

# CAROLINA VISIONS

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**Oates & Company, LLC**

**Getting Technology To Work For You. Everyday.**

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## Determining Compatibility with Microsoft Patches

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With the Automatic Update feature now offered with Windows, Microsoft has the ability of pushing updates to the Windows server and client workstations automatically if they are connected to the Internet. On average, Microsoft releases about one patch a week to systems or services that MAS 90, MAS 200 or MAS 500 rely on, including Internet Explorer, SQL Server, IIS, and of course, the Windows operating system. Microsoft assumes that the user will test and certify its updates or patches with the software they are running.

Best Software follows the general policy of providing support and certification only with generally available releases of service packs or similar updates. For example, Windows XP Service Pack 2 is currently scheduled to be supported with the MAS 90 and MAS 200 4.05 and MAS 200 SQL 3.72 releases. It is vital that you review the compatibility information for your specific version of software (MAS 90, MAS 200 or MAS 500) before applying any patch or service pack to ensure it is currently supported by Best Software. For more information as to why it makes sense to wait for a full service pack release before applying individual security patches, please read the article on Microsoft's Web site at: <http://www.microsoft.com/technet/archive/community/columns/security/essays/srvpatch.mspx>

Best Software realizes that our customers may feel certain critical patches are required to be applied to systems. Those patches released by Microsoft that are rated as critical and affect essential functionality used by Best Software products are tested under fundamental testing protocols. Only service pack releases that contain these updates are fully regression tested. If patches or updates have been applied outside of those tested and either the client or server software is failing in an unusual manner, you may need to remove any patches and/or rebuild the server or client machine. As always, please refer to the installation and compatibility information included with your Best Software application for a list of supported platforms and service packs. Finally, don't forget to keep track of the latest software updates and news online through our award-winning Web site at: <http://shop.bestsoftwareinc.com/boss>

**Call Oates & Company before installing the Windows XP Service Pack 2.**

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## Oates & Company's Open House

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As many of you know, we moved to a new office in July. We will be hosting an open house on the afternoon of Thursday, December 9<sup>th</sup>. Come by and see us; it's a wonderful opportunity to see the new offices and meet those voices behind the phones. We'll send more details when we have them set!

### Did you hear the news?

**Best Software honored by Start Magazine's 7th Annual Technology & Business Awards.** "The annual T&B Awards is a celebration of achievement in (manufacturing)...it is especially vital to recognize companies that have invested in their futures with intelligent technology deployments," said John Buell, editor-in-chief of *Start*.

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## President's Letter

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As fall fades into winter, most of us are actively working on projects and budgets in preparation for the busy holiday season and year end. Oates & Company is no different. Since our last newsletter, we have settled into our new office space, wrapped up another successful Carolina Visions Users Conference, and begun selling SalesLogix customer relationship management software from Best.

We would like to thank everyone who attended Carolina Visions this year. A special thank you goes to our MAS 500 clients who attended the first MAS500 section of the conference. For those of you who could not attend, we missed you and you missed a fun, informative day. We are already actively working on next year's conference. Please join us next year to find out all of the changes and improvements Best Software has in store for you.

Oates & Company is very excited to announce that we are now an authorized reseller for SalesLogix CRM software from Best. This product further enables us to offer a complete business management solution to you, our valued customers. Please see an overview of SalesLogix later in this newsletter. Our vision is to be your partner in technology. You can count on Oates to help you with the technology to run your businesses more efficiently.

Sincerely,  
*Chris Oates*

### MAS 90/200 Year-End Seminar Coming in December

Our annual MAS90/200 Year End Close seminar will be held in our office on the morning of Thursday, December 9, 2004. If this is the first year you have worked with MAS90/200 we strongly suggest that you attend this class. More information and registration forms will follow at a later date.

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### MAS 90/200 4.0 Upgrade Issues with G/L

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Best Software has made major changes to the MAS 4.0 General Ledger account structure and data files. In preparation to upgrade your MAS 90 and MAS 200 data files to MAS 4.0, your General Ledger cannot have any missing accounts, special characters or Out Of Balance Source Journals. To assist you in finding these G/L problems, Best has provided the GL-3053\_T.EXE download file, as well as two Knowledge Base Articles (GL4000-KBA and GL4001-KBA).

The GL-3053\_T.EXE contains five Crystal Reports, which must be run for each MAS90/200 company that will be upgraded. These will report any accounts with invalid characters, any missing accounts in your GL5 - Detail Transaction file, any missing accounts in your GL8 - Budget and History file, or Out of Balance Source Journals. GL-3053\_T.EXE can be run on any MAS 90 3.71 or prior MAS system. All systems should be upgraded to 3.71 prior to going to 4.0. Also included are G/L programs to remove future date transactions. Detailed instructions accompany GL-3053\_T.EXE. This program and Knowledge Base articles can be downloaded from the Support Section of the Best Website.

Before scheduling your upgrade to MAS 4.0, these programs will need to be run and corrections made to the General Ledger. Failure to do this for all companies to be converted will result in extra down time during the upgrade or may cause severe out of balances after the upgrade. Please take time to thoroughly read all articles and documents contained in the files provided from Best.

Contact Oates & Company if you have any questions or would like assistance in obtaining these programs.



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## SalesLogix CRM

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SalesLogix is the Customer Relationship Management solution that drives sales performance in small to mid-sized businesses through Sales, Marketing, and Customer Support automation and integration to accounting and business management applications. SalesLogix empowers sales professionals to be more effective sellers and provides the information and tools they need to make profitable business decisions. SalesLogix also grows with the changing requirements of small to mid-sized businesses. SalesLogix provides an affordable CRM solution with low cost of ownership, rapid time to productivity, and high return on investment. With over 4,600 companies using SalesLogix worldwide, SalesLogix is the CRM leader for small to mid-sized businesses.

### Ten Compelling Reasons To Consider SalesLogix

- **SQL Database.** A true relational database allows for the manipulation and analysis of contacts, accounts, and opportunities and the ability to expand and customize data tables to your business needs.
- **Customizable.** SalesLogix allows you to create general or user-specific customizations. Customization capabilities enable you to achieve a quick first productive use of the product, tailor the product to your unique business needs, keep the total cost of ownership down, and achieve a high return on investment.
- **Robust Forecasting.** Segment your opportunities by account manager, region, or probability of close, create custom filters, and view data in multiple graphical formats. You can also review historical trends to assess effectiveness and guide strategic changes.
- **Account and Opportunity Management.** By combining opportunity management with contact management, you can create a multidimensional view of each opportunity to gain competitive advantage; shorten sales cycle times, gain visibility into sales pipelines and forecasts, and increase revenues and margins.
- **Web Based Solutions.** SalesLogix Web solutions leverage the flexibility and accessibility of the Internet. Designed for businesses needing a Web-based CRM solution, SalesLogix Web solutions deliver resources and tools that drive sales performance and provide superior customer support. Easy to deploy, customize, and use, SalesLogix Web solutions are practical and deliver low total cost of ownership.
- **Multi-channel Team Selling.** Whether a prospect results from the web, an inside sales phone call, or an outside sales visit, SalesLogix allows your company to track all selling activities in all Channels so you have a granular history of where a prospect came from and an idea of what you should do next.
- **Marketing Campaigns.** SalesLogix delivers critical business intelligence such as ROI to allow you to see which promotional activities are working for your company. Design and launch marketing campaigns complete with tasks and associated budgets. Easily track responses and sales revenue associated with each campaign.
- **Advanced Sales Functions and Processes.** SalesLogix offers tools that help you standardize your company's sales approach and monitor the effectiveness of your approach. Sales processes consisting of a series of steps and stages walk your staff through the sales cycle. Monitor results of each step and instantly analyze which opportunities are worth pursuing.
- **Support.** SalesLogix Support enables your organization to build and maintain solid relationships with customers. It offers real-time access to all relevant customer data—including products purchased, ticket and defect history, RMAs, and maintenance contract status. SalesLogix maximizes each interaction with your customers, enhancing customer service and providing you new selling opportunities.
- **Integration Tools.** SalesLogix was designed from the ground up to facilitate integration with third party packages. Powerful integration tools such as Scribe Migrate, Intellisync, and the Import Wizard make sophisticated data exchange possible. With integration to leading back-office applications, you can have access to even more key customer information. Sales reps can look at accounting data such as credit status, activity, receivable balance, and discounts.