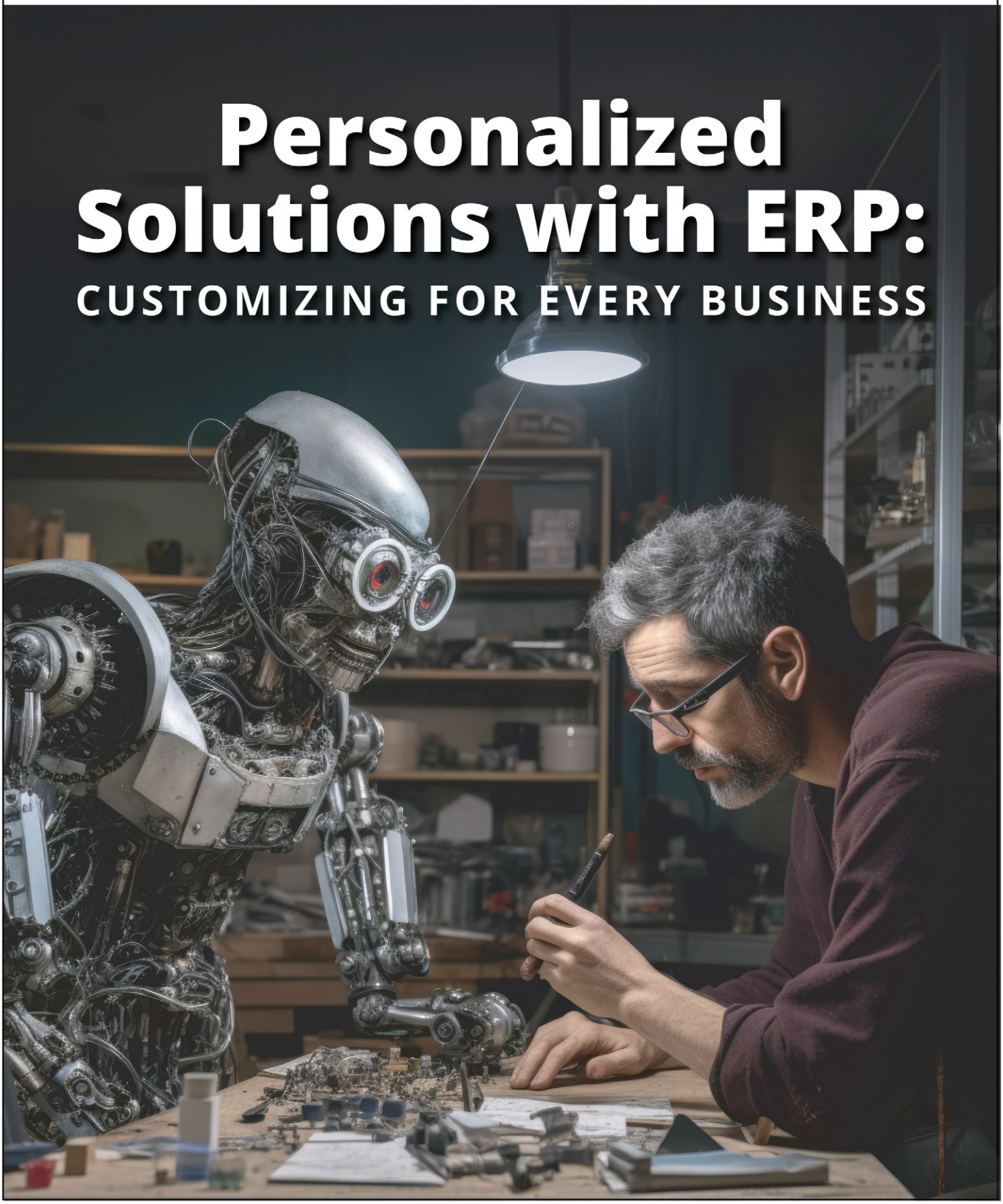
ERP NEWS
MAGAZINE
ISSUE #45 • 07 / 2024

Personalized Solutions with ERP:

CUSTOMIZING FOR EVERY BUSINESS



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EDITOR'S NOTE

Welcome to the July issue of ERPNews!

This month, we delve into a compelling editorial theme: "Personalized Solutions with ERP: Customizing for Every Business." As the landscape of enterprise resource planning continues to evolve, the need for tailored solutions has never been more critical. ERP platforms are no longer one-size-fits-all; they are becoming increasingly adept at meeting the unique demands of diverse industries. In this issue, we explore how leading ERP solutions are customizing their offerings to drive efficiency, scalability, and success for businesses of all sizes.

In our feature interview, we have an insightful discussion with Pieter Goes, Vice President of IT & BI at ET Browne, and Jamie Veinot, Product Manager at SYSPRO Americas. They share how a 25-year partnership with SYSPRO ERP has been pivotal in ET Browne's growth, highlighting the recent upgrade to the latest SYSPRO version and the impressive results achieved, such as a 22% reduction in inventory and a 113% increase in profits. This interview provides a fascinating look at how SYSPRO's tailored solutions have enhanced ET Browne's operations and supported their sustainability initiatives.

Additionally, we bring you exclusive interviews with leaders from Auditoria and insightsoftware. These discussions offer a deep dive into how their ERP platforms are personalizing solutions to address specific business challenges and drive innovation across various sectors.

As we continue to explore the theme of customization in ERP, we hope you find these interviews and articles both informative and inspiring. Our aim is to provide you with the knowledge and insights needed to leverage ERP solutions that are tailored to your business's unique needs.

Thank you for joining us in this journey of discovery and innovation.

Enjoy the issue!

Warm regards,

Pinar SENGUL, EDITOR

ERPNEWS

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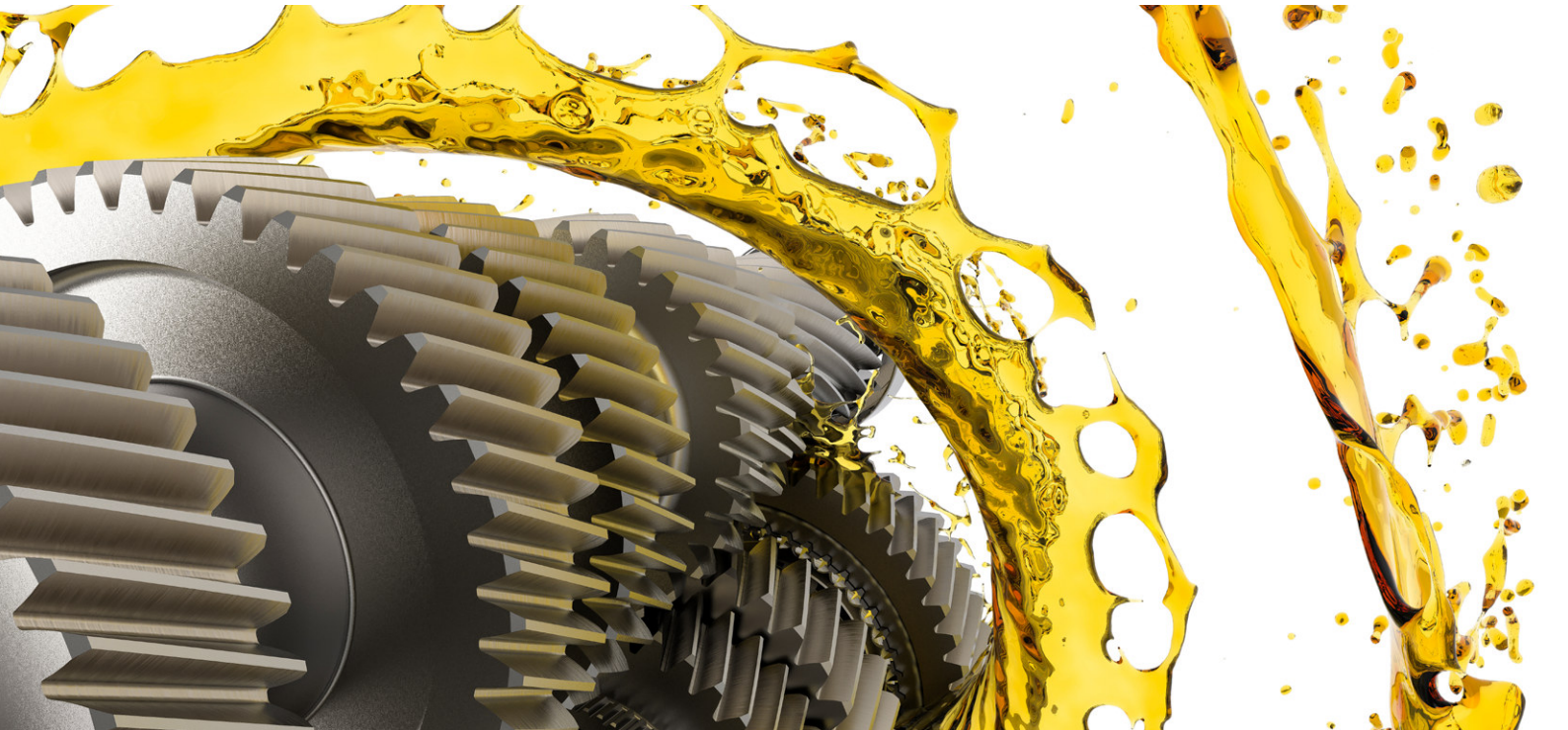

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Create the Shop Floor You Always Wanted with ERP

The world of modern manufacturing holds no room for error. Competition is fierce, margins are razor-thin, every process matters, every second counts, and every piece of data can have the potential to make or break your business. Accuracy is king, efficiency is queen, and with customers demanding faster turnaround times, real-time data is the ace up your sleeve.

Success in today's rapidly evolving industry requires thriving, innovating, and being a leader in your markets. It relies on having the right building blocks, technology, and ERP partner to reimagine your business, starting with a better manufacturing shop floor. With the right tools at your disposal, you can simplify processes, boost productivity, and stay ahead of the curve.

Global Shop Solutions has been simplifying manufacturing for more than 45 years. During that time, history has shown that those with the best before-and-after stories have made the following 10 functions of ERP software the heartbeat of their business.

If you're ready to take your manufacturing shop floor to the next level, here's where to begin.

Whitepaper by
Adam Grabowski
Director, Global Shop Solutions

Global Shop
SOLUTIONS

1. Planning & Scheduling

Efficient planning and scheduling is the most important process in manufacturing because it lays the foundation for everything that follows. The *Planning & Scheduling application* leads the way in simplifying operations and maximizing productivity by providing real-time load visibility, accurate forecasting, and trustworthy scheduling so employees know what to work on next and jobs get finished on time.

Among the software's numerous standout features, finite/infinite scheduling and its drag-and-drop functionality make it easy to reschedule or reroute jobs to meet customer deadlines. Planners can easily view and schedule employees, workcenters, materials and other various elements, including outside processes, to accurately estimate lead times.

> "It wasn't too long ago that quality was measured with hand tools and the human eye. Now it's managed with ERP Quality Control application that ensures quality in all manufacturing processes."

2. Shop Floor Data Collection

There's an old saying in business that you can't manage what you don't measure. The *Shop Floor Data Collection application* measures employee performance and other key metrics in real time to increase accuracy, efficiency, and control. The software automatically collects labor and production data when employees clock in and out of jobs, sequences, machines, and facilities. It helps balance labor costs by shift, work order, project, or department and guides employees with live dispatch lists. Real-time data provides more control by enabling the identification and resolution of production problems when they occur rather than after the job is complete.

3. Quality Control

It wasn't too long ago that quality was measured with hand tools and the human eye. Now it's managed with ERP *Quality Control application* that ensures quality in all manufacturing processes. It provides features for managing rework, rejects, and scrap. It allows quality personnel to isolate and measure the quality of manufactured or purchased parts based on scrap trends, cost, department, employee, workcenter, and other parameters. Engineers and machinists can create tailored records to meet internal and external quality control requirements, complete with electronic sign-off. For maximum control of part revisions the software controls each step of the process, including sign-off, department communications, and tracking. This feature-laden software captures real-time entry of non-conforming parts so jobs can be halted and a cause and corrective action can be created.

4. Inventory Management

Precise inventory management is a key element for shop floor efficiency. When you don't have enough materials, jobs get delayed. When you overstock, carrying costs soar. The *Inventory application* ensures accurate physical inventory management by tracking every aspect of your material needs, including detailed inventory data, while controlling costs. It supports multi-location inventory, usage reports, cycle counting, and product lines. Automated purchasing based on material requirements, planning functions, and purchase history helps prevent stockouts and excess purchasing. Easy access to jobs, sales, receivables and performance data further enhances effective shop floor management.

5. Customer Relationship

Management (CRM) Excellent service plays a vital role in building long-term customer relationships and increasing sales. *CRM software* built into your ERP helps grow sales by supporting on-time delivery and providing all sales order data in one screen. It connects all your data, providing real-time access to details on orders, shipping, job status, and communications for customers, prospects, and vendors. It also includes invoicing, shipping, quotes and more to streamline customer and prospect management.

The CRM application includes tailored sales Dashboards that help organize and maintain the sales pipeline, empowering your sales force. Moreover, it seamlessly integrates with other software to stream data between platforms and enhance overall business efficiency.

6. Document Control

If you're tired of hunting for paper documents that disappeared or were misfiled, *Document Control software* is for you. With this application, you can scan documents of any type into your ERP and they will be at your fingertips whenever you need them. This digital format application manages important documents, including process documentation,

training materials, CAD files, labels, and includes version management. It reduces paper usage on the shop floor by allowing personnel to scan and attach digital files to work orders, sales orders, inventory lists, purchase orders, and more. It seamlessly prints a complete set of quality requirements and inspection plans for any job or order, maintains a historical record of changes made to each file, and can roll back to previous versions if needed.

> "A well-managed shop floor is integral to meeting production targets, delivering high-quality products, satisfying customer demands, and driving overall business growth."

7. Tailored ERP

Your ERP software should be tailored to fit the unique needs of your industry and your business. Moreover, it should allow customization to modify standard screens by adding or removing functionality. Tailored screens help maximize efficiency by supporting the creation, scheduling, and automation of reports or workflows that go beyond what is included in standard applications.

Tailored ERP software, known as the Global Application Builder (GAB) at our company, enables the creation of applications specific to your manufacturing processes. It optimizes operational efficiency by allowing you to create custom Dashboards to pull data and functionality from various screens into one for seamless work processes.

8. Integrations

The ability to connect ERP software with outside third-party software and other business applications is a game-changer for manufacturers. These types of applications enhance the interoperability of systems, reduce manual data entry, and improve speed and accuracy to facilitate simplified and efficient operations across your organization.

Imagine using a CAD/CAM integration to automatically update bills of materials (BOMs) and job orders from CAD files rather than transferring the data manually. Think of the time and cost savings from using Nesting software to make the most efficient cuts on a piece of metal. Whether it's CAD/CAM, banking, tooling, or eHR/payroll integrations, you can expect huge increases in labor and machine efficiency.

9. Dashboards and Key Performance Indicators (KPIs)

These analytics tools facilitate data-driven decisions by enabling you to track, analyze, and improve the performance of specific metrics that align with your business goals. They also provide personnel with a single functional screen to manage daily tasks, including labor performance, purchasing, master scheduling and other functionalities. With these applications you can gain valuable operational insights, identify areas for improvement, and work the way you need to with flexible, searchable KPIs and *tailored Dashboards* that format data the way you need to see it.

10. Job Costing Accounting

This financial module helps guide strategic decisions by pinpointing the profitability of each job. It allows you to measure cost components by Freight, Labor, Overhead, Outside Services, Other, and Material (*FLOOOM*), and provides a breakdown of costs for inventory, work in progress (WIP), and cost of goods sold (COGS) using FLOOOM components. You can also view the history of finished goods (FG), including old quantities, current transactions, new quantities, and the cost for each. From big-picture summary information to data as simple as a single part number, the software lets you sort, filter, and drill-down for details that ensure you have the information you need when you need it.

Strive for Continuous Improvement

A well-managed shop floor is integral to meeting production targets, delivering high-quality products, satisfying customer demands, and driving overall business growth. Mastering these 10 features will simplify operations, improve productivity and efficiency, and make your shop floor a better place to work. However, continuing to make your ERP work for you requires upgrading the skills of your personnel on an ongoing basis. We recommend the following:

- Take the *Manufacturing Health Test* to identify the areas needing the most improvement.7

- Conduct a Process Audit to review current processes, pain points and inefficiencies and develop a tailored plan to achieve your desired future state.

- Simplify ERP training with an *online Learning Management System* to deliver, track and certify training for each ERP user.

- Develop at least one ERP "super user" in your business – someone who knows the ERP system inside and out and can train others throughout the company. Then build a team of employee experts knowledgeable about how ERP operates within their specific departments.

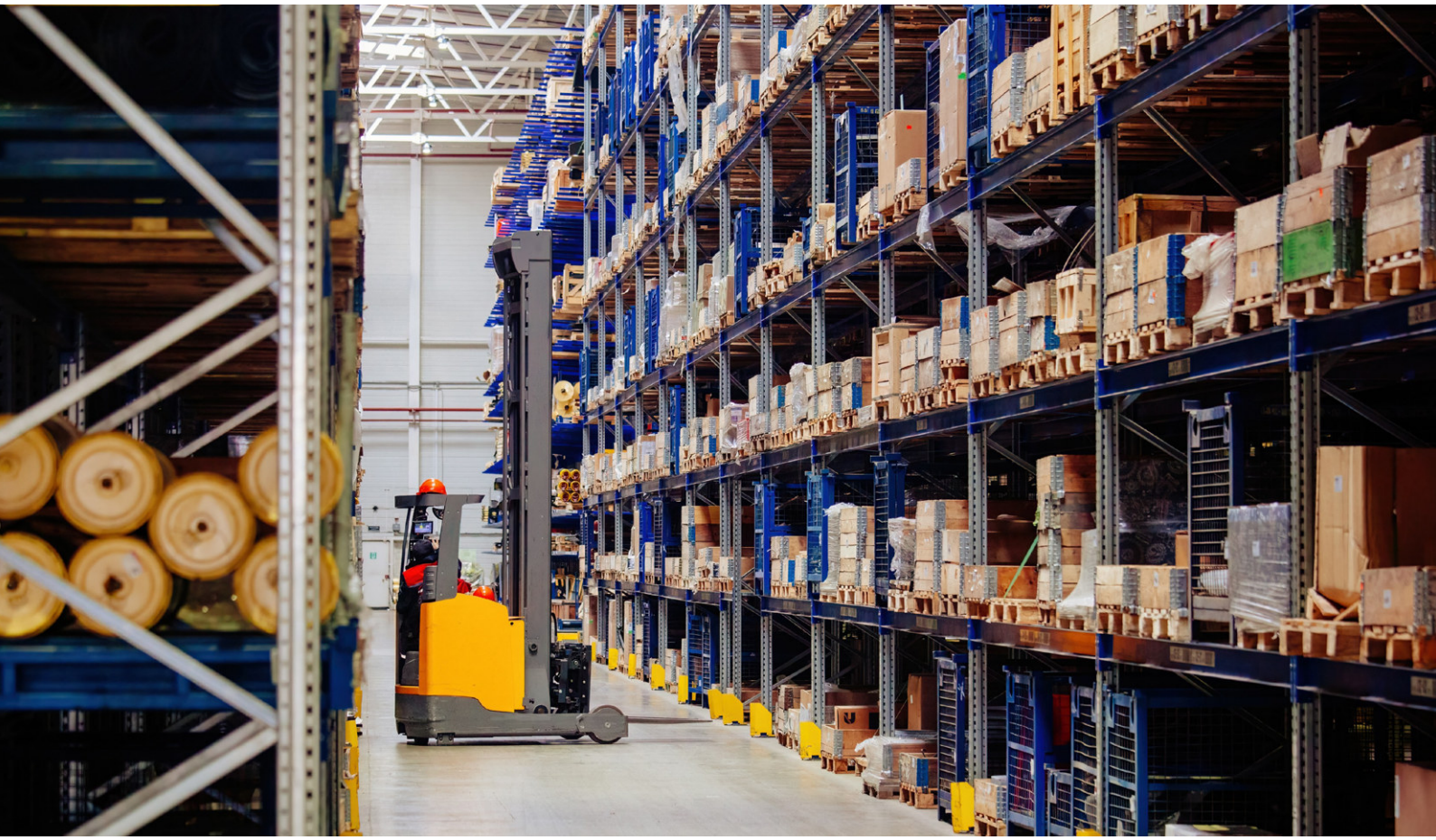
Make these a regular part of your continuous improvement plan and you'll be amazed at the speed, productivity, and innovation with which your workforce gets things done.

About Adam Grabowski

Adam Grabowski is the the Director of Marketing at Global Shop Solutions. He is responsible for translating the company's business objectives into successful brand, marketing, and communication strategies to drive awareness, revenue, and loyalty.

About Global Shop Solutions

Global Shop Solutions ERP software provides the applications needed to deliver a quality part on time every time from quote to cash and everything in between including shop management, scheduling, inventory, accounting, quality control, CRM and 25 more. Available in the cloud or on premise, our manufacturing customers benefit from real-time inventory accuracy, improved on-time delivery, lower administrative costs, increased sales and improved customer service. Headquarters in The Woodlands, Texas includes a state-of-the-art R&D facility and Global Shop Solutions training center. Through its offices in the U.S., Mexico, Indonesia, Singapore, Australia, New Zealand and the United Kingdom, the company supports thousands of manufacturing facilities in over 25 countries and more than 30 industries. For more information please visit globalshopsolutions.com.



Transforming Financial Management with AI: An Interview with Rohit Gupta, CEO and Co-founder of Auditoria.AI

In a rapidly evolving financial landscape, technology continues to play a pivotal role in enhancing operational efficiency and productivity. Auditoria.AI, a trailblazer in automated AI-powered intelligent apps for finance, has recently announced a groundbreaking reseller partnership with Workday. This collaboration aims to revolutionize supplier management and accounts payable operations for customers, providing a comprehensive AI solution that streamlines processes and reduces errors. We had the opportunity to discuss this exciting development with Rohit Gupta, CEO and Co-founder of Auditoria.AI. In this interview, Rohit shares insights into the partnership, its impact on financial management, and the future of AI in the fintech, accounting, and ERP software sectors.

1. Can you provide an overview of the new reseller partnership between Auditoria.AI and Workday? What are the key objectives of this agreement?

Workday has announced its first-ever SKU for a reseller partner solution with Auditoria. The benefits for Workday Financial Management customers are an absolute game-changer. Auditoria.AI SmartBots for Workday provides new and existing Workday customers with a more comprehensive solution to improve and automate specific AP and GL functions that fall outside of our Workday Financial Management capabilities.

Interview with
Rohit Gupta
CEO and co-founder, Auditoria.AI

It allows for certified direct integration and frictionless procurement of the ***Auditoria SmartBots for Workday***, with a Workday SKU for Auditoria's AP Helpdesk and AP Accruals solutions from within Workday Financial Management, and for purchasing Auditoria.ai products directly through existing Workday contracts.
This is a reseller agreement rather than a traditional partnership and is part of a larger strategy, and cross-functional effort to expand the Workday Financial ISV Ecosystem.

2. How will this partnership enhance supplier management and accounts payable operations for Workday customers?

A company's shared AP inbox plays a critical role in the overall procure-to-pay process. It is the primary way to receive vendor bills, drives supplier communication and experience, is susceptible to fraud and spam, and is a point of communication for internal stakeholders to ensure proper accounting.

AP staff typically fully manage AP inboxes. This work can be mundane, requiring staff to cross-reference many data points to ensure the validity of the liability and extract the proper data needed for the ERP. This is in addition to answering high-volume inquiries into the status of invoices and payments by suppliers and internal stakeholders alike.

This unengaging work can lead to human error, which is troublesome for an area that drives the largest expense for many organizations. Not deploying talent appropriately can lead to employee dissatisfaction and churn. It also can lead to a subpar supplier experience, particularly in times of high-volume engagement with AP teams, such as month end.

Slow close cycle times for AP and accruals can be expected. With Auditoria, AP teams can reduce time spent on AP Helpdesk and AP Accruals by 70% and 60% respectively after using their products.7

Key features include:

- Executing data entry, preventing bad data from entering the system of record and reducing errors and omissions

- Automating email replies to supplier inquiries related to invoices and auto-generating accrual entries based on email collaboration with suppliers
- Automating tasks such as outreach and journal entry creation so AP teams elevate work to focus on analysis and action

- Enhancing vendor relationships through increased response time and improved relationship management

3. What specific capabilities does Auditoria.AI bring to Workday Financial Management, and how do they complement its existing functions?

The Auditoria SmartBots for Workday + Workday Advanced AP Automation offers Workday Financial Management customers three unique and valuable finance solution offerings that work together to drive better productivity:

- Invoice / Statement automated document recognition and data extraction with the Workday OCR module.
- Vendor email processing automation with Auditoria's AP Helpdesk built with Intelligent App intent detection and bi-directional communication.
- Accruals automation with Auditoria's AP Accruals to help improve vendor spend compliance.

Purpose-built for finance with NLP, AI, and ML, SmartBots act as AI "teammates." Adoption and execution are accelerated with the English language, business terminology configuration, and intent detection for finance processes. Next-generation generative AI and machine learning-built technology deliver a 70% workload reduction for finance teams.

Auditoria's proprietary, patented small language model (SLM) offering combines LLM capabilities with finance-specialized data that allows for fine-tuned and customized finance context, expanding the AI advantages of Workday.

This specialty-built SLM comprises three billion tokens designed to understand and generate human-like finance text but is smaller in scale and yields more accurate results to radically improve outputs and workflows.

More specifically, the Auditoria modules offer the following:

AP Accruals
Reduce Risk • Improve Accuracy • Expedite Close

Auditoria AP Accruals delivers autonomous supplier outreach

to automate the month-end supplier expense accruals process and eliminates the long hours needed to close the books.

Using machine learning and natural language processing, Auditoria's SmartBots create journal entries, estimate supplier accrual expenses, match with third-party data sources, and reconcile with the general ledger. AP Accruals delivers an industry-first capability to automate the typically arduous and error-prone period-end supplier process.

AP HELPDESK

Speed-Up Response Time • Reduce Resource Requirements • Improve Vendor Satisfaction

Auditoria's AP Helpdesk increases speed, accuracy, and efficiency in the finance back office using generative AI-enabled SmartBots to automate redundant and manual monitoring and responding to requests in the shared AP email box.

These intelligent SmartBots are trained in finance concepts and handle more than 90% of the incoming inquiries received, executing authorized tasks and requests.

4. Can you share some examples or case studies demonstrating the improvements in productivity and efficiency that customers can expect from this AI solution?

AP Accruals Faster Period Close

- Improved team / FTE productivity by 40%+
- Reduced process workload by 55%+
- Speed up the collection of GL entries by 90%+
- Reduce errors and omissions by 85%+
- Close books 20% faster
- Improve overall compliance
- Elevate cash visibility

AP Helpdesk Streamline the AP Shared Inbox

- Recover 1000s of hours for AP teams
- Improve vendor serviceability by >75%
- Minimize vendor risk and fraud by >50%
- Achieve >50% AP productivity improvements
- Increase response rates by 80+%

Denny's

- Centralized finance inboxes to streamline workflows and increase response times
- Reduced process workload by 60+%
- Improved employee morale and vendor satisfaction
- Identification of duplicate invoices to save time and effort processes invoices already in the system
- 95% of received emails in the shared inbox are processed by SmartBots

> "Using machine learning and natural language processing, Auditoria's SmartBots create journal entries, estimate supplier accrual expenses, match with third-party data sources, and reconcile with the general ledger."

5. How does Auditoria.AI's solution help reduce processing time, errors, and costs associated with managing the accounts payable inbox?

AP Helpdesk automates vendor email processing and request fulfillment. AP shared inboxes are automatically processed using tech that deciphers the context and intent message. Responses are composed on up to 90% of the inbox, shifting team member focus to more impactful work.

- Eliminate the need to login to shared inboxes, saving time and increasing productivity
- Deliver consistent, accelerated turnaround of email-originated AP requests and inquiries
- Reduce operational expenditure by streamlining workflows for manually executed and auto-processed AP tasks
- Simplify AP communication and improve vendor satisfaction

6. What impact do you foresee this partnership having on the overall financial management landscape for companies using Workday?

Resource Scalability and Reliability

- With a pre-configured, built-in finance context, minimal time is needed to get the project up and running, allowing more time for other projects. The Auditoria platform was built with extreme scalability to handle an infinite number of requests, working in real time. Always on the job, the technology rarely makes mistakes, ensuring a more efficient, accurate, and productive finance office.

Outstanding Time to Value

- With rapid delivery and implementations for Auditoria's

SmartBots, customers see value in days, not weeks or months. A sandbox could be installed in less than a day, with a go-live typically rolled out in four to eight weeks.

- SmartBots training takes minutes, unlike human onboarding programs that may take weeks, months, or even years. With quick onboarding, typical ROI payback could be demonstrated in just two quarters.

Best-in-class AI Ecosystem for Workday

- Auditoria's purpose-built domain-specific language models for Finance, Accounting, and Procurement allow Workday Financials customers to leverage highly tuned language models to automate business processes, thereby driving greater efficiencies, productivity, and business transformation.

Pure SaaS Certified for Workday

- With certified connections with Workday Financial Management, mailboxes, and other systems, Auditoria extends application investments with secure, cloud-native, seamlessly integrated APIs that increase the value of implementation investments while reducing the cost of ownership over time.

7. Can you explain how the AI solution aids in reducing close time and eliminating manual, error-prone supplier accrual outreach processing?

AP Accruals automates scheduled requests for PO and PR status updates and estimations for accrual entries. By automating the accruals workflow, the collection of GL entries is accelerated, errors and omissions are reduced, and the books are closed faster.

Value Proposition

- Anticipate supplier expenses and have less unplanned spend
- Improve supplier expense accruals accuracy and completeness, and reduce close time
- Detect anomalies and identify erroneous or unusual activity to reduce compliance risk
- Provide leadership visibility into projected spend and accruals backup

"Collaborative Mode brings increased accuracy in responses, higher productivity, and stronger trust in automation. By allowing human oversight, the system minimizes risks associated with potential errors or omissions."

8. How does the integration of Auditoria.AI's intelligent apps with Workday Financial Management enhance the user experience for accounts payable teams?

Collaborative Mode brings increased accuracy in responses, higher productivity, and stronger trust in automation. By allowing human oversight, the system minimizes risks associated with potential errors or omissions. This synergy between human insight and AI capability marks a significant advancement in streamlining finance office operations.

The ability for human operators to manage data flow and approve data input and outflow before writing to systems of record. Reporting lists with system-generated decisions, giving finance managers the ability to review and audit software and team performance. Teams handle large volumes and process requests efficiently and rapidly to mitigate fluctuations in operational expenses and minimize negative financial impact.

Business intelligence and reporting are critical to generating insightful reports and real-time visibility into key indicators. Auditoria's intuitive user interface empowers business users to create, update, and maintain templates, rules, and correspondence with drag-and-drop functionality. This low-code, no-code technology reduces dependence on IT. These types of features optimize accounting processes, enhance vendor relationships, and enable efficient decision-making.

9. What are the anticipated long-term benefits for customers who adopt this comprehensive AI solution for their accounts payable and general ledger functions?

Auditoria's SmartBots for Workday built with GenAI will bring the power of assisting, advising, and recommendations will empower CFOs to simplify finance processes, accounting closes, filings, planning, analyses, and broad decision-making. Tasks that were once arduous, time-intensive, and manual, will become routine, often running in the background, freeing up resources for more strategic initiatives.

Auditoria's SmartBots for Workday built with GenAI will bring the power of assisting, advising, and recommendations will empower CFOs to simplify finance processes, accounting closes, filings, planning, analyses, and broad decisionmaking.

This transformation doesn't just boost productivity; it propels finance teams toward a future where decisions based on real-time data, analysis, and recommendations become the norm. The CFO will be equipped to focus on forward-looking, business value-focused activities, leading to significant enterprise-level benefits.

10. Looking ahead, what are the next steps for Auditoria.AI in terms of further collaborations or innovations in the fintech, accounting, and ERP software sectors?

Auditoria will be introducing a wealth of AI innovation purpose-built for finance, accounting, and procurement teams. In the immediate short term, Auditoria is introducing a first-of-its-kind order-to-cash remittance processing solution built on GenAI and LLMs. This allows for automated remittance data processing, streamlined cash application mapping, and automated payment record processing.

Furthermore, Auditoria has additional plans to augment its capabilities in AP, AR, and GL, and deliver advanced Finance Operations analytics giving finance teams the operational insights they need, all as part of their FinOps workflows.

About Rohit Gupta

Rohit founded Auditoria.AI in 2019, with the vision of ushering a new paradigm in Artificial Intelligence, Machine Learning, and Automation for ERP Financial Applications. He is responsible for conceiving, developing, communicating, and growing Auditoria's strategy and business as an industry pioneer in the next generation autonomous, self-driving Finance back office.

Most recently, Rohit was Group Vice President for Cloud Security at Oracle Corporation having joined via the acquisition of Palerra, the industry's first API-centric Cloud Access Security Broker, where he was Founder and CEO. Prior to Palerra, Rohit was Vice President and General Manager for the Remedy IT Service Management division at BMC Software and Founding Vice President of Product Management for Identity and Access Management at Oracle Corporation. Rohit earned his master's degree in Computer Science from Case Western Reserve University, and is a well-known speaker and industry thought leader in the areas of emerging technology innovation, advanced analytics, automation, security, and privacy.

About Auditoria.AI

Auditoria.AI exists to make organizations more efficient and competitive by accelerating key finance processes, increasing business visibility, and improving compliance using leading-edge artificial intelligence and machine learning technology. By automating these key functions, Auditoria strives to improve the lives of finance and accounting professionals by applying technology to automate the routine, repetitive, and laborious parts of the finance function, freeing finance teams to perform higher-level business functions.

SecurityBridge Announces Bill Oliver As U.S. Managing Director

Company Continues U.S. Team Expansion

SecurityBridge, a leading global provider of SAP security solutions, announced the appointment of Bill Oliver as Managing Director of its U.S. operations. Oliver brings over 15 years of business operations and finance experience, as well as a vast knowledge of SAP, cybersecurity technology, and services.

"The expansion of SecurityBridge's U.S. team underscores the company's unwavering commitment to protecting North American customers' SAP platforms from debilitating cyber-attacks," said Ivan Mans, CTO and Co-Founder of SecurityBridge. "Bill Oliver brings a wealth of cybersecurity experience and a proven track record in driving business success. We look forward to his contributions as SecurityBridge continues its U.S. momentum."

In his new role, Oliver will be responsible for increasing SecurityBridge's overall market share, operations, and strategic direction in the U.S. market. Before joining SecurityBridge, he held leadership and consulting roles with Winterhawk Consulting and Oliver Advisory Group and managerial roles in external audit, advisory, and assurance services.

"I have had the privilege of working with Ivan and Christoph, SecurityBridge's CEO and founder, for several years; the innovative SAP cybersecurity solutions they have developed are exceptional. I look forward to our continued relationship as we extend the company's presence throughout the U.S. market," said Oliver.

For more information about SecurityBridge and its SAP security solutions, visit *www.securitybridge.com.*

Press Release from Security Bridge

Acumatica Expands College Education Program to Empower the Future Workforce

Business Management Solutions Company's Successful Initiative Provides Hands-On ERP System Training to Equip Students with In-Demand Skills

To help address the growing demand for cloud-based business solutions and the resulting need for skilled technical professionals, *Acumatica* announced that it plans to expand a program offering college-level courses designed to prepare digital-native students for the workforce. The *Acumatica College Education Program*, which specializes in providing hands-on experience with the Acumatica Cloud ERP solution, is now branching out to other colleges to replicate successful learning experiences and further equip more students with essential skills.

As businesses evolve with rapid technological advancements, there's an increasing demand for programs that arm a new generation with necessary STEM (Science, Technology, Engineering and Math) skills. Acumatica is leading the way in ensuring graduates are prepared to meet the expectations of modern employers and contribute effectively from their first day of employment.

The initial beta program, developed by *Infinity Resources Management* (IRM), was successfully launched in 2023 at Farmingdale State College, part of the State University

of New York (SUNY) system. In May 2024, Farmingdale celebrated the graduation of its second Acumatica ERP class. All graduates received an Acumatica Welcome badge and Business Consultant certification upon completing the course. Plans are underway to develop and introduce more courses to additional colleges, including the Sam M. Walton College of Business at the University of Arkansas, the School of Management at the University of Michigan-Flint and the University of Hawaii Maui College.

"We're committed to providing more students with the essential skills and knowledge they need in real-world situations through firsthand experience with our innovative business technology," said John Case, CEO of Acumatica. "Our College Education Program not only empowers a new generation of digital natives with skills that are in high demand but also addresses a growing need for technical expertise to help businesses transform their operations."

The comprehensive course gives students a thorough understanding of an ERP system's principles and fundamental processes. Using Acumatica ERP and a Learning Management System (LMS), students benefit from an immersive online learning experience featuring text, videos, case studies of Acumatica customers and hands-on use of the Acumatica Cloud ERP software. For students who complete the courses, recruitment support from *TwentyAI* is available, helping them transition smoothly into the workforce.

"This program is not just about education—it's about molding career pathways. We're bridging the gap between academic training and real-world employment," said Gene Caiola, managing partner at IRM. "We're confident that students with Acumatica Cloud ERP skills will be highly sought after in the workforce, setting them up for long-term professional success."

For more information about the course or Acumatica, please reach out to Luis Goncalves at *Luis.Goncalves@acumatica.com*.

Acumatica
The Cloud ERP

About Acumatica

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future. For more information, visit acumatica.com or follow us on LinkedIn.

Global Shop Solutions Digitally Transforms How Manufacturers Work With Dashboard Designer Feature

As the manufacturing industry continues to grow more complex, manufacturers are becoming more dependent on accessing operational and financial data the way they want to see it. Global Shop Solutions, a leading provider of ERP software, is improving transparency for manufacturers with the Dashboard Designer feature. This innovative feature makes it easy to design, customize, track and display data in formats that meet the unique business needs of manufacturers.

"Dashboard Designer is a no-code data analysis tool manufacturers can use across their organization," says Dusty Alexander, President and CEO of Global Shop Solutions. "Manufacturers can tailor Dashboards to their own specifications by dragging and dropping features directly onto the screen. If they know Excel they can easily tailor just about anything they want to do in the Dashboard Designer."

Basic Dashboard Designer templates come standard with the ERP and can be edited according to user preferences. The most popular Dashboards for current customers include Sales Analysis, Employee Productivity, Real-Time Workcenter Dispatches, and Work Order Estimate Versus Actual. These data metrics are prized because they make it easy to discern outliers, including which products are profitable and which aren't, and why work order estimates are deviating projections at unacceptable levels.

One of the newest Dashboard Designer features fulfills an urgent need for manufacturers by displaying shop floor metrics on interactive TV screens located on the shop floor. Shop floor personnel no longer have to search for production data because it is always in front of them. Five times faster than running a report, the interactive TV screens have proved so efficient that the Dashboard Designer team created a "sister" Report Designer to generate faster, more customized reports.

Global Shop Solutions has also grown a user community where manufacturers with a Dashboard Designer license can download, implement and edit existing Dashboard designs at no cost. These include tailored Dashboards that have been created for other customers by Global Shop Solutions employees. Dashboard Designer users download custom designs from the library of tailored Dashboards and, if needed, edit them so they can see the data in ways that add value to their decision making.

"Our goal has always been to continually simplify manufacturing and be more than a software company for our customers," says Alexander. "With the latest update, Dashboard Designer data is always live, and enables our customers to drill down into as much detail as they want to see. It literally transforms the way they work."

About Global Shop Solutions

Global Shop Solutions ERP software provides the applications needed to deliver a quality part on time every time from quote to cash and everything in between including shop management, scheduling, inventory, accounting, quality control, CRM and 25 more. Available in the cloud or on premise, our manufacturing customers benefit from real-time inventory accuracy, improved on-time delivery, lower administrative costs, increased sales and improved customer service. Headquarters in The Woodlands, Texas includes a state-of-the-art R&D facility and Global Shop Solutions training center. Through its offices in the U.S., Mexico, Indonesia, Singapore, Australia, New Zealand and the United Kingdom, the company supports thousands of manufacturing facilities in over 25 countries and more than 30 industries. For more information please visit [globalshopsolutions.com.](globalshopsolutions.com)

Insightful Integration: Insightsoftware's Monica Boydston on Their New ESG Solution

In the evolving landscape of corporate sustainability, organizations need robust tools to navigate complex Environmental, Social, and Governance (ESG) reporting requirements. Monica Boydston, General Manager of Controllership at insightsoftware, delves into the intricacies of their newly launched ESG solution. Designed to support organizations at every stage of their sustainability journey, this comprehensive solution aims to simplify data collection, streamline workflows, ensure seamless compliance, and provide future-proof flexibility. Boydston shares how this end-to-end ESG solution differentiates itself in the market, addresses key challenges faced by companies, and integrates with existing systems to enhance transparency and accountability. Discover how insightsoftware's innovative approach empowers businesses globally to meet their sustainability goals and stay ahead of regulatory demands.

1. Can you provide an overview of insightsoftware's new ESG solution and its key features?

insightsoftware's new Environmental, Social, and Governance (ESG) solution is a comprehensive end-to-end solution designed to support organizations at any and all stages of their sustainability journey. Aimed at addressing the impact of the Corporate Sustainability

Interview with
Monica Boydston,
General Manager,
Controllership at insightsoftware

insightsoftware

Reporting Directive (CSRD) requirement, insightsoftware ESG is a modular solution that facilitates effortless data collection and consolidation. It provides a pre-configured data model to streamline the data-gathering process; simplified workflows, enabling comprehensive BI analytics to create interactive dashboards; seamless compliance and filing, based on an integrated solution that simplifies CSRD compliance and business reporting filing requirements; and future-proof flexibility, as evidenced by its modular configuration that adapts to any organization's specific needs - even as regulatory requirements change.

> "insightsoftware ESG differentiates itself from other solutions in the market by offering data collection, narrative reporting, and analysis in one solution."

2. What motivated insightsoftware to develop an end-to-end ESG solution, and how does it differentiate from other solutions in the market?

ESG reporting mandates, such as the CSRD, greatly affect how organizations prioritize sustainability efforts. As a result of these mandates, insightsoftware identified the need for an end-to-end ESG solution. It is important for insightsoftware to provide the most comprehensive solution set for the Office of the CFO, so adding ESG reporting capabilities was crucial. insightsoftware ESG differentiates itself from other solutions in the market by offering data collection, narrative reporting, and analysis in one solution. insightsoftware ESG is built upon an existing solution used by thousands of companies. With over 20 years of experience supporting companies with diverse filing regulations, insightsoftware is uniquely positioned to guide businesses through the ever-evolving ESG reporting landscape.

3. How does the insightsoftware ESG solution support organizations throughout their sustainability journey? Can you share some specific use cases or success stories?

The complexity of managing disparate ESG data sources can be overwhelming. insightsoftware ESG simplified the entire process. It allows organizations to connect seamlessly with its existing systems including enterprise resource planning, customer resource management, excel, and other sustainability tools. Organizations can then collect and consolidate ESG metrics alongside their financial data, guaranteeing consistency and completeness, and finally, store this data in their chosen ESG standard's taxonomy. Ultimately, insightsoftware creates a single source of truth for all an organization's ESG information, ensuring accuracy, transparency and clear picture of its sustainability performance. We are just launching the insightsoftware ESG solution, so we look forward to building out future case studies as our customers continue to utilize its capabilities to meet their unique sustainability goals.

4. What challenges do companies typically face with ESG reporting, and how does your solution address these challenges?

ESG reporting is complex, requiring data from multiple sources, such as enterprise resource planning, sustainability systems, customer relationship management, and human resource management. These systems are often siloed across an organization and its suppliers, adding to the complexity. Businesses also struggle to collect and consolidate ESG metrics alongside their financial data. Disjointed systems and inefficient processes limit an organization's ability to provide ESG transparency and accountability to investors, consumers, regulators, and stakeholders.

insightsoftware ESG helps companies address these challenges through key features including effortless data collection and consolidation, simplified workflow, seamless compliance and filing, as well as future-proof flexibility. insightsoftware ESG empowers organizations to accurately and efficiently satisfy reporting requirements to internal and external stakeholders, demonstrating a commitment to their sustainability efforts and effectively utilizing their ESG data as a strategic driver for organizational growth.

5. With evolving regulations like the CSRD, how does insightsoftware ensure its ESG solution remains adaptable and compliant with international standards?

The CSRD directive and others like it (i.e. the European Sustainability Reporting Standards) usher in a new era of transparent and comprehensive corporate sustainability reporting across the EU. With growing global adoption, they are poised to reshape the landscape for businesses worldwide. With that said, they will require companies to disclose more and better ESG information,to use eXtensible Business Reporting Language (XBRL) tags, and format for their reporting. To prepare for these regulations, companies will need to rely on consolidation and disclosure management tools like insightsoftware ESG that can help them collect, consolidate, validate, analyze, report, tag, file, and publish their ESG information in a compliant and efficient way. By doing so, companies can not only meet their ESG reporting obligations, but also create value for their business and their stakeholders while contributing to a more sustainable and inclusive economy.

insightsoftware ESG allows companies to embrace a tailor-made CSRD journey without settling for a one-size-fits-all approach - which will remain crucial. By providing a unified approach to data management, analysis, and reporting, insightsoftware ESG offers pre-built templates and workflows aligned with major ESG frameworks, streamlining the process and ensuring consistency. The modular design adapts to an organization's specific needs alongside future regulatory changes.

> "By building insightsoftware ESG to be a modular solution, organizations are empowered with the tools and flexibility to tailor their sustainability journey to their specific needs. This enables businesses to collect, consolidate, and analyze ESG data from any source and create accurate and compliant reports in minutes versus weeks or months."

6. How does the insightsoftware ESG solution integrate with existing systems and processes within an organization to enhance transparency and accountability?

Don't underestimate the ability to deliver investor-grade data that seamlessly integrates ESG and financial information into a single, visually engaging report. This transparency provided by insightsoftware ESG, achieved through accurate, auditable, and timely data presentation, allows organizations to clearly demonstrate the link between sustainability and value creation. Such clarity goes beyond mere compliance; it strengthens brand reputation and resonates with stakeholders, fostering trust and engagement. For example, the ability to integrate with tools like InDesign ensures efficient multi-author collaboration and eliminates tedious formatting struggles. Its support for XBRL tagging and other regulatory requirements also makes compliance effortless and accurate. Because insightsoftware ESG unlocks the power of visual storytelling with data-driven insights, it enables organizations to go beyond reporting – they can cultivate meaningful engagement with stakeholders.

7. Can you explain how your solution helps businesses tailor their sustainability journey and make informed decisions based on ESG data?

By building insightsoftware ESG to be a modular solution, organizations are empowered with the tools and flexibility to tailor their sustainability journey to their specific needs. This enables businesses to collect, consolidate, and analyze ESG data from any source and create accurate and compliant reports in minutes versus weeks or months. Without this tool, organizations are left scrambling to keep up with frequent last-minute mandate changes and new compliance requirements. Instead, this ESG solution suite gives organizations flexibility in how they pull in data, where they pull it from, and how they use it – whether it be for Sustainability Accounting Standards Board (SASB) reporting, XBRL Tagging & Filing, multiple taxonomies, or glossy reports – to eliminate the risk of manual errors in the process. By allowing for this flexibility, teams are equipped with the tools they need to make the most up-to-date and informed decisions based on their ESG data.

8. Why do you think US companies are increasingly prioritizing sustainability despite the lack of ESG mandates, and how can insightsoftware support them in this transition?

U.S. companies currently follow a voluntary approach when it comes to ESG reporting. However, there is an increased demand for transparency and accountability on ESG issues among investors, consumers, regulators, and stakeholders. This means that despite the lack of any major mandates, U.S. companies still find value in demonstrating the impact of their sustainability efforts. In fact, it *has been* found that investors increasingly believe companies that perform well on ESG are less risky, better positioned for the long term, and better prepared for uncertainty.

insightsoftware is able to simplify and streamline a U.S. company's ESG journey. Especially at the beginning stages, what will be most important is consolidating internal and external data sources, reducing manual data entry and errors, and providing real-time analytics. By integrating ESG reporting with existing financial reports, insightsoftware can help companies link ESG performance to financial outcomes and demonstrate ESG leadership and value creation to stakeholders and potential investors - transforming ESG data into actionable decisions in minutes.

9. Looking forward, what are the next steps for insightsoftware in terms of developing and enhancing ESG solutions? Are there any new features or updates on the horizon?

Looking forward, insightsoftware has plans to expand the ESG solution into other markets. Additionally, the ability to support multiple ESG/ sustainability frameworks and share data between them is on the roadmap to be delivered in the next 12 months. insightsoftware also intends to make the following prepackaged templates available within 12 months: GRI, IFRS S1, IFRS S2, GHG scope 1, 2, and 3 emissions.

insightsoftware

About Monica Bodyston

Monica Boydston is a visionary product leader who thrives on challenges and embraces change as a catalyst for innovation. With an unwavering commitment to influencing innovation and fostering deeper product adoption, Monica has chartered an impressive trajectory marked by transformative success. She has orchestrated remarkable sales growth and market expansion by spearheading the delivery of intricate, scalable software initiatives. Monica currently serves as the General Manager of Controllership at insightsoftware.

About insightsoftware

insightsoftware is a global provider of comprehensive solutions for the Office of the CFO. We believe an actionable business strategy begins and ends with accessible financial data. With solutions across financial planning and analysis (FP&A), accounting, and operations, we transform how teams operate, empowering leaders to make timely and informed decisions. With data at the heart of everything we do, insightsoftware enables automated processes, delivers trusted insights, boosts predictability, and increases productivity. Learn more at insightsoftware.com.

Leveraging SYSPRO ERP: ET Browne's Journey to Enhanced Efficiency and Profitability

In this exclusive interview for ERPNews' July issue, we delve into the 25-year partnership between ET Browne and SYSPRO ERP, exploring how this collaboration has propelled ET Browne to new heights. Pieter Goes, Vice President of IT & BI at ET Browne, alongside Jamie Veinot, Product Manager at SYSPRO Americas, share their insights into the evolution of their relationship, key milestones, and the transformative impact of SYSPRO ERP on ET Browne's operations.

From upgrading to the latest version of SYSPRO ERP in 2023 to implementing just-in-time inventory systems and enhancing demand forecasting, this interview reveals the strategies behind ET Browne's impressive achievements, including a 22% reduction in inventory and a 113% increase in profits. Additionally, the discussion touches on the role of SYSPRO ERP in supporting ET Browne's sustainability initiatives and managing the complexities of incorporating recycled materials into their supply chain. Discover how SYSPRO ERP's innovative features and future-focused approach continue to drive efficiency, scalability, and success for mid-market manufacturers like ET Browne.

1. How has the relationship with SYSPRO ERP evolved over the past 25 years, and what key milestones have you achieved during this partnership?

It's been a great relationship, and as ET Browne has grown, SYSPRO has scaled right alongside us. For most of this time, we've relied on SYSPRO ERP to help us manage and control financial operations. But as our business has expanded, it became clear there were opportunities to take advantage of additional capabilities within the platform.

2. What were the primary reasons behind upgrading to the latest version of SYSPRO ERP in 2023, and how has this upgrade impacted your business operations?

Sure. By 2023, we'd grown into a $250 million company, and it was clear we needed to standardize all our facilities on a single system for managing inventory and the supply chain. It was evident there were efficiencies we could take advantage of, but we lacked the visibility to find them. By upgrading to the latest version of SYSPRO ERP, we took advantage of additional capabilities to gain better visibility and control, which enabled us to predict demand, understand how fulfilling anticipated sales pipeline would affect our production schedules, and anticipate the peaks in demand we needed to buffer.

Interview with
Pieter Goes
Vice President of IT & BI,
ET Browne

The benefits were striking. We were able to achieve a fill rate of 95% and reduce our inventory by 22%, and we didn't sacrifice preparedness — we retain a substantial buffer so we can weather supply chain disruption.

3. Could you elaborate on how SYSPRO's MRP capabilities have helped in creating a just-in-time inventory system and the specific benefits you've observed?

We can see exactly what's on hand, where it is, and when and what we will need in the coming months given anticipated demand. But it does much more than that. Like any manufacturer, we need to use up the raw materials we have on hand first, and the system provides us with that visibility. So, purchasing managers can go into the system, see precisely what the forecast says we should order, understand what we have on hand, and then make informed decisions to purchase only what we need.

Those inventory reductions have translated directly into profits. Revenue grew 7% year over year, but our profit grew 113%. We couldn't have achieved that without our just in time inventory system and the executive efforts to streamline our operation.

4. How has SYSPRO ERP's demand forecasting and supply chain management functionalities improved your visibility and control over inventory?

Simply put, we're no longer ordering materials based on spreadsheets — which may be out of date — or gut feelings. We're basing decisions on hard data that's accurate and the same for everyone. As I noted earlier, we've got a 95% fill rate, so we don't run into shortages, nor do we have an overabundance of raw materials. This has led to improved forecast accuracy, which drives trust in the system across the planning, procurement and production teams.

"Revenue grew 7% year over year, but our profit grew 113%. We couldn't have achieved that without our just in time inventory system and the executive efforts to streamline our operation."

5. Reducing inventory by 22% and increasing profits by 113% are impressive feats. Can you share more details on the strategies and processes that contributed to these results?

Ultimately, we wanted a system for inventory management that enables us to manage multiple warehouses, lot control, and the supply chain. That's what SYSPRO provides. Then on top of that, SYSPRO provides an MRP calculator that enables us to know when materials will arrive. Without all this information, we couldn't have achieved those inventory reductions and or a 95% fill rate. The key to our success in merging systems with process is that our operational teams trust the data provided and act accordingly. Aligning the actual activities our teams perform with the suggestions coming out of SYSPRO drives most of the efficiency.

As far as processes go, we run mini MRPs at each warehouse and it gets consolidated into our finished good warehouse. That leads to production job suggestions at our production facility and then to the purchasing dept, with all the required lead times. It simplifies a very complex process. We set up a fixed time period with a field that says all POs will be grouped into one big order I can place at the beginning of the month. We also conduct a weekly, thorough PO review to make sure we're all on the same page, and this helps get all our purchases in much sooner than we did before, which results in better supply.

6. As you plan to meet the growing need for recycled materials in packaging, how do you anticipate SYSPRO ERP will help manage the increased complexity within your bill of materials?

ET Browne is committed to a variety of sustainability efforts, but currently in the process of moving from virgin plastics in our containers to post-consumer recycled plastics. But as we make that transition, we need to use up all the virgin plastic we have on hand first, and accounting for that in a bill of material can be an enormous headache from a management standpoint. SYSPRO will simplify this process, providing visibility and automation to our marketing, purchasing and production planning teams to smoothly transition to these new components.

Managing the bill of materials for all our products is paramount in all cases, but particularly these ones that are transitioning, to assure the accuracy of the MRP outputs. As such, ET Browne puts in a lot of effort into master data management, leading to accurate BOMs driving the right insights from SYSPRO MRP to our operational group.

Interview with
Jamie Veinot
Product Manager,
SYSPRO Americas

SYSPRO

1. What has been the foundation of the 25-year successful partnership between SYSPRO and ET Browne, and what lessons have you learned from this collaboration?

SYSPRO's ERP is specially designed to meet the needs of manufacturers and distributors, and our people pride themselves on knowing our customers' industry and businesses as well as we know the technology. We also have a culture of collaboration, where everyone is all in to solve customer challenges and ensure they get maximum value from the platform. In the software business, it's unusual for a customer to stay with you for longer than five years, much less a quarter century. I think what we've learned is that if you understand your customers' challenges and work alongside them as a partner to help them grow their business, you can forge a strong relationship that lasts.

2. What new features and enhancements were introduced in the latest version of SYSPRO ERP, and how do they address the needs of modern manufacturers like ET Browne?

ET Browne is primarily taking advantage of enhanced capabilities in warehouse management – such as the ability to easily streamline sales orders – and increased visibility into the supply chain. But there were many new capabilities and enhancements, the largest of which were:

- ***SYSPRO Embedded Analytics:*** This capability integrates intelligence and data capabilities directly within the ERP system, providing heightened visibility of operational activity across the organization. This empowers users to easily create, customize, and deploy dashboards and visualizations anywhere in SYSPRO, providing real-time, accurate, and relevant data from all aspects of the business.
- ***SYSPRO Quality Management:*** Fully integrated into SYSPRO ERP, this enables manufacturers to oversee all activities and tasks required to maintain a desired level of excellence. Manufacturers can set their own quality control standards in their business, achieve less variability, and improve overall customer satisfaction as it enables them to inspect and approve quality at each process throughout the supply chain quickly and effectively.
- ***Low Code Application Designer:*** Customers can use this capability to easily integrate new solutions into SYSPRO, and to also build custom solutions into the SYSPRO UI.
- ***Document Services:*** AP Invoice Automation: This form recognition enables the digitization of AP invoice data directly from physical forms, streamlining data entry and expediting the three-way invoice matching process.

3. Can you explain how SYSPRO ERP's MRP and just-in-time inventory systems work, and what immediate impacts these systems have on a business's efficiency and profitability?

SYSPRO MRP is designed to offer real-time visibility and control over manufacturing and supply chain processes by taking into consideration demand from sales orders, quotes and production plans, which it compares against existing inventory, supply chain transfers (SCTs) and incoming purchase orders (Pos). The results of these analyses help manufacturers and distributors streamline operations, reduce costs, and improve efficiency by providing insights into inventory, demand forecasting and production planning. By aligning production with demand and optimizing inventory levels, MRP minimizes stockouts, reduces carrying costs, and enhances overall supply chain efficiency. And as you can see with ET Browne, all these efficiencies translate directly into higher profitability.

4. How does SYSPRO ERP's demand forecasting technology help businesses predict demand accurately and improve their supply chain management?

SYSPRO ERP employs advanced analytics and predictive AI to crunch all the data about the supply chain that resides within the platform to predict not only demand, required inventory levels and purchasing, but it can also identify which suppliers are likely to deliver late and when these late deliveries will arrive. Customers who use it tell us they have no idea how they managed their supply chain without it — with all this new visibility, they say they feel like they'd be working blind without it.

5. In light of ET Browne's initiative to use more recycled materials, how does SYSPRO ERP support sustainability and manage complexities within supply chains?

SYSPRO ERP supports sustainability in a number of ways. Companies waste and order less material because they know exactly what they have on hand. Raw materials don't spoil because managers can see exactly which lots they need to use first. And with a more efficient organization, they consume fewer resources, such as people, raw materials, power and water. We believe sustainability and profitability go hand in hand, and SYSPRO ERP helps enable both.

6. How does SYSPRO ERP ensure that its solutions remain scalable and customizable to meet the unique needs of mid-market manufacturers across different industries?

There's no simple trick to achieve this. Our platform's scalability and flexibility are the direct result of many years of development and a guiding philosophy that our ERP platform must be easy to scale and integrate with other software systems. It's what our customers need, and solving their business problems is our No. 1 goal.

7. What are the emerging technologies and trends that SYSPRO is focusing on to stay ahead in the ERP market, and how do you plan to incorporate these into your platform to benefit companies like ET Browne?

We focus on the mid-market, a sector that doesn't have the resources of the Fortune 500 and the Global 2000, so our focus has been to provide them with advanced technologies within the ERP so they're easy to use and maintain. For instance, we recently introduced embedded analytics, which provides analytics capabilities to our clients using the data they already have in the ERP, though they can bring in other data sources as well. This way, they don't need to buy a separate, enormous business intelligence platform, build a data warehouse and then spend time and money maintaining it. Everything is contained within the ERP.

We have had AI predictive modelling capabilities since 2017 and will continue to build on what we have deployed by tying generative AI into the mix. We want to leverage AI with our document services engine to further streamline and automate business processes such as sales order and purchase order processing.

Our chief innovation officer, Kevin Dherman, is leading the charge for innovation. We expect to continue providing manufacturers and distributors advanced technologies that aren't just cool, but also provide practical benefits that drive their businesses forward.

SYSPRO

About SYSPRO

SYSPRO is a leading, global Enterprise Resource Planning (ERP) software provider specializing in key manufacturing and distribution industries. For over 40 years, SYSPRO's team of specialists have continued to address unique industry needs and enable customers to easily adapt and grow. The solution is scalable and can be deployed in the cloud, on-premise, or both, and accessed via the web on any device to provide customers with choice and flexibility. SYSPRO remains focused on the success of partners and customers. Our evolving solutions are aligned with industry trends to leverage emerging technology that will enable partners and customers in securing a digital future. With more than 15,000 licensed companies in over 60 countries across six continents –SYSPRO offers guidance and support every step of the way as a trusted advisor.

Strategies to Mitigate Supply Chain Disruption: Inventory Management, Supply Chain Mapping & Risk Assessment

The previous installment of our blog series on strategies to help mitigate disruptions in your supply chain covered the need for investment in supply chain visibility software. In this final blog of our series, we will discuss the critical capabilities of inventory management, supply chain mapping, and risk assessment to help mitigate supply chain vulnerability.

In an era of volatility, supply chain disruptions have become an inescapable reality. From natural disasters and geopolitical conflicts to shifts in customer demand, unforeseen events can derail even the most meticulously planned operations. However, by embracing advanced strategies and leveraging cutting-edge technology, businesses can bolster their supply chain resilience and emerge from adversity as industry leaders.

Article by
Will Quinn
Global Director of Strategy,
Infor WMS

The Pillars of Supply Chain Resilience

Inventory Management: The Backbone of Operational Efficiency

Effective inventory management is the cornerstone of a robust supply chain. By systematically tracking stock levels from purchase to sale, companies can identify trends, respond proactively to fluctuations, and ensure a seamless flow of goods and services. This strategic approach enhances operational efficiency and visibility into your supply chain, which helps prevent stockouts and overstocking, optimizes cash flow and helps reduce supply chain risk.

Supply Chain Mapping: Visualizing the Flow & Optimizing the Journey

Mapping supply chains involves documenting the complex web of entities, processes, and interactions that control the flow of materials, information, and money. By creating visual representations of this system, companies can spot possible bottlenecks, make operations more efficient, and proactively tackle emerging issues to help address any supply chain crisis.

Supply chain mapping offers an overview of the entire value chain, from sourcing raw materials and making purchases, to manufacturing, distribution, and delivering products to customers. This comprehensive perspective sheds light on how interconnected supply chain operations help businesses grasp the dependencies, limitations, and supply chain vulnerabilities within their networks.

Supply chain mapping allows organizations to identify inefficiencies and unnecessary redundancies, such as transport routes, excessive inventory holdings, or duplicated processes. Armed with this insight, they can optimize their processes by improving the flow of goods and information, leading to cost reductions and increased efficiency.

Supply chain mapping also helps recognize supply chain risks and finds ways to mitigate them. By identifying all touchpoints in the supply chain network, businesses can pinpoint weak spots, such as relying too heavily on one supplier or transportation method, enabling them to develop backup plans and diversify suppliers for enhanced supply chain resilience.

"Supply chain mapping offers an overview of the entire value chain, from sourcing raw materials and making purchases, to manufacturing, distribution, and delivering products to customers."

In today's fast-paced business world, it's also important to note that creating a supply chain is not a one-time endeavor. It's important to ensure that companies continuously review and adjust their supply chain maps to keep up with changing regulations and evolving customer expectations in order to properly address new supply chain challenges.

Risk Assessment: Proactive Preparedness Against a Myriad Threats

Risk evaluation is crucial in managing supply chains. This process carefully assesses all aspects of the supply chain to pinpoint weaknesses that could result in disruptions, financial setbacks, or harm to a company's reputation. By recognizing and addressing supply chain risks, businesses can strengthen their operations against various threats.

For example, a meticulous risk assessment would analyze a company's dependence on a supplier or location, revealing supply chain vulnerabilities to localized disruptions like disasters, political unrest, or labor disputes. Companies can reduce the impact of incidents by diversifying their supplier network and creating contingency strategies.

Additionally, risk assessment procedures should consider cybersecurity risks that can hamper supply chain functions through data breaches, ransomware attacks, or system failures. Enforcing cybersecurity protocols, regular software updates, and staff training on security practices can protect against these digital threats.

Environmental and regulatory risks present another obstacle as companies navigate changing laws, sustainability requirements, and the increasing effects of climate change. A thorough risk assessment can identify areas of non-compliance, assess the company's footprint, and help implement eco-friendly practices.

Article by Will Quinn

The Infor Advantage: Your Single Source for Cutting-Edge Supply Chain Management Solutions

To effectively address the critical needs of inventory management, supply chain mapping, and risk assessment, you can rely on Infor, a leading provider of industry-specific cloud software designed to empower businesses with unparalleled supply chain resilience.

Infor CloudSuite Distribution & CloudSuite Distribution Enterprise: ERPs Built for Distributors

Based on best practices from thousands of customers, Infor's industry-specific, multi-tenant, cloud-based *distribution software* provides businesses of all sizes the tools to streamline operations, adapt to evolving market dynamics and effectively manage supply chain risk through robust capabilities spanning order entry, pricing, supply chain management, and global localizations.

Supply Chain Management: Delivering Superior Visibility & Control

From real-time orchestration and global trade management to advanced planning and demand forecasting, *Infor's Supply Chain Management (SCM)* software delivers the visibility, control, and agility required to navigate even the most turbulent landscapes.

Demand Planning: Precision Forecasting

Infor's Demand Planning solution simplifies and accelerates forecasting, delivering unmatched accuracy through advanced data modeling and analytics. It enables businesses to proactively adjust their supply chains by predicting market fluctuations, improving service levels, and optimizing inventory management for maximum productivity.

Inventory Management: Real-Time Visibility

Infor's Warehouse Management System (WMS) provides real-time visibility into inventory levels across multiple locations. Coupled with demand forecasting capabilities, this solution enables businesses to optimize stock levels, reduce costs, and enhance customer satisfaction through data-driven decision-making.

Conclusion

As supply chain disruptions continue to challenge businesses worldwide, the need for resilience has never been more pressing. By embracing strategies like inventory management, supply chain mapping and risk assessment, and leveraging the power of Infor's cutting-edge solutions, companies can fortify their operations, mitigate risks, and emerge from adversity as agile, adaptable, and competitive forces in their respective industries.

As we conclude our 5-part blog series focusing on strategies to mitigate supply chain disruptions, it's clear that effective strategy and preparation are paramount in today's volatile business landscape. Distributors must adopt a multi-faceted approach to address supply chain risk, which should include a combination of mitigation strategies such as:

- Leveraging *nearshoring* to create geographic diversification
- Applying *supply chain redundancy* through multi-sourcing and safety stock practices
- Investing in *supply chain visibility* solutions to empower businesses with informed decision-making
- Investing in solutions that help you effectively manage inventory, map your supply chain and properly assess risk

By seamlessly integrating these strategies and harnessing the power of Infor's advanced technology, businesses can cultivate a supply chain that is not merely reactive, but inherently resilient. One that withstands shocks, capitalizes on opportunities, and propels organizations toward sustained growth and competitive dominance in an era of unprecedented volatility.

Embrace resilience as a cornerstone of your supply chain strategy and emerge as an industry vanguard, equipped to thrive in the face of any supply chain disruption.

About Will Quinn

Will boasts 25+ years in supply chain and logistics and is the Industry & Solution Strategy Director for Distribution. His rich expertise aids the sales team in grasping distributors' daily challenges. Engaging with industry associations and events as a frequent speaker, Will's insights shape discussions on distribution hurdles. Prior to Infor, he managed distribution centers at Grainger, Coca-Cola, MSC Industrial Supply, WEG Electric, and Cintas. Will's logistics journey commenced with a 12-year tenure in the US Marine Corps. He holds a Master of Science in Supply Chain Management from Elmhurst University.

Maximizing efficiency: Why SaaS companies should implement both Sage Intacct and Sage PSA

Combining Sage PSA with Sage Intacct can streamline resource management for SaaS companies. Learn more on our blog.

For SaaS organizations, optimal resource management is at the heart of business success, especially as they scale and their operations grow more complex.

Linking Sage PSA's – Professional Services Automation resource and project management suite to Sage Intacct gives organizations access to unmatched financial visibility and streamlined strategic project planning.
In this post, we'll be

1. Starting with a brief refresher about the benefits of Sage PSA,
2. Exploring why you should combine Sage PSA and Intacct
3. Analyzing what can go wrong when you don't have a real-time connection between your general ledger (GL) and Resource Management software.

Ready to optimize your resource management?

Article by
David Appel
Head of the SaaS Vertical,
Sage

Article by David Appel

What does Sage PSA do?

Sage PSA helps businesses optimize project planning and resource management with AI-powered predictions and real-time capacity management to keep projects on track and on budget.

Their AI-powered platform delivers real-time assistance for resource management, project planning, execution, monitoring and adjustment, enabling businesses to achieve the best possible outcomes, grow project capacity and scale their business.

In short, it takes the guesswork out of project planning.

> "Sage PSA also provides AI-fueled financial management, enabling organizations to track companywide profitability in real time."

AI-powered resource, project, and financial management

CFOs and other stakeholders can use Sage PSA to run, track, and manage their work. With Forecast, you can:

Balance workloads
Business leaders can quickly allocate and balance resources to match all project and skill needs accurately. Meaning workloads can be balanced across multiple projects with crystal-clear visibility, and utilization can be tracked and managed in real-time.

Anticipate future demand
Forecast helps companies instantly understand who is available for which projects and when by proactively managing an entire team in real-time on one dashboard.

Quickly make adjustments
Real-time insights and recommendations driven by AI mean businesses can reduce risk to projects with easier and more accurate planning to make better decisions.

What used to take days, now takes just seconds with Sage PSA.

Sage PSA also provides AI-fueled financial management, enabling organizations to track company-wide profitability in real time.

However, SaaS CFOs still need to consider one more vital point – GL integration.

Key benefits of combining Sage Intacct and PSA

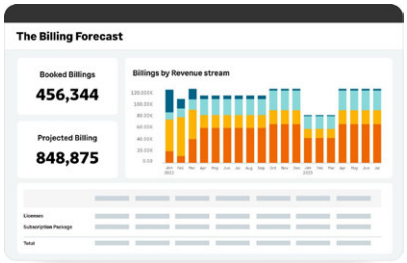
By integrating Sage PSA and Intacct, CFOs and other business leaders can enjoy a new level of visibility, flexibility, and efficiency in managing financial and human capital.

Let's see what you can gain by establishing a real-time connection between these two powerful enterprise resource planning tools.

Boost financial visibility
When you combine Sage Intacct and PSA, you get a 360-degree view of your organization's financial health.

PSA allows you to instantly see which projects are costing more than they should, and which ones are highly profitable.

With that information, you can *generate an automatic forecast in Sage Intacct* that will help you balance your resource expenditures, boost cash flow, and adjust your future strategies.



Sage PSA and Intacct can give you clarity in the present and confidence in the future.

Companies at the forefront of their market know the importance of both sides of that coin.

Avoid time-based bottlenecks and spread tasks evenly

Every company has key stakeholders that they rely on to move the organizational needle. But if you overload your key employees, more than their work quality will suffer– they could succumb to burnout and leave your organization altogether.

Combining Sage PSA with Intacct gives you a centralized and automated platform to:

Keep stakeholders' workloads manageable
We all end up with a bit too much on our plate sometimes and just have to trudge through it.

But that shouldn't happen all the time.

Combining Sage PSA and Intacct helps you optimally plan and balance employee workloads.

Prevent turnover among key staff

High turnover rates are never good. But when they occur among key stakeholders due to burnout and poor workload management, they can be fatal to an organization's trajectory.

By effectively managing task load with Sage PSA, you can maintain high employee morale and keep turnover low.

Maintain a high standard of project quality

Project quality is just as important as the turnover factor. If you overload your employees, eventually something's just got to give, and the work inevitably suffers.

By using Sage PSA, you ensure that no one gets overworked so everyone performs at their peak potential.

Sage PSA also gives you a real-time overview of stakeholders' available bandwidth, enabling you to gauge their ability to take on new projects.

> "Resource management tools like Sage PSA supply vital clarity into how effectively you're using capital, both financial and human."

Eliminate manual errors and duplicate entries

When SaaS companies combine Sage PSA and Intacct, they eliminate the hassle of manually transferring data between their resource management software and GL.

Even a small manual error that occurs during the data transfer process could have significant downstream effects on your company's financial planning.

In order to create and execute successful strategies, you need total confidence in the data you're using as a starting point.

The real-time link between Sage Intacct and PSA enables instant and seamless data flow between the two products, eliminating the risk of costly manual errors and ensuring trustworthy data.

A modern, intuitive UI

Both Sage PSA and Intacct supply a sleek and streamlined user interface, and are highly intuitive products.

To maximize the success of employees and stakeholders alike, it's very important to select enterprise tools that are simple to learn but pack truly robust functionality.

That's precisely what you get when you use these two powerful enterprise planning tools together.

Dismantle data silos at your company

Financial data silos are a significant threat to organizational efficiency and profitability.

With Sage PSA, you can dismantle data silos and create a shared business consciousness at your company.

Leveraging these two products together enables SaaS CFOs and other stakeholders to:

Instantly sync up on important decisions

Many business decisions require input from multiple individuals, often with differing ideas and priorities.

Combining Sage PSA and Sage Intacct centralizes your company's data, allowing stakeholders to quickly get on the same page for profitable decision-making.

Rapidly find and share business insights

Sage PSA and Sage Intacct both feature advanced data drill down capabilities.

This allows company stakeholders to quickly find important anomalies or promising insights and share them for feedback.

Know exactly where your finances stand

Sage PSA gives business leaders crystal clarity on where they're most profitable.

Sage PSA allows you to pull that data into *Intacct for long-range automated forecasts* for better financial planning and resource restructuring.

Clearly, Sage PSA and Intacct have a lot to offer.

The risks of not integrating your resourcing system with your GL

What can go wrong when your GL isn't connected to your resource and project management software in real time?

Quite a bit, as it turns out.

Resource management tools like Sage PSA supply vital clarity into how effectively you're using capital, both financial and human.

Article by David Appel

But to take full advantage of Sage PSA, you need a way to reliably get its data into your chosen GL software, such as Sage Intacct.

Let's take a look at why this piece of the equation is so critical. What can go wrong when real-time data flow is absent?

> "A real time connection between your resource management, time tracking and ERP can guarantee trustworthy financial reports and FP&A."

Invoice inaccuracies

Sage PSA enables companies to meticulously track time and expenses associated with projects.

However, if you need to manually transfer that data into your GL to generate an invoice, you expose yourself to the risk of manual discrepancies.

If financial inaccuracies make it into your GL and you create an invoice with that information, you'll find yourself sending error-riddled invoices, which can be expensive and time-consuming to correct.

Sage PSA and Intacct together let companies automatically generate invoices from project data.

Cash shortfalls and inaccurate reports

Invoice inaccuracies aren't the only risks that you're exposed to when you rely on manual reconciliations.

When you manually transfer data between your resource management system and your GL, you create the possibility of cash shortfalls.

The process looks like this:

1. Your resource management and/or time tracking system system correctly logs your company's resource expenditure data for a recent project.
2. A rushed employee manually transfers that data from the time tracking system into your GL, making a mistake along the way.
3. Due to the error, you believe you have more available cash than you actually do.
4. You then use that data for financial planning and reporting, producing inaccurate reports and downstream cash shortfalls.
5. You eventually realize what's happened and scramble madly to correct the mistake. Often at great expense and a lot of manual time consumption.

Sage PSA can give you clarity into your resource utilization and help you maximize organizational profitability, automatically.

A real time connection between your resource management, time tracking and ERP can guarantee trustworthy financial reports and FP&A.

This can all happen seamlessly with Sage PSA and Intacct in combination.

Decision-making difficulties and delays

When you don't have real-time data flow between your GL and resource management software, decision-making is more difficult and less strategically effective.

Instead of instantly sharing and receiving insights through a centralized platform, stakeholders are left to sift through emails and spreadsheets, or other manual data sharing methods.

Not only does that eat away at precious time, but it also:

Exposes companies to security risks

Emails and email attachments are a favorite haunt of digital hackers.

If you use emails and spreadsheets to transfer important financial data at your company, you could find yourself struggling to keep your data secure.

Depending on the type of company data that gets compromised, you could even face compliance penalties and fees.

Makes it hard to arrive at a unified vision

Running a company hinges on key stakeholders having access to a shared organizational consciousness.

You simply can't get that with emails and spreadsheets.

Businesses need to be able to arrive at important decisions quickly and confidently – delays can mean losing market share to your more nimble competitors.

Combining Sage Intacct and PSA puts real-time centralized data flow at your fingertips.

Combine Sage PSA with Intacct today

Sage PSA offers users a simple and secure way to seamlessly get the most modern resource and project management in the market, combined with Sage Intacct as the most modern ERP for software and tech businesses.

The two become digital connective tissue, making Sage PSA and Sage Intacct the most modern and intuitive stack for the CFO and operations teams of the future.

Sage Intacct was just awarded the top accounting software marketshare in the SaaS CFO's Tech Stack Survey for the fifth year in a row.
Combining the two lets you put a permanent end to manual data entry and the inevitable errors that come with it.

Learn more about unlocking the full potential of your SaaS finance tech stack *here.*

Sage

About David Appel
David Appel is Global Head of the SaaS Vertical for the largest technology company on the London Stock Exchange, Sage. Over time, his organizations have earned the business of >1,800 SaaS and Software companies, growing at 40%+/year. He previously ran Direct Sales at Bill.com, led NetSuite's Software Vertical, and was part of IBM's Corporate Development team.

About Sage
Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to help business flow. By digitizing business processes and relationships with customers, suppliers, employees, banks and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis. Learn more at www.sage.com/en-us/.

Article by David Appel

No Thirsty Fans at the European Championship Thanks to SAP Customer Checkout

The excitement of football fans in Europe and around the world for the European championship this summer is high, as Germany takes on the role of host for the second time in the history of the tournament.

While fans enjoy action-packed games, the service in the stadiums also plays a crucial role. Food and drinks are an important part of the stadium experience, and smooth processes are essential for this. Fans want to get their favorite snacks and drinks quickly so they don't miss a minute of the game. Efficient service not only ensures satisfied visitors but also contributes to the overall mood and atmosphere in the stadium.

This means that the behind-the-scenes systems for orders and payments must function flawlessly. Fast and reliable checkout systems are essential to avoid long queues and serve fans in the shortest possible time. A smooth transaction process helps fans enjoy the action on the field without interruptions.

SAP Technology Drives Smooth Processes at the Stadiums

SAP is also part of the action. *SAP Customer Checkout*, an integrated point-of-sale application for the gastronomy and retail industry, helps ensure that the fans' catering runs smoothly and efficiently. The application is in use at four venues of the championship: Munich, Stuttgart, Duesseldorf, and Cologne, where it has already proven to be effective at numerous events.

The application is designed to serve a large number of fans in the shortest possible time, even during high visitor traffic periods. Its efficiency has been successfully demonstrated not only in football stadiums but also at large international events such as EXPO 2020 in Dubai. The payment flexibility in SAP Customer Checkout can also be a great advantage, allowing international visitors in particular to pay with Alipay, Apple Pay, or other options.

Caterers at the Venues Rely on SAP

The catering providers in Stuttgart, Duesseldorf, Cologne, and Munich already use SAP Customer Checkout and are delighted with the results. Michael Fichtner, CIO of FC Bayern Munich Digital & Media Lab, says: "We have been relying on SAP Customer Checkout at the Allianz Arena in Munich for years and appreciate the speed, reliability, and variety of payment methods available. We are also expecting numerous international visitors during the European championship and trust that SAP Customer Checkout will ensure smooth processes."

The use of SAP Customer Checkout at the 2024 tournament is also a significant milestone for SAP. "We are excited to be part of the European championship, the biggest football event of the year in Germany, and to optimize processes for fans, cashiers, and caterers with SAP Customer Checkout," says Fadi Naoum, senior vice president at SAP Sports and Entertainment.

About SAP

As a global leader in enterprise applications and business AI, SAP (NYSE:SAP) stands at the nexus of business and technology. For over 50 years, organizations have trusted SAP to bring out their best by uniting business-critical operations spanning finance, procurement, HR, supply chain, and customer experience. For more information, visit www.sap.com.

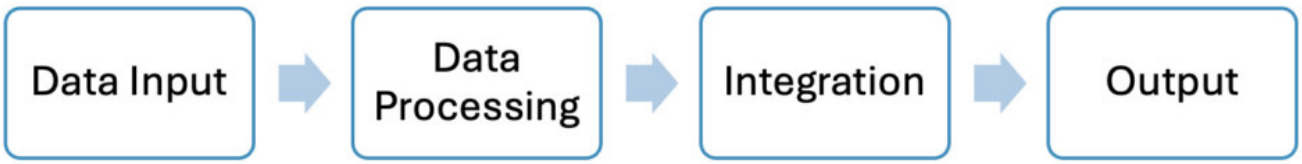
The evolution of Multimodal AI

Multimodal AI is nothing but an AI that can see, hear, read just like how us humans do.

It is a type of Artificial Intelligence that can understand data, process it and generate new data based on the data which it had previously collected and processed. Unlike traditional AI models where it was limited to just text input, multi modal AI can basically take in more than one type of data to perform its tasks. By combing multiple forms of data, the Multimodal AI gains a rich understanding of the world.

The data can be in a variety of forms such as:
Images
Videos
Audio
Text

Following is a high level breakdown of how multimodal AI works:



- ***Data Input:*** Multimodal AI systems take in data from multiple sources. For example, a system may need to process both audio and visual data from a video file.

- ***Data Processing:*** The Multimodal AI system uses machine learning algorithms to interpret each type of data. For example, it might use natural language processing to understand spoken words, and computer vision to understand visual data.

- ***Integration:*** The Multimodal AI system integrates the information from each type of data to form a more complete understanding of the input. For example, it might combine information about what is being said with information about who is speaking and what they are doing.

- ***Output:*** The system generates an output based on its understanding of the input. This could be anything from generating a response to a user's question, to identifying objects in a video, to predicting future events based on past data.

Multimodal AI is particularly useful in scenarios where a single mode of data is not enough to perform a task completely. By combing data from these multiple sources, Multimodal AI gains a richer understanding of the world and it can:

- ***Handle ambiguity better:*** Real-world data is often messy and unclear. Multimodal AI can combine information from different sources to make sense of complex situations.

- ***Boost performance:*** Combining different data types can lead to more accurate results in tasks like image recognition or sentiment analysis.

- ***Open doors to new applications:*** This technology is a game-changer for fields like:
  -Content creation: Imagine AI that generates captions perfectly tailored to an image or even creates videos based on your photos.
  -Enhanced search experiences: Search engines that can understand the context of your queries, including images and videos.
  -Personalized storytelling: AI that writes stories inspired by art or creates poems that capture the emotions in a photograph.

The emergence of multimodal models

The trend has been accelerated by advancements in several key areas such as:

- ***Natural Language Processing (NLP):*** NLP helps AI to understand human language. Currently there are NLPs that are capable of processing native languages like Hindi, Malayalam etc.
- ***Image and Video Analysis:*** AI is now capable of extracting meaningful data from visuals with amazing accuracy.
- ***Speech Recognition:*** AI is getting better in understanding the human speech.

The AI model landscape continues to grow at an exponential phase with new models with amazing capabilities being launched frequently. The latest of the addition being GPT-4O and GPT-4 Turbo.

What does the future hold for Multimodal AI

The potential of Multimodal AI is huge and one can surely expect a lot of transformational apps across various industries and domains as the technology matures.

Here is a glimpse of what the future holds:

- ***Natural Human-Computer Interaction:*** Interactions with machines will be in a natural way, using various forms of words, gestures, and text. Big players like Google have already imagined/conceptualized this through Google Classrooms.
- ***Revolutionizing Education:*** Personalized learning experiences that cater to different learning styles.
- ***Advancements in Robotics:*** Robots that can perceive and respond to their environment in real-time.

Overall, the evolution of Multimodal AI is a significant step towards achieving human-level intelligence in machines. It promises to reshape the way we interact with technology and solve some of the world's most pressing challenges.

About Roy Maria John

Roy M J is a Technology Architect with Infosys. He is a Digital Transformation Specialist associated with Digital Experience IP Platforms & Frameworks in Infosys. He helps in delivering digital transformation for large enterprises across the globe via Live Enterprise Interactions Suite and Digital Marketplace Platforms. He has rich experience in Web technologies primarily on the JavaScript stack. He is part of Cloud and Emerging Technologies track in the Digital Technology Council and is the Vice-Chairperson of TechCohere (Tech focus Group) in Infosys Thiruvananthapuram DC.

How To Choose The Right Capacity Planning Strategy

Manufacturers are obsessed with productivity, and rightly so. But optimizing productivity requires insights across the operations and up and down the supply and demand chains. You need to know what you can produce, what customers want, and how you will deliver. Only through operational visibility and a clear understanding of your manufacturing capabilities can you create an efficient plan that keeps customers happy and manufacturers profitable.

Manufacturers refer to this complex coordination as capacity planning. Creating a successful capacity planning strategy is crucial for fulfilling customer orders on time to minimize costs and maximize profits. It's also increasingly difficult as *supply chain problems* and *staffing shortages* add to the complexity. Today's most effective manufacturers rely on modern capacity planning solutions that offer drag-and-drop speed and simplicity for greater agility to meet changing customer expectations.

Choosing the right manufacturing capacity planning strategy depends on understanding your customer demand and manufacturing capabilities deeply, even as those components are in constant flux. Clearly, relying on Post-it Notes, spreadsheets, and emails will only put you further behind your faster, more agile, more responsive competitors. A modern, connected solution is table stakes for real-time manufacturing capacity planning.

To maximize your operational effectiveness, you can select from several strategies for attacking this manufacturing capacity planning challenge. Of course, you also need the right capacity planning solution in place to help you implement your chosen strategy.

What is Capacity Planning in Manufacturing?

Capacity planning in manufacturing describes the process of determining the resources manufacturers need to meet the demand for their products. Capacity planning is necessary for successful *supply chain management*, *production scheduling*, and *inventory management*.

Different from the timing, procurement, and capacity of external vendors handled typically by *material requirements planning (MRP), capacity planning deals with your own capacity*. Capacity planning generally includes three main elements: equipment, labor, and products. Many factors must be accounted for in a capacity plan, such as the types of products being produced, equipment utilization, employee availability, and the number of machines available. These factors are calculated to ensure manufacturers have the capacity to meet forecasted demand.

Without an effective capacity planning strategy, manufacturers are impacted directly on the bottom line. You'll either:

- Not produce enough resulting in late or short shipments,
- Produce too much and be forced to sit on inventory that you are paying for, or
- Produce the wrong products that result in waste or rework.

>> Download the eBook: *How to Choose the Best Capacity Planning Strategy*

Capacity Planning Strategies Explained

There are several capacity planning strategies that manufacturers use to ensure that they can effectively meet demand. Each strategy has benefits and drawbacks that must be considered before implementation.

> "Benefits of a driver-based capacity planning strategy include inventory optimization and better responsiveness to demand shifts."

Driver-based Capacity Planning Strategies

A driver-based capacity planning strategy relies on always having access to the products, workers, and/or equipment necessary to deliver products in a way that meets customer expectations. It requires manufacturers to have:

- Robust connections with suppliers so that when a new order arrives, the necessary raw materials and components never delay customer deliveries.
- Flexible workforces with a wide range of skills, so workers can easily shift across production lines or production can be scaled up or down as needed.
- Access to equipment, storage, and logistics resources needed to manufacture and deliver whatever products are currently in demand.

Benefits of a driver-based capacity planning strategy include inventory optimization and better responsiveness to demand shifts. Drawbacks include the potential for idle machinery and workforces, as well as the investments necessary to shift production as required.

Time-based Capacity Planning Strategies

A time-based capacity planning strategy allows you to plan capacity around today's needs or tomorrow's expectations. Your capacity plan then either lags, leads, or matches real-time demand.

- A lag capacity planning strategy stretches existing capacity to its current limit, then expands capacity as demand increases. Manufacturers then delay capacity expansions (and investments!) until they have demand.
- A lead capacity planning strategy increases capacity based on forecasts and before demand increases. This capacity planning strategy involves a significant upfront investment in resources to prepare for a future increase in demand.
- A match capacity planning strategy is the middle ground between lead strategy and lag strategy and adds capacity incrementally based on current demand.

Benefits of these time-based capacity planning strategies come from the flexibility to schedule investments alongside broader

financial or corporate goals. Drawbacks include being unable to meet customer expectations, tying up resources in large capital expenditures, or trying to optimize capacity planning investments to match fast-changing markets or fickle customers.

Agile Capacity Planning Strategies

An agile capacity planning strategy shifts capacity to match demand, market, and sales data. It strives to eliminate manual guesswork, instead adding capacity just before it is required based on real-time demand and sales forecasts. The success or failure of agile capacity planning relies on the quality of the predictions from your forecasts. For very complex environments that deal with historical trends, seasonality, and even promotions the sales team may conduct, a more sophisticated supply and demand planning solution such as *ketteQ* can provide even greater nimbleness to an already agile strategy.

Think of agile capacity planning as a middle ground between every other strategy but customized to align with your unique manufacturing and business goals, constraints, and capabilities. You're making data-driven decisions so may also use a combination of capacity planning strategies across customers, markets, or production lines. Of course, you need accurate, timely data to make the best data-driven decisions.

Benefits of an agile capacity planning strategy include better matching of investments with expected demand, connecting investments with profitability so manufacturers can make more effective decisions, and better guidance for sales and marketing teams to target more lucrative markets. As indicated above, drawbacks include the need for more data from more areas of the manufacturing business and to have more confidence in that data.

Tips for Choosing the Right Capacity Planning Strategy

Each capacity planning strategy can be effective if it's matched to your manufacturing goals and capabilities. But, as the economic future remains in constant flux, any strategy you choose will have to consider your ability to deal with continued uncertainty. Events of the past few years have contributed to huge volatility in supply chains, forcing manufacturers to shift capacity plans quickly based on material availability. Your capacity planning strategy must be able to maintain pace.

To be effective with any capacity planning strategy, manufacturers must have a modern *capacity planning solution* that integrates data from supply to sales, provides deep and comprehensive insights, and then produces accurate demand forecasts. A cloud-based ERP system centralizes data, including *production*, *sales*, *field service*, *inventory*, and *finances*, onto one platform that's accessible from anywhere.

Regarding capacity planning, manufacturers should choose a strategy that enables flexibility and speed. For manufacturing organizations in fast-changing markets, manufacturers must become more agile and respond to changes in capacity, demand, or market landscape quickly. Dynamic capacity planning tools like *Rootstock Cloud ERP* put your relevant internal and *external data on one platform*, helping operations teams generate insights to create an effective capacity plan and meet your growth objectives.

Improve Strategic Capacity Planning with Rootstock Cloud ERP

Rootstock ERP is an all-in-one Cloud ERP system built on the Salesforce Platform with intuitive production and capacity planning features. Rootstock Cloud ERP provides drag-and-drop scheduling and capacity planning, helping teams immediately identify and fix shortages and overloads with a click and other features to help automate production management. Stay on top of demand, respond to changing market trends quickly, and save resources with Rootstock Cloud ERP.

Learn more about *capacity planning solution capabilities* and *watch an 8-minute Demo of Rootstock Production ERP.*

About Rootstock

Rootstock Software provides the leading Manufacturing Cloud ERP, which empowers hundreds of manufacturers to turbocharge their operations in today's dynamic, post-pandemic world. Natively built on the Salesforce Platform, Rootstock delivers a future-proof solution. With it, manufacturers gain the agility to continually transform their business to meet evolving customer needs, navigate emerging challenges, and accelerate success. In addition, the "connectability" of Rootstock Cloud ERP gives manufacturers 360° visibility to collaborate with suppliers, trading partners, and the broader value chain. As Rootstock continues to grow, stay tuned to the company's latest customers, career opportunities, and LinkedIn posts.

How This Specialty Lumber Dealer Saved $100,000 in Inventory

10	$2,000	$100,000
Hours per week shaved off payroll	**Saved in paper costs annually**	**Savings in inventory**

Who is Exotic Woods, Inc?

Headquartered in Burlington, Ontario, Canada, Exotic Woods Inc. is not your run-of-the-mill lumber supplier. Customers in the greater Toronto area can visit the company's 18,000-square-foot retail shop to purchase more common woods, such as oak, pine, walnut, and maple. But customers local and worldwide can also purchase specialty woods such as verawood, snakewood, ebony, purpleheart, cedar, and more. Exotic Woods' inventory of hard and soft woods is nearly infinite and valued at about $2M at any given time. In addition to its retail store, Exotic Woods has a 30,000-square-foot warehouse. That's a lot of wood to keep track of, which is a major reason why Exotic Woods switched to ECI's Spruce platform.

"I'd say 50% of our customers are contractors, with the other 50% split between do-it-yourselfers, weekend warriors, and hobbyists," says Mike DeBoer, Exotic Woods general manager. "Since 2019, our business has grown 20% to 30%."

Part of this growth was the result of the COVID-19 pandemic. "A lot of people were working from home and not taking vacations," Mike says. "So, they spent money on home renovations and offices, such as building desks and shelving. "Also, many hobbyists weren't spending two to three hours commuting to work, so they had those hours to spend on hobbies."

COVID is not the only reason Exotic Wood's business is booming. "People know our quality and our selection is good and that they don't have to drive all over to find what they are looking for," Mike says. "Contractors can be confident of the quality of the wood they are buying for their customers. We get a lot of business through word of mouth, and we ship internationally; I just shipped an order to Israel. The business has leveled off a bit since COVID, and the housing market has slowed down some, but most contractors are booked months ahead."

The challenge

According to Mike, growth wasn't the only impact the pandemic had on the business. "COVID-19 forced us to face business challenges and do things we would never have thought of before. We had to adjust from retail to phone, email, and back door pickup. It forced us to find better ways to run our business."

One change Mike knew the company needed to make to increase efficiency was to switch software systems. "We had been using a customized system built by an independent programmer," he says. "After about a year, we realized we weren't getting to where we needed to be. The inventory management portion wasn't there. We were spending $100,000 on dead inventory and 40 hours a week on purchasing. Customers' orders were backed up; every day was a headache. It just wasn't working out. Customized programs can be great, but they can take a long time to build and have too many hurdles. Our company was growing too fast for it to keep up."

> "COVID-19 forced us to face business challenges and do things we would never have thought of before. It forced us to find better ways to run our business."

The solution

After testing three software platforms, the best choice for Exotic Woods was clear. "We needed an inventory management system that fit our business," Mike says. "A lot of companies sell using SKU numbers; they enter 500 SKUs, and away they go. For us, there are too many variations for that simplicity. There are many ways we measure that are unique to hardwood/ softwood sales. Our wood is sold by the board foot, square foot, linear foot, and weight per piece. It is dressed and undressed. A lot of ERP [enterprise resource planning] systems are not able to handle this. Spruce can convert inventory from one to the other; it can convert board foot, which is how we buy the wood from our suppliers, to linear foot, the way we sell some products to our customers. The PO will say board foot, and the invoice will say linear. A more generic program can't do all this. Spruce understands the terminology; it understands how we do business. It was built for this industry."

The impact

Mike couldn't be happier with Spruce's inventory management/ tracking functions. "Tracking is a great benefit for us," he says. "It tracks all our inventory and costs and gives us the profit margin right there." The tracking also saves the company significant time and money.

"Back in the day, we used to keep every order in a box so, in theory, we could find it if we needed it, but we never really could have," Mike says. "Now, we save about $2K in paper costs. We just finished the first year since installing Spruce in April, so it will take time to build the history, but as time goes on, it will be great. We'll have more customer and inventory history and will be able to see what is selling. It will help us with seasonal products; based on past years' sales, we can look in January for what we need in June or August and order it to get the larger preorder discounts." Mike is also happy that the company can now use the $100,000 once tied up in dead inventory in profitable areas.

Other Spruce features are already paying off. "You can enter the

information once," Mike says. "You can create a quote, and when the customer says yes, you can create an order, change it to a purchase order, and change it to an invoice. Special orders can be customized once and go from quote to invoice with a click of a button. There's no need to rewrite each one. All of them are linked, and you can look back and see it all from start to finish. This is a big strength of the system for us." Overall, he says purchasing requires far less time and labor.

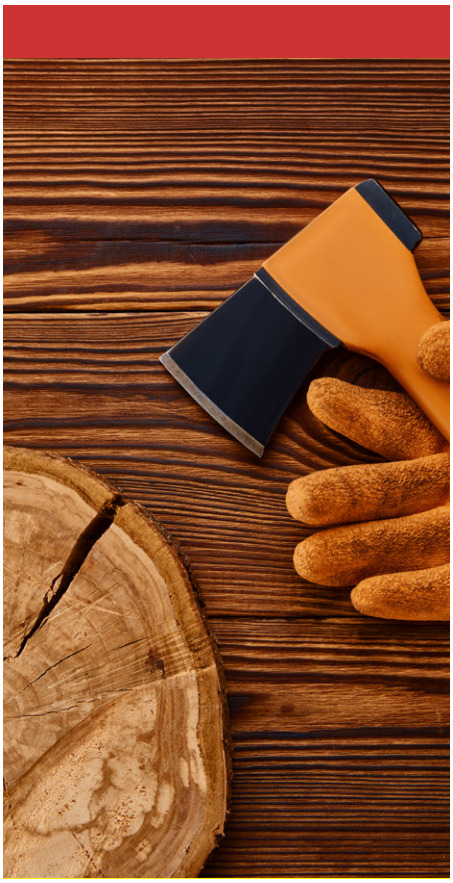
> "Before Spruce, we had a customized dashboard, but [now] I like Spruce's quick, easy reference for different things that you can see with just a click of a button."

The Spruce platform has also improved Exotic Woods' accounts payable functions. "In the system we used before, this was a tedious job," Mike says. "It was a clunky upload from the system to QuickBooks, and we had to do it every day. We still use QuickBooks to look up old history until Spruce has more history input and for payroll, but all the information we need is right there in Spruce."

Overall, Mike believes Spruce has saved at least 10 hours of payroll time a week. And he is confident the benefits will continue to multiply. "I 100% believe the return on investment will increase and become more important over time," he says. "As we continue to grow, the need to be more accurate will be increasingly important. Spruce is allowing us to be a scalable company."

> "Spruce makes us feel cared for and are educating us."

Mike doesn't think switching to any new software platform can all be smooth sailing, but he believes the transition to Spruce went as well as could be expected. "ECI's training was good," he says. "There were things that our staff didn't understand, things they wanted to do. And learning and adjusting to a new system can be frustrating, of course. But ECI's staff was supportive. One of the best things we did was bring an ECI trainer on site for a week after about the first six months of using the system. Initially, I thought I should have scheduled this visit right away. But I think it was better to wait because, by the time the trainer came, we were somewhat familiar with it. You pay extra, but I strongly recommend investing in onsite training after six months of using the system."



And the software company's service overall? "ECI staff has been good," Mike says. "Our staff wants our customers to feel and be cared for and that we are helping educate them. I believe Spruce wants us to feel the same. They make us feel cared for and are educating us."

About ECI

ECI Software Solutions provides cloud-based business software for running small and mid-sized businesses end to end. Built by experts in manufacturing, residential construction, field service, building supply, office technology, and wholesale/retail distribution industries, ECI's industry-specific software connects businesses and customers, improving visibility, operational efficiency, and profitability. With ECI, businesses seamlessly integrate sales and marketing, business intelligence, CRM, data and analytics, ecommerce, mobile apps, and payment processing. With more than 30 years of industry leadership, ECI is trusted by 24,000 customers in more than 80 countries globally. Headquartered in Westlake, Texas, it has offices in the U.S., Canada, Mexico, the United Kingdom, the Netherlands, and Australia. For more information, visit www.ECIsolutions.com.

Infor Acquires Acumen and Albanero

Infor Acquisitions Strengthen Industry-Centric Data Foundation

Infor, the industry cloud company, has completed the acquisitions of Albanero, a data migration and management partner, and Acumen, a Revenue Growth Management and highly-specialized consulting company. Both acquisitions strengthen Infor's focus on helping customers understand how to translate the deep industry-centric data within their environment into opportunities to generate greater value and profitable growth.

"Infor's strategy remains fiercely focused on helping customers unlock core value drivers within their industry-specific operations," says Infor CEO Kevin Samuelson. "The next wave of innovation is completely data driven and generating real value from it begins with a secure industry-rich data foundation." Both Albanero and Acumen advance this core strategy by offering customers contextualized meaning to their industry-specific data within their core ERP systems.

Albanero

Data migration and management capabilities are essential to moving customers into a cloud environment and maximizing the value of their solutions. What data is migrated, how it is structured, and how a business maintains the integrity of that data is a complex endeavor. Since 2022, Infor has partnered with Albanero to make their data migration and data management capabilities available to Infor customers.

Data migration typically involves bringing data from multiple systems into the cloud environment. Albanero's established data mesh platform is currently available to customers that are harmonizing, migrating, and governing Data as a Service across Infor's industry CloudSuite solutions and from external source systems such as SAP, Oracle, Salesforce, Sage, and NetSuite. With the intent to embed the Data Mesh platform capabilities within Infor OS, the industry cloud platform, Infor customers will have a consolidated enterprise view of a company's data that is unmatched in the market today. Generally cost-prohibitive for midmarket customers, this union of capabilities will allow them to leverage technologies and capabilities such as GenAI on top of an unparalleled data foundation to advance their business differentiation.

Albanero's established data migration services and API connector is currently available for customers adopting Infor's CloudSuite for Food & Beverage, Fashion and Distribution industries. Work is already in progress to fast-track these same services and capabilities for Infor customers across industries.

"We are thrilled to become part of the Infor family. This union represents a significant milestone for both companies, combining our innovative data mesh capabilities with Infor's extensive industry expertise," says Bruce Douglas, Founder and CEO of Albanero. "Together, we are poised to deliver unparalleled data management solutions that will empower businesses to harness the full potential of their data. We look forward to a future of shared success and innovation."

"Cloud technologies have enabled Albanero to innovate in how data is managed," explains Manish Sharma, Founder and CTO of Albanero. "We are excited to provide Infor customers with a decentralized data mesh solution that puts the power of their data back into their business. This technological leap has addressed many of the challenges associated with centralized data management by empowering data owners at the source. We look forward to leveraging the extensive technological capabilities of Infor and Koch to expand our market reach."

Acumen

Consumer goods brands have complex pricing requirements for promotions and rebates that are core to their operations. The ability to apply the right data, at the right time to the right mix of pricing strategies, trade terms, promotions, processes, and talent – in addition to being able to effectively forecast and respond to the rapid changes in market – is critical in reaching and influencing the right customers at the right time.

Acumen offers solutions and highly specialized consulting and analytics services for consumer packaged goods (CPG) manufacturers to drive smarter, more informed decision-making to optimize the impact of their promotional investment. With this acquisition, Infor brings CPG companies critical last mile functionality for Trade Promotion Management (TPM). As a data-intensive vertical, integrating Acumen into Infor CloudSuite Food & Beverage and CloudSuite Fashion will help customers establish a single source of truth for decision-making while enhancing the volume of industry-specific data on which they can build new technologies and capabilities.

Nick Ryan, Co-Founder of Acumen says, "We are excited to become part of Infor, bringing our CPG Revenue Management software solutions and strategic consulting practice into the Infor portfolio. Joining Infor will enable us to leverage the latest Infor technologies to enhance our platforms and speed to market, while enabling us to continue to grow our client base and extend our geographic reach."

"We're so proud of the team we've built, the business we've established and the clients we work with," adds Matt Wills, Co-Founder of Acumen. "The Infor acquisition will allow us to offer great opportunities to our team and speed up our time to value for our clients."

Twelve of the top 20 of the world's leading consumer goods companies, such as Campari, L'Oréal, Unilever, Colgate Palmolive, and Heineken, recognize the strong value of Acumen's TPM solutions coupled with its revenue management capabilities.

Infor's acquisition of Acumen and Albanero closed on July 1, 2024. Financial terms are not being disclosed for either acquisition. Albanero founders, Bruce Douglas and Manish Sharma, Acumen founders Nick Ryan and Matt Wills, and employees of both organizations, a total of 160 people, will transition into the Infor organization

Rootstock Software Recognized as an ERP Leader in the Nucleus Research 2024 SMB ERP Value Matrix

Rootstock Manufacturing ERP excels in product functionality and customer experience, achieving Leader status for the third consecutive year

Rootstock Software is proud to announce its recognition as a "Leader" in Nucleus Research's 2024 SMB ERP Value Matrix. This marks the third consecutive year that Rootstock has been acknowledged for its outstanding performance in the areas of product innovation and customer usability.

"We're thrilled to be recognized as an ERP Leader by Nucleus Research for three years running," said *Raj Badarinath*, Chief Product & Marketing Officer at Rootstock Software. "This achievement is a testament to the trust and support of our customers who have used our *Manufacturing ERP* to drive their growth and efficiency. Our relentless focus on innovation and customer success

has enabled us to deliver solutions that not only meet but exceed the evolving needs of manufacturers."

The 2024 *ERP Value Matrix* highlights how SMBs are moving away from outdated methods like QuickBooks and spreadsheets, which are inadequate for growth. Instead, they require modern ERP solutions that provide agility and predictive insights, especially in supply chain planning amid inflation and geopolitical risks. SMBs are increasingly data-oriented. As such, advanced analytics are fundamental to enabling a decisioning platform across business functions, and generative AI remains a significant trend.

"Specialized in discrete manufacturing, Rootstock caters to mid-sized companies in segments like industrial machinery, aerospace & defense, and medical device," said *Samuel Hamway*, analyst at *Nucleus Research*. "Rootstock ERP offers many of the trending capabilities manufacturers are looking for, including AI, analytics, supplier collaboration, balancing production capacity, and more. Built on the Salesforce Platform, Rootstock natively connects with CRM and other ecosystem solutions, enabling manufacturers to assemble a data cloud for manufacturing. As a result, Rootstock customers referenced for this report experienced improved visibility across their enterprise, streamlined operations, and an enhanced ability to service customers."

Since the previous Nucleus ERP Value Matrix, Rootstock has introduced several key product enhancements, including the launch of its revolutionary *AIRS™ (AI from Rootstock)*, continued enhancements to *Enterprise Insights* (its analytics solution), improvements to Rootstock Financials, and the introduction of the *Rootstock Signal Chain Appstore*, which offers pre-validated third-party software applications and consultants for broader ERP success. In addition to product updates, Rootstock rolled-out QuickStart Implementation to help mid-sized manufacturers streamline the go-live process with pre-configured settings and templates.

A free excerpt of the 2024 SMB ERP Value Matrix report is available for download:

https://clouderp.rootstock.com/erp-software-value-matrix.

About Rootstock

Rootstock Software provides the leading Manufacturing Cloud ERP, which empowers hundreds of manufacturers to turbocharge their operations in today's dynamic, post-pandemic world. Natively built on the Salesforce Platform, Rootstock delivers a future-proof solution. With it, manufacturers gain the agility to continually transform their business to meet evolving customer needs, navigate emerging challenges, and accelerate success. In addition, the "connectability" of Rootstock Cloud ERP gives manufacturers 360° visibility to collaborate with suppliers, trading partners, and the broader value chain. As Rootstock continues to grow, stay tuned to the company's latest customers, career opportunities, and LinkedIn posts.

Sage Introduces Streamlined Inventory Planning Tool for Small Merchants Exclusively on Shopify

Inventory Planner Essentials aims to revolutionize inventory planning and buying for small businesses, available exclusively on the Shopify App Store.

Sage, a global leader in accounting, financial, HR, retail and payroll technology for small and mid-sized businesses, today announces the launch of Inventory Planner Essentials, a new tool from *Inventory Planner by Sage* designed specifically to meet the needs of small merchants.

Inventory Planner Essentials, initially available exclusively on the Shopify App Store, tackles a major pain point for small merchants: excess, unsold inventory. According to a recent Inventory Planner by Sage survey, the typical small merchant in the U.S. has around $48,000 in unsold inventory on hand at any given time. This ties up valuable

capital, hindering cash flow and limiting investment in new products and critical business needs. With entry-level demand forecasting and inventory purchasing capabilities, Inventory Planner Essentials makes accurate forecasting and reliable buying recommendations accessible to smaller businesses.

"Inventory Planner Essentials is crafted with the smaller merchant in mind, especially those using Shopify and operating from a single location," says Rob Sinfield, SVP of ERP at Sage. "Rising inflation and interest rates are putting a strain on cash flow, and small merchants can't afford to tie up capital in unsold inventory. Whether you are a multitasking CEO or the first-ever inventory manager at your company, Essentials takes the guesswork out of inventory management, providing accurate forecasts and data-driven buying recommendations."

Inventory Planner Essentials addresses significant challenges for small merchants, such as overstocking and stockouts, which can lead to substantial financial losses. With actionable buying recommendations, small business owners can optimize their inventory levels and grow their operations confidently.

Key features include:

- ***Transparent demand forecasting***: This allows small merchants to predict future sales trends with confidence and ensure they have the right amount of stock on hand.

- ***Clear, actionable buying recommendations:***
- With data-driven buying recommendations, merchants are equipped with actionable insights that ensure they order the right quantity of products and avoid costly overstocking.

- ***Simplified inventory management:*** A simple, user-friendly interface makes planning inventory accessible to all users, even first-time inventory managers.

Find out more about Inventory Planner Essentials *here.*

About Sage

Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to help business flow. By digitizing business processes and relationships with customers, suppliers, employees, banks and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis. Learn more at www.sage.com/en-us/.

NetSuite Launches Healthcare Solution Designed to Enhance Efficiency and Improve Patient Care

NetSuite SuiteSuccess Healthcare Edition helps streamline business processes, expand insights, and enhance decision-making while supporting HIPAA privacy and security requirements

Oracle NetSuite announced a new solution to help healthcare organizations improve business efficiency and support Health Insurance Portability and Accountability Act (HIPAA) compliance. With *NetSuite SuiteSuccess Healthcare Edition*, healthcare organizations can quickly take advantage of the latest advancements in cloud computing and artificial intelligence (AI) to help streamline business processes, expand insights, improve decision-making, optimize resource allocation, and enhance patient care.

"Healthcare is one of the biggest, most critical, and most complex industries in the world. Oracle is making a significant investment in healthcare to help simplify processes and enhance the patient experience," said Evan Goldberg, founder and executive vice president, Oracle NetSuite. "With NetSuite, healthcare organizations can take advantage of an integrated cloud system to help automate and streamline business processes, make more informed decisions, and reduce costs, all while addressing HIPAA compliance. As a result, these organizations can do more with less and enable frontline workers to focus on what matters most—delivering high-quality care to their patients."

NetSuite SuiteSuccess Healthcare Edition is an industry-specific pre-configured solution with pre-defined role-based dashboards, reports, KPIs, and workflows. Building on Oracle's significant investment in ***healthcare***, it is designed to help healthcare organizations improve operational efficiency, gain faster time to value, bolster security, and support compliance. NetSuite SuiteSuccess Healthcare Edition includes:

- ***Financial management and reporting:*** Helps healthcare organizations automate and streamline transactions, payables, and receivables, improve purchasing controls, and accelerate reporting. With a single, real-time view of the business, from clinic financials and patient billing to inventory, customers can improve decision-making, enhance resource allocation, and increase operational efficiency.

- ***Inventory management:*** Helps healthcare organizations gain a real-time view of inventory across all locations including medications and medical supplies. With a comprehensive view of inventory, customers can reduce costs and minimize delays by optimizing the reorder processes and confirming the right quantity of stock is in the right location.

- ***Asset and lease management:*** Helps healthcare organizations quickly and accurately manage assets and leases for medical devices, ambulances, or offices. With detailed asset reporting and seamless integration with NetSuite's accounting software, healthcare customers can control costs by efficiently creating amortization schedules, planning maintenance, and tracking depreciation.

- ***Compliance and security:*** Helps healthcare organizations control access to electronic protected health information (ePHI), with role-based access controls, password policies, and multifactor authentication. These features can help customers to protect sensitive patient information while streamlining business processes and improving overall efficiency.

- ***User activity auditing:*** Helps healthcare organizations monitor access to ePHI in NetSuite – including user activity monitoring of the customer record and associated transactions – to identify unusual activity and report on interactions with patient data. With NetSuite Compliance 360, healthcare customers can enhance patient privacy by improving customer record visibility and accelerating audits and HIPAA-related investigations.

"Our mission is to redefine the way aging adults in our community receive healthcare, so we needed an integrated business system that would help us deliver more personalized care," said Merlan Powell, vice president of finance, Coastal Care Partners. "NetSuite provides a 360-degree view into our operations, enabling us to streamline business processes and enhance decision-making. With these expanded capabilities and support for HIPAA compliance, we can better protect patient information and ensure first-class care."

ORACLE NETSUITE

About Oracle NetSuite

For more than 25 years, Oracle NetSuite has helped organizations grow, scale, and adapt to change. NetSuite provides an integrated system that includes financials / Enterprise Resource Planning (ERP), inventory management, HR, professional services automation and omnichannel commerce, used by more than 37,000 customers in 219 countries and dependent territories.

ECI Software Solutions Acquires MiTek's Residential Construction Software Business, Expanding its Software Portfolio

Strategic acquisition will broaden ECI's residential construction software portfolio and bring in new customers

ECI Software Solutions, a global provider of cloud-based business management software and services, today announced it has completed the acquisition of two residential home construction software business units from MiTek, a global company focused on providing integrated software, services, engineered products and automated solutions for the building industry. The acquired businesses include BuilderMT®, a turnkey workflow management suite for home builders, and Sales Simplicity®, a CRM and sales automation software for single-family, semi-custom and custom home builders. Terms of the deal were not disclosed.

"This acquisition reflects our strategic approach and commitment to providing high-value solutions and helping our customers manage their day-to-day operations and grow sustainably and profitably. Both BuilderMT and Sales Simplicity enable us to expand our residential construction software portfolio, and in turn, we're able to offer the existing customers of those products new opportunities with our proven ERP software that's built specifically to address unique industry needs," said Trevor Gruenewald, CEO of ECI Software Solutions.

Providing a seamless and efficient business management system for every stage of new residential construction, MarkSystems is ECI's home builder enterprise resource planning (ERP) software for production and semi-custom builders in the residential construction industry. Designed to overcome the specific challenges of home builders, *MarkSystems* offers a centralized database for all project details, making project and financial management faster and easier—from prospecting to warranty—all in a single platform.

"ECI's focus on providing end-to-end solutions for small to medium-sized builders closely aligns with the BuilderMT and Sales Simplicity customer base. As part of the ECI portfolio, these customers will have access to a broad set of capabilities that will increase their efficiency and in turn, allow them to better serve their customers," said Bryan Bohme, SVP, Finance and Mergers & Acquisitions at MiTek.

The product acquisition brings new customers to ECI. BuilderMT and Sales Simplicity will not replace any existing ECI products.

To learn more about ECI Software Solutions, visit the *website*.

About ECI

ECI Software Solutions provides cloud-based business software for running small and mid-sized businesses end to end. Built by experts in manufacturing, residential construction, field service, building supply, office technology, and wholesale/retail distribution industries, ECI's industry-specific software connects businesses and customers, improving visibility, operational efficiency, and profitability. With ECI, businesses seamlessly integrate sales and marketing, business intelligence, CRM, data and analytics, ecommerce, mobile apps, and payment processing. With more than 30 years of industry leadership, ECI is trusted by 24,000 customers in more than 80 countries globally. Headquartered in Westlake, Texas, it has offices in the U.S., Canada, Mexico, the United Kingdom, the Netherlands, and Australia. For more information, visit www.ECIsolutions.com.

IFS Acquires EmpowerMX

EmpowerMX's powerful MRO technology adds further differentiation and depth to IFS's Industrial AI proposition for Aerospace & Defense

IFS, the leading technology innovator in cloud and Industrial AI software, announces the acquisition of EmpowerMX. EmpowerMX is an AI-powered aviation maintenance software provider specializing in Airframe Maintenance Repair and Overhaul (MRO) solutions, which are trusted by the largest aviation organizations in the world, including Embraer, MRO Holdings, Delta and American Airlines.

The acquisition reinforces IFS's commitment to Industrial AI and underpins the importance of industry-specific capabilities that enable customers to rapidly derive value and improve the way they serve their customers at the moment of service. For aerospace & defense customers, this translates to improving efficiencies, enhancing production control, minimizing turn-around times, and reducing maintenance costs.

Together, EmpowerMX and IFS will provide aerospace & defense customers with the most comprehensive and capable maintenance management system that can support multiple users in multiple roles, as well as provide well-documented, paperless governance in the form of electronic task cards and logbooks.

The acquisition will deliver more value and Industrial AI innovation to customers at a time when aviation MROs and the airline industry are experiencing multiple challenges that negatively impact profitability and operational efficiency, including supply chain disruption, labor and skills shortages, capacity shortfall, compliance, and ESG reporting.

EmpowerMX's customers will now be able to leverage IFS's capabilities and global scale to benefit from embedded IFS.ai innovation that enables them to maximize asset availability, deliver best practices, and ensure compliant delivery.

Scott Helmer, President of IFS's Aerospace & Defense Business Unit, commented: "Combining EmpowerMX with IFS is a perfect opportunity to proactively advance our leadership position in the aviation MRO software space due to the many synergies we have: an aligned technology vision, deep sector expertise and a shared commitment to customer value. Together, we not only expand our reach and foothold into the burgeoning MRO space, but we can also better serve a wider base of global A&D customers with the Industrial AI-fueled MRO innovation that enhances security, safety and efficiency."

Helmer added: "EmpowerMX's world-class and established customer base of leading aviation brands complements our own roster of industry leaders including Southwest Airlines, Air France KLM, Lockheed Martin and BAE Systems."

Dinakara Nagalla, Founder & CEO, EmpowerMX, commented: "EmpowerMX has been at the forefront of technology innovation in the MRO space, and I am incredibly proud of what our team has achieved with the EMX platform, products, and services. We are excited to join the IFS team that will enable us to accelerate innovation and extend the value we create for MRO customers. With IFS's global presence, EmpowerMX can help our MRO clients deliver faster turnaround, drive bottom line growth, and leverage the AI capabilities we are infusing into our products."

IFS is independently recognized as a leader in EAM, ERP, and FSM solutions for asset and service-centric industries. Within A&D, more than 310 million passengers fly safely thanks to aircraft maintained by IFS.ai.

Aly Pinder, Research Vice President, Aftermarket Services Strategies, IDC, commented: "For the aviation MRO and airline industry, digital transformation initiatives are critical to addressing operational challenges, including long turnaround times, out-of-service aircraft, and compliance adherence," said IDC analyst Aly Pinder. "As a notable company in the aviation MRO software market, IFS has helped some of the world's largest air carriers address these challenges by modernizing their enterprise intelligence systems. The acquisition of EmpowerMX will complement IFS's existing cloud-based aviation maintenance solution and present IFS with an opportunity to strengthen its market position in the MRO sector."

About EmpowerMX

Based in Frisco, Texas, EmpowerMX is an industry leader in aviation maintenance management software solutions. Recognized for their leading-edge technology, EmpowerMX streamlines and simplifies Maintenance, Repair, and Overhaul (MRO) operations, enhancing efficiency and productivity. Through its innovative use of cloud-based and mobile-first technology, EmpowerMX continues to transform and modernize the field of aircraft maintenance.

About IFS

IFS develops and delivers cloud enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers—at the Moment of Service™. The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our team of over 5,500 employees every day live our values of agility, trustworthiness and collaboration in how we support our thousands of customers. Learn more about how our enterprise software solutions can help your business today at ifs.com.

High-Growth Supply Chain Businesses Adopting AI and Machine Learning at Faster Pace than Competitors, Epicor Study Finds

According to the 2024 Agility Index research study from Epicor and Nucleus Research, nearly half of surveyed companies across the make, move, and sell industries cited concern over escalating costs as the foremost challenge confronting supply chains, with more than half using artificial intelligence, automation, or machine learning for at least one supply chain management application to address.

Notably, a higher percentage of businesses (63 percent) that identify as high-growth – defined by revenue growth of 20 percent or more over the past three years – have already integrated generative AI into their respective supply chain operations to manage cost and operational challenges.

Nucleus Research surveyed more than 1,700 supply chain management leaders worldwide to understand how they are leveraging powerful technologies like artificial intelligence and machine learning to thrive while navigating challenges like supply chain disruptions, escalating costs, and skilled labor gaps. The study also

uncovered anticipated future investments in these technologies.

"When workers are empowered to spend more time innovating—what humans do best—that's where the real value creation happens. That is agility," said Vaibhav Vohra, Chief Product and Technology Officer at Epicor. "Our 2024 Agility Index underscores the growing adoption of AI and other automation technologies as an essential factor in enabling supply chain businesses to better thrive and compete. These *cognitive capabilities* are coming together to empower workers and their businesses to more readily adapt to shifting market conditions and better serve their customers."

Survey respondents indicated they are integrating generative AI into digital supply chain operations across various functions such as product descriptions, customer service chatbots, natural language querying, reporting, and in-application assistance. Specifically, the adoption of generative AI in customer service chatbots, noted by 72 percent of organizations, is highlighted as the most prevalent use case. This widespread implementation is attributed to the technology's ability to streamline customer interactions across various sectors.

Similarly, 67 percent of organizations currently employ generative AI for crafting product descriptions, leveraging the technology's capacity to analyze customer sentiment and forecast market demand. This enables a more informed approach to product design and feature development.

Businesses are also implementing machine learning most frequently in inventory optimization (45 percent) and demand forecasting (40 percent), underlining the critical role of these technologies in managing inventory levels and accurately predicting future demand.

According to survey respondents, the greatest hope for the impact of automation technologies lies in increased efficiency and productivity (32 percent), cost savings (26 percent), and improved supply chain automation (23 percent). This reflects a strong belief in the potential of these technologies to drive significant improvements in supply chain management.

To download a copy of the 2024 Agility Index, please *visit our website.*

Zone & Co Acquires Accounts Payable Product, Staria Flow, Bolstering its ERP-Expanding Procure-to-Pay Solution with Enterprise OCR Capabilities

This acquisition further advances Zone's vision to deliver a unified platform of end-to-end software solutions for the office of the CFO

Zone & Co, the leading provider of ERP-expanding software solutions for the CFO's office, has announced the acquisition of Staria Flow, an innovative AP automation solution, developed by Staria, a Helsinki-based advisory services and solutions firm for growth companies. This acquisition accelerates the capability expansion of Zone's robust AP automation solution, further cementing the company's position as the most comprehensive ERP-expanding software provider for companies of all sizes.

Staria Flow is designed to streamline accounts payable processes and payments offering users increased efficiency and control over their financial operations, including robust bank connectivity, best-in-class e-invoicing, and precision-driven OCR technology. The acquisition reflects a shared commitment to enhancing the capabilities of the Zone platform, leading to a faster pace and higher quality of product innovation. With the addition of Staria Flow's key features, Zone is creating

a true enterprise end-to-end *AP solution*.

"Over the past year we've significantly expanded the breadth and depth of our end-to-end platform, including the addition of GenAI functionality and the acquisitions of *Solution 7* & *Infinet Cloud*," said Thomas Kim, CEO at Zone & Co. "This announcement marks yet another great investment to accelerate our platform's capabilities, in line with our broader vision that continues to support our organic growth. By combining our capabilities, we create more value, faster for our combined global customer bases. Enabling them to streamline their procure-to-pay process from start to finish with a single login."

Artti Aurasmaa, CEO at Staria, adds: "We are excited to join forces with Zone & Co to bring our customers the best of both worlds: Staria's unparalleled service offering and Zone's cutting-edge technology. Integrating Staria Flow and Staria Banking into Zone's suite of products will enhance the payments and accounts payable experience and create a seamless financial management environment for our users. Furthermore, it allows us at Staria to focus on bringing our customers top-notch services and solutions within global accounting, ERP consulting, and BI & planning."

Wilkie Farr & Gallagher LLP acted as legal adviser to Zone.

To learn more about Zone & Co, please visit *www.zoneandco.com*.

About Zone & Co

Zone is reinventing the way companies approach back-office excellence, empowering finance leaders and their teams to scale and thrive in today's dynamic business landscape. Its highly flexible platform enhances out-of-the-box ERP capabilities, offering maximum visibility and control over company operations. From complex billing & revenue recognition to AP automation and advanced FP&A reporting, Zone's unified platform integrates seamlessly with leading ERP software, adapting precisely to evolving needs. Trusted by over 4,000 customers worldwide, Zone & Co is committed to delivering real-world solutions that deliver tangible results for its customers. Headquartered in Boston, MA, with hubs across Europe, North America, Australia, and Asia, Zone is dedicated to shaping the future of enterprise back-office management. For more information, please visit: www.zoneandco.com or follow us on LinkedIn: linkedin.com/company/zoneandco.

Abas ERP Takes Lacher Grossküchen GMBH to a New Level of Efficiency...

... and enables significant process improvements, up to 100 percent faster invoicing, and an increase in liquidity

Founded in 1920, Lacher Großküchen GmbH is one of the leading large-scale catering and kitchen suppliers in Germany. The company's unique selling point is its comprehensive planning and consulting services, because when drafting a large-scale catering facility or kitchen the focus is not on design but rather on efficiency. It is not unusual that 5,000 meals have to be prepared and served within only an hour. Stoves, ventilation systems, contact grills, coffee makers, and other electrical devices as well as utensils have to be customized to individual needs. With more than 100 years of industry experience, Lacher not only provides the necessary equipment but also adds the required expertise. The wholesaler offers all steps from a single source, successively and perfectly coordinated. This was also the case with the largest project in the company's history: At the European Central Bank in Frankfurt, Lacher was responsible for providing the large-scale catering and small kitchen equipment from the first draft and the development of a tailored solution through to the final implementation. Since the previous ERP system could no longer meet the increasing market requirements, the wholesaler decided to introduce a new ERP system from abas in 2016 to automate and improve its processes.

Prepared for The Future Requirements

On the path towards the final decision for a provider, Lacher first performed a comprehensive comparison of various ERP systems. In several successive stages, the wholesaler reduced the initial ten providers, first to four, then to two, and finally made the decision in favor of the business software Abas ERP: With the support of reference customers, external consultants, comparison platforms, and further sources, a detailed information base was established in a first step to make a top 10 preselection of potentially suitable software solutions. After roughly defining the function requirements for the ERP system, these were compared with the function ranges of the ten providers. They were weighted on the basis of the results according to their suitability and the number of providers was reduced to four. This was followed by individual presentations to the management and heads of the responsible departments of Lacher, who finally decided in the next step which two providers would be invited to the final selection round. This included creating an actual quotation with a detailed specification by the provider and Lacher visiting several reference customers of the two software companies. The last step was the final evaluation of the offers and overall performance. The German ERP manufacturer abas from Karlsruhe finally fulfilled the objective of providing an advanced system that satisfies not only current but also future requirements for logistics, project business, and customer service across all processes.

> "Abas offers exactly the flexibility and efficiency that we need. We would choose Abas ERP again. Driven by this high level of satisfaction and the previous success with Abas ERP, Lacher aims to further intensify the cooperation with abas and is continuously working on optimizing the software installation."
>
> *Thilo Jörg_*
> *CIO, Lacher Großküchen GmbH*

Methodical ERP Introduction Up to the Go-Live

The introduction took place according to the seven-stage method GIM (Global Implementation Method). It began with the kick-off meeting in the start-up phase to define the exact project organization and the milestone plan, among other things. Then the Smart Check was performed: abas checked how "ERP-compatible" Lacher was with regard to the planned introduction of the business software. This also included the training of the project team by means of abas Academy courses in Karlsruhe during the next stage. For the team to get to know the software better and to tailor the requirements specifically to day-to-day business, a training infrastructure with demo clients was installed. In this way, the target processes and applications could be defined during the organization stage and as the result of the stage the organizational and technical implementation concept could be created.

As a next step, this concept was transferred to Abas ERP as part of the configuration stage. In continuous cooperation with the Lacher project team, the implementation partners of abas checked if the requirements had changed during the project phase. In this way, corrections could still be made as necessary. Furthermore, the data from the previously used system were migrated to Abas ERP. The subsequent training phase was about familiarizing the individual users of the technical departments with the specific, workstation-related content by means of project-related test scenarios and applying the acquired knowledge. In general, the procedure helped Lacher to achieve the company's goals with the available human, economic and financial resources within the

defined period and also had positive effects in terms of increased sales and faster ROIs. Because the method guided the catering and kitchen supplier reliably through the entire process, took into account the individual requirements, strengths and weaknesses, and helped to identify hidden potential. Finally, the go-live took place in February 2017. Abas ERP was put into operation with 70 licenses and very little customization.

The ERP software from abas defines an important part of Lacher's restructuring and is the basis for the digitization of all core processes of the company group in order to finally get rid of manual work steps and duplicate work. For example, invoices are now processed electronically via EDI: Incoming invoices are posted fully automatically and outgoing invoices are transferred directly to the email system. Manual enveloping is now a thing of the past.

Comprehensive ERP Functions Perfectly Completed by Further It Solutions

In addition to the basic functions, a great variety of expansions, plug-ins, mobile apps, and various interfaces to other programs are available to Lacher. Lacher uses Abas ERP for its entire financial accounting, controlling, purchasing, sales, material management and scheduling, as well as for service processing and customer relationship management (CRM). Furthermore, various plug-ins are used, such as the project management tool Abas PM and Abas BI (Business Intelligence), while mobile applications are connected via interfaces. Additionally, Lacher relies on an expansion for plant data collection as well as on the CTI (Computer Telephony Integration) and communication tool. A significant advantage for Lacher is the compatibility of Abas ERP with the DMS system (document management) from ArcFlow previously in use. There are also interfaces to different carriers, such as the logistics tool Delisprint from DPD, the above mentioned email system and the CTI software from Estos as well as the connection of Praxedo as a mobile cloud solution for field service management. Barcode scanners are included in the business software as well.

> "The increase in efficiency that we achieve thanks to Abas ERP is really enormous."
>
> *Vanessa Fischer_*
> *CFO, Lacher Großküchen GmbH*

Achieved Benefit and Added Value

In general, the introduction of Abas ERP at Lacher has resulted in better structuring, traceability, and transparency of the business processes. This is particularly evident in the area of financial accounting. Last but not least, the change to Abas ERP has significantly increased the level of automation, which with regard to financial accounting does not only reduce errors but also considerably accelerates the processes: While previously it took up to 12 hours to collect all relevant data from the departments, today the information is centrally available in Abas ERP for invoicing at just the click of a button. Lacher is now able to achieve much higher productivity with only half the number of employees and perform more postings in less time. Another advantage is improved liquidity: The company mainly works with downpayment invoices and discounts that are based on the performance progress of the projects, and relies on the percentage of completion method to evaluate them. What was previously almost impossible to achieve manually can now be done easily and considerably faster thanks to the comprehensive approach of abas including material cost posting. "Particularly in the project business, it is essential being able to map the current status and progress to generate liquidity. With the completely contained financial accounting in Abas ERP, we have all relevant data readily available in real time thanks to material cost posting, and process chains are adhered to in all areas," explains Vanessa Fischer, CFO at Lacher.

High Level of Flexibility and Efficiency

Above all, the specialist for large-scale catering facilities benefits from the high flexibility of the ERP system, because also after the go-life adjustments can be made quickly and flexibly. "Being able to implement many things ourselves thanks to FOP (flexible interface programming) and making customizations according to our requirements – without loosing the ability to upgrade – is a convincing added value for us," says Thilo Jörg, CIO of Lacher Großküchen GmbH. This also becomes evident with regard to the challenge in project business that any kitchen order consists of a different number of parts that are difficult to evaluate as mixed products. For this, the company now uses a solution that generates a unique one-time product for each project, imports it to Abas ERP, and triggers the subsequent standard processes there.

In addition, the high degree of digitization made possible by

Abas ERP leads to a significant improvement in sales processes: On the one hand, this is reflected in the creation of quotations, which can be carried out much faster thanks to recorded product images and brochures that are automatically sent by email and stored in the DMS. On the other hand, enormous time savings are also achieved when creating and processing orders, because the ERP solution provides a transparent status overview of the order progress at all times and ensures automated and bottleneck-focused process control. Another reason for this is that figures are always available transparently through the Abas BI solution, which allows Lacher to react quickly to any changes, if necessary. Last but not least, Lacher gains an enormous advantage from the fact that the online shops based on Shopware are directly connected to Abas ERP via a standard interface, which once again increases digitization of sales. The Multisite connection of the sister company Lacher Service GmbH, which is responsible for the maintenance, repair, and installation of the kitchen appliances, creates further added value: Thanks to Abas ERP, a service product is created for every product sold that informs the responsible employees about all important data and documents at a glance – from the serial number, the purchase date, and the warranty period through to the packing slips, invoices, and the current service location.

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> *CIO, Lacher Großküchen GmbH*

At its headquarters, the catering and kitchen supplier has a 4,000 m² showroom where customers can gain an overview of the product range in advance of a project. In addition to the European Central Bank, its customers include commercial kitchens at well-known companies, such as ADAC in Munich or Fraport, restaurants, but also street food trucks, and bistros. The company is a member of the leading industry associations, such as GGKA e. V., the German Professional Association of Food Service and Commercial Kitchen Equipment, as well as PENTAGAST, Europe's largest network for restaurants, hotel business, and communal catering. With the ERP system from the Karlsruhe-based provider abas, Lacher is more advanced than almost any other company of the association. "The increase in efficiency that we achieve thanks to Abas ERP is really enormous," sums up Vanessa Fischer, and also Thilo Jörg says: "Abas offers us exactly the flexibility and efficiency that we need. We would choose Abas ERP again. Driven by this high level of satisfaction and the previous success with Abas ERP, Lacher aims to further intensify the cooperation with abas and is continuously working on optimizing the software installation." For example, the company plans to perform an upgrade to the current version of the ERP solution. Furthermore, Lacher wants to expand the Abas BI solution that is already being used in other departments to the finance area.

Kiabi

Transforming omni-channel retail even faster

Meet the customer:

Kiabi is the French retailing powerhouse famous for not resting on their laurels. In 1978, they transformed the retail clothing industry by offering modern fashion for the whole family. Since 2002, Kiabi has doubled in size, expanded from 5 to 32 countries, grown to 9,000 employees, increased revenue to €1.8 billion a year, and gone all-in on digitalization and omni-channel retailing.

Challenges

- Find a way to respond to demand from the burgeoning volume of customers
- Manage data overload—and data inconsistency
- Efficiently navigate the market-wide transition to omni-channel retail

Outcomes

- Slashed application development time by 50%
- Improved website performance from 3.6 to 1.2 seconds
- Expanded online presence from 5 to 32 countries
- Cut internal-external connection times from 4 months to 1 week

Solution

Kiabi used webMethods for Integration and API management to create a fluid flow of data throughout systems and partners. And ARIS for business process transformation.

> "ARIS and webMethods gave us the power to drive the changes we needed in our e-commerce business."
>
> *Christophe Alie_*
> *CIO, Kiabi*

The digital imperative

Kiabi's success is based on a visionary digital transformation. Seeing their marketplace on the cusp of disruption—due to accelerating technological advances, increased competition from web-based start-ups and newly connected and empowered consumers—the company saw a strategic advantage if they could deliver a seamless and compelling omni-channel customer experience.

The key to it all would be to create greater connections: Integrating devices, applications, networks, content, channels and interactions. A tall order on its own, executing this vision was particularly difficult because of Kiabi's consistent growth of nearly 9% annually. Many of their new customers were Millennials, a group unlike anything the company had encountered before—constantly online, in-touch and communicating. Kiabi's legacy systems simply couldn't keep up, their website slowed to a crawl and their data was riddled with errors. IT had to align to the company's business functions—and fast—for Kiabi to turn themselves into the omnichannel business they had envisioned.

Love at first integration

From the moment Kiabi saw how Software AG's ***ARIS*** and ***webMethods*** allowed them to visualize and restructure their processes, and speed up and extend their customer contact, they knew they'd chosen the right partner to realize their vision. Independent solutions would enable them to be service-oriented and event-driven, increase their flexibility and make changes to their systems without downtime or making compromises.

The most pressing need was to overcome a 40% increase in data volume and a laggy website. So in 2012, Kiabi implemented Software AG's in-memory data solution. By keeping databases loaded in memory rather than on traditional hard-drive servers, Kiabi reduced web page load-time by 300%, from 3.6 to 1.2 seconds. The solution was adopted in months, and had an immediate impact on revenue as digital natives—easily frustrated by delays—were no longer abandoning their online shopping carts. In addition, by linking all of their retail channel experiences through a single, unified platform, Kiabi saw its online revenue skyrocket to €130 million a year.

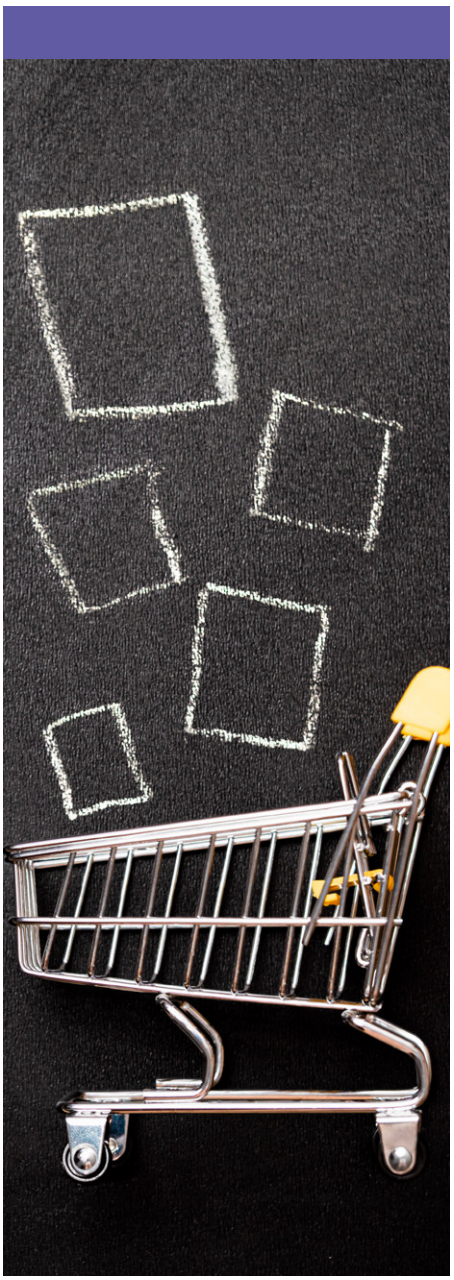
Omni-channel demands omnipresence

Kiabi took the next step just two years later with a full transition to omni-channel retailing. To do this meant digitalizing all their processes and building a system agile enough to respond to the behaviors of their Millennial customers.

This meant targeting customers who hopped from trend to trend faster than their predecessors, and who made purchasing decisions based on convenience and price. Personalization and real-time price and availability comparisons via mobile were the name of the game.

"ARIS and webMethods gave us the power to drive the changes we needed in our e-commerce business, to deliver greater value to customers and to respond to the future demands of our customers as they arise. The project was up and running in just a few days—and on our own terms!"

Kiabi needed an end-to-end chain for integrating and connecting applications, and the ability to add features on the fly. They also needed to get products to market more quickly.



Acting as an integration layer, *webMethods Integration* and *webMethods API Management* enabled different systems storing, editing and distributing data to communicate with one another—without developing data flows or point-to-point connections. And thanks to in-memory data management, it could happen faster than ever before.

"The simplicity and speed of the webMethods APIs let us build an app for retail staff to check inventories with hand-held devices quickly. It literally changed how we operate at the lowest possible level."

Using *API Management* meant Kiabi was able to assemble and update internal applications twice as quickly as it had in the past.

Even Kiabi's external relationships benefited. Since B2B partners like suppliers were now able to seamlessly and securely access data that Kiabi earmarked to share with private API keys, new B2B connections that used to take up to four months to set up were now being enabled in as little as a week.

No wonder that just a year later Kiabi brought ARIS for *business process analysis* (BPA) into the fold. They needed to increase process agility, reduce implementation times and increase process efficiency—and ARIS was the perfect fit.

IT project managers couldn't believe it. Suddenly they were shaving three weeks from the lead time of half-year projects by using ARIS BPA to share holistic views of customers, products, processes, and suppliers. IT and the business were on a winning trajectory. Kiabi's CIO was a hero. But for him the decision had been a no-brainer: "Unlike the alternatives, Software AG's solutions were the only ones that provided all five of Kiabi's requirements: business and IT transformation, in-memory data, integration, process and analytics & decisions. This eliminated the risk of inconsistencies right from the start, and greatly simplified support."

Today Kiabi is more agile than they've ever been, both internally and externally. They have just been ranked third in the "2017 Great Place to Work," seeing them placed for the fourth consecutive year.

Their independent solutions offer endless possibilities. And their customers? They're happy right where they should be—at the center of Kiabi's attention.

Motion & Flow Control Products

Advanced EDI Platform Automates Processes, Enhances Transparency and Lays Foundation for Expansion

Company Facts

- Location: Littleton, CO
- Specialist Industry: Industrial Distribution
- Website: mfcp.com

Challenges

- Unwieldly, unreliable EDI platform
- Manual, resource-demanding processes
- Inability to effortlessly integrate third-party tools
- Lack of reporting capabilities

Benefits

- Automated processing of up to 300 invoices per day
- User-friendly visibility and proactive alerts
- Flexible EDI solution for seamless integrations
- Responsive, trusted partnership promotes expansion

Go With the Flow

Think of the millions of critical parts moving the fluids and gases that keep planes flying, utilities serving, electronics connecting, food and beverages flowing, and energy streaming. Those systems depend on companies like Motion & Flow Control Products (MFCP) to help keep their world moving. Since 1960, MFCP has built a strong reputation as a service-focused industrial fluid power, motion, and process control products distributor. Through 60 locations across the western and central U.S., the company offers hydraulic system engineering, design, manufacturing, hydraulic component repairs, hydraulic system service and troubleshooting, hydraulic and industrial filtration solutions, remote system condition monitoring and implementation, and more.

With efficiency a vital component of MFCP's promise to customers, it is no surprise that the company looks to technology to drive productivity with internal processes. For almost 20 years, Epicor Prophet 21 has run MFCP's distribution and manufacturing business. In 2023, the company made the switch from a legacy EDI solution to Epicor HQXchange (HQX). Peter Stember, Business Development Manager at MFCP, explained, "We wanted to move more of our partners and customers to EDI, but our previous platform was limited in terms of visibility and communication. We needed a cloud-based solution that gave us a foundation for the future."

Seamless Productivity Boost

One of the unfortunate ironies of migrating to a technology solution is that productivity often takes a step backward before it improves. As MFCP receives between 100 and 300 invoices a night just from its largest vendor, Parker Hannifin, Stember was understandably nervous about potential disruption to the business and to its important relationships. "The entire migration experience to Epicor HQX was great. We moved quickly—from contract signature to go-live in just three months—and everything worked as promised," Stember recalled. "All our data maps were transferred, we had in-depth training and a terrific implementation team working closely with us."

Today, MFCP has eight trading partners and several customers already live on Epicor HQX. Stember divulged, "We plan to add ten additional partners and more customers over the next year."

"The big picture is to improve productivity both for our accounts payable and purchasing teams, and they are asking for more EDI. With Epicor HQX, there is no need for manual data entry, freeing up staff from the mundane to focus on value-added contributions," Stember adjoined.

Effortless Visibility, Proactive Alerts

One of the most significant benefits of Epicor HQX has been the ability to view document status quickly and easily. For example, if an order failed to import into Epicor Prophet 21 in the past, MFCP typically would not know about it until the customer called to inquire about the order. Additionally, researching the order was difficult and time-consuming. Stember explained, "You had to go into the date and manually open up the transactions to find the right order."

"The entire migration experience to Epicor HQX was great. We moved quickly—from contract signature to go-live in just three months—and everything worked as promised."

With Epicor HQX, finding an order is a breeze. "Not only can I easily search based on the PO number, but Epicor HQX also helps to offer proactive alerts if there is a glitch, so we learn about it early and address it before it becomes an issue," Stember remarked.

Epicor HQX also seamlessly integrates with other MFCP tools, such as IDX, which allows customers to research purchase orders and invoices. Similarly, for the thousands of other vendors that send invoices via email, MFCP utilizes an optical character recognition (OCR) tool integrated with Epicor Prophet 21. This helps to enable the extraction of data from the invoice to produce the same files and import them into Prophet 21, further helping automate manual processes. Stember shared, "We have a goal to limit the amount of data entry accounts payable that we need to do to pay invoices. This integration is saving time and money by automating that task."

The Ultimate Flex

Epicor HQX has also helped in providing MFPC with the ability to meet vendors and customers where they are in terms of their technology. "We have an existing customer with more than 140 locations," Stember highlighted. "They utilize an in-house system that we needed to be able to connect with, and Epicor HQX gave us the flexibility to transmit data easily in different formats."

> "We are in our infancy with EDI, and Epicor HQX gives us the ability to expand as quickly as needed."

Stember also appreciates that reporting is easy to fine-tune based on transaction type and by vendor or customer. "The interface is interactive and user-friendly," he continued. "The finance and purchasing teams also have access to IDX when troubleshooting EDI issues and verifying outgoing purchase orders, which helps them make real-time decisions."

Connect with Confidence

Stember emphasized another key differentiator between the old solution and Epicor: "The Epicor team is a tremendous resource and very quick to respond when I have a question or an issue. It has been a game-changer."

That level of partnership and support has given the MFCP team the trust to accelerate its EDI initiatives. "We are in our infancy with EDI and Epicor HQX gives us the ability to expand as quickly as needed," Stember acknowledged.
He continued, "Epicor frees up time for our staff to work on other important efforts rather than manual, tedious processes. It definitely saves time and money that we can direct to value-added projects."

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