they want to keep up, we asked Michael, our resident Sage Pro guru what he thought about the switch and what it would mean to you as a Sage Pro User.

Michael's Two-Cents:

Currently, the only version of Sage Pro that Sage has certified for use in Windows 7 is Sage Pro 2010. For those of you that are still running previous versions of Sage Pro, it is still possible to work in the new operating system, via XP Mode which is really a full install of XP Pro in a virtual environment. XP Mode is integrated with the Windows 7 environment and therefore users should still have all the network connections and peripherals accessible to any applications installed in the XP Mode environment. You can read more about this below.

Here's a peek at the advantages and drawbacks

small to medium sized businesses like yours might encounter in the switch to Windows 7.

Yes, You Should Upgrade to Windows 7

You can still use XP apps. If you need Windows 7 speeds but have applications that only run on eight-year-old Windows XP, XP Mode can save you. This free, downloadable add-on for the Pro, Enterprise, and Ultimate versions of Windows 7 lets your old programs run as if native to Windows 7. XP Mode does not require a separate, licensed copy of XP. Sure, you can accomplish the same thing with third-party software, but that'll cost you.

Better search. If you're an organizational pro, you never need to search your hard drive. But the chance that all your employees are equally gifted is about as likely as Steve Ballmer using an iPhone. Search is the killer app on the Web, and Vista's had lots of time to get all the hardware support it needs. Better yet, Windows 7 is designed to go directly to the driver download pages

Continued on page 3

How is Your Backup Strategy?

93% of companies that lost their data center for 10 days or more due to a disaster filed for bankruptcy within one year of the disaster. 50% of businesses that found themselves without data management for this same time period filed for bankruptcy immediately (National Archives & Records Administration in Washington).

How is your backup strategy?

[Checkout this article](#) about Why Online Backups Make Sense.

Learning Opportunities from Sage

Maximize your investment, take advantage of Sage Pro learning opportunities today!

Visit www.GilbertAssociates.com/events.html for a complete list of available courses.



Anytime Learning

Get the convenience of Internet-based recorded sessions that are available whenever you are. This is an ideal way to review material, acquaint new hires with basic software skills, and train your staff in remote offices.

Realtime Learning

These sessions are online, instructor led and scheduled for a specific date and time. All you need is a computer, phone, and an Internet connection. Everything happens live, so you can ask questions and interact with other participants and the instructor. Realtime combines the interaction of a classroom with the convenience of staying right where you are.

Lunch & Learn

Lunch & Learns are one-hour Realtime (Online) sessions that cover a particular topic or process. Each Lunch & Learn is designed to increase productivity by simply providing you with a stronger understanding of a specific feature or functionality within the software. Note: Sage University Lunch & Learns are based on Eastern time. This may be more of a brunch & learn for all of us on the West Coast.

Tech Tuesday Promotion: Free Lunch & Learns

Customizing Sage Pro Reports

February 16, 2010 | 10:00am-11:00am PST | FREE

Learn how to customize reports in Sage Pro. This course will teach you how to add calculated columns, format reports to look and feel the way you want them to look, and cover a few more advanced features.

Sage Pro ERP 2010 Features

March 16, 2010 | 10:00am-11:00am PST | FREE

This course will highlight some of the new features in the latest version of Sage Pro. It will cover reserving inventory for specific customers against sales orders and how to create custom filters on reporting grids.

Go to www.GilbertAssociates.com/events.html to find out more information and to register for these courses. Hurry, Sage's free Lunch & Learns end March 31st, 2010.

Windows 7, continued from Page 1

of major vendors if a compatible driver isn't found.

DirectAccess may be the best access. DirectAccess is just that: direct access to your business network from anywhere, via secured tunneling using IPsec and IPv6—without the use of a trusted virtual private network (VPN). The catch: Your network has to run Windows Server 2008 R2, so this solution won't work for offices without dedicated IT staff.

Better enterprise features. There's a lot of good stuff in Windows 7 Enterprise (which is essentially Windows 7 Ultimate bundled on corporate OEM systems) besides DirectAccess, specifically for security and management. That includes encryption software and application blockers to let IT Pros specify exactly what programs are run on Windows 7 systems, so users can't bring in games from home.

Don't Do It, Keep Your Business with XP

No learning curve. There's a hidden cost when you upgrade users to an OS with as many significant interface changes as Windows 7: training. Windows 7 is a looker and features big improvements, especially over XP. But, after almost a decade, users know XP backwards and forwards and getting them up to speed on Windows 7 might take time your company can't afford.

XP updates until 2014. You might feel you have to upgrade to Windows 7 because eventually Microsoft will stop patching XP for security and other issues. And it will. But do you consider five years from now soon? If you're happy with XP (and can live without the tech support from Microsoft, which ended earlier this year), why change?

No direct XP upgrades. Think you can just pop a Windows 7 disc into a system and upgrade the OS but leave your software and data intact? Think again. Microsoft is only allowing "in-place" upgrades from Vista—XP users have to format their drives and do a clean install.

New hardware needed. You've been running XP for years just fine on

computers that were the top of the line in 2001. The chances of them supporting Windows 7 are slim. We're not talking just upgrading a couple of components—it's going to be time to get all-new systems, which can be costly, even if computers are cheaper today. Remember, at the very least, you need 1GB of RAM and 16GB of disk space just to install the 32-bit version of Windows 7. You need even more RAM and disk space to go 64-bit or to run XP Mode.

So how does Sage Pro 2010 work and feel in a Windows 7 environment? Well, it works and feels just like Sage Pro 2010! There is no ground-breaking difference or improvement in performance.

Users on older versions of Sage Pro could potentially experience slower processing speeds in XP Mode than if you were to run the same Sage Pro version in a true Windows XP environment. And this is primarily due to the need to run Sage Pro in a virtual environment. For those that are unfamiliar with virtualization, think of XP Mode as a program inside Windows 7, and that program uses up processing power and memory of the host computer just to run it. On top of that, install Sage Pro 2010 inside XP Mode, and now you have the idea of a complete ERP program running inside another program inside Windows 7. How your Sage Pro will run depends on how powerful your PC is.

Overall, Windows 7 is still a refreshing change from XP and I would encourage office users to give it a try. Having full Sage certification for use with Sage Pro 2010 is assuring. I cannot speak for other critical applications that you use daily, and I encourage you or your IT department to research before switching. Coupled with the assurance that your older applications will run in XP Mode, switching to Windows 7 may not be as scary as you think. Just be sure not to get either the Professional or Enterprise versions for the office.

If you are still reluctant to dive in, why not assign someone at the office to be the designated Windows 7 lab rat and have that person's PC switch over to Windows 7? See how it works and go from there.

Adapted from a PCMagazine by Eric Griffith. [See the full article here.](#)

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.



Sage Pro ERP Tips & Tricks

Q. Can I create a report to display the tax amount for each line on the purchase order receipt?

A. Yes! A common request is to have a report to display the tax amount for each line on the purchase order receipt. Here is a step by step guide to accomplish this by creating a custom data drill.

1. Under the **File** menu, click **Maintain Dataviews**.
2. Type **PO_TAX** in the **Dataview ID** field.
3. Click **Add**.
4. Type the title and the description for this new dataview.
5. Click the [...] button located beside the **Table** field.
6. Select the **ICTRAN** table from the list.
7. Click **OK**.
8. Click the ellipse button located beside the column field.
9. Add the desired fields for this report
 - ORGNO
 - DOCNO
 - ITEM
 - TDATE
 - SQTY
 - TQTY
 - TAXRATE
10. Select from the **Dataview Columns** list in the DataDriller - Define Columns screen.
11. Click **Details**.
12. Click **Advanced**.
13. Click **Add Expr**.
14. Type $((\text{taxrate}/100)*(\text{sqty}*\text{tcost}))$ in the **Column or Expression for the SQL Select** field.
15. Type **totl_taxrate** in the **Column Alias** field.
16. Select **Currency** from the **Data Type** list.
17. Type **Total Tax** in the **Column Title** field.
18. Click **OK** to save changes.
19. Type the following in the **Filter Format** field:
ALLTRIM(UPPER(APPLID)) = "PO" AND
TAXRATE > 0
20. Type the following in the **Order by** field:
ORGNO, DOCNO
21. Click **Save**.
22. Exit the **Maintain Dataviews** screen.

The PO_Tax dataview will now display the tax amount for each line item for a purchase order.

Questions to Ask Your CRM Vendor

Looking into a CRM solution? Do your research, find out which solution best fits your needs. We would be happy to show you around Sage CRM and see if it's a good fit for you! Check out the full list of questions and our other CRM resources on our website at www.gilbertassociates.com/crm.html.

Question to ask	Why you should ask it
What CRM functions does your suite provide?	To figure out whether the software has a full range of functions or is really a CRM point product.
If the suite has gaps, do you have partnerships with other vendors?	This provides clues about weaknesses in the product. Get details on the vendor's alliances.
Is your product Web-based?	Web-based CRM is flexible, accessible and secure.
Has your product dealt with customer data volumes similar to ours?	Great functionality and a slick user interface won't help if you have 50 million customers and the vendor's biggest account has 5 million.
Has your product dealt with transaction volumes similar to ours?	To find out the upper limit of the product.
Does your software work with our relational database (or data warehouse) product?	If it doesn't, you might have to migrate data back and forth into the vendor's database.
How do you migrate data from your product into other software packages, and vice versa?	To understand interfaces with ERP and accounting packages. Do you have to write a custom program, or is there a utility? Is data migration even possible?
Can end users extract data so they can use it locally?	To find out if end users can manipulate data without being connected to the CRM server.
Can you provide a published data model?	Some vendors keep the data model secret, but access to the underlying model will allow you to extract the data for other uses, using software you already have.
Is there a development toolbox with templates?	Development templates speed up implementation by giving programmers packaged software they can customize rather than having to write it from scratch.
What is your product's average implementation time?	Vendors and systems integrators are notorious for low-balling this number, so beware.
Does your company provide implementation help, or do you rely on partners to perform the work?	Some CRM vendors partner with systems integrators or consulting companies, while others have in-house consultants. Understand who will be doing the work.



First Look at Sage Pro 2010

If you missed our Sage Pro Fall User Group, or even if you were there, and want to know more about what the latest version of Sage Pro has to offer, check out the Sage Pro 2010 Webcast, or the What's New in Sage Pro 2010 document on our website.

February 9, 2010 | 9:30am-10:30am

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.



gilbert
& ASSOCIATES
1319 Dexter Avenue N. Suite 360
Seattle, Washington 98109

Don't Miss These Articles:

- Windows 7 and Sage Pro
- Learning Opportunities from Sage University
- Tips & Tricks: Custom Reports to display Tax Amounts on PO Receipts

The Advisor | Quarter 04 | January 2010



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 March 2010

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

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