

**March
2004**

Headline News

Best Software reported record revenue for the 2003 business year. Total revenue was \$424.7 million, and operating income was \$99.1 million, increases of four percent and 17 percent, respectively, over the same period of the prior year.

ACT!, Best Software's best-selling contact management solution, has been awarded the "Willy Award" for Best SOHO CRM solution by SellMoreNow.com. "Willy" refers to the character, Willy Loman, in the Arthur Miller play *Death of a Salesman*.

Maintenance Renewals

Make sure to contact us for your BusinessWorks Gold maintenance plan renewals! Don't know when your plan expires or need pricing on the different support options?

Call us—(831) 373-8200

**Custom Office
A Module Worth Its Weight in Gold**

Would you let an opportunity to boost productivity, streamline operations, and maximize data analysis options pass you by? If you are not taking advantage of the productivity tools offered by Custom Office, you are missing a powerhouse of potential. Custom Office allows you to integrate Business Works Gold with Microsoft Office products such as Excel and Word. Custom Office consists of three separate components: Targeted Mail Merge, Attachment Manager, and Custom Worksheets; each geared to increase your productivity by saving you time and increasing your efficiency. Let's take a closer look at each feature.

Mail Merge

Using the Targeted Mail Merge feature of Custom Office you can quickly merge BusinessWorks Gold data into a Microsoft Word document, and then send the resulting document to multiple recipients simultaneously, either by print or by Email. Your recipients can include Customers, Vendors, or Employees.

How Can I Use It?

There are many ways to use the Mail Merge feature; here are just a few ideas:

- ★ Send an Email to employees announcing the annual holiday schedule.
- ★ Create a post card to mail to your vendors informing them of your company's new address.

- ★ Create a welcome letter for new customer.
- What Is Involved In Creating A Mail Merge?**

Creating a new Mail Merge is easy. First create the document in Word that you want to send; for example the New Customer Welcome letter. Now you are ready to start the user friendly BusinessWorks Wizard to guide you through the entire process:

- 1 Using the Wizard, give your Mail Merge Job a name, and pick Customers, Employees, or Vendors as the source of your data.
- 2 Select your Word document from the list displayed. You can edit your Word document here and insert data elements such as Name, Address, Credit Limit, etc. from BusinessWorks Gold. You can even create a new Word document here by copying from

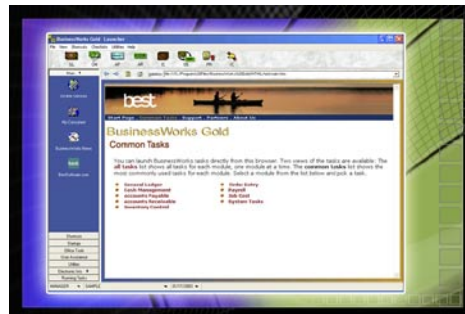
an existing Job.

- 3 Choose how you would like the recipients in your mailing list sorted. Your list of sort options is vast, consisting of most of the fields in the Customer, Vendor, or Employee files.

- 4 If you want to filter the data, you can use: =, >, <, <>, </=, >/=, or Between as filter tools. In our exam-

ple, you would only want to select customers whose Customer Since date is Between the date range you specify. Here too, virtually all of the related data fields may be used as filters.

- 5 Your new Job is now created. Simply click on the Merge button to send your Job to Word, or the Email button to generate Emails. Your new saved



Custom Office is the perfect tool to help you organize your client, vendor, or employee information.



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Job may be used again, as is, or edited to suit a new purpose.

A related function is Instant Correspondence. Instant Correspondence is used when you want to create a mail merge document or email for a single customer, vendor or employee. Look for the Instant Correspondence icon on the tool bar of the Maintain Customers, Vendors, and Employee screens. Clicking on this icon will launch the Mail Merge function, for the selected record only (e.g. customer, employee or vendor).

Your correspondence can be printed and distributed manually, or sent automatically via Email. Email is an effective and cost efficient way to reach your audience and you will lower your postage costs. You also avoid misdirected mail and can be assured your message is delivered right to your contact's desktop.

Creating a Email, or Email blast, to your customers, vendors, or employees is a snap. Simply select your Job, and click on the Send Email button. The list of potential recipients is displayed, along with their Email address. If there is no Email address on file, or if you need to change an address, you can edit the field *on the fly*. You can decide to send your correspondence as an attachment or in plain text. A Send Test button is available which allows you to enter your own Email address to receive a copy of the Email for final review before you send it off.



Select from a list of your customers, vendors, or employees to send an Email blast

Attachment Manager

Attachment Manager is the third component of Custom Office, and one of the best ways to avoid the paper chase in your office. The Attachment Manager function of Custom Office enables you to associate OLE (Object Linking and Embedding) objects with General Ledger Accounts, Customers, Vendors, Employees, Jobs, and Items.

What Is OLE?

OLE is a Microsoft technology that allows Windows programs to share data. Embedding an Excel spreadsheet in a Word document is an example

of OLE technology—the spreadsheet is an OLE object. An OLE object can be almost any type of file such as a Bitmap Image (e.g. .bmp, .jpg, .gif), an Adobe Acrobat file, a Word document, a sound or video clip, or an Excel graph or spreadsheet.

What Can It Do For Me?

You can capture the power of OLE within BusinessWorks Gold using the Attachment Manager function. Think of the practical uses for this technology. No more hunting for that missing contract or scrambling to find a copy of an invoice. Multiple OLE objects can be associated with a single record, so you're limited only by your imagination. Use Attachment Manager to better organize the wide variety of data associated with your company's daily business activities, saving time and increasing efficiency. Here are just a few examples of ways you can utilize Attachment Manager:

General Ledger Accounts:

- ★ Link an Excel spreadsheet containing your budget worksheet to an account. You'll always be able to refer back to the underlying detail that led to your budget amount.

Accounts Receivable Customers:

- ★ Embed a copy of a signed customer contract.
- ★ Record a sound byte giving the correct pronunciation of a difficult name.
- ★ Scan and retain the customer's credit application.
- ★ Attach a map to the customer's location.

Accounts Payable Vendors

- ★ Scan payables invoices and attach each of the image files to your vendor's file.
- ★ Attach a copy of each vendor's W-9 tax information form.

Payroll Employees

- ★ Embed a copy of the employee's resume, proof of citizenship, drivers' license, I-9 and/or W4 form.
- ★ Attach copies of awards, certificates or diplomas.
- ★ Link to the employee's last performance review documents.

Job Cost Jobs

- ★ Link to blueprints, plans, schematics, and permits.
- ★ Attach the signed job contract or subcontractors' bids.

Inventory Items

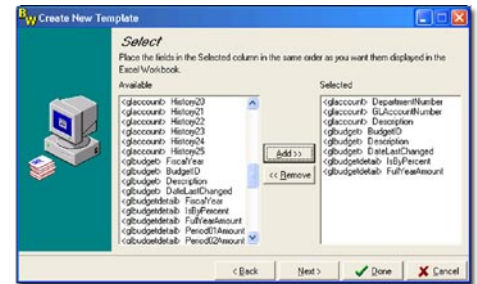
- ★ Link to an item's Material Safety Data Sheet.
- ★ Attach photos of the item.
- ★ Attach a copy of the item's warranty.

- ★ Include a document detailing the kit assembly process.

Embedded Versus Linked Objects

Your OLE attachments can be either embedded or linked. Which you choose will depend upon how you intend to use the attachment.

If you select a *linked* OLE object, the object's data remains stored in its original file, in its original location. It can be opened and edited us-



Use the Wizard to select which information you wish to use.

ing the originating program, or within BusinessWorks Gold, and any changes are saved to the original file. In contrast, if you select an *embedded* OLE object, you are creating a copy of the OLE object's data for use exclusively within BusinessWorks Gold. Any changes made to the original file are not reflected in BusinessWorks Gold, and likewise, changes made to the OLE object are not saved back to the original file.

If the object you are attaching is often updated outside of BusinessWorks Gold and you wish to always have the current file available, then select a *linked* object. An item's Material Safety Data Sheet might be an example of a linked attachment. It's updated frequently in another program, and you always want the most current copy available.

However, if you want to preserve the file as it was when originally attached, or if you want any edits reflected in BusinessWorks Gold only, then select an *embedded* object. Copies of contracts or an employee resume are examples of documents you would want to embed. An Embedded file also offers greater security since it will be included in BusinessWorks backups, and BusinessWorks password security controls whether a user may move or access the file.

Treasure Chest Of Functionality

With its communication, organization, and data manipulation tools, Custom Office has the power to make your company more efficient. If you don't yet own the Custom Office module, or simply have not taken the time to explore its potential, please give us call for a demonstration. ☆