

DATA-BASICS, INC.

2010 BEST PRACTICES SEMINAR & USER'S GROUP MEETING

SEPTEMBER 12-14, 2010
CLEVELAND, OHIO



Join us in Cleveland 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' 2010 User's Group Meeting and Seminar will be maximizing the underlying power of SAM Pro Enterprise and the Anywhere Suite. This will include capitalizing on Data-Basics' software tools in automating daily tasks, implementing wireless field service software and utilizing Data-Basics' signature Rules-Based Management technology to handle a variety of situations and enable management by exception.

NEW FEATURES IN SAM PRO VERSIONS 7.3/8.0

Enhanced Project Managers Workbench (Version 8.0)

- RFI/RFP/Submittal document tracking
- Sub-contractor PO management
- Vendor Invoice Approval
- Change Order Management

Equipment Tracking (Version 8.0)

- Ability to charge company owned equipment to Jobs and Work Orders
- Track costs associated to company owned equipment

Enhanced Payroll Processing (Version 7.3)

- Advanced overtime shift Pay/Bill rules defined by Tech and Customer
- Exports to Paychex and Paycor payroll services
 - ASCII file timesheet import capabilities

New Ease of Use Features (Version 7.3)

- Set initial screen location and size by user
- Specify initial values for Starter Functions, Reports and Viewer text fields

Electronic Vendor Payment Processing (Version 8.0)

- Payment of Vendor invoices via ACH bank transfer

Quote Master Change Order Creation (Version 8.0)

- Create Change Order quotes and budgets via Quote Master

Review of TechAnywhere 3.2

- Support of Android mobile devices
- Enhanced C.O.D. payment processing

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BREAK-OUT SESSIONS

The goal of this part of the seminar will be to establish best practices procedures using SAM Pro on a day-to-day basis. Topic based round table discussion groups will be set up to allow attendees to share ideas and learn new procedures for using SAM Pro. Each table will be monitored by a Data-Basics representative. Break-out sessions will be established for:

Accounts Payable:

- Recurring AP Journal
- 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
- AR Sales Journal CM button
- Enhanced AIA-type invoice format
- Consolidated Invoicing
- Service Invoicing
- Cash Receipt application/processing
- Bank Deposit Processing

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
- Sales and use tax tracking
- Reported Completion Methodologies
- Job End-of-Month WIP Procedures
- Milestone Establishment/Reporting
- Project Manager's Work Bench

Payroll:

- Prevailing wage handling
- Managing time from multiple sources

General Ledger:

- Job Use validation
- GL Report Writer
- Bank Reconciliation

QuoteMaster/CSRAnywhere:

- Establishing Web Portal for Sales Reps
- Flat Rates for easy Quote generation
- Escalation Manager for Quote control

Service Management:

- Master Contract
- 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
- Excel Pivot Tables

TechAnywhere

- Deployment of mobile field service in your organization

SageQuest GPS Integration

- How to integrate location based management into your service organization

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.

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

LODGING

Data-Basics has arranged for a special group rate of \$105.00 per night at the Hyatt Regency Cleveland at the Arcade. Contact Data-Basics for details.



MEALS + REFRESHMENTS

Breakfast and lunch are included on both Monday and Tuesday. Special evenings of dinner and entertainment are planned for Sunday and Monday.

ENTERTAINMENT

Attendees who have attended previous user's group meetings know that the days are densely packed with tips, training and insight... Which is why we always reserve time for something fun. This year we will be offering TWO nights of company sponsored entertainment.



On **Sunday September 12th**, please join us for a Clambake at the Arcade. Clambakes are a Cleveland tradition and what better place to hold one than the Cleveland Arcade adjacent to the Hyatt hotel. Originally opened in 1890, the Arcade has been completely restored to its original glory by the Hyatt group. Most of the Data-Basics staff will be attending the event for a chance to meet and socialize with our customers.

On **Monday September 13th**, we will be returning to the VIP room of the Corner Alley, Cleveland's premier bowling alley/restaurant/martini bar. As in years past, it's a great place to enjoy a great meal, top-shelf spirits and some active entertainment.



SIGN UP NOW!

Data-Basics is holding the line on prices, and offering the same rates as last year! The fees for the 2010 User's Group Meeting and Seminar are as follows:

\$995 for the first attendee from a company

\$350 for each additional attendee

Register and pay by August 13th 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 27th, 2010 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.