

DATA-BASICS, INC.

2009 BEST PRACTICES SEMINAR & USER'S GROUP MEETING

SEPTEMBER 14-15, 2009

LAS VEGAS, NEVADA

Join us in Las Vegas and 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' 2009 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.

NEW FEATURES IN SAM PRO

Document Management (7.2)

- QuickAttach streamlines attachments
- Create a multi-page PDF from a list of documents
- Enter category, description, and 'Viewable' criteria when scanning documents

Review of TechAnywhere 3.1

Data Management

- Obsolete Record handling
- Record References functionality
- Operation Lockdown

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:

- Additional User Groups per User (7.2)
- Report Auto-scrolling (7.2)
- Registry viewer enhancements (7.2)
- Custom Fields functionality
- Required and Disabled fields
- Spell Checking
- Backer bitmap functionality

Accounts Payable:

- Recurring AP Journal (7.2)
- AP Journal Sales Tax tab
- Pay-when-Paid / Pay-when-Invoiced
- Vendor Insurance Tracking/Enforcement
- Alternate Vendor Mailing Addresses

Invoicing/Accounts Receivable:

- Sales Commission Reporting (7.2)
- AR Sales Journal CM button
- Enhanced AIA-type invoice format
- Consolidated Invoicing
- Service Invoicing
- Cash Receipt application/processing
- Bank Deposit Processing

General Ledger:

- Job Use validation (7.2)
- GL Report Writer
- Bank Reconciliation

Payroll:

- Improved prevailing wage handling
- Start / Stop Times

Purchasing/Inventory:

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

Job Costing:

- Job Billing Items and Change Orders (7.2)
- Sales and use tax tracking
- 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

Service Management:

- Master Contract Enhancements (7.2)
 - Inspection Intervals
 - Time Of Service Billing
 - Day of the Week Inspections
- Start/Stop Times
- Effective use of Escalation Profiles
- Creative use of WO's/Dispatch Boards
- CRMAnywhere configuration

Reporting:

- Database structure familiarization
- Establishing a "Join"
- Creating a Query

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

Data-Basics has arranged for a special group rate of \$85.00 (**guaranteed thru 8/14/2009**) at the Harrah's, Las Vegas. Contact Data-Basics for details.

MEALS + REFRESHMENTS

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

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. This year we are going to escape to Margaritaville to enjoy cocktails, beer, wine and (of course) margarita's at Jimmy Buffett's themed restaurant right on the Strip. Jimmy Buffett's Margaritaville is a mecca for Parrot Heads or anyone else who wants to have a good time and a great meal in the ultimate tropical setting.



SIGN UP NOW!

Data-Basics is holding the line on prices, and offering the same rates as last year! The fees for the 2009 User's Group Meeting and Seminar are as follows:

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

Register and Pay by July 17, 2009 and receive a 15% discount applied towards all attendees. This brings the cost for the first attendee down to \$850 and additional attendees down to \$300.

Payment must be sent to Data-Basics by August 28, 2009 to reserve your seat if you are not paying early for the discounted rate.

QUESTIONS?

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