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Accounting Technology Insights....

for our clients and friends

Inside this issue:

Accounting Technology Adds New Staff Member

Mark Payne is the newest addition to our Technical Department

Accounting Technology prides itself on maintaining current certifications on all of our 20+ technical resources

The Buzz on Business Intelligence

Business Intelligence (BI) is a big buzzword in today's IT world. It is a concept understood by some, but misunderstood by many. Part of the confusion about BT lies in the flurry of acronyms relating to analyzing business information.

Through knowledge comes control

In addition to business intelligence, terms like *business performance management* (BPM), *business process management* (also BPM), *corporate performance management* (CPM), and *business activity monitoring* (BAM), have also emerged. All of these are a part of BI. They are all dependent on the BI tools, but it should be noted that BI is not dependent upon them.

Though the name was coined by the Gartner Group in the mid nineties, business intelligence as a concept started much earlier. The concept was rooted in the reporting systems and mainframe computers in the seventies. During that period reporting systems was static, two dimensional, and had no analytical capabilities. The demand for dynamic multidimensional reporting systems for predictive and intelligent decision-making pushed BI to develop. With the advent of new technologies and applications, BI came to its present state and is continuing to grow every day. BI today is capable of multidimensional analysis of date to see 360 degree business insight, statistical analysis, and forecasting to help better decision support systems. Based on present trends, the use of BI will become so widespread that every desktop will have a BI icon. BI will become an integral part of an enterprise's information system and, like word processing software, BI will be used by almost all end users, business users, and government officials to gauge whether their strategies are aligned with their companies' overall strategic plan.

(cont'd page 3)

SalesLogix Cuts Quote Development Time in 1/2 for BlueCross BlueShield of Tennessee

Salespeople at BlueCross BlueShield of Tennessee (BCBST) had been using a contact management system that was, as Andrea Cooling, marketing consultant and project manager for the company put it, "very antiquated."

With a growing business selling through a three-pronged salesforce, BCBST knew it was time to upgrade.

Flexibility, Cost, End-user Acceptance

"We looked at many different products," Cooling recalled, including Pivotal. "We knew we would have to highly customize whatever we bought because everybody does business differently. SalesLogix fit the bill in that respect, as well as cost."

SalesLogix (cont'd page 2)

(Cont'd– BlueCross BlueShield– CRM)

offered another key to CRM success: salespeople would use it. Cooling said, "The way it looked on the screen was very attractive to our end-uers.:

Improved Processes

"We wanted to overcome a lot of inefficiencies with the new system," Cooling said. "Typically, a broker might send in one request for a quote, but with 14 options. That's 14 individual quotes." Every bit of information for each quote had to be entered manually, so the time devoted to preparing quotes was staggering! And they were all stored on individual salespeople's computers and could not be shared.

Quotes in Half the Time

"Today, we have it all within SalesLogix," Cooling said proudly. "We have the ability to change only specific elements to generate variations. And individuals working in the same office can share their work."

The efficiency gain was immediate. Previously, it took 5-10 minutes to generate a typical quote. Now, with SalesLogix, it takes half that time. Cooling observed, "When you're talking about an office that runs 60 or 70 quotes a day, that's a lot of time saved!" The savings multiplies when it's time to renew a policy because current and past quotes can be modified to meet customers' changing needs. Salespeople are also now automatically prompted to offer additional products.

Web Rollout to Brokers, Customer and Prospects

The overall renewal process has improved, too. Instead of 500 pages of paperwork, account managers now receive documents electronically through SalesLogix, improving efficiency and giving them greater flexibility in managing their workload.

The system is already used by 350 BCBST employees, it's rolling out to about 250 independent brokers via the Web, and soon customers and prospects will be able to access a portal for estimates.

More Back-Office Integrations Coming

Now, more back-office applications are being integrated with SalesLogix. Snapshots of each month's billings are currently available in SalesLogix and BCBST is integrating information on which brokers and account managers are assigned to which customers. Interfaces with the company's claims-processing and financial information systems are also in the plans.

"Everything at their fingertips"

Cooling said, "When we trained people and they saw what SalesLogix could do for them - the time it could save—they really went for it. We have definitely increased productivity and proficiency, and cut down on manual work.

"Now when you talk to some of the people who were apprehensive at first, they love it. They have everything at their fingertips!"

SNAPSHOT:

Customer: **BlueCross BlueShield of Tennessee**

www.bcbst.com

CORPORATE PROFILE

Headquarters: Chattanooga, Tennessee

Type of Business: Health care financing

Challenge:

To replace a homegrown contact manager with a full featured CRM solution that:

- Could be tailored to meet changing business needs
- Was affordable
- Salespeople would use

Solution:

A SalesLogix system designed to meet current needs, as well as update and improve business processes, increasing sales teams' efficiency and ability to share customer information.

Results:

- Quote development time cut in half
- Critical sales information now shared
- Web-based solution rolling out to brokers statewide
- Back-off integration phased in

To learn more about SalesLogix contact 866-286-3335.

"When we trained people and they saw what SalesLogix could do for them—the time it could save—they really went for it. We have definitely increased productivity and proficiency, and cut down on manual work."

Andrea Cooling,
Blue Shield of Tennessee
Marketing Consultant &
Project Manager

MAS 90 and MAS 200 Tips & Tricks

Why am I getting a "no orders to print" message when trying to print S/O Picking Sheets?

There are a number of reasons this may be occurring, but the most common cause is if the Pick Sheet was previously printed. However, if the Sales Order contains credit card information, but no deposit amount (therefore no authorization code), or if the credit card is expired, the same message could occur. You can get by this by clicking "on" the "include unauthorized/expired credit card orders" check box in the Picking Sheet Printing. Or, using the Custom Office module, you can force this check box "on."

Why am I getting error messages when installing Reports on a Windows 2000 workstation?

You may need to log onto the computer as Administrator, and try again.

We have graphical forms turned on, but when I print one, it's not using the graphical form. Why?

The most common cause of this is loss of the workstation's network connection. Re-boot the workstation, verify your network drive mapping and try again. If the drive mapping isn't there, you must set it.

How can I reverse a range of posted invoices?

You would have to manually reverse each one. There is no automated process– unless it was a very large volume of invoices, in which case we might recommend a Visual (cont'd pg.4)

Business Intelligence…(Cont'd)

What is BI Is All About

BI is neither a product nor a system. It is an umbrella term that combines architectures, applications, and databases. It enables the real-time, interactive access, analysis, and manipulation of information, which provides the business community with easy access to business data. BI analyzes historical data—the data businesses generate through transactions or by other kinds of business activities—and helps businesses by analyzing the past and present business situations and performances. By giving this valuable insight, BI helps decision makers make more informed decisions and supplies end users with critical business information on their customers or partners, including information on behaviors and trends.

Businesses generate a sea of data. Every datum carries a small piece of the business' story. This data is scattered everywhere, in disparate systems and in different departments. It is held captive in dead hard drives, and can even be situated in geographically different regions. However, it is in data, where the true nature of business– its trends, strengths, and weaknesses—lie. BI gathers all the related data to turn it into information and information that is analyzed properly can be used for decision making which can finally go into action.

Why BI

BI has a tremendous impact on business once installed. It produces the right information at the right time, which is a key element for the success of any business enterprise. BI is the art of knowing and gaining the business advantage from data. Whether it is marketing competition, customer retention, inventory control, financial modeling, or even in national security, BI is the answer. BI can answer a company's critical questions such as, why market share are going to competitors; which products contribute the most to profit; how can business become more profitable; why some divisions are not profitable; who are best and worst customers; where is money being lost or made, etc.

In addition to determining trends, another push to implement BI comes from the Sarbanes-Oxley legislation.

To learn more about Business Intelligence tools, contact Accounting Technology Today!

www.accounting-tech.com

(MAS 90 & MAS 200 Tips Cont'd)

Ask about Accounting Technology's Education & Training

Integrator job.

What is the correct way to merge Vendors, Customers, etc.?

First of all, any Delete/Renumber/ Merge Utility should be performed first thing in the morning. The reason for this is if you accidentally do it incorrectly, and need to restore off the backup system from last night, you won't have to re-do any of the current day's work (This Utility CANNOT be undone!)

For merging (customer for example), the starting and ending Customer # must be the same, unless you specifically want to merge a range of customers into a single customer.

How can I control the number of records to print on the check stub when using Graphical A/P checks?

On the A/P Check Printing screen, simply set the Stub Lines to the appropriate # (e.g. 22).

When updating Cash Receipts, what date is used for the posting date?

MAS 90 uses the deposit date, not the A/R system date.

Can I enter all my invoices through the Purchase Order system without creating a PO and a receiver for all of them?

Yes, in Receipt of Goods Entry, skip the PO# field and just enter an Invoice #.

What options do I have for remote connections?

It depends. If you want to operate remotely "un-tethered" to your system, there are a couple of modules that can help. Remote Salesperson allows your sales force to enter orders, check inventory and customer accounts on a Palm Pilot that was previously synchronized with your system. Timekeeper allows entry of time on a Palm Pilot that can then be "pushed" into Payroll as well as Sales Order, Accounts Receivable, Job Cost or Time and Billing. If you want to actually connect with your system, you have a number of options depending on how many people need to connect and what your budget will allow.

How can I put criteria on my Crystal Report for Invoice Dates that are blank?

(SO_03SOHistoryHeader.LastInvoiceDate) = Date (0000, 00, 00)

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