

Your instructional experience is enhanced by knowledgeable seminar leaders including:

Timothy Carcione is Director of Product Development for SAM Pro Enterprise. Tim's industry experience allows him to offer advanced consulting on Data-Basics software and our client's overall systems, including networks, hardware and third-party software.

Jeffrey Carr is Manager of Technical Support Services for Data-Basics. Jeff's extensive experience in programming, networking and information systems has come from almost 30 years of computer-related experience. His depth of knowledge with SAM Pro Enterprise represents a solid resource for Data-Basics' clients.

No need to worry about meals or hotels, we've got you covered:

LODGING + TRANSPORTATION

Data-Basics has arranged for a special group rate of \$93.00 (**guaranteed thru 8/16/2008**) at the DoubleTree Hotel Cleveland South. To make reservations, call 800-753-437 and mention the Data-Basics seminar.

Complimentary shuttle service is available from 7:00 a.m. to 11:00 p.m. out of Cleveland Hopkins Airport. To arrange a ride, call DoubleTree Hotel from the courtesy phone at baggage claim.

MEALS + REFRESHMENTS

Breakfast and lunch are included on both Monday and Tuesday. A special evening of dinner and entertainment is planned for Monday.

COMPANY PICNIC

Once again, our annual company picnic will coincide with the User's Group Meeting. If you will be arriving in Cleveland on Sunday, September 7, you are cordially invited to join the Data-Basics family at this annual event. Our picnic will run from 3:00 to 9:00 PM, and transportation is available. We hope you will join us!

ENTERTAINMENT

Companies that have attended previous user's group meetings know that the days are densely packed with tips, training and insight... Which is why Monday night is always reserved for something fun. By popular demand, we will once again be hitting a revitalized part of Cleveland to have a great meal, top-shelf spirits and some active entertainment in the VIP room at the Corner Alley, Cleveland's premier alley/restaurant/martini bar.



SIGN UP NOW!

Data-Basics is holding the line on prices, and offering the same rates as last year! The fees for the 2008 User's Group Meeting and Seminar are as follows:

\$995 for the first user from a company
\$350 for each additional attendee

Register by August 20, 2008 and receive a 15% discount applied towards all attendees.

Payment must be sent to Data-Basics by August 29, 2008 to reserve your seat. Please include payment along with the enclosed registration form or fax it to Data-Basics at 216-663-5454 with payment method indicated.

You may also submit a PayPal payment online at: www.databasics.com/payment. All funds to be paid in US dollars.

ADDITIONAL TRAINING + CONSULTING

Firms interested in the Additional Training and Consulting taking place on Wednesday, September 10 should contact David Jack to schedule a meeting and/or inquire about pricing.

QUESTIONS?

Contact Terreathe or David at 1-800-837-7574.

DATA-BASICS, INC.

**2008 BEST PRACTICES
SEMINAR
&
USER'S GROUP MEETING**

**SEPTEMBER 8-9, 2008
CLEVELAND, OHIO**

(COMPANY PICNIC SUNDAY, SEPTEMBER 7)



2008 USER'S GROUP MEETING + SEMINAR

Learn how to take full advantage of the advanced features incorporated into the latest release of SAM Pro Enterprise as well as how to establish system-wide best practices.

The focus of Data-Basics' 2008 User's Group Meeting and Seminar will be maximizing the underlying power of SAM Pro Enterprise and the Anywhere Suite for firms currently using the enterprise software suite. This will include maximizing software tools in automating daily tasks, implementing wireless field service software and utilizing Data-Basics' signature Rules-Based Management technology to handle exceptions and enable management by exception.

MOBILE COMPUTING: THE USER'S PERSPECTIVE

We are excited to announce a presentation by our clients **Paul and Susan Beckett of Performance Air**. They will discuss how field service software has enhanced the efficiency and productivity of their service department.

NEW FEATURES IN SAM PRO

Requisitioning Module (7.1)

- Order, pick and stage materials required for Work Orders in advance of installation.
- Reserve stock and auto-generate purchase orders based on requirements.
- Import Bills of Material into work order job requisitions and future date releases.

Service Channel and Office Trax:

Web Services Integration

- Electronically receive and acknowledge work requests.
- Synchronize WO status changes and notes.
- Submit invoices electronically.

Preview of TechAnywhere 3.1

BEST PRACTICES

The goal of this part of the seminar will be to establish best practices procedures using SAM Pro on a day-to-day basis. Among the topics that will be covered:

User Enhancements:

- Custom Fields functionality (7.1)
- Required and Disabled fields
- Spell Checking
- Folder views and work flow
- Backer bitmap functionality

Accounts Payable:

- AP Journal Sales Tax tab (7.1)
- Pay-when-Paid
- Pay-when-Invoiced
- Vendor Insurance Tracking/Enforcement
- Alternate Vendor Mailing Addresses

Invoicing/Accounts Receivable:

- AR Sales Journal CM button (7.1)
- Enhanced AIA-type invoice format (7.1)
- Using Spell Check for Invoicing
- Master PM Contract Invoicing
- Consolidated Invoicing
- Service Invoicing
- Cash Receipt application/processing
- Bank Deposit Processing

General Ledger:

- GL Report Writer
- Bank Reconciliation

Payroll:

- Improved prevailing wage handling (7.1)
- Start / Stop Times (7.1)

Purchasing/Inventory:

- Use of the Inventory Adjustment Journal
- Truck restocking
- Auto Purchase Order Generation
- Serialized/Lot Controlled Inventory

Job Costing:

- Improved sales and use tax tracking (7.1)
- Effective WIP reporting
- Reported Completion Methodologies
- Job End-of-Month WIP Procedures
- Milestone Establishment/Reporting
- Project Manager's Work Bench

QuoteMaster/CSRAnywhere:

- Establishing Web Portal for Sales Reps
- Flat Rates for easy Quote generation
- Escalation Manager for Quote control
- Creating CSR Work Orders (leads)

Service Management:

- Auto Refresh Dispatch Board (7.1)
- Start/Stop Times (7.1)
- Effective use of Escalation Profiles
- PM Contract Management
- Creative use of WO's/Dispatch Boards
- CRMAnywhere configuration

Reporting:

- Database structure familiarization
- Establishing a "Join"
- Creating a Query
- Simple report writing skills

CLINICS AND DISCUSSION

Each day's session will end with a results-oriented clinic. In these sessions, Data-Basics will set aside time to address any questions and to provide answers on the spot. This is the perfect time to dig deeper into topics covered that day or to discover what SAM Pro Enterprise has to offer.

NETWORKING

With many types of firms at our seminar, you may discover great business opportunities for your company. Whether you specialize in service, construction, facilities maintenance or equipment sales and distribution, you can be certain profitable ideas and new relationships will be abundant.

Seminar Materials

Attendees will receive a Seminar Workbook which is yours to keep with a summary of the main topics covered during the sessions and space for your additional notes. This will be an excellent resource for future use or as a training guide for co-workers.