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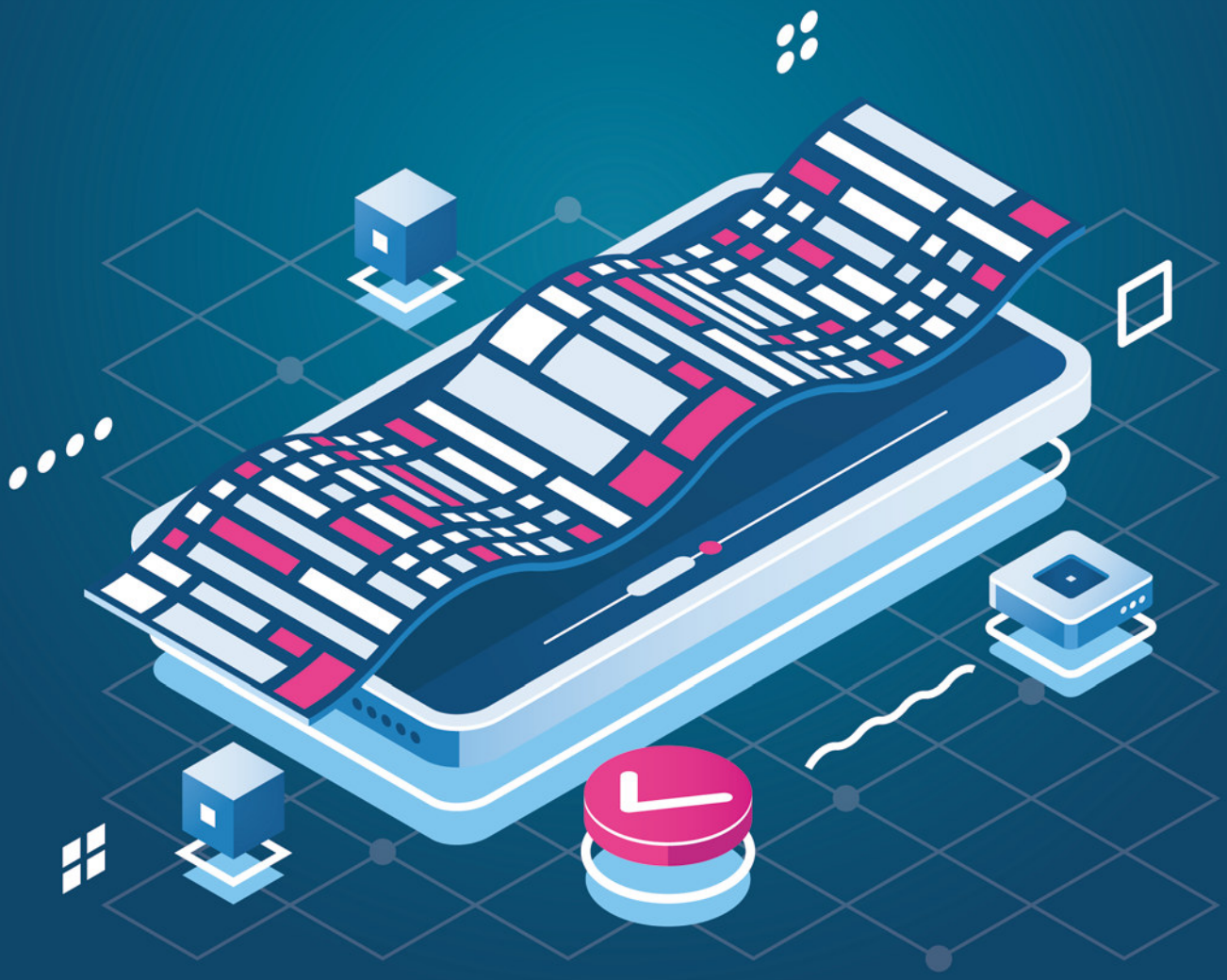
MOBILE ERP

Empowering Decision-Making On-the-Go



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EDITOR'S NOTE

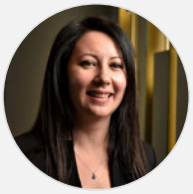
Welcome to the November 2024 issue of ERPNews, where we delve into a pivotal theme for modern businesses: Mobile ERP: Empowering Decision-Making On-the-Go. As companies navigate a landscape marked by rapid change and the need for agility, mobile ERP solutions are transforming how decision-makers access and act on critical information in real time. This month, we explore how mobile ERP is becoming essential in industries ranging from manufacturing to distribution, allowing leaders to make informed choices anytime, anywhere

In this issue, we feature two insightful interviews that bring the theme to life. Brad Feakes, President of EstesGroup, shares his expertise on selecting the right ERP systems and discusses how mobile ERP solutions are enabling his clients to make data-driven decisions on the move. Brad provides real-world examples of how mobile ERP empowers distributed teams, creating a seamless flow of information that fuels business growth and operational efficiency.

We also had the opportunity to sit down with Carter Lloyds, Chief Product Officer at QAD, to discuss the latest advancements in mobile ERP as part of QAD's broader vision for an Adaptive Enterprise. Carter highlights how mobile ERP, combined with advanced scheduling tools, is helping manufacturers boost productivity, respond faster to market demands, and ensure their workforces remain agile in an ever-evolving business environment.

These perspectives underscore a common truth: mobile ERP is no longer just an option; it's an essential component of a resilient and future-ready organization. We hope the insights in this edition inspire you to leverage mobile ERP to unlock new levels of efficiency and responsiveness in your own operations.

Enjoy the read!



Pinar SENGUL, EDITOR

ERPNEWS

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Unlocking Efficiency: How QAD Advanced Scheduling is Transforming Manufacturing for the Adaptive Enterprise

In this exclusive interview, Carter Lloyds, Chief Product Officer at QAD, shares insights into the company's recent acquisition of Phenix Software, a strategic addition to elevate QAD's Advanced Scheduling capabilities. Selected for its robust industry-specific features and exceptional user experience, Phenix Software now powers QAD Advanced Scheduling. Carter discusses how this solution empowers manufacturers to optimize production sequencing, reduce changeovers, and enhance resilience against workforce challenges—all essential for today's adaptive enterprise. Discover how QAD's advanced scheduling solution integrates seamlessly with their ERP suite to bring real-time adaptability and efficiency to the manufacturing floor.

1. What drove QAD to acquire Phenix Software, and how does this acquisition align with QAD's long-term strategy?

QAD began the search for an advanced production scheduler in early 2023; the initial intent being to bridge the gap between planning and scheduling by complementing our industry-leading Digital Supply Chain Planning (DSCP) solution. At the same time, we were looking to uplift our current Master Scheduling Workbench / Production Scheduling Workbench (MSW/PSW) offering that is bundled with our ERP with enhanced functionality and a fully web-based user interface.

After evaluating 69 solutions, we shortlisted 17 and selected Phenix based on its vertical industry support, process and discrete functionality, strong multi-level, multi-line capabilities and rich interactive user experience including drag-and-drop Gantt charts.

Interview with
Carter Lloyds,
Chief Product and Marketing Officer, QAD

Phenix will support QAD's vision for the Adaptive Enterprise given scheduling improvements directly impact efficiency. This can increase the effective capacity of your plant and mitigate the impact of workforce shortages. Manufacturers will be able to increase production beyond what was previously possible without capital investment while improving resilience against employee attrition. Combined with QAD ERP, QAD Connected Workforce and QAD DSCP, QAD and Phenix customers can optimize the entire flow from planning through scheduling to execution. It has been said that you can not schedule yourself out of a bad plan; a holistic view across planning, scheduling, and execution helps identify and solve root-cause problems that would otherwise lead to suboptimal performance.

2. Could you explain the primary benefits QAD Advanced Scheduling brings to manufacturers?

Phenix specializes in Production Scheduling Software designed to help manufacturers optimize their operations. Their solutions assist businesses in scheduling and managing production processes more efficiently. By leveraging advanced algorithms and real-time data, Phenix's software aims to improve productivity, reduce operational costs and enhance overall efficiency.

Key Features:

- Advanced Production Scheduling (APS): Optimizes production schedules by considering resource constraints, deadlines and demand forecasts.
- Real-Time Data Integration: Connects with existing ERP and MES systems to provide up-to-date information on production status.
- Resource Management: Efficiently allocates machinery, labor and materials to maximize output and minimize waste.
- What-If Analysis: Enables simulation of different production scenarios to support informed decision-making.
- Analytics and Reporting: Offers insights into key performance indicators through customizable dashboards and reports.

Benefits:

- Increased Efficiency: Streamlines production workflows to reduce downtime and eliminate bottlenecks.
- Cost Reduction: Enhances resource utilization, leading to lower operational expenses.
- Improved Delivery Times: Boosts the ability to meet customer deadlines through better scheduling and forecasting.
- Enhanced Visibility: Provides comprehensive oversight of production processes for proactive management.

3. How does advanced scheduling optimize production sequences and help minimize changeovers?

Advanced Scheduling uses product attributes such as pack configuration, brand, label type, and allergens to determine the individual changeover activity between any two production activities. For example, cleaning a filler from a product containing nuts to a product with no nuts takes 'x' hours. The opposite sequence may be 'y' hours. There is no limit to the number of attributes. Multiple changeover activities (filler, labeller, palletizer) can be configured to occur in serial or parallel depending upon the tools and labor required. When generating a schedule the solution can use product wheels to ensure non-productive time (cleaning, setups, changeovers) is minimized by allocating production of alike attributes (or changeover friendly attributes) in an optimal sequence. Allergenic products are batched together and occur after regular products. Paint production will be sequenced from light to dark color. Filler equipment will batch together similar pack configurations. The approach minimizes the effort to maintain changeover data as values are managed by attributes, not SKUs.

4. In what ways does QAD Advanced Scheduling support manufacturers' goals for agility and resilience?

In addition to improving labor efficiency, QAD Advanced Scheduling enhances resilience against both unexpected machine downtime and workforce challenges. By optimizing production sequences, the system allows for quick reallocation of tasks, whether it's adjusting to a machine breakdown or a sudden worker shortage. This built-in flexibility ensures that even when disruptions occur—whether from equipment failure or absent employees—the production line continues running smoothly with minimal delays.

For the workforce, QAD Advanced Scheduling makes labor more efficient by ensuring that workers are allocated

optimally, minimizing idle time and maximizing productivity. This efficiency creates more room in the schedule to absorb the impact of high turnover or absenteeism. If workers are unavailable, the system can quickly adjust and redistribute tasks without significant loss of output. This reduces the pressure caused by worker shortages, making the operation more resilient. With more room in the schedule, shifts can be extended or added if needed.

Moreover, by increasing the effective capacity of the plant—through more efficient use of labor and equipment—the company becomes more agile. This enhanced capacity means the business can absorb unexpected surges in demand that it otherwise would not have been able to fulfill. With more room to maneuver, manufacturers can quickly scale up production to meet these demands and bounce back from unexpected disruptions.

5. The most important customer facing items we have in plan for the next year.

Closed Loop Scheduling

QAD will use its unique position as a provider of best-in-class Production Scheduling and Factory Workforce Collaboration solutions to close the loop between planning and execution. This involves a tight bidirectional integration between QAD Advanced Scheduling and QAD RedZone. Production schedules can be published in real time disseminating crucial schedule changes to the factory floor. In turn, actual factory floor activities such as unforeseen downtime or delayed starts can be published back to Advanced Scheduling allowing the schedule to be automatically adjusted to absorb the impact of the event. Often there is a lag between a current real-time event (e.g. delayed start, overrun) and the consequent constraint violation. The early detection provides more options for resolution and minimizes the impact on the production schedule. This greatly improves the agility of a manufacturer to respond in an optimal manner to unforeseen events. The closed loop is enhanced even further when connected to QAD ERP so changes in material advanced shipping notices can be incorporated into the material constraints of the schedule in real-time. This provides our customers with a synchronized and optimized operational plan that is highly responsive to near term disruptions.

> "After evaluating 69 solutions, we chose Phenix for its strong industry support, multi-level scheduling capabilities, and rich user experience, which includes interactive, drag-and-drop Gantt charts."

Operations Centric Scheduling

Most scheduling solutions operate at the Production Order level. Production Orders generated by MPS/MRP processes are sequenced in a capacity constrained manner across the production timeline sensitive to material, labor, and tooling availability. In the next year QAD Advanced Scheduling will allow production orders to be expanded into a lower level of operations prior to being scheduled. The Operations may be non-production related (sterilize equipment, calibrate a scale, take a QA sample) or production related (paint, weld, sort, quality check). Once the Production Orders are translated into sequenced operations, then alike operations are grouped, allocated a work center, and scheduled. This finer granularity of operation scheduling is critical to resolving work center constraints and improving throughput efficiency. This is table stakes in high volume discrete repetitive environments such as Automotive and A&D.

Holistic Optimization

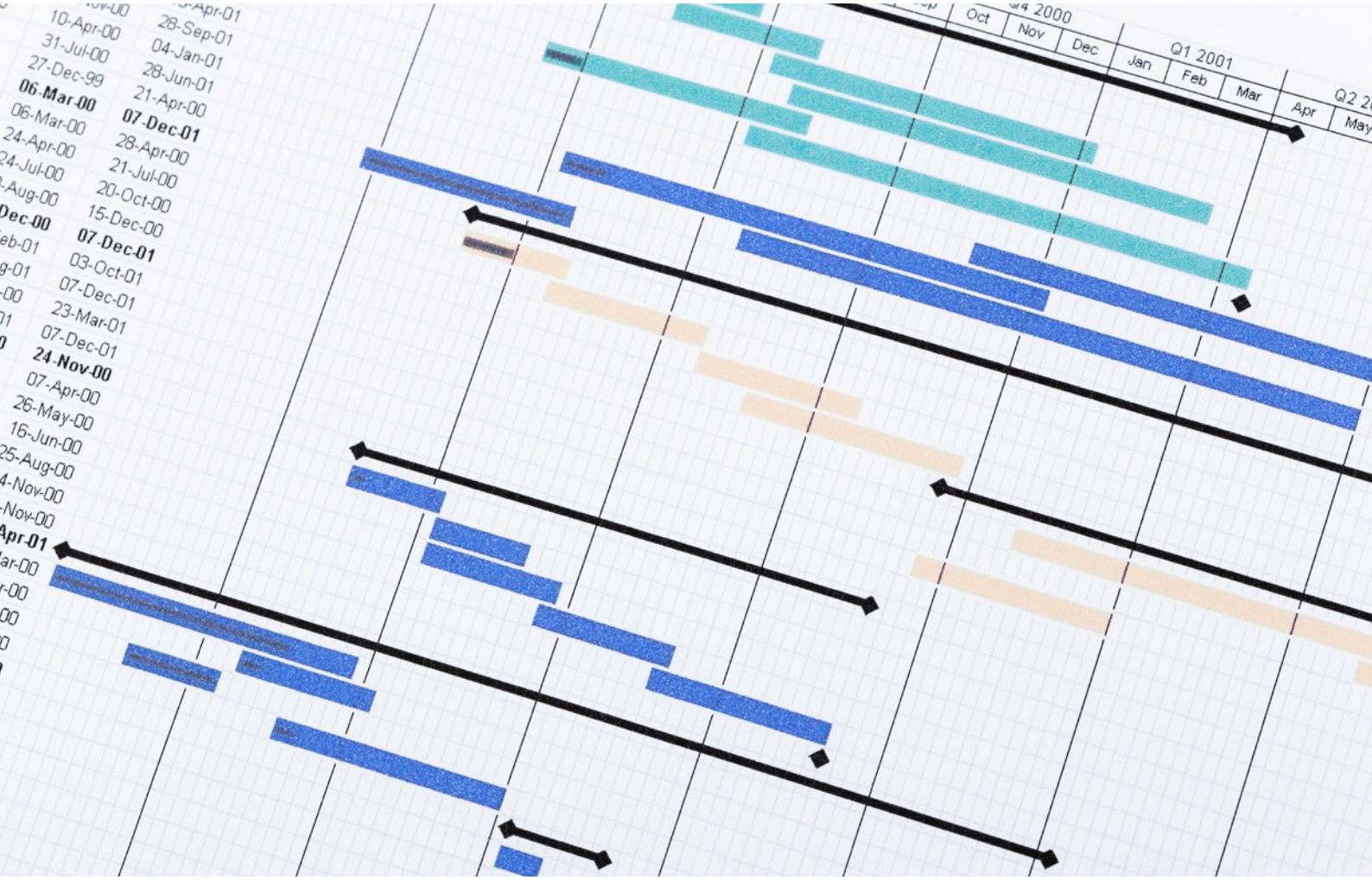
QAD Advanced Scheduling uses the concept of Product Wheels to optimize production sequences across the scheduling horizon. Product Wheels have proven to generate feasible and planner intuitive schedules. QAD Advanced Scheduling will continue to support the product wheel approach. In addition, to support highly complex production environments with dynamically floating, multi-stage bottlenecks that change depending upon the product mix, QAD will also provide a holistic optimization engine that can generate a finite capacity schedule based upon a set of objective functions. Objective

functions will include: minimize non-production time (for highly constrained factories); minimize production span (duration from consumption of raw material to generation of finished product across all production stages) for factories with shelf sensitive intermediate product or in-factory inventory staging constraints; balanced workload (for factories with high labor costs), in addition to a series of sub-vertical niche objectives used in specific industries.

6. How does the new solution integrate with QAD's existing suite of manufacturing and ERP tools?

QAD Advanced Scheduling compliments the existing QAD manufacturing solutions including the manufacturing system of record (QAD ERP), decision support (QAD DSCP), and factory floor execution (QAD Redzone Connected Workforce). QAD Advanced Scheduling will plug into the QAD Integration Framework publishing schedules and subscribing to orders and inventory positions that are published by QAD ERP. Likewise QAD DSCP will publish capacity constrained weekly manufacturing requirements which will be shared with Advanced Scheduling to generate sequenced time phased production activities. An important differentiator is the link between Advanced Scheduling and the workforce collaboration capabilities of QAD Redzone. This will allow schedule changes to be instantly published to the floor and actual production results to feed back into the schedule. This improves the visibility and agility of the factory.

"QAD Advanced Scheduling helps manufacturers increase production without additional capital investment, making it possible to mitigate workforce shortages and enhance plant capacity."



7. What unique capabilities does Phenix Software offer that other scheduling solutions do not?

QAD Advanced Scheduling has very clear differentiation in "closed loop" scheduling. In the past, manufacturers invested heavily in complex optimization tools and data cleansing processes to mathematically build the purest optimal schedule the first time. In some cases this was the full extent of the scheduling processes. In today's hyper-connected manufacturing landscape, the "perfect" schedule becomes obsolete in a matter of minutes. As soon as a job starts late, a production batch is out of spec, something breaks on the line, or materials arrive late; the schedule is being automatically updated with real-time data feeds, some of which will trigger potential constraint violations. The close-loop scheduling capabilities of QAD Advanced Scheduling then becomes a firefighting tool for the scheduler. This greatly enhances the value proposition of an Advanced Scheduling tool. Not only is OEE and resource utilization improved, there is earlier detection and resolution of potential disruptions. The reduced impact of potential disruptions reduces chaos and improves schedule performance. The cohabitation of QAD Advanced Scheduling and QAD Redzone offers a unique capability to synchronize scheduling and execution.

8. How does the solution help manufacturers balance cost and service goals while managing inventory and capacity?

QAD Advanced Scheduling optimizes production schedules by creating the best sequence of tasks, reducing unnecessary changeovers and minimizing downtime. This directly reduces time spent on unproductive activities, such as machine setup or waiting for materials. By minimizing these delays, manufacturers can increase the effective capacity of their plants without needing to add more shifts or machinery, which reduces labor and operational costs.

The streamlined scheduling also reduces the need for excessive safety stock or buffer inventory, as production is more closely aligned with demand. With fewer disruptions, inventory levels can be kept lower, which reduces holding costs such as warehousing and spoilage, improving overall efficiency.

> "By connecting QAD Advanced Scheduling with QAD Redzone, we're closing the loop between planning and execution, allowing manufacturers to adjust schedules in real-time based on factory floor activities."

This optimized approach also enhances service levels by ensuring that the right products are produced and delivered on time. By efficiently meeting customer demand without overproducing, manufacturers can lower costs related to expedited shipping or penalties for late deliveries, while increasing customer satisfaction with better on-time performance. The result is a dual benefit of lower operational costs and higher service quality.

9. What role will Phenix Software play in supporting and implementing QAD Advanced Scheduling moving forward?

Phenix started as a collaboration of highly experienced planning and scheduling practitioners at Zinata Inc., who identified that customers were experiencing major performance loss due to suboptimal changeovers and inventory levels, with no suitable tool to sustain the gains made with existing scheduling solutions. With a shared commitment to providing the best scheduling solution possible, Zinata Inc. has become a QAD Distributor to sell, support, and implement the product as a valued partner. Zinata's vast experience in manufacturing and scheduling will provide continued expert support, benefiting our current and future customers.

> "With QAD Advanced Scheduling, we're enabling manufacturers worldwide to streamline production and respond more effectively to market demands, seamlessly integrating scheduling into the entire ERP suite for a synchronized, adaptive operational plan."

10. How does QAD plan to expand the reach of QAD Advanced Scheduling in the global market?

QAD has the infrastructure to bring Advanced Scheduling to new regions, industries, and customers, ensuring a seamless deployment across diverse markets. Our broad network of partners allows QAD to penetrate markets where local expertise is crucial, further enhancing the global reach of the solution.

QAD Advanced Scheduling is a natural fit for our existing QAD ERP, QAD Digital Supply Chain Planning (DSCP), and QAD Redzone Connected Worker customers. These customers already rely on QAD solutions to optimize other parts of their operations, and integrating Advanced Scheduling will enable them to further streamline production, improve capacity management, and respond more effectively to market demands. Our large global customer base provides an immediate opportunity for cross-selling and extending the value of QAD's broader solution suite.

This strategy positions QAD to not only serve new customers but also to enhance value for existing ones, driving adoption of Advanced Scheduling across multiple industries and geographies.

About Carter Lloyds

Carter is the Chief Product and Marketing Officer, where he is responsible for the alignment of customer needs, offerings, engagement, and messaging. His goal is to bring the voice of the customer into everything we do at QAD.

About QAD

QAD Inc. is a leading provider of next-generation manufacturing and supply chain solutions in the cloud. To succeed in a turbulent world, facing disruptions in supply and fluctuations in demand, manufacturers and supply chains must rapidly respond to change and seamlessly optimize agility, efficiency, and resilience for effective customer service. QAD delivers Adaptive Applications to enable these Adaptive Enterprises. Founded in Santa Barbara, California, QAD has customers in 84 countries around the world. Thousands of companies have deployed QAD enterprise solutions including enterprise resource planning (ERP), digital commerce (DC), supplier relationship management (SRM), digital supply chain planning (DSCP), global trade and transportation execution (GTTE) and enterprise quality management system (EQMS). To learn more, visit www.qad.com or call +1 805-566-6100. Find us on LinkedIn, Twitter, Facebook and Instagram.

Mobile ERP on the Move: Brad Feakes of EstesGroup on Decision-Making, Digital Transformation, and the Power of Real-Time Data

In the November 2024 edition of ERPNews, we explore the transformative power of mobile ERP with Brad Feakes, President of EstesGroup. With the theme "Mobile ERP: Empowering Decision-Making On-the-Go," this interview dives into how mobile ERP solutions enable executives and teams to make data-driven decisions anytime, anywhere. Brad shares insights on the essentials of ERP selection, the role of strategic partnerships, and the impact of mobile ERP on industries like manufacturing and distribution. Through practical examples and thoughtful advice, he reveals how mobile ERP can streamline operations, enhance customer satisfaction, and drive business growth in an increasingly remote and digital world.

1. How does EstesGroup approach the complexities of ERP selection and implementation, particularly in today's fast-paced digital landscape?

I have a funny story about that actually; I once ran into a distribution company that was using a manufacturing ERP system. This is a problem, as manufacturing systems are not well-equipped to handle the needs of the distributors. It happens that the company in question was looking for an ERP system and had reached out to an ERP vendor who had both manufacturing and distribution ERP options. But it just so happened that they reached out to the manufacturing sales team, and they sold the customer their manufacturing package rather than transferring them over to the distribution sales team. Had they transferred the call, they could have better served their customer, but they had a sales quota to hit. It's honestly a little disappointing to see that kind of behavior in the ERP space.

Interview with
Brad Feakes,
President, Estes Group

ESTESGROUP

That is all to underscore the importance of selection at the onset of an implementation. It is hard to have a good implementation when you are starting with the wrong ERP system. ERP selection is a matter of eliminating systems that are a bad fit and then picking from what's left. So, you want to look initially for things that will help eliminate the obvious mismatches. Price is one obvious criterion. For many small companies, an industry-leading system like SAP would be unrealistic from purely a cost standpoint. From there, you probably want to look at company size, as some systems are better geared to smaller firms, and some are better geared to larger enterprises. Once you've gotten past those general considerations, it becomes a matter of fit in terms of industry-specificity, functionality, efficiency, and interoperability.

> "It's hard to have a good implementation when you start with the wrong ERP system. ERP selection is a matter of eliminating systems that aren't a good fit and then choosing from what's left. Understanding whether an ERP can support your business often depends on knowing if it's successfully used by other firms in your space."

In this context, ERP selection differs quite a bit between the manufacturing and distribution spaces. Manufacturing is more easily divided between discrete manufacturers and process manufacturers, and I find that to be the most important determining factor when eliminating ERP systems that aren't a good fit. In the distribution world, it's more diverse, as there are an inordinate number of different verticals that may need different functionality, and a given ERP system may or may not cater to the needs of a specific vertical. Some systems are good for electrical distribution, plumbing, and tile, while others are focused specifically on flow control products. Understanding whether a given ERP system can support the needs of your business, quite often, is a matter of understanding whether it supports your vertical in general. This is most often understood by determining whether other firms in your space are successfully using the ERP system.

2. Could you elaborate on the role of partnerships in successful ERP projects? How does EstesGroup leverage these relationships?

Partnerships are critical in all phases of an ERP project, and all phases of the sales cycle, for that matter. Companies encounter a wide variety of needs over the course of their daily work life, and not all of these needs are things that a company can directly satisfy. As such, we look to build relationships in the communities where we operate. It is rarely the case that one firm can handle every and all tasks in bringing a customer successfully live. This may involve software selection. We work with a great company, Third Stage Consulting, that focuses on the selection aspect of ERP. Conversely, this may involve third-party solutions and integrations. Our friends at DCKAP are a good example as they handle platform-based integrations such as e-commerce. In general, we try to stay very engaged with our partner community. A vibrant partner community makes for a creative and collaborative environment, and out of this comes a ton of mutual benefits.

3. What leadership qualities do you consider essential for guiding organizations through digital transformation?

Oh boy, that is a loaded question! I'll offer a few thoughts here. One key quality is the ability to work one layer down from the strategic and understand how digital solutions can help an organization achieve its goals. We don't transform our organizations just for laughs – digital transformation is a thoughtful tactical reaction to a strategic need. So, it becomes a conversation between the business side and the technical side of the organization to understand how to best achieve a company's goals. This conversation ultimately results in the construction of a roadmap that details the technical steps in achieving business goals.

Another key characteristic is the ability of an organization to achieve its goals incrementally. When moving your organization forward digitally, it's tempting to try and do it all at once. I've seen companies tank themselves by trying to do too much too quickly – trying to reach Mars without

stopping to refuel on the Moon. So, the challenge here is to build out a roadmap that takes your organization where it needs to go but is divided into achievable milestones. I'm from Wisconsin, and if you've lived through as many seasons of watching Brett Favre as I have, you'd understand that the pass that most often gets intercepted is the Hail Mary. Good leaders find a way to make their way down the field without getting picked off in the end zone.

4. How does mobile ERP support real-time decision making for executives on the go, and what impact has it had on EstesGroup's clients?

Let me give you a specific example of one of the ERP systems that we work with - Epicor's Kinetic manufacturing solution. Kinetic has a highly tailorable home screen. This homepage architecture allows a user to embed a variety of metrics, queries, summary reports, exception reports, charts, graphs, and KPIs to understand how a given department is operating on a day-to-day basis, using real-time data for this purpose. As such, a user can log into the system in the morning and can be presented with a set of actionable steps to be taken based on the state of the live data in question. A manager can see the higher-level metrics that measure the efficacy of the organization and provide the ability to drill down to troubleshoot as necessary. This is tremendous functionality, but surprisingly, it is a feature that quite often is underutilized by many organizations.

"Timely, data-driven decisions are a core benefit of mobile ERP. Having real-time tools accessible to your mobile workforce—whether sales reps or service technicians—enables them to transact and make decisions based on accurate ERP data, even when they're on the road."

5. Could you share examples of how mobile ERP has empowered businesses in distribution or manufacturing to make timely, data-driven decisions?

The question of mobility can be taken in multiple directions. In one sense there is application-based mobility as represented by things like iPhone apps. A broader form of mobility might relate to simply having a distributed workforce that is working against the same solution from a variety of locations. For the sake of our conversation, let's focus on application-based mobility. Timely, data-driven decisions are a core benefit of mobile application solutions. The key here, in my mind, is having a set of tools in front of your mobile workforce, be they sales reps or service technicians, or delivery resources, to be able to transact in real-time in a manner that allows them to be able to make decisions based on factual ERP data. One great example of this would be the sales automation solution that our friends at Rubber Tree promote. Their solution provides just this kind of access to things like inventory levels and delivery times to allow a salesperson to commit to a sale while on the road and in the absence of the luxuries that come from a desktop office setting. Being able to commit to a delivery when you know you have the unallocated inventory available is quite often a differentiator in the distribution world.

6. What are some key considerations when selecting a mobile ERP solution to ensure it aligns with a company's unique needs?

Software selection in the mobile space is quite similar to software selection in other areas. You first need to understand if you actually have the need for a mobile solution – you want to make sure that mobile solutions are a business enabler and not just a solution looking for a problem. So, that's a matter of prioritization: what are your highest priorities in terms of the gaps in efficiency or effectiveness that your company has? Once your priorities are understood, it's a matter of understanding the specific areas where mobile solutions can help you drive down to a targeted solution. This is not a matter of mobile for mobile's sake. Rather, it's understanding whether your shop floor, your warehouse, or your sales team has needs that can be handled by a mobile solution, and then finding the right solution to address those needs. Mobile solutions tend to be a best-of-breed activity according to functional area, as I don't know of many players in this space who are good at everything. If you have mobile needs in sales, you'd be picking

between a subset of mobile sales automation solutions. If your needs are in field service, you would probably be looking at a different set of solutions. Once you've whittled down your list to the true contenders, it becomes a matter of understanding things like ease of use, the ease of ERP integration, the robustness of the relative feature sets, and which ones have the best ability to solve your problems and the highest ceiling to achieve further tactical goals.

7. How does EstesGroup integrate mobile ERP with other systems like CRM and e-commerce to create a seamless user experience?

Interestingly enough, some of this goes back to our discussion of partnerships. Integration, quite often, is the responsibility of the third-party provider. Third-party solution providers frequently address the interactions with the ERP systems out of the gate, as they are targeting specific systems and not simply creating solutions without the necessary hooks. In these cases, our efforts are mostly focused on the network side and understanding how the systems best interact with the ERP in question and enabling the appropriate connections. This has traditionally been accomplished via opening ports and whitelisting IPs, but there are more elegant solutions that are slowly replacing these older methodologies.

Now, when you're encountering a situation where a customer comes to you looking to configure a solution for the first time, you find yourself going down the solution development lifecycle path and working to understand what the system does, how it needs to interact, and what best practices can be utilized in the construction of a solution. Are you looking to develop your code base using an ERP system's API layer, store the business logic inside of the ERP system, or some combination? These are big questions that affect the efficacy, portability, and maintainability of the solution in question. And similarly, you're looking to do all of this in a manner that is as portable and as secure as possible.

> "Good leaders find a way to move down the field without throwing a Hail Mary. Digital transformation is about building a roadmap with achievable milestones, understanding how digital solutions help achieve strategic goals, and ensuring every step is meaningful and sustainable."

8. What trends in mobile ERP are you seeing, and how do they influence the way businesses operate remotely?

Well, one trend I am seeing is a more nuanced understanding of when mobility is appropriate and when mobility is not appropriate. This goes back 15 years to the example of the shop supervisor who is so busy typing up emails on his BlackBerry that he is not efficiently managing his shop floor. Mobility is a key element of ERP, but it's not the be-all and end-all. There are places and times where mobility will help, such as out in the field, out on the road, and in the warehouse or the shop floor, but there are also times when a good old-fashioned ERP setup with three monitors and a fiber Internet connection is the best way to process the bulk of system transactions. I think we are starting to better understand when mobility is useful and when it is a pernicious distraction.

9. How do you address concerns related to data security and privacy when implementing mobile ERP solutions?

Operating in a distributed manner, whether through mobile apps or VPN desktops, really needs to be based on a carefully developed and secure architecture. Multi-factor authentication is becoming a big deal with ERP, whether it is a mobile app or a web browser-based connection. Interconnectivity comes with a tremendous risk of bad actors, assuming the roles of everyday employees and exploiting them in deleterious ways. EstesGroup has encountered this on several occasions and has helped customers mitigate situations where their connected applications have compromised the underlying ERP system's integrity. An insecure connection has the ability to subvert all of the benefits that you would yield through mobile connectivity. Such great care needs to be taken here. MFA is a start, but I am seeing increasing attention being given to additional layers like MDR/XDR in the attempt to lock down the interactions between elements of an ERP ecosystem.

10. What advice would you give companies considering mobile ERP for the first time to maximize its impact on decision-making and business growth?

Companies looking to implement mobile ERP hopefully understand that it truly is a force multiplier and not just a shiny new object. With that assumption in place, I would recommend taking on an initial project with a clearly defined scope, to avoid some of the challenges that happen with these kinds of expansionist initiatives. Clear scope keeps you focused on clear goals, and these are relatively easy to measure and act upon. It should also be understood that a successful mobile implementation sits on top of a successful ERP implementation. If your data is a mess, if your processes are inconsistent, if your administration of the application is lazy, you will likely exacerbate these problems with a mobile solution, because you are automating chaos. We don't build skyscrapers on sand.

About Brad Feakes

Brad Feakes joined the EstesGroup in 2014 and currently manages daily operations, focusing on the convergence of Enterprise Resource Planning (ERP) and cloud technologies. Brad has more than 25 years of experience in manufacturing, construction management, supply chain, and ERP systems, and has helped companies over the decades embrace emerging technologies to stay competitive and drive business value. To that end, Brad works to help organizations plan and execute cloud migration strategies as a vehicle for process improvement and business optimization. His experience includes systems analysis, Six Sigma, Lean, Business Process Management, and Value Stream Mapping. He leverages his background to help companies, especially manufacturers and distributors, benefit from the simplicity of private and hybrid cloud solutions for complex business environments. With his focused mission of implementing and managing business applications in an increasingly cloud-centric environment, Brad enjoys helping clients deploy new technology as the vehicle for business process improvement.

About Estes Group

EstesGroup, a leader in combining technology and cloud solutions with Enterprise Resource Planning (ERP), provides comprehensive business services and solutions. With a focus on infrastructure, artificial intelligence, and IT management, EstesGroup builds solutions around your company's needs. Unlock your company's full potential with EstesGroup's game-changing EstesCare Services. Our powerhouse suite of subscription-based solutions is revolutionizing how businesses operate in today's fast-paced digital landscape. EstesGroup was founded in 2004 in Estes Park, Colorado, and in 2014 we moved our headquarters to Loveland, Colorado.

Mobile ERP: Solutions for Modern Manufacturing

Manufacturers have a lot to gain by switching from outdated manual processes or even a legacy planning system to a mobile ERP solution. This article elaborates on the many benefits and modern capabilities of mobile ERP software in the manufacturing industry.

What is Mobile ERP?

Most manufacturers are familiar with or have long utilized ERP software, or enterprise resource planning software. It helps production, operations, finance, accounting, human resources, and other teams track and manage fundamental manufacturing processes. ERP connects and consolidates those various aspects of a manufacturing business for greater visibility, awareness, insight, and control over its operations.

However, many manufacturers still rely heavily on manual, paper-based, or spreadsheet-driven processes. Alternatively, manufacturers limp along on outdated legacy systems that lack the modern interfaces and capabilities needed in today's ever-evolving working environment.

Mobile ERP provides an easy and modern transition for manufacturers. It's an ERP solution that can be accessed through a mobile device such as a phone or tablet, in addition to the traditional browser-based user interfaces. Let's explore the benefits of mobile ERP over legacy ERP and manual processes.

Mobile ERP Software Benefits

Mobile ERP software provides a series of notable benefits to manufacturers, including *enterprise mobility for creating an agile business*. Below are the most important ones to ensure that you understand what it can bring to your operations and that your selection has what you need.

Article from Rootstock

1) Real-Time Access to Reporting Data

Mobile ERP software allows employees at all levels of an organization to access data in real-time from cloud-based systems using a phone, tablet, or any connected device. Being able to store and retrieve information instantaneously and with just a few clicks facilitates more accurate insights, improved decision-making, and increased collaboration. Additionally, it eliminates the need for purchasing and maintaining IT systems, servers, and data storage infrastructure and equipment, as well as training employees how to use and maintain them.

2) Mobile ERP Can Be Accessed from Anywhere

Having the freedom and flexibility to collect or retrieve data from any connected mobile device increases productivity and efficiency. Shop floor employees can save time since they don't have to find a tethered computer to access or document relevant data; they can simply interact with ERP for mobile from anywhere they have a wireless mobile, wi-fi, satellite, or other internet connection. Furthermore, manufacturers managing production at multiple facilities and locations, and at customer sites, can be sure remote, service, and field workers have access to the data they need at each location.

By providing manufacturers with universal, real-time access to the critical data workers need through their mobile phone or tablet, *Rootstock mobile ERP*, launched in 2017, has become the trusted choice of manufacturing enterprises all over the world.

3) Print & Scan QR Codes and Bar Codes

Barcodes and QR codes significantly expedite and simplify the process of inventory and logistics management, cutting costs and saving time for your manufacturing enterprise. Barcode scanning is reliable, fast, and easy to use, allowing employees to track products and equipment with effortless efficiency. Mobile ERP software enables your employees to print and scan barcodes and QR codes on the shop floor, in the warehouse, and virtually anywhere else without interrupting their work. It also enables manufacturing workers to capture pictures, scan important documents, and upload files to the cloud so critical information can be accessed and seen collaborators, colleagues, suppliers, customers, and others.

> "Large manufacturers are expected to have mobile capabilities for instant answers, and even small manufacturers now have access to cloud ERP and mobile ERP capabilities without the expense of traditional software."

4) Improve Collaboration with ERP for Mobile

With access to company, worker, inventory, operations, supply chain, and other critical data available through their mobile devices, ERP software for mobile facilitates effective communication and collaboration amongst your employees. Collaboration is blocked or slowed if workers have no access to data and insights outside of their immediate field of view. Mobile ERPs, especially ones with real-time social collaboration features like *Salesforce Chatter*, enable your employees to stay connected and up to date, sharing files and information easily and communicating promptly and efficiently from anywhere on the shop floor, on the road, or a customer's facility.

5) Create Custom Mobile Applications Tailored to Business Needs

Mobile apps have become ubiquitous for easy and on-the-go access to information. Many mobile ERP software provides the ability to build applications customized to your unique business needs. The Salesforce Cloud Platform includes a feature called *Flow*, which allows users to quickly build mobile apps to suit unique business processes, custom workflows, and role-specific tasks using a simple point-and-click interface. These features let even non-technical users build entire applications just the way you want, tailored to your business, using clicks, not code. With Rootstock, these customized applications can be published and utilized quickly to reduce training time and costs, increase productivity, speed up tasks, and more.

See the team at Equipter, a leading construction equipment supplier, use Rootstock Mobile ERP in action.

Mobile ERP Applications for Manufacturers

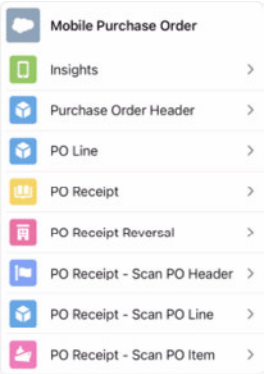
Using ERP for mobile with Flow, manufacturers can build their own application workflows specifically tailored to their manufacturing processes and operational needs. Here are just a few examples.

Mobile Inventory Management

With Rootstock's mobile inventory application, users can check stock levels at various locations, adjust inventory status and location, add or remove inventory from inventory containers, and a plethora of other *inventory management functions*, all from their mobile device and in real-time.

Purchase Order Management

Using Rootstock mobile applications' purchase order management feature, manufacturers can view and manage purchase orders, purchase order receipts, and changes to inventory resulting from recent purchase orders from the shop floor, a customer's location, or anywhere using a mobile phone or tablet.



Work Order Management

Rootstock's work order management application enables your employees to view, process, issue, and manage work orders from their mobile device, including material selection and receipt.

> "Rootstock mobile ERP on Salesforce provides the features your manufacturing company needs to stay ahead of the competition."

Sales CRM

Rootstock's mobile application is *natively integrated with Salesforce CRM* so manufacturers can view and manage sales order fulfillment as well as manage material allocation, issue, packaging, and shipment from a mobile phone or tablet.

Rootstock Cloud ERP Mobile App is Available on Android and iOS

Manufacturing is currently undergoing a digital revolution. Manufacturers that are falling behind are put at a distinct disadvantage. Large manufacturers are expected to have mobile capabilities for instant answers, and even small manufacturers now have access to cloud ERP and mobile ERP capabilities without the expense of traditional software.

Rootstock mobile ERP on Salesforce provides the features your manufacturing company needs to stay ahead of the competition. It empowers teams with easy-to-create, customized applications tailored to your business's unique needs.

Rootstock Cloud ERP Mobile app is currently available for download on both iOS and Android devices, or can be accessed via any browser on mobile Windows and Mac laptops.

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.

Article from Rootstock

UK Midmarket Manufacturing Report

Key Tech Trends, Best Practice and Future-Proofing

Executive Summary

Talking about manufacturing and manufacturers usually means the big UK names, such as Rio Tinto, Unilever, GlaxoSmithKline and BAE Systems. Yet according to the *business population estimates for the UK and regions in 2023*, there are 5.6 million private sector businesses in the UK. 5.51 million of those are classified as "small" (0 to 49 employees) and 36,905 as "medium-sized" (50 to 249 employees).

The overwhelming majority of UK manufacturers are in the midmarket, a sector we know well and one on which we wanted to focus this report.

UK Midmarket Manufacturing Report: Key Tech Trends, Best Practice and Future-Proofing looks at the specific concerns of the UK midmarket and explores how these organisations are coping with digital transformation, with a particular focus on ERP and the cloud.

Many midmarket manufacturers began life as factories or workshops—traditional businesses that were the basis for the UK's reputation as a nation of manufacturing excellence. This meant, though, that they were perhaps slower to modernise than businesses in other sectors.

Our research certainly reflected this. Many respondents are using cloud-based ERP, but more than twothirds (68%) of midmarket manufacturers believe that the cloud is an untapped opportunity for their company. More than half (54%) say their organisation's lack of cloud usage means they aren't seeing the benefits of technologies such as AI and IoT.

Cloud-based ERP is being used but not everyone is doing so in a way that unlocks its full potential. And that's a problem because ERP was identified as a technology of the highest importance. If their ERP system went down for a day, almost half (47%) of midmarket manufacturers would expect a revenue loss, and 38% would anticipate reputational damage.

Any midmarket manufacturer should prioritise utilising ERP in the cloud. This whitepaper will present the full findings from our research and provide guidance on how businesses should approach cloud-based ERP.

Article by
David Coste,
President, North and Western Europe, Forterro
FORTERRO

Introduction

UK midmarket manufacturing has endured a challenging few years. Anecdotally, many of our customers have found the ongoing trade restrictions that emerged post-Brexit to be a significant barrier to growth and, in some cases, survival.

This was followed by the global pandemic, which put vast pressure on supply chains and, for many manufacturers, meant trading was heavily disrupted during 2020/2021. When the pandemic appeared to be subsiding, the war in Ukraine and the subsequent cost-of-living crisis meant that the price of doing business became disproportionally and prohibitively high. Our research found that more than four in 10 midmarket manufacturers believe global economic and political uncertainty to be their industry's biggest challenge.

When you factor in a skills shortage and a growing requirement to do business more sustainably, it's clear that UK manufacturing is at something of a crossroads. In summer 2024, the heads of the Trades Union Congress (TUC) and Make UK launched a joint report that highlighted this and warned the government that 'rapid action is required to launch a long-term industrial strategy, or risk losing billions of pounds in investment abroad.'

One critical factor highlighted in the report was the lack of digital skills required for businesses to adopt new technologies. This certainly aligns with our research. Another major industry challenge cited by the business leaders we surveyed was talent acquisition.

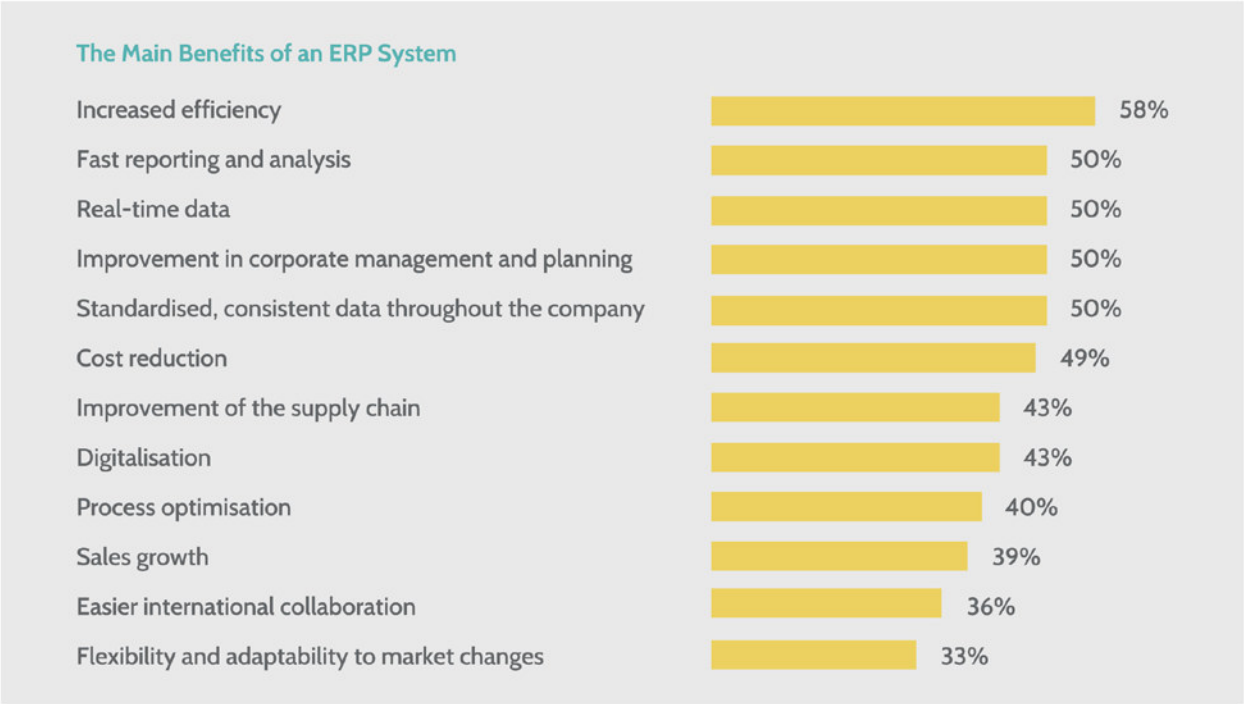
This is exacerbated further when you look at the trend towards cloud ERP. This can be a powerful tool for manufacturers, offering benefits such as high availability and greater processing speed and performance. While our research found that most manufacturers are already deploying ERP in the cloud, around one-third said that budget and skill constraints were a significant barrier to further progression.

We conducted research with 100 decisionmakers at UK midmarket manufacturers to find out their biggest challenges, how they are using ERP, and how they can more fully embrace ERP in the cloud in the future.

The following report explores those findings and provides recommendations for any midmarket manufacturer looking to implement cloud ERP.

The ERP Landscape for UK Midmarket Manufacturers

ERP is firmly established as a technology used by UK midmarket manufacturers. Its benefits are widely recognised, helping businesses with everything from increased overall efficiency to the provision of realtime data.



Article by David Coste

Although ERP is seen as hugely beneficial, many midmarket manufacturers have been using the same system for a long time. Almost half of respondents (49%) have used their current ERP system for three to five years, while 21% have used it for at least six years. Is this because the current system works perfectly, or is it because of inertia or a perceived lack of time and resources to make a change?

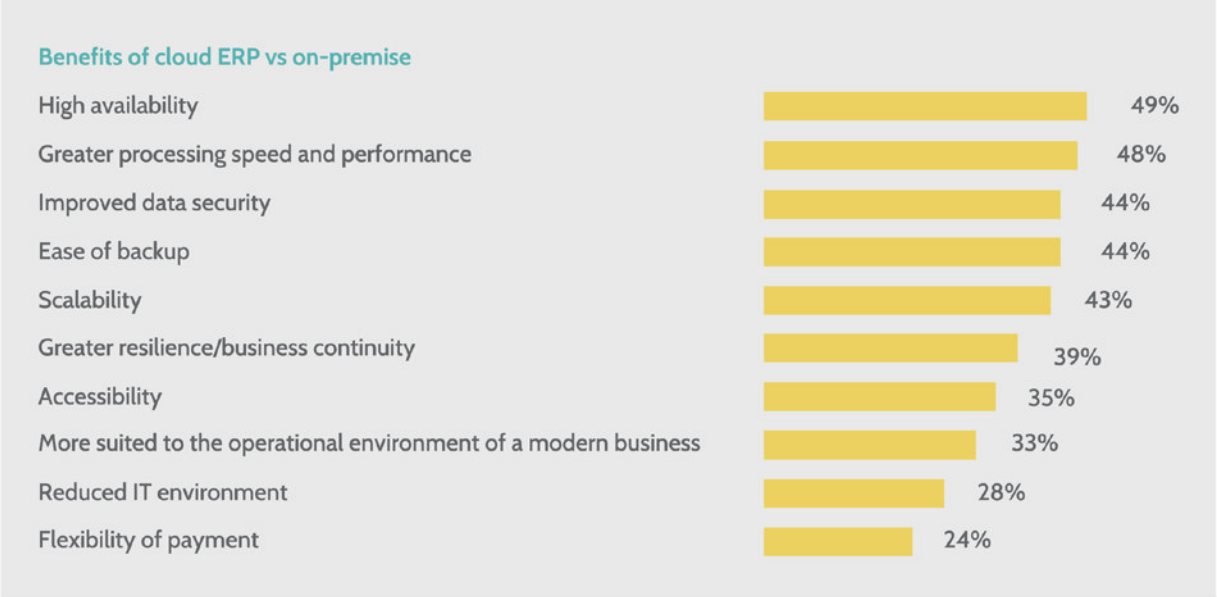
Our findings suggest the latter, with more than eight in 10 UK midmarket manufacturers either in the process of switching, planning to switch or considering the possibility.

Cloud ERP vs. On-Premise ERP

The cloud has penetrated UK midmarket manufacturing more than one might expect. 40% of respondents have their ERP system delivered via cloud, while a further one-third use a hybrid model. Yet more than one-quarter (27%) still rely on an on-premise ERP solution. With cloud and other digital transformations set to become ubiquitous over the next few years, how will cloud ERP latecomers fare in the future?

Most manufacturers in the study want to continue with the delivery model they are currently using. That still means almost three-quarters of UK midmarket manufacturers prefer either cloud-based (43%) or hybrid (29%) ERP systems for the future. Yet 27% would like to continue with on-premise solutions – a potential sticking point, as on-premise is already a model that is in decline.

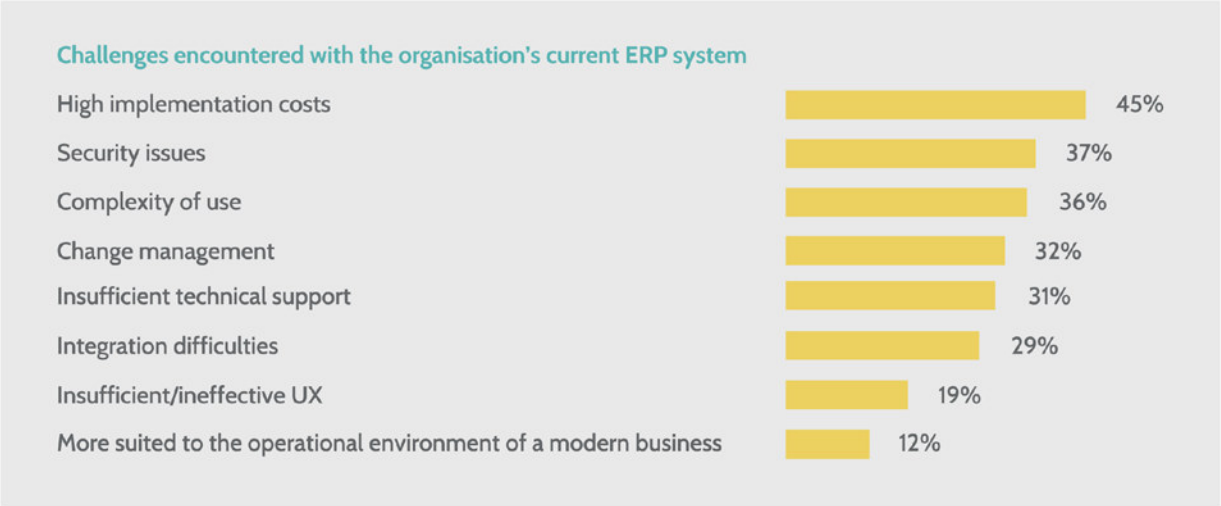
Respondents were clear about how they believed cloud ERP was an improvement compared to onpremise ERP. High availability and greater processing speed and performance were the two most significant qualities identified, followed by ease of backup, greater data security and scalability.



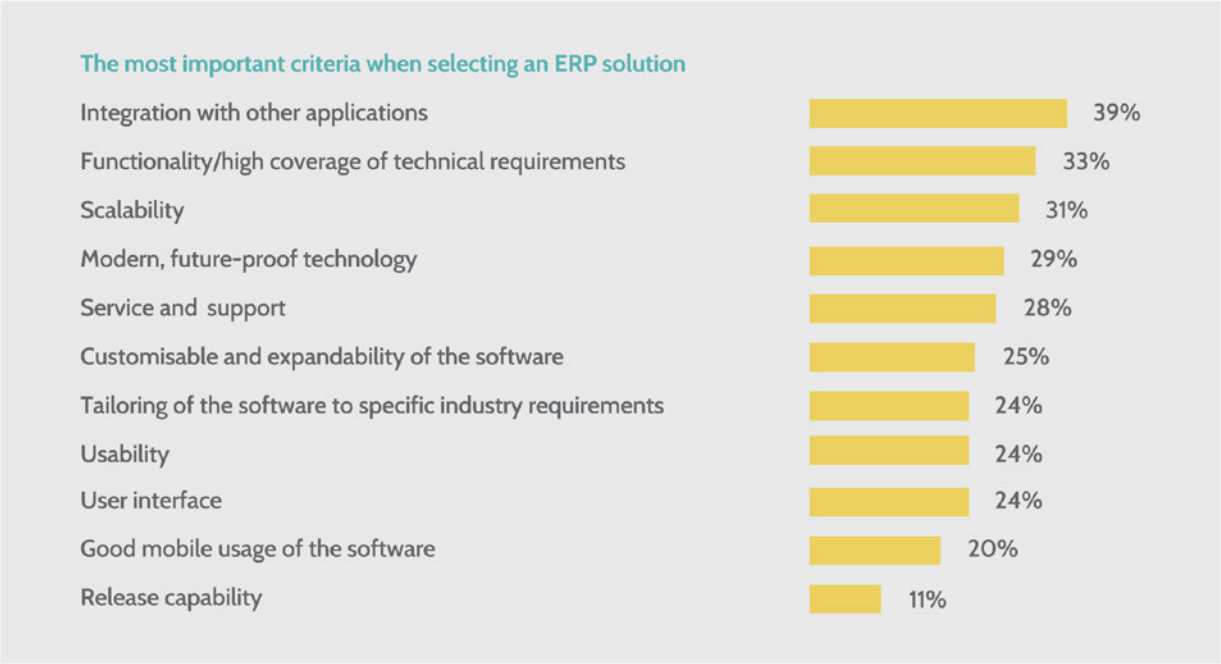
The main barrier to cloud ERP adoption was a concern over data security, loss, and leakage. This illustrates that some in the sector are still uncertain about technology. Yet the right cloud provider offers much greater security than the manufacturer on its own, given that it has invested in enterprise-grade cybersecurity protection.

ERP Challenges and Opportunities

27% of UK midmarket manufacturers are keen to remain using on-premise and there are certain subsectors within manufacturing to which on-premise ERP is suited and preferred. Yet no system is perfect. While a fortunate 12% had experienced no challenges whatsoever, a broad range of other challenges were identified.



But with every challenge comes an opportunity. Switching ERP systems can be a transformative change for a midmarket manufacturer, capable of overhauling operations and delivering significant business benefits. The most compelling reason for switching to ERP was the need for integration with other applications, highlighting the complexity and interconnectivity of the modern tech stack. Qualities such as scalability and modern, future-proof technology scored highly.



There was a clear winner when it came to the most desired ERP system add-ons or extensions. Almost half (48%) of UK midmarket manufacturers would like AI functions such as predictive maintenance and predictive logistics, while 45% see the most value in business data intelligence add-ons.

Article by David Coste

The Current Status of UK Midmarket Manufacturing

Given some of the challenges that we've already discussed for midmarket manufacturers, it is clear that the industry is in a period of flux. Global political uncertainty was the principal industry issue identified by respondents, and that's unlikely to recede any time soon. This means that manufacturers need to prepare for the unexpected and put in place measures that will help, such as protecting the supply chain.

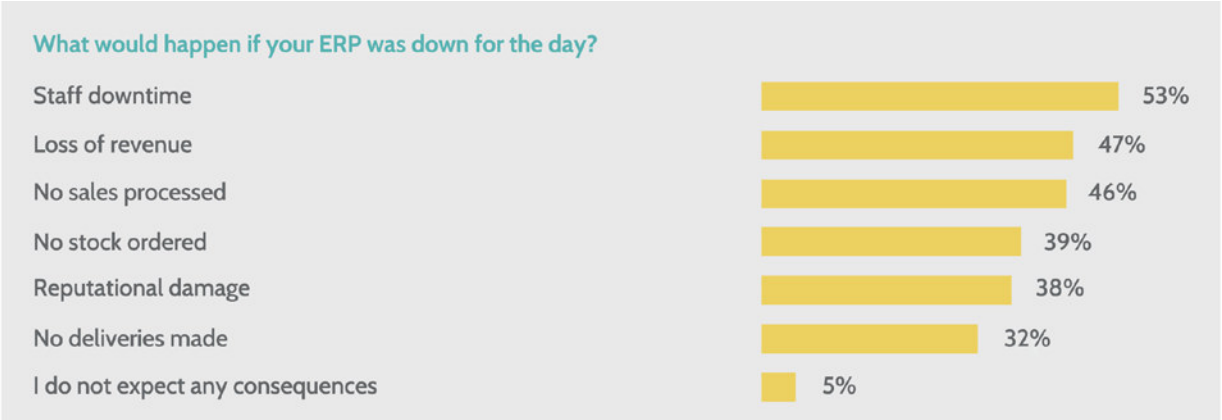
Almost half of respondents said their organisation would localise its supply chain to gain more control over its operations and reduce costs.

Although sustainability wasn't mentioned as a key challenge, it is on the agenda of many UK midmarket manufacturers. The Plastic Packaging Tax has significantly impacted the midmarket and it's a constant challenge to do business more sustainably. 84% said that sustainability is a priority for their organisation, and 81% stated that ERP helps their organisation operate more sustainably. As almost three-quarters of respondents say that operating more sustainably has increased their profitability, the importance of ERP is further reinforced.

The Importance of ERP

It is not in question that ERP has become an important technology for many midmarket manufacturers in the UK. We wanted to explore just how vital ERP systems are. What might the consequences be if an ERP system were to go down for a day?

The results showed that the consequences are severe. Staff downtime was the most cited answer, followed by loss of revenue. However, the long-term damage to the company's reputation and brand might be even more critical. Once an organisation acquires a reputation as inefficient and unable to fulfil deliveries, it can be hard to change perceptions.

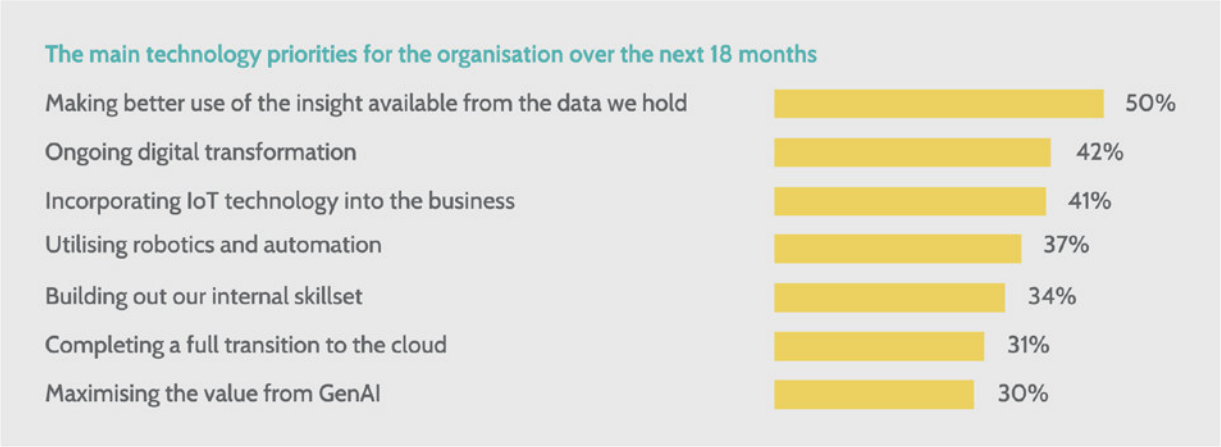


However, revenue and cash-flow are fundamental to most manufacturers. If an ERP system went down for the day, how much money could be lost? The amounts are alarming. 12% of respondents expect to lose between £10,001 and £15,000 in one day of ERP downtime, while one in five midmarket manufacturers would expect to lose more than £100,000. £41,888.30 was the average amount a UK midmarket manufacturer would expect to lose if ERP went down for a day, highlighting the need for ERP systems to have the highest of availability.

Future Priorities and Technology

There were also clear leaders when our research turned to manufacturers' future priorities. Given the current cost of doing business in the UK, it was unsurprising that cost reduction (46%) was the biggest priority for nearly half of UK midmarket manufacturers. Security was the next highest future priority, with 40% of respondents.

Again, given the volume and complexity of cybersecurity attacks in the manufacturing sector, a focus on security and safety is no surprise. Regarding technology adoption, it was clear that ongoing digital transformation was critical. That was the second biggest technology priority cited (behind making better use of data) and shows that UK midmarket manufacturers have a keen eye on using technology to improve operations.



However, more than half of respondents say their organisation's lack of cloud usage means they aren't seeing the benefits of technologies such as AI and IoT, so in many cases, the business is not fully aligned with future priorities.

Conclusion

While the midmarket manufacturing industry has embraced the cloud—to greater or lesser degrees—more than two-thirds (68%) of manufacturers say that the cloud is an untapped opportunity for their company. A similar amount (67%) believes that manufacturers who resist switching to the cloud will struggle to retain market share.

For any midmarket manufacturers looking to get more from their cloud ERP deployment, there are three principal considerations to make. Working with a cloud ERP provider that uses AWS means all the benefits of AWS innovation, infrastructure knowledge, scalability, and best practices can be passed on to them.

Manufacturers should also use the standard product as much as possible and not consider customising it. With a cloud subscription, you benefit from the vendor's integrative and incremental improvements and additions of new features and functionality. If you have a customised version, that's different. It won't evolve the same way and will slow you down in adopting new features.

Finally, your people are the most crucial element to consider. Rolling out any new system takes work. People need to get used to it and be provided with the requisite digital training. Talent acquisition and retention were issues for many research respondents, and equipping people with the skills to do their jobs effectively is integral to that.

Methodology

The research was conducted by OnePoll during June and July 2024. 700 decision-makers were surveyed as follows:

- Sweden - 100 decision-makers in midmarket manufacturers
- France - 200 decision-makers in midmarket manufacturers
- Spain - 200 decision-makers in midmarket manufacturers
- UK - 100 decision-makers in midmarket manufacturers
- UK - 100 decision-makers in midmarket e-commerce companies
- All respondents worked in organisations with between 10-499 employees.

FORTERRO

Article by David Coste

What Is Mobile ERP? Benefits and Features

The global market for enterprise resource planning (ERP) software is expected to continue along its multibillion-dollar growth path, and it's little wonder why: By centralizing real-time data and automating many critical business processes, ERP has helped businesses become more operationally efficient and better able to make strategic decisions. Increased adoption of cloud-based ERP has also been advantageous for businesses with remote workforces spanning different geographies and time zones. The next logical extension? Mobile ERP, which allows workers to access and use an ERP system directly from their mobile devices. Among the business benefits, to be explored in this article, are productivity gains, greater internal collaboration and stronger customer relationships.

What Is Mobile ERP?

Mobile ERP means business users can log in to use *ERP software* on their mobile devices, including smartphones and tablets, from any location and at any time. As such, they can easily obtain the information they need to do their jobs more effectively, add data at the point of capture to streamline workflows and process transactions to bring in more revenue. Team leaders and executives are also able to manage critical day-to-day business processes, working with the same real-time data that resides on a centralized platform. Another advantage? Early discovery of workflow inefficiencies, supply chain bottlenecks and possible cash flow interruptions, which can be then managed and/or resolved before they become bigger issues that impact customers and businesses alike.

Article by
Lisa Schwarz ,
Senior Director of Global Product Marketing, Netsuite
ORACLE NETSUITE

Key Takeaways

- Mobile ERP keeps remote employees connected to the business via their mobile devices.
- Key features of mobile ERP include access to real-time information, offline access, and security and access controls.
- Mobile ERP can quickly scale to support mass deployment, company growth and new features.

> "Mobile ERP keeps remote employees connected to the business via their mobile devices."

Mobile ERP Explained

Mobile ERP is not just about empowering a mobile workforce. It's also about streamlining processes, improving productivity, making smarter decisions and growing the business by extending an ERP system's reach to employees wherever they may be. Accessible via a browser-based interface or mobile application, mobile ERP should be easy to navigate and readily adaptable to smaller screen sizes (known as responsive design), yet still provide full functionality that includes the ability to manage workflows, complete tasks and view real-time data, from client information and sales histories to inventory levels and employee performance metrics. Mobile ERP works in sync with a company's ERP system to ensure that everyone works with the same information.

How Does Mobile ERP Work?

A *significant ERP trend* for the foreseeable future, mobile ERP serves as a portal into an ERP system. Using any mobile device supported by the ERP application — and depending on the ERP itself — employees should be able to do anything they would be able to do from their desktop computers, such as track orders, monitor financials, view dashboards and generate reports. Mobile ERP typically connects to a cloud ERP back-end system through a secure API that delivers the requested information and services to the mobile device. Workers are typically granted access only to the features and functionalities necessary to do their jobs, enhancing data privacy and security.

Benefits of Mobile ERP

With 92 million employees working remotely part or full time in the U.S. alone, mobile enablement has increasingly become a standard software feature. Mirroring the ERP systems on which they rely, mobile ERP offers a multitude of *business benefits* that can result in increased revenue, decreased costs and greater profitability.

Access to Real-Time Information

The business world moves quickly, and companies must move just as fast. Mobile ERP provides employees with entry to real-time data collected from across the organization and stored in a central database so that every division is working with the same information. With the most up-to-date data at their fingertips, salespeople, for example, can determine product availability, field technicians can download the latest procedures for maintaining hardware and accountants can track payments.

Enhanced User Experience

A well-designed mobile interface that optimizes the ERP's layout for best viewing on a mobile device's screen makes it easy for employees to navigate the system, so they can accomplish their workflow tasks, improve their response times and keep business flowing. Around-the-clock access, offline capabilities and personalized interfaces are additional ways to enhance the user experience.

Increased Productivity

Rather than having to return to their desks to view documents, input purchase data, work on a budget or answer customer queries, employees are able to conduct these activities, and many more, on the spot, courtesy of mobile ERP. This permits workers to make the most use of their time — imagine a salesperson with 10 minutes to spare before an appointment logging into the mobile ERP to review the customer's purchase history. It also speeds workflows, reduces response times and frees employees' time to conduct additional business.

Improved Collaboration

In their personal and professional lives, people are accustomed to connecting to the internet and to colleagues in their networks via their mobile devices. Mobile ERP builds on that behavior. Mobile ERP makes it easy for employees in widespread locations and from different departments to brainstorm on projects, share documents and expedite approval

processes. Moreover, automatic notifications can alert workers when messages arrive or tasks require their attention, which also enhances collaboration.

Scalability

Business success and business growth go hand in hand. As part of cloud-based ERP software, mobile ERP can easily grow to accommodate new users, new capabilities, simultaneous workloads and ever-growing volumes of data, without affecting system performance.

Cloud Storage

Speaking of the cloud, businesses that subscribe to *cloud-based ERP* put responsibility for storage infrastructure, such as storage servers, in the hands of their cloud providers. Mobile ERP users can securely retrieve real-time, encrypted data from anywhere, at any time. The cloud vendor is also responsible for maintenance, data backup and recovery, regulatory compliance and software updates or patches.

Business Agility

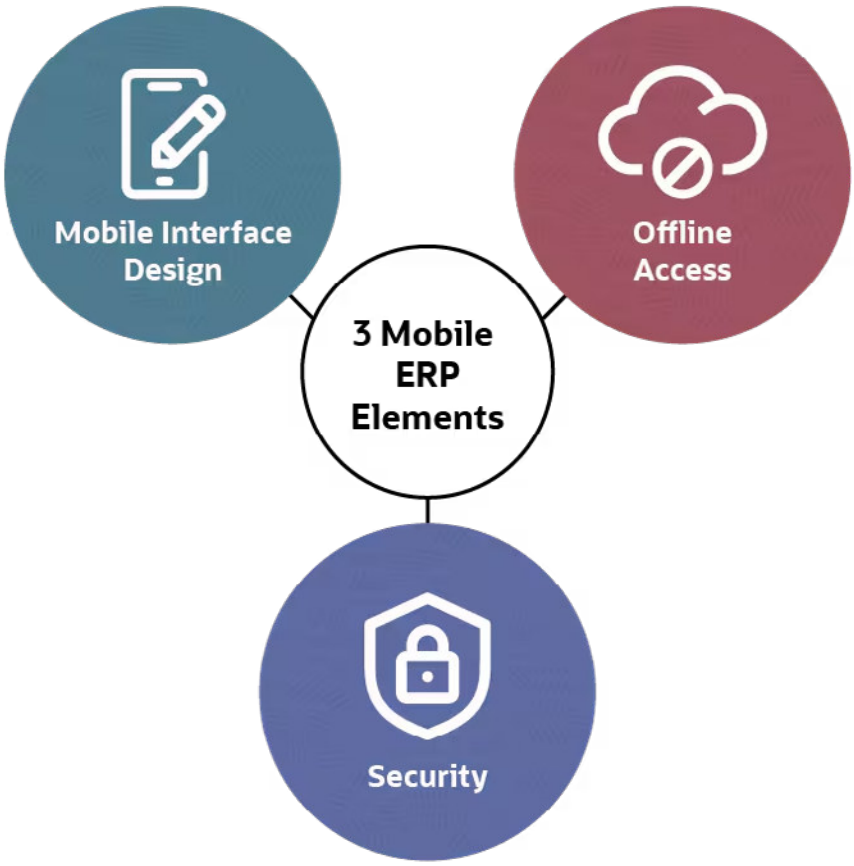
Companies that adapt quickly to the ever-changing business environment have enjoyed increases in financial and operational performance, innovation, decision-making speed and customer satisfaction, according to McKinsey. Key to this agility, which also helps businesses capitalize on new opportunities and outperform their competitors, is decision-makers having 24/7 access to real-time data and to each other. Mobile ERP enables both.

Streamlined Supply Chain

Companies are under continuous pressure to tightly manage their global supply chains, a stress exacerbated by the COVID-19 pandemic and increasingly sophisticated cyberattacks. *Supply chain management* requires around-the-clock, end-to-end visibility across vendors, customers, warehouses and partners to head off any potential disruptions that could impact the ability to source, produce or deliver quality goods and services as cost-effectively as possible. Mobile ERP allows businesses to connect with their supply chains, pinpoint weak links and streamline operations.

Key Elements of Mobile ERP

Mobile ERP must be able to replicate the desktop experience. That includes access to various *ERP components*, or *modules*, that are dedicated to specific business functions, such as finance, human resources and *customer relationship management (CRM)*. That said, working from smaller screens across the public internet requires a few key considerations inherent to the mobile experience.



Mobile ERP must take into account readability on small screens; offline access, if internet connection is unavailable; and security features, such as encryption.

Mobile App Interface

A mobile ERP may sport all the bells and whistles, but without a well-designed, user-friendly interface, employees may become frustrated or even resist adoption. A general rule of thumb: Simple is better.

- ***User interface (UI) design considerations:*** Important UI features include automatic adaptation to different screen dimensions, as well as intuitive and customizable navigation, so employees can easily access the features they use most. Streamlining the number of steps in a workflow is also helpful, as is making sure employees of all abilities are able to operate the app.

- ***Data visualizations:*** Charts, diagrams, graphs and the like can require scrolling or zooming in to highlight areas of interest on smaller screens — for example, when a table has too many columns and/or rows. Uncompressed images can also slow page-loading times, which, in turn, drain a device's battery — and people's patience.

Offline Capabilities

A router malfunctions. Wi-Fi goes down during a storm. An area has poor internet coverage. Work must go on. What's Plan B for mobile ERP?

Offline functionality: A mobile ERP should offer offline functionality, where employees can access and modify data stored on their local mobile devices. This is analogous to working from the hard drive of a desktop computer.

Data synchronization: Once the device reconnects to the internet, data should automatically upload and synchronize to the central platform.

Security Features

It stands to reason that business-critical data that travels over the internet requires strong security, and mobile ERP is no exception. Security measures for mobile ERP applications generally fall into three categories:

- ***Data protection:*** Strong authentication methods, including multifactor authentication, can protect data by preventing unauthorized users from gaining mobile ERP entry. Establishing secure enclaves within a mobile device is another form of protection, as is mobile device management for ensuring adherence to security policies.

- ***Role-based access controls:*** Role-based access controls enforce the principles of least privilege, limiting users to specific data and functions in accordance with their responsibilities.

- ***Encryption and secure communication protocols:*** Encryption is a security technique that encodes data at rest and in transit, so it can be read, or decrypted, only by authorized staff. Secure communication protocols, including HTTPS, SSH and SSL/TLS also encrypt data and establish secure remote access.

Features of a Mobile ERP Solution

Leading mobile ERP solutions should be as *feature-rich* as their desktop counterparts so businesses can manage their operations from anywhere, through department-specific ERP modules that support front- and back-office functions, such as accounting, inventory management and procurement. Here are eight key features and functions businesses should expect an mobile ERP solution to have.

> "Key features of mobile ERP include access to real-time information, offline access, and security and access controls."

Reporting and Analytics

Modern ERP systems store a wealth of business insights that help employees, including those out in the field, perform their jobs better and make smarter, data-informed decisions. Mobile ERP provides employees with access to *actionable reports* and analytics that support operational strategies, shed light on what's working and ferret out areas that need improvement.

Offline Capabilities

Remote workers may not always have an internet connection. When that occurs, a mobile ERP solution should be able to access an offline repository where ERP data and functionalities are maintained so that employees can carry out their tasks. Once their mobile devices go back online, the updated information should synchronize with the central application.

Article by Lisa Schwarz

Real-Time Data Access

Providing employees with up-to-the-minute information about business operations and results requires the collection and delivery of data from wherever they might be. This is essential for maintaining a continuous flow of information and supporting agile decision-making processes.

Workflow Management

Projects are at the heart of business operations, and managers need to plan, create and execute efficient workflows to see them through. With mobile ERP, team leaders can closely *manage workflows*, even when they're not physically present to oversee them. Employees, too, can stay on top of their roles in workflow plans by using mobile ERP systems.

Inventory Management

Inventory includes raw materials, components and finished goods, all of which require careful *inventory management*. After all, no business wants to run out of inventory, affecting its ability to manufacture goods, meet customer demand and increase its revenue and cash flow. The same is true of overordering, which ties up funds in unused/unsold merchandise, increases carrying costs and reduces cash flow. Mobile ERP provides 24/7 access to real-time inventory data, so managers can plan for demand and make on-the-spot decisions that lead to cost savings, improved cash flow and higher customer satisfaction.

Supply Chain Management

Turning raw materials into finished goods and services that wind up in customers' hands necessitates a well-managed supply chain in which each touch point in the chain operates at maximum efficiency. All it takes is one bottleneck to disrupt its flow, which is why constant monitoring is a must. Mobile ERP provides *end-to-end visibility* across multinational supply chains so managers can check that all parts are working in harmony and on schedule. Any problems, or potential problems, along the way can be proactively managed, including communicating delays to customers.

> "Mobile ERP can quickly scale to support mass deployment, company growth and new features"

Sales and Customer Management

Mobile ERP extends CRM capabilities to mobile devices, allowing sales, marketing and customer-service teams to manage leads, customer interactions and sales processes effectively. CRM also gives companies a holistic view of their customer base and revenue, improves team collaboration and supports an overall customer-centric approach.

Security and Access Controls

Mobile ERP should be built with security and access controls so that only authorized users can get into the parts of the ERP they need to perform their jobs. This requires the ERP provider to adhere to *security best practices*, such as creating a documented ERP security strategy, instilling good password hygiene and constant monitoring of threat intelligence.

Mobile ERP Challenges

For all of mobile ERP's many benefits, businesses may encounter a few technical challenges to navigate, especially when trying to retrofit mobile enablement to legacy software. Hurdles relate to system compatibility, security and how much work can be accomplished from a small screen. Here are some points for businesses to keep in mind.

Compatibility Issues With Existing ERP Systems

Incompatibilities between a mobile ERP and existing infrastructure and software can create data silos, disrupt business processes and inflate costs, due to the need for custom solutions. Companies should confirm compatibility and then roll out a small pilot project to ensure that the mobile ERP works as planned.

Security Concerns Related to Mobile Devices

Mobile ERP requires strong security guarantees. Not only can mobile devices be stolen or lost, but each device and connection over the public internet expands a business's attack surface. To minimize security risks, companies should add multifactor authentication, enforce end-to-end encryption and have the ability to lock out suspicious mobile users.

Potential Limitations in Functionality Compared to Desktop Versions

The extent of a mobile ERP's functionality will depend on the ERP in use. If the mobile ERP doesn't

match the full functionality of its desktop counterpart, its use and effectiveness can only go so far. Employing middleware, developing custom integrations or devising a plan for data migration and synchronization are all options to bridge the gap, but they incur additional costs and are time- and resource-intensive.

Take Control of Your Business From Anywhere With NetSuite Mobile ERP

The mobile workforce is here to stay, and organizations' reliance on their ERP software continues to grow. *NetSuite's mobile app for ERP*, which debuted in 2015, reflects both realities. The app is easy to navigate and provides a unified experience across iOS and Android devices. Mobile employees can tap into real-time operational data and performance metrics, manage their teams and workflows, collaborate across departments, search records, generate reports and collect data at the point of service. These access-anywhere capabilities result in greater business agility, reduced costs and opportunities to uncover information your business can use to identify new opportunities.

Business operations have long passed the tied-to-your-desk days of 9 to 5. Mobile ERP solutions grant an increasingly mobile workforce entrée into their companies' ERP software from their smartphones and tablets around the clock, wherever they are. Employees have everything they need at their fingertips to perform their jobs, leading to gains in productivity, operational efficiencies, internal collaboration, stronger customer relationships — and a healthy bottom line.

Mobile ERP FAQs

What is a mobile ERP?

Mobile ERP provides entry to a company's enterprise resource planning system via mobile devices, including smartphones and tablets.

What is the importance of mobile ERP?

By providing access to real-time business data, mobile ERP allows workers to make decisions faster and to provide data at the point of capture, improving the quality of business intelligence, reducing operations costs and helping the company become more agile.

Is ERP an app?

ERP is software businesses use to manage their daily operations. A mobile ERP app provides access to the ERP from an employee's smartphone or tablet, from wherever they are working.

About Lisa Schwarz

Lisa Schwarz is Senior Director of Global Product Marketing for the Oracle NetSuite Global Business Unit. She is responsible for driving the go-to-market messaging and positioning for NetSuite solutions. Prior to this role, Lisa served as Senior Marketing Director for NetSuite Commerce products, focusing on creating awareness and demand generation activities. Prior to joining NetSuite in 2012, Lisa held a variety of roles, including Director of Ecommerce, Latin America Marketing Manager and Enterprise Service Marketing Manager at Sun Microsystems (acquired by Oracle).

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.

ORACLE NETSUITE

The Impact of Mobile ERP Software on Field Service Operations

Field service operations play a crucial role in the success of many businesses, especially those in industries such as construction, telecommunications, and utilities. Ensuring that field technicians are equipped with the right tools and resources is essential for maximizing efficiency and productivity.

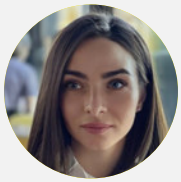
Increasing Efficiency and Productivity in Field Service Operations

In this article, we will explore how implementing software solutions can help streamline field service operations and drive business success.

Challenges in Field Service Operations

Field service operations face numerous challenges that can impact efficiency and productivity. These challenges include managing a large workforce, scheduling appointments, tracking inventory, and providing timely service to customers. Without the right systems in place, these challenges can lead to inefficiencies, delays, and increased operational costs.

According to a recent study by Field Technologies Online, 52% of field service organizations still use manual methods to manage their operations, such as pen and paper or spreadsheets. This outdated approach can result in human errors, inefficient processes, and missed opportunities for optimization.



Article by
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The Benefits of Field Service Management Software

Field service management software offers a range of benefits for businesses looking to improve the efficiency and productivity of their operations. One of the key advantages of using software solutions is the ability to automate and streamline processes, reducing the risk of errors and freeing up staff to focus on more value-added tasks.

With the right software in place, field technicians can easily access real-time information about their appointments, customer details, and inventory levels. This access to critical data on the go allows technicians to make informed decisions quickly and provide better service to customers.

Key Features of Field Service Management Software

- Appointment scheduling and dispatching
- Inventory management
- Route optimization
- Work order management
- Mobile access

By integrating these features into a single software solution, businesses can streamline their field service operations and drive greater efficiency. For example, automated scheduling and dispatching can help reduce travel time between jobs, while inventory management tools ensure that technicians have the right parts and equipment on hand to complete their tasks.

According to research conducted by Aberdeen Group, companies that adopt field service management software see a 31% improvement in first-time fix rates and a 37% increase in technician utilization. These improvements translate into tangible benefits for businesses, such as higher customer satisfaction, reduced operational costs, and increased revenue.

> "Field service management software offers a range of benefits for businesses looking to improve the efficiency and productivity of their operations."

Choosing the Right Software Solution

When selecting a field service management software solution, businesses should look for a platform that offers scalability, flexibility, and integrations with other systems. The software should also be user-friendly, with a mobile app that allows technicians to access information on the go.

Integration with CRM and ERP systems is also critical for ensuring a seamless flow of data between different departments. This integration enables better collaboration between field technicians, dispatchers, and customer service representatives, leading to improved communication and faster problem resolution.

With the right software solution in place, field service operations can become more agile, responsive, and competitive in today's fast-paced business environment. Embracing technology is key to staying ahead of the competition and meeting the evolving needs of customers.

Streamlined Workflows and Enhanced Customer Satisfaction through Mobile ERP Implementation

Mobile ERP solutions allow employees to access critical business data and processes from anywhere, at any time, using their smartphones or tablets. This flexibility not only enhances employee productivity but also enables businesses to streamline workflows and improve overall operational efficiency.

Key Features of Mobile ERP

Mobile ERP solutions come with a range of features that are designed to meet the specific needs of mobile users. Some of the key features of mobile ERP include:

- ***Real-time Access:*** Employees can access real-time data on the go, enabling them to make faster and more informed decisions.
- ***Mobile Dashboards:*** Customizable dashboards provide a quick overview of key performance indicators and metrics, allowing users to track business performance in real-time.
- ***Collaboration Tools:*** Mobile ERP solutions often come with built-in collaboration tools that enable team members to communicate and collaborate effectively, regardless of their location.
- ***Offline Access:*** Some mobile ERP solutions offer offline access to key business data, ensuring that employees can continue working even when internet connectivity is limited.

Benefits of Mobile ERP Implementation

There are several benefits to implementing a mobile ERP solution in your business, including:

- ***Increased Productivity:*** Mobile ERP solutions improve employee productivity by enabling them to access critical business data and processes from anywhere, at any time.
- ***Streamlined Workflows:*** By providing real-time access to data and processes, mobile ERP solutions help businesses streamline workflows and reduce manual tasks.
- ***Enhanced Customer Satisfaction:*** With faster response times and improved communication, businesses can provide better customer service, leading to enhanced customer satisfaction.
- ***Improved Decision-making:*** Real-time access to data and analytics enables businesses to make faster and more informed decisions, improving overall business performance.

Industry Statistics

According to a recent report by Gartner, the global mobile ERP market is expected to reach $15.3 billion by 2025, with a compound annual growth rate (CAGR) of 7.8%. This growth is driven by the increasing adoption of mobile devices in the workplace and the need for businesses to stay competitive in an increasingly digital world.

Another study by Aberdeen Group found that businesses that implement mobile ERP solutions see an average of 45% increase in productivity and a 30% reduction in operational costs. These statistics highlight the significant impact that mobile ERP can have on businesses of all sizes.

Mobile ERP solutions offer businesses a powerful way to streamline workflows, increase productivity, and enhance customer satisfaction. By enabling employees to access critical business data and processes on the go, mobile ERP solutions help businesses stay agile and competitive in today's fast-paced business environment.

If you're looking to improve operational efficiency and enhance customer satisfaction, consider implementing a mobile ERP solution in your business today. With the right mobile ERP system, you can take your business to the next level and achieve greater success in the digital age.

"With the right software in place, field technicians can easily access real-time information about their appointments, customer details, and inventory levels."

Cost Reduction and Improved Decision-Making with Mobile ERP Solutions

The Benefits of Mobile ERP Solutions

Mobile ERP solutions offer a range of benefits that can help businesses reduce costs and improve decision-making processes. Here are some key advantages:

Cost Savings: Mobile ERP solutions eliminate the need for expensive hardware and infrastructure, as they can be accessed from any mobile device with an internet connection. This significantly reduces upfront costs and maintenance expenses.

Real-Time Access: With Mobile ERP solutions, employees can access critical business data anytime, anywhere. This real-time access to information enables faster decision-making and improved productivity.
Improved Decision-Making: Mobile ERP solutions provide executives and managers with real-time insights into key performance indicators, enabling them to make data-driven decisions on the fly.

Statistics on Mobile ERP Solutions

According to a recent study by Gartner, 74% of businesses plan to increase their investments in mobile ERP solutions within the next two years. This indicates a growing trend towards mobile technology in the ERP space.

Additionally, a survey conducted by Deloitte found that businesses using Mobile ERP solutions experienced a 20% increase in productivity and a 15% decrease in operating costs. These statistics highlight the tangible benefits that businesses can achieve through the implementation of mobile ERP solutions.

Features of Mobile ERP Solutions

Mobile ERP solutions come with a range of features that enable businesses to operate more efficiently and effectively. Some key features include:

- ***Cloud-Based Access:*** Mobile ERP solutions are typically cloud-based, allowing for easy access to critical business data from anywhere in the world.
- ***Customizable Dashboards:*** Users can customize their dashboards to display the most relevant information for their roles, enabling quick access to key performance metrics.
- ***Integration with Existing Systems:*** Mobile ERP solutions can be seamlessly integrated with existing systems, such as CRM software and accounting platforms, ensuring data consistency across the organization.

Mobile ERP solutions offer businesses a cost-effective and efficient way to manage their operations and make better decisions. With real-time access to critical business data and customizable dashboards, businesses can improve productivity and reduce operating costs.

As the demand for mobile technology continues to grow, businesses that invest in Mobile ERP solutions are well-positioned to stay ahead of the competition and drive business growth. With the right Mobile ERP solution in place, businesses can achieve cost savings, improve decision-making processes, and ultimately drive success in today's digital economy.

About MoldStud

Founded on the principles of innovation, accessibility, and efficiency, MoldStud has quickly established itself as a leader in IT consulting and development. Under the visionary leadership of Vasile Crudu, who brings over 15 years of IT management experience and a Master's Degree in International Transactions and Economic Diplomacy, MoldStud has committed to bridging the digital divide with accessible and innovative technology solutions. Since its inception, MoldStud has been at the forefront of creating digital products and services that not only meet but exceed the evolving needs of businesses and individuals alike. Our mission is to empower our clients by leveraging the latest technologies to deliver solutions that are not just effective but truly transformative.

Unlocking Business Agility: The Power of Mobile ERP with ERPup

In today's fast-paced business landscape, organizations need agile solutions that empower their workforce to stay connected and productive, regardless of their physical location. Mobile Enterprise Resource Planning (ERP) systems offer precisely that—seamless access to critical business processes and data via mobile devices. In this article, we'll explore what Mobile ERP is, its benefits, and why ERPup stands out as an ideal solution.

What Is Mobile ERP?

Mobile ERP refers to the capability of accessing and utilizing ERP software and functionalities through remote access or mobile devices such as smartphones, laptops, and tablets. It enables users to perform essential ERP tasks, regardless of their physical location.

Benefits of Mobile ERP:

1. ***Anywhere, Anytime Access:*** Mobile ERP allows employees to access real-time data, approve workflows, and collaborate on tasks from virtually anywhere. Whether they're in the office, on the field, or working remotely, mobile access ensures continuity.

2. ***Improved Decision-Making:*** With mobile ERP, decision-makers can access critical insights on the go. Whether it's inventory levels, sales data, or financial reports, timely information leads to better decisions.

3. ***Enhanced Productivity:*** Employees can complete tasks such as order processing, inventory management, and approvals without being tied to their desks. This flexibility boosts overall productivity.

> "In today's fast-paced business landscape, organizations need agile solutions that empower their workforce to stay connected and productive, regardless of their physical location"

4. ***Streamlined Workflows:*** Mobile ERP streamlines processes by eliminating manual steps. For example, sales representatives can update orders directly from their mobile devices, reducing paperwork and delays.

5. ***Real-Time Inventory Management:*** Mobile ERP provides visibility into inventory levels, allowing businesses to optimize stock levels, reduce excess inventory, and improve order fulfilment times.

Why Choose ERPup?

ERPup is a leading Online Reputation Enhancer that specializes in managing and enhancing brands' online presence. Here's why it's the perfect solution for Mobile ERP:

1. ***User-Friendly Interface:*** ERPup offers an intuitive platform for monitoring and managing customer reviews, social media mentions, and online feedback. *Its user-friendly interface ensures ease of use for businesses of all sizes*.

2. ***Comprehensive Sentiment Analysis:*** The platform goes beyond surface-level feedback. By employing advanced natural language processing techniques, it delves into customer sentiments expressed in reviews. *This insight helps businesses tailor their offerings and enhance overall satisfaction*.

3. ***Net Promoter Score (NPS) Solutions***: ERPup provides a comprehensive approach to measuring and tracking customer loyalty. By categorizing customers as promoters, passives, or detractors, businesses gain a clear understanding of their brand's standing and can foster customer advocacy.

4. ***Competition Analysis:*** Stay ahead in the competitive landscape with thorough competition analysis. *Understand rivals' online presence, reputation, and sentiment to adapt strategies and position your brand as a frontrunner*

Mobile ERP: Revolutionizing Business Operations

Companies today must remain constantly adaptable, looking for ways to increase operational effectiveness, give employees more autonomy, and maximize productivity. Mobile enterprise resource planning (ERP) solutions have revolutionized business operations by giving organizations access to vital data while remaining productive and competitive in digital business environments. Here, we explore this concept further and examine whether mobile ERP could help companies make more intelligent decisions while streamlining processes to remain ahead in today's increasingly digital sphere.

Companies should strategically invest in *Mobile ERP solutions* as the demand for efficient operations management has skyrocketed. Mobile technology allows organizations to increase efficiency, streamline procedures, gain a competitive advantage, and make quick decisions using readily accessible vital data or performing necessary operations when moving.

Reading this article, you will learn about mobile ERP solutions and their potential benefits to your organization. We will explore their numerous benefits and drawbacks and the processes associated with creating an ERP mobile app.

Understanding Mobile ERP

Mobile ERP describes how typical ERP systems can be expanded via web-based interfaces or mobile applications to give employees greater access to real-time data and complete tasks on mobile devices like smartphones. Organizations can become more agile, responsive, and flexible by offering mobile access to ERP features.

An *ERP mobile application development* is designed to assist companies with running their operations from a mobile device more effectively and efficiently. The app gives instantaneous access to information, optimizes corporate procedures, and increases overall efficiency.

> "Mobile ERP solutions have revolutionized business operations by giving organizations access to vital data while remaining productive and competitive in digital business environments"

How does Mobile ERP work?

Users can now access their ERP system through a mobile device or tablet in a mobile ERP configuration, thanks to cloud technology and real-time updates from mobile ERP apps seamlessly integrated with enterprise ERPs, allowing real-time syncing of changes made via these apps.

To take full advantage of mobile ERP capabilities, a business requires an ERP system hosted in the cloud. Various preconfigured ERP apps from various ERP software providers are readily available for customer use; examples may include field sales and service applications, delivery warehouse storage POS (Point-of-Sale), purchase approval process, and employee time attendance.

Understanding The Significance Of Mobile ERP Solutions

Accounting, HR, supply chain management, CRM (customer relationship management), and other critical corporate operations can seamlessly coordinate via enterprise resource planning (ERP), an all-inclusive software suite designed to connect them. ERP allows businesses to efficiently control all end-to-end processes while increasing productivity, profit, and growth for the firm due to streamlining fundamental processes through automation and simplification.

Businesses looking to gain a competitive edge may gain many advantages from adopting ERP software solutions, including mobility capabilities that enhance this advantage. Businesses using an ERP system with mobility features experience greater data accuracy, strengthened partnerships, and higher service quality, as well as mobile apps giving quick access to vital data at any location or time from mobile ERP apps.

Integrity and connectivity in today's corporate environments are of utmost importance, which mobile ERP apps help organizations accomplish. By accommodating remote work arrangements and globally distributed workforces, organizations can better adjust to this trend with improved departmental visibility and effortless, time or location-independent access via mobile phones to ERP systems.

Mobile ERPs are designed to be easily accessible on portable electronics like phones and tablets, giving users more freedom and mobility in accessing ERP features on the move. By helping users stay in contact, make wise decisions, and complete essential tasks from any location, these solutions enable businesses to fully exploit mobile technology's potential while increasing overall productivity and responsiveness. Now that we understand how mobile apps are utilized for ERP purposes let's consider the available mobile ERP solutions.

Benefits of Mobile ERP for Businesses

Increased Productivity

Mobile ERP allows staff members to complete critical work when and wherever suits them, drastically improving productivity. Employees can take care of jobs more efficiently when not tied down by desk-bound duties, from authorizing purchase orders or reviewing inventory levels to accessing client data quickly providing real-time insights that allow staff members to make quick, informed decisions that expedite company procedures and increase output.

Improved Collaboration and Communication

Cooperation and effective communication are integral parts of every firm's success, which makes mobile ERP's integrated communication features all the more essential in helping staff members collaborate smoothly while communicating files, changes, and information instantly with one another improving collaboration while expediting decision-making procedures and hastening reaction times significantly.

Enhanced Decision-making

At firms, informed and timely decision-making is vital to maintain their competitive edge. Mobile ERP allows decision-makers to access vital KPIs, dashboards, and reports on mobile phones, giving them real-time visibility of key performance metrics and allowing executives to make data-driven choices to advance strategic objectives while staying ahead of competitors.

Flexibility and Work-Life Balance

Flexibility and work-life balance have become increasingly valued components of today's workforce, as employees work remotely from anywhere around the globe with

mobile ERP accessing ERP systems and performing activities from anywhere around the globe. Such flexibility helps firms attract highly qualified workers while supporting remote work models to increase employee happiness.

Seamless Integration and Scalability

Mobile ERP solutions can enhance rather than replace current ERP systems in terms of functionality, eliminating duplicative data entry and guaranteeing data consistency. As organizations expand, scale smoothly with them while accommodating rising data volumes and steadily growing user bases.

Inventory and Supply Chain Management

Mobile ERP applications are essential in inventory and supply chain management, enabling supply chain managers and warehouse operators to monitor shipments, control inventory levels, and ensure efficient logistics processes using mobile devices. Warehouse employees may maintain accurate inventory data while optimizing stock levels by scanning barcodes and instantly updating ERP systems, ultimately increasing customer satisfaction and decreasing costs.

Customer Relationship Management

With mobile ERP, salespeople and customer support teams can manage leads more effectively while collecting client data quickly, answering immediate client requests quickly, processing orders more accurately on mobile devices using real-time information, as well as issuing estimates with ease and providing personalized client contacts resulting in stronger bonds between employees and clients as well as an overall better experience for all involved customers.

> "Organizations can become more agile, responsive, and flexible by offering mobile access to ERP features."

Challenges and Considerations

While the *benefits of mobile ERP* are significant, Businesses should remain mindful of some challenges:

- Security: While using mobile ERP, there may be data transmission and access risks on mobile devices. Organizations should implement robust security measures to protect sensitive information, including user authentication procedures, mobile device management (MDM), and encryption programs.
- User Adoption: Companies looking to maximize the return on their mobile ERP investments must prioritize user adoption. Training and awareness campaigns need to be implemented to encourage staff members to adopt this new technology, and user-friendly interfaces should also be designed.
- Device Compatibility: As there is such a diverse array of mobile devices on the market, businesses must ensure their mobile ERP solutions work across platforms, operating systems, and device sizes for consistent user experiences across devices.
- Data Governance: Mobile ERP has created unique challenges regarding data governance, especially data consistency, integrity, and compliance issues. Establishing solid policies and procedures regarding data management is essential in upholding regulatory compliance while protecting quality.

Conclusion

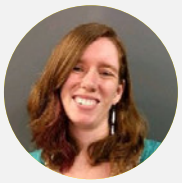
Mobile ERP offers businesses unprecedented productivity and efficiency, revolutionizing business operations while unlocking unprecedented levels of productivity and efficiency. Through mobile ERP, companies can stay ahead in the current digital era by using informed decision-making, collaboration, and real-time access to vital data, staying one step ahead of competitors such as IBM or SAP. When deploying mobile ERP solutions, organizations must pay special attention to security, user uptake, device compatibility issues as well as data governance concerns when selecting which mobile solutions best meet organizational requirements; using it may result in sustainable success through strategic planning combined with solid execution along with user empowerment measures allowing companies to create sustainable successes, generate development or streamline operations using strategic planning combined with solid execution techniques combined with user empowerment techniques allowing organizations to stay one step ahead in today's highly competitive business world. Contact us as we are the best *ERP Custom Development Company*.

Tricks, No Treats: 3 Terrifying Tales For SMBs

Halloween is all about things that are spooky and scary. For business leaders, nothing is scarier than unexpected challenges that bring your business down. This Halloween season, we'd like to share some true horror stories from the business world that might give you a fright. These stories are not for the faint of heart but do offer important learnings for all of us. So, grab some popcorn and read on, if you dare. (Names have been changed to protect the innocent.)

The night the ransomware monsters came

One dark and stormy night, a sinister force hacked a large distribution company's systems. Like a vampire, a ransomware attack sucked the life from their systems, leaving them paralyzed. As panic set in, a glimmer of hope emerged-DDMS, their cloud-based software lifeline. However, even that stronghold was being attacked. Fortunately, we were able to identify when the suspicious



Article by
Debbie Kumararaj
Social Media Coordinator,
Eci Solutions

activity was happening, and our team shut them down and contacted the company.

We called the business and found out what was happening. Armed with that knowledge, our team embarked on a daring midnight mission. The company also used our *e-automate* solution, but it was on-premise. So, we worked feverishly to move their entire e-automate system into the cloud. Although the rest of their systems were inaccessible, they could manage their end-of-the-month reports and take care of their customers.

For this company, the cloud was their silver bullet to protect themselves from the monster of ransomware. While they were large enough to have an IT department and a security team, most SMBs are not staffed in this way. *Ransomware attacks* hit a new victim every 14 seconds, stealing information and exploiting businesses. For smaller businesses, this could spell doom. Don't let your business become another statistic in this grim tale. Embrace the protection of the cloud and keep the ransomware monsters at bay!

The midnight mix-up

One late evening, a third-shift employee at a mid-size *manufacturing* plant was making paint. Something he had done many times before. Since this manufacturing plant didn't track its inventory, this employee, Harry, could cut dangerous corners. He poured the ingredients into the 3,000-gallon mixing tank and started it up. Everything was fine until, about 30 minutes later, a bone-chilling snap echoed throughout the plant. It came from Harry's mixing tank. To his horror, Harry saw that the shaft connected to the motor housing had completely sheared off.

With trembling hands, Harry slowly peered into the tank. It was worse than he expected. Inside the 3,000-gallon tank was a rock-hard, solid batch of paint.

Cleanup crews had to be hired to chip away at the solid paint with jackhammers, but that wasn't enough. Two people had to go through by hand, scraping the inside walls of the tank to get it clean.

The nightmarish incident cursed the company with eight weeks of downtime for this one tank. Additionally, it cost the company tens of thousands of dollars in wasted materials, lost finished goods, incurred clean-up costs, production downtime, and equipment replacement. The total cost of Harry's mistake ended up exceeding his annual wages.

To this day, the exact ingredients of Harry's mixture remain a mystery. But that company implemented a quick yet thorough *inventory control process* to ensure it would never happen again.

> "Ransomware attacks hit a new victim every 14 seconds, stealing information and exploiting businesses. For smaller businesses, this could spell doom."

Triple threat: The story of the haunted hardware store

This next story follows a hardware store that runs on *Spruce* and hit a period of terrible luck. One foggy morning a few years ago, the store owner, Frank, pushed open the creaky door only to be overwhelmed by the stench of smoke. His blood ran cold as he traced the odor to the server room. And there he saw something straight out of a tech horror movie. One of the servers had caught fire and completely burned the other two.

Frank found a company several states away that could retrieve some of the data from their burned hard drives for $14,000. What else was he to do?

But bad luck wasn't done with them yet.

Several months later, as the witching hour of their fiscal year approached, the dreaded blue screen appeared on their computers with a message. The message read that they had to pay $55,000 to get their data back. This hardware store had backups, but the hacker had gotten a hold of all except one flash drive.

Of course, Frank called the police, and he heard that they shouldn't pay the ransom. There was no guarantee they would get anything back or that the hacker wouldn't just demand more money, so Frank called ECI.

By working tirelessly together, the team got this hardware store's cloud version of Spruce up and running. All was well—until Mother Nature had other plans.

A while later, a tornado howled through Frank's town. It knocked out the power and knocked down trees. Everyone wanted to buy chainsaws and other equipment to clear

the trees and roads. Fortunately, because they were cloud-based, Frank could continue to run his store from his iPad and keep up with the needs of his customers. It wasn't perfect but was miles better than working off paper. At last, their streak of bad luck had ended.

Like any spine-chilling, scary story, there is a way to defeat the monster. For many of our customers, that solution is the cloud, and for good reason. The cloud helps protect your business from ransomware, natural disasters, and small mistakes with huge consequences.

There are many unknowns and boogeymen in business, but there are ways to protect your business from them. Make sure you're doing what makes sense for your business and not making unsafe decisions like so many horror movie characters.

About Debbie Kumararaj

Debbie Kumararaj is a writer, strategist, and word enthusiast. Her marketing background began in manufacturing, but now she works in all division that ECI serves.

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.

9 Key Features of Electronics ERP

While electronics manufacturing shares core processes with other industries, it presents unique challenges that standard ERP systems can't fully address. Electronics manufacturers are expected to provide customer service, maintain accounts when selling products, and pay employees, which requires a human resources module.

Electronics manufacturers work with precision and care, handling delicate and valuable items that become obsolete due to constant innovation and disruption. This specific manufacturing sector requires an *ERP system tailored for electronics manufacturing* to meet the unique challenges of electronic goods manufacturers, such as tracking the expiry dates of electronic components, managing inventory efficiently, and reducing manufacturing costs.

While a standard ERP system may suffice for some original equipment manufacturers (OEMs) and electronic manufacturing services (EMS) providers, those operating assembly lines require a specialized ERP for electronics.

Assembly line operations are intricate and encompass various complex processes, and the supply chain is subject to compliance requirements, multiple regulations, and quality management constraints. Additionally, unpredictable customer demand and a generally shorter product lifespan affect business stability.

Article by
Keren Sherer Taiber,
VP Product Management,
Priority

9 Key features of ERP for the electronics industry

1. Bill of materials (BOM) management

A Bill of Materials (BOM) is a list of all the components, raw materials, parts, and other things needed to manufacture a single electronic item. It includes details such as the tier 1 and 2 manufacturers of these components and parts, their serial numbers, and the required quantity.

The document is prepared hierarchically in a manner that helps product managers easily see the details during each manufacturing stage. An ERP system designed for the electronics manufacturing sector can help efficiently manage the BOM. This enables manufacturing managers to initiate production orders and finalize purchase requests promptly.

2. Quality control and industry compliance

Electronic items are some of the world's most commonly recalled products due to various external factors. Although these cannot be controlled completely, implementing an ERP system designed for the electronics industry can assist in maintaining quality and ensuring compliance with regulations to minimize the chance of production failures.

Manually overseeing quality in electronic production is practically impossible due to complex assemblies and supply chain processes. Therefore, quality tests are required throughout the production/assembly cycles on the received components and not only on the final product.

Outsourcing quality control often complicates things and reduces transparency in the electronics manufacturing process. An Electronics ERP system integrates all the processes involved in electronics manufacturing and helps maintain each component's quality until assembled into a finished product. The automated ERP quality assurance module facilitates quick recalls of faulty products, enabling prompt investigation before the issue escalates and helps handle warranty claims.

> "An ERP system designed for the electronics manufacturing sector can help efficiently manage the BOM. This enables manufacturing managers to initiate production orders and finalize purchase requests promptly."

3. Environmental compliance and sustainability tracking

With rising global environmental awareness and increasing regulations on electronic waste, manufacturers are required to comply with waste disposal regulations and source materials from sustainable vendors.

Electronics manufacturing ERP systems facilitate this process by integrating sustainability criteria into the sourcing and production workflows. They enable manufacturers to ensure that components and materials meet environmental and energy guidelines set by authorities.

An electronics manufacturing ERP's tools also help optimize, organize, and track your approval process, prioritize production methods that reduce energy consumption, and align with policies focused on reusing, remodeling, and repairing. This results in producing greener and more sustainable electronic products while maintaining compliance with environmental regulations.

4. Product lifecycle management (PLM)

Electronic products often have a short lifespan due to rapid technological development and varying consumer preferences. Therefore, electronic and contract manufacturers must be prepared for new product introductions and consider this when developing products.

Product managers must work closely with sales, marketing, manufacturing, and IT teams to ensure everything is forward-looking and ready for the future, regardless of the product stage. In this regard, ERP systems for electronic manufacturers play a crucial role.

They consider the transient nature of electronic products and ensure that there is room for agile adoption of new raw materials, product workflows, processes, and vendors. This ensures timely repairs, support, and component replacements.

5. ECO (Engineering change order) management

Innovation and the introduction of new technologies can cause disturbances in the smooth operation of production lines. The electronic industry, in particular, is no stranger to such disruptions.

Product managers and owners often implement engineering change

orders (ECOs) that necessitate team involvement when these occur. ECO management is essential to maintain a living record of all product features, specifications, and alterations.

An Electronics manufacturing ERP system ensures that version and revision control is maintained, creating a historical account of these changes and improving team collaboration. Automating ECO management can optimize production line performance to bring products to market quickly.

> "An Electronics ERP system integrates all the processes involved in electronics manufacturing and helps maintain each component's quality until assembled into a finished product"

6. Supply chain & inventory management

The electronic industry incorporates many small components, parts, and items required to assemble a final product. These components may originate from various vendors and must conform to diverse compliance and sustainability standards.

An ERP system that caters to the electronic industry is essential to facilitate ramified procurement procedures and ensure transparency. As components and parts are often expensive and challenging to store, procuring the appropriate quantity is crucial.

Electronics ERP's Inventory Management feature assists electronic manufacturers in managing their supply chain and inventory, helping to avert understocking or overstocking issues. This guarantees that an adequate quantity of components and parts is always available for an undisturbed production process.

7. Demand forecasting and planning

Effective and precise demand forecasting is crucial for manufacturers to plan their raw material procurement and production of goods, as even minor errors could result in significant financial losses and missed opportunities.

Modern ERP systems developed for electronic manufacturers integrate advanced AI capabilities to predict demand metrics accurately. This allows manufacturers to optimize their stock and inventory levels and produce just the right amount of components to maintain operational and undisturbed assembly lines.

8. Real-time data and analytics

The electronic industry is a volatile field subject to various changing factors, so access to real-time insights is necessary. Manufacturers need to be familiar with market trends and stay up to date on inventory levels, available vendors, raw materials pricing, and other variables, including production line occurrences.

When it comes to electronic manufacturing, things get a lot more complex. An ERP specifically targeted at electronic manufacturers considers these factors and ensures that real-time data is collected and collated from various sources.

Many ERP solutions targeted at electronic manufacturers are equipped with IoT-enabled technology, which allows electronic manufacturers to provide remote assistance and software updates, which helps take preventive steps that eliminate the need for costly repairs in the future.

> "An ERP system designed for the electronics industry can help manage inventory and supply chain processes efficiently, ensuring timely procurement of components and materials"

9. Integration of ERP with manufacturing execution systems (MES)

A full-fledged ERP geared towards electronic manufacturers should have the ability to be integrated with a manufacturing execution system (MES). An MES helps electronic manufacturers *track and monitor granular production-floor operations.*

While an ERP handles other backend operations such as procurement, inventory management, HR, etc. Both tools are essential for electronics manufacturers. Integrating an ERP with MES helps electronic manufacturers gain access to granular processes on the production floor and align them with real-time data emerging from the Electronics ERP.

How Priority software's ERP can help streamline electronic manufacturing operations

Priority's electronics ERP is an end-to-end solution for electronics manufacturers to streamline their business and assembly-related operations. It helps them plan, develop, and manufacture electronic goods with cutting-edge technology and engineering.

In addition, it also helps manage the business side of manufacturing by allowing manufacturers to engage in effective sales and marketing campaigns, ship compliant end-products to customers, and provide excellent after-sales support and repairs.

It enables floor-to-door management, eliminating the need for multiple software tools and programs. Consequently, electronic manufacturers can immediately witness the heightened collaboration between different departments, vendors, and customers.

Priority

About Keren Sherer Taiber

Since joining Priority in 1998, Keren has progressed through several leadership positions and now leads as the Director of Product Strategy. She has an industrial engineering degree and an MBA from Tel Aviv University. Her journey reflects a consistent dedication to advancement and excellence.

About Priority

Priority is a versatile and highly scalable, AWS-based, native cloud ERP platform, catering to businesses of all sizes. As a flexible and open ERP platform, companies can quickly adapt to evolving business needs and seamlessly integrate the platform with other business management systems. With a powerful and user-friendly UI, users can personalize the system and create mobile apps, web portals and business processes without any coding. Powered by AI, it offers process automations, recommendations, and optimization algorithms. With several decades of development and innovation, Priority stands out as one of the most comprehensive ERP platforms available. It supports an impressive array of in-depth functionalities, covering financials, CRM and sales, supply chain management, manufacturing, distribution, customer service, project management, warehouse management, equipment rental, business intelligence, intelligent workflows, mobile app generation and more.

Article by Keren Sherer Taiber

Digital Excellence Accelerates Growth for SAP Partner Inetum

SAP's extensive partner ecosystem empowers thousands of customers around the world to consistently improve and grow their businesses with cloud solutions from SAP. To continue supporting the growth of this vibrant and dynamic partner community, SAP is equipping partners with digital practices, tools, and methodologies to help serve more customers faster and more responsively while enhancing their own efficiencies.

Inetum has been an SAP partner since 1998. With over 28,000 professionals, 2,700 are SAP consultants across the EMEA, MEE, and LATAM regions. As a European leader in digital services, it specializes in SAP solutions across 19 countries, with a focus on the *GROW with SAP* offering.

"In some countries, such as Spain, Inetum has traditionally served public sector and large enterprises, but, as part of our cloud growth strategy, our aim was to also expand into midmarket and new territories," said David Bayon, global SAP go-to-market director at Inetum. "The traditional sales approach we relied on couldn't meet the demands of engaging midmarket customers at scale, and our collaboration with the SAP EMEA digital hub, then subsequently with the MEE hub as well, was critical in helping us make this transition."

Article by
Edina Manuel,
Communications Lead,
Digital Hub, SAP

> "In some countries, such as Spain, Inetum has traditionally served public sector and large enterprises, but, as part of our cloud growth strategy, our aim was to also expand into midmarket and new territories."

Located on six continents and 15 locations, SAP digital hubs are home to more than 1,000 digitally native, highly skilled, multidisciplinary teams. These teams innovate with artificial intelligence (AI) and the latest intelligent technologies, like digital modalities, to virtually serve large numbers of SAP customers at exceptional velocity while delivering high-quality, immersive, and personalized customer experiences and expert advice, whenever and wherever customers need it.

"Thanks to the digital approach and replicable digital assets and practices, we've reduced the time it takes to enter new markets – from six weeks to kick off our midmarket outreach in Spain to three weeks to do the same in Portugal and two in Morocco! This has led to an increase of 400% in the efficiency of our SAP sales specialist team, helping us exceed our first-half 2024 targets by 192%," Bayon explained.

Inetum's work with SAP digital hubs enables the company to quickly validate which customers it can bring the most value to at any given time, in a given territory, while addressing local languages and cultural specifics. The partner also has access to the SAP digital hub modalities, which are based on AI and immersive technologies, to help support the creation of compelling customer value propositions at scale and speed while also making them available to customers via tailored microsites in a self-service mode for elevated agility. Digital modalities can further provide continuous feedback and data on what works and what doesn't, as well as how the process needs to be tweaked for maximum impact.

"The partnership with Inetum is a prime example of how SAP digital hubs synergistically collaborate with SAP partners to add value to customers' value journeys with SAP. We share our digital methodologies – digital modalities for high-quality customer engagements at scale and speed – and we support our joint customers with digital adoption tools and practices, ensuring faster time-to-value from SAP solutions. We're also learning from Inetum's experience on new industry best practices, and we test innovative and award-winning digital practices together," said Sam Masri, global head of SAP Digital Hubs.

By the end of 2024, Inetum will also be serving customers in Mexico, Poland, Romania, Switzerland, and the UK and Ireland while also releasing its own intellectual property for the strong digital support of the retail, wholesale distribution, and engineering and construction industries. The company also plans to launch capabilities to help SAP Business One customers migrate to SAP S/4HANA Cloud Public Edition within the same period.

> "Thanks to the digital approach and replicable digital assets and practices, we've reduced the time it takes to enter new markets... This has led to an increase of 400% in the efficiency of our SAP sales specialist team, helping us exceed our first-half 2024 targets by 192%."

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.

Article by Edina Manuel

Dreamforce 2024: Strengthening Partnerships & Embracing AI

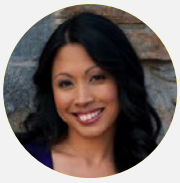
Attending Dreamforce 2024 provided Rootstock with significant opportunities to engage with manufacturers, revel in the power of AI, and strengthen our relationships within the Salesforce ecosystem.

"The seamless platform connection between *Rootstock ERP* and *Salesforce* products presents a tremendous opportunity for manufacturers. By eliminating the complexities of integrating disparate systems, customers can focus on agility, efficiency, and cost savings—key factors for success in today's ongoing volatile market," said *Raj Badarinath*, Chief Marketing and Product Officer at Rootstock.

While Dreamforce highlighted cutting-edge technological advancements, it also underscored the crucial role of human connection in driving success. Rootstock embraced this theme, hosting several events designed to foster our community.

Winery Event: A Taste of Napa Valley

Before Dreamforce kicked off, Rootstock hosted an unforgettable experience at the stunning Artesa Winery in Napa Valley. We collaborated with our partner, *ComplianceQuest*, to invite select guests. At the event, we enjoyed a gourmet lunch and curated chocolates—all paired with wines from Artesa's collection.



Article by
Tammy Delatorre,
Sr. Director of Communications,
Rootstock Software

Afterward, attendees took in breathtaking views and modern architecture while on a tour of the winery. "Having in-person opportunities to mix and mingle is crucial to deepening our relationships with both customers and partners. These face-to-face interactions build more trust than any Zoom call could," said *Jonathan Skelding*, SVP of Global Alliances at Rootstock.

Speakeasy Night: Where Partnerships and AI Converge

Another highlight at Dreamforce was our Speakeasy Night. "This was a cool event," said *Bill Winans*, Senior Director of Global Alliances at Rootstock. "Held at the iconic Bourbon & Branch in San Francisco, the speakeasy added just the right ambiance. Attendees needed a secret password to get in, making it exclusive and memorable."

> "Attending Dreamforce 2024 provided Rootstock with significant opportunities to engage with manufacturers, revel in the power of AI, and strengthen our relationships within the Salesforce ecosystem."

"We kicked the evening off with an executive roundtable on 'Revolutionizing Manufacturing in the Shadow of AI,' hosted by Rootstock in partnership with Salesforce and *Uptima*. It featured our own Raj Badarinath, along with *Tony Kratovil*, VP, Manufacturing Products and Solutions at Salesforce, and *Adam Menzies*, CEO of Uptima," added Winans.

The roundtable provided valuable insights into the future of manufacturing, exploring how manufacturers on the Salesforce Platform can build resilience and drive growth by uniting customer and operational data.

"AI definitely dominated the conversation," said Winans. "Overall, the event was well-attended, drawing customers, prospects, and various manufacturing professionals. Other partners were also involved—including *Avalara* and *Propel*—further solidifying our collaborative efforts across the Salesforce ecosystem."

Excitement in the Exhibit Hall

Rootstock's booth, which was located near the AI theater, was a hub of activity. One of the main attractions was our unique giveaway—a glass with a personalized engraving. "People lined up for the chance to take home such a unique keepsake, which added to a constant flow of visitors," said Winans.

"In addition, since we were strategically located between Propel and *Nagarro*, there was a lot of bi-directional traffic," noted Winans. "Our proximity allowed us to collaborate with one another, providing examples of how our customers have used our joint solutions and services to achieve their desired business objectives."

> "Salesforce is redefining AI for manufacturers in a very practical way. The next generation of AI, centered around intelligent agents, will take over tasks traditionally done by humans."

"Our partners introduced us to new leads. These prospects came by the booth, received a demo of Rootstock, and came to better understand the value of our ERP on the Salesforce Platform. We've already arranged to meet with these companies, post-event, to see how we can help meet their needs."

The Japanese market was also well represented with nearly 800 attendees coming from Japan. "Salesforce Japan's ISV team ran a booth tour, bringing large groups over to learn about our regional ERP initiatives and partners in that area, like Nagarro. These interactions generated significant interest, underscoring our global reach," said Winans.

Article by Tammy Delatorre

Manufacturing Trends

One of the major announcements at Dreamforce was the introduction of *AgentForce*, as well as results from Salesforce's "*Trends in Manufacturing*" survey.

"Salesforce is redefining AI for manufacturers in a very practical way," said Badarinath. "The next generation of AI, centered around intelligent agents, will take over tasks traditionally done by humans. These AI agents can dramatically improve the customer and agent experience, with senior agents focusing on escalations while 80% of the work can be handled seamlessly by AI agents. Salesforce is in a great position to lead this transformation in AI."

Many manufacturers recognize they can't continue with business as usual if they want to remain successful. There is a growing trend to transform their operations with increased tech investments—Salesforce's manufacturing survey showed that 95% are considering AI adoption to help drive that change.

Building on Dreamforce Success

Dreamforce 2024 was not just about showcasing technology—it was also about reinforcing our partnerships, exploring new opportunities, and embracing the future of AI in manufacturing.

"Looking ahead, we're focused on building upon the momentum we generated at Dreamforce. We'll continue to foster strong relationships with key partners like *Alto*, *Praxis*, *Deloitte*, and Nagarro to help drive future growth," said Skelding. "These partnerships are critical to our success—not only for pipeline development but also for delivering value to our customers."

As we continue to tout Rootstock's seamless connectivity with Salesforce products and to collaborate with our SI and ISV network, the future looks bright for our customers and partners alike. Stay tuned as we continue to share more insights and innovations from the Rootstock ecosystem.

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.

rootstock® MANUFACTURING ERP

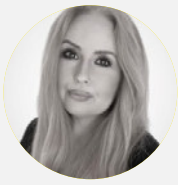
Acumatica 2024 R2: Optimize B2B Operations with Acumatica's Shopify Connector

Together, Acumatica and Shopify address operational challenges experienced by businesses in today's B2B landscape. Here's how.

Acumatica's Native Shopify Integration B2B Efficiency

Acumatica is dedicated to providing small and midsized businesses (SMBs) with powerful tools, resources, and technologies built to fuel their current and future success. These include robust industry-specific technologies, easy configurations, continuous support, and seamless integrations with world-class applications, like *Shopify*—a leading software platform that enables its over one million commerce customers to create and customize online stores.

In November 2023, Acumatica became the first ERP solution to *integrate with Shopify*, offering business-to-business (B2B) merchants a single omnichannel tool to unify their storefront and back-office needs.



Article by
Stacie Jurczak,
Program Manager -
Retail Commerce , Acumatica

At the time, *Acumatica said*: "Our [native] integration to the new B2B features of Shopify empowers companies to digitally sell their own products using the same solution that automates their day-to-day business operations."

With Acumatica's latest release, Acumatica 2024 R2, users will have access to even more features and enhancements delivering advanced retail and ecommerce capabilities. Through updates to the native Shopify Connector, users will be able to leverage new B2B functionalities for managing customer hierarchies, controlling payment terms, and configuring custom pricing rules.

Why Acumatica's Shopify Connector Is Crucial for B2B Operations

B2B retail—in which goods, usually bulk shipments, are sold to other businesses rather than to consumers—is complex. B2B operations strive to manage and fulfill orders across multiple sales channels, track cash flow, synchronize inventory, provide proactive customer service, and much more. They also typically have specialized payment requirements—like purchase orders, special pricing for repeat customers, or volume-based pricing. Some may operate with invoices and buy-on-credit terms; some may accept cash, credit, or ACH payments at the time of sale; and still others may use a mix of both.

Unfortunately, many B2B companies attempt to manage these complexities with multiple, disconnected systems. This creates data silos, where information is locked in each individual system, so team members have to manually transfer data between applications. Of course, this double data entry is tedious and time consuming, but it can also lead to human error, miscommunication, and ineffective collaboration—ultimately delaying order processing and creating unhappy customers.

Acumatica's native Shopify Connector supplies B2B and D2C retailers with a unified platform that seamlessly connects front- and back-end office processes, ensuring smooth data flow and putting an end to aggravating operational challenges.

> "Acumatica's native Shopify Connector offers B2B retailers a unified platform that seamlessly integrates front- and back-office processes, ensuring smooth data flow and addressing operational challenges."

Technical Overview of Acumatica's Shopify Connector

Acumatica 2024 R2 Updates

Because B2B merchants often need to offer customer-specific and volume-based pricing, Acumatica 2024 R2's Shopify Connector has been updated so users don't have to manage these pricing rules separately in the Shopify and Acumatica interfaces.

Directly in Acumatica, businesses will now be able to:

- Configure fixed prices based on a customer's location.
- Create quantity control rules and tiered price breakdowns to set discounts for bulk purchases.
- Set up product availability controls to manage product visibility and accessibility.

An important note for users: Sales Price Export is unidirectional from Acumatica to Shopify. If the prices are configured in Shopify then those cannot be imported back to Acumatica. By managing all B2B customer pricing rules in Acumatica and exporting them to Shopify, customers will receive consistent pricing estimates, no matter how they engage with the business.

Real-Time Data Synchronization

Data is king. Updated, accurate information informs every business decision. Having easy access to such data—and the ability to analyze it in one place—helps businesses decide what their next strategic move should be.

With the seamless integration between Acumatica and Shopify, users enjoy real-time, data flow that syncs Acumatica's back-office financial, sales order, warehouse, and inventory information to Shopify storefronts, resulting in better decision-making, improved inventory accuracy and order processing, and an enhanced customer experience.

Advanced Inventory Management

Tracking inventory with a centralized solution—especially across multiple distribution centers, retail stores, and warehouses—provides B2B companies complete visibility into their inventory, which reduces or eliminates over- and under-stocking, as well as the costs associated with losses and storage needs. Acumatica users enjoy automated stock updates, synchronized inventory levels (per item, unit, and location), and the ability to manage complex product catalogs with variants. These features deliver insights that tell companies what to order and when, so they can strengthen their connections with suppliers and customers.

Comprehensive Financial Management

Acumatica tackles business complexities with built-in financial management tools, including General Ledger, Accounts Receivable, Accounts Payable, Cash Management, Currency Management, Tax Management, Recurring Revenue Management, Deferred Revenue Accounting, Multi-Entity and Intercompany Accounting—and more. With the Shopify Connector, financial accuracy is secured as payment information, tax calculations, and discounts are automatically synched between Shopify storefronts and the Acumatica system. The Connector also supports compliance with industry standards—like PCI compliance—and reduces the risk of financial discrepancies.

Scalability and Customization for B2B Needs

B2B companies handle large volumes of transactions and multiple Shopify storefronts. By connecting effortlessly with Acumatica, they can define customer-specific pricing that will carry forward to Shopify. They can create tailored discount schemes and specialized order workflows and add purchase order information to B2B orders that will synchronize with Acumatica. They can also sell bundles using *Shopify's Bundles feature*, which automatically shows the individual items and quantities in Acumatica but informs the buyer in Shopify that the "Bundle" is shipped—a feature that leads to greater revenue, satisfied merchants, and happy customers.

Real-World Impact: B2B Success Story

Established to process orders for Jeffree Star Cosmetics, Los Angeles-based company *Killer Merch* helps artists and brands design, manufacture, and ship merchandise to fans and companies around the world.

Initially, Killer Merch relied on QuickBooks, Shopify, and ShipStation for their accounting, ecommerce, and distribution needs. But Jeffree Star Cosmetics rapidly grew in popularity, bringing complexities—including thousands of orders per day—that the three disconnected solutions couldn't handle.

The issues kept piling up. Employees had to manually type order information into each system; they had no visibility into inventory, operations, or key data; they couldn't book revenues and cost of goods sold (COGS) in the same period; and they operated from one Shopify store, causing chaos for royalty payments and cash flow management.

Needing efficiency, the Killer Merch team searched for a single ERP solution with inventory management and data insights. After reviewing many options, they landed on Acumatica.

"A really big feather in Acumatica's cap is that they were able to understand what we were trying to do (integrate some 80 Shopify sites to facilitate drops) and accomplish it in a world that didn't really exist four years before," says Mark Bubb, Co-Owner and Chief Operating Officer of Killer Merch and Chief Revenue Officer of Jeffree Star Cosmetics.

Now, with Acumatica and its native Shopify Connector, Killer Merch handles hundreds of thousands of orders per week, receives those orders in real-time, can modify or cancel orders instantly, and has boosted revenue with access to customer data (e.g., purchase histories.)

"We've come to rely on Acumatica to run the whole company," says Jenni Arant, Chief Strategy Officer of Jeffree Star Cosmetics and Executive Vice President of Killer Merch. "It's cool to see how far we have come and that we don't have to make guesses anymore. We can make decisions based on the information in front of us in Acumatica."

> "The latest release, Acumatica 2024 R2, introduces enhanced features, including the ability to configure fixed prices based on customer location, create quantity control rules with tiered pricing for bulk purchases, and set up product availability controls—all managed directly within Acumatica."

Conclusion

Killer Merch's story perfectly exemplifies why B2B ecommerce businesses should embrace Acumatica and its native integration with Shopify. The technical and operational benefits—including end-to-end visibility, centralized order management, streamlined buying processes, secured commerce transactions, product and order information synchronization, personalization, multiple Shopify store capabilities, and so much more—drive B2B efficiency and scalability.

Article by Stacie Jurczak

A Conversation with Dan Miller: Sage Copilot's Journey to Sage Intacct

As Sage Copilot makes its way into Sage Intacct, Dan Miller, EVP of Financials and ERP, discusses how Sage's generative AI is shaping the future of finance—starting with early adopters and partners

With Sage Copilot set to transform Sage products, and ahead of the much-anticipated Sage Partner Kick-offs in Chicago, US, and Birmingham, UK, we sat down with Dan Miller, EVP of Financials and ERP at Sage, to learn more about Sage's generative AI's journey so far. After successful early adoption in the UK with Sage Accounting and its introduction to Sage Active users in Europe, Sage Copilot is now in the hands of select Sage Intacct customers.

"It's been a remarkable journey and seeing Sage Copilot evolve has been rewarding and a lot of fun," Dan said as we discussed the AI assistant's gradual rollout. "The goal is to help organizations to focus on what really matters to their business, enabling them to save time, make faster decisions and ultimately drive growth.

Sage Copilot is being steadily integrated into one product at a time and after its initial UK launch within Sage Accounting and in Europe through Sage Active, it is exciting

to hear Sage Intacct customers are now getting their hands on the AI assistant. "We're excited to see how our customers in Sage Intacct will take advantage of this," Dan added. "We've worked closely with them to make sure Sage Copilot is solving real-world problems."

He explained that customer engagement is critical to shaping the product. "Since day one, we've been gathering insights from customers in real-time. This has helped us to adjust and improving Sage Copilot as we go, ensuring that we are creating a tool that delivers real value to our customers," Dan noted.

> "The goal is to help organizations to focus on what really matters to their business, enabling them to save time, make faster decisions and ultimately drive growth."

Dan was clear that it's still early days for Sage Copilot in Sage Intacct. "This is just the beginning," he explained. "We're learning a lot through this process, and the feedback we're gathering from customers will shape how we improve and evolve Sage Copilot. It's critical to have this real-time feedback as we refine the tool to deliver the most value."

When asked about the role partners play in this journey, Dan highlighted their importance. "Our partners help customers select solutions and make business process changes that make customers more effective," he said. "Whether it's automating repetitive tasks or providing deeper financial insights, partners are key recommenders and will help businesses unlock the full potential of Sage Copilot."

AI is driving real change

The conversation shifted to how AI is driving broader transformation within Sage Intacct. While Sage Copilot is a game-changer, it's just one piece of a larger AI strategy. Dan pointed to Sage Intacct's AP Automation as another example of how AI is already making a significant impact. "With AP Automation, we've seen businesses in the US process over 10,000 bills per month while halving the time spent on accounts payable," Dan explained. "At these volumes, it can save organizations over $100,000 per year in data entry costs while also streamlining workflows and improving accuracy."

> "We're learning a lot through this process, and the feedback we're gathering from customers will shape how we improve and evolve Sage Copilot."

"Sage Copilot builds on six years of AI foundation," Dan added. "Together, these tools are transforming financial processes and enabling businesses to focus on growth rather than administration. AI is no longer just a future concept - it's here, embedded within Sage Intacct, and it's driving real change for our customers."

As our conversation ended, Dan emphasized the excitement around Sage Copilot's early days with Sage Intacct. "We're just at the beginning of this journey, but the potential is enormous. We're thrilled to see what the future holds, and we're committed to continuing this collaboration with our customers and partners to bring even more AI-powered solutions to market."

Sage

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/.

QAD Redzone Debuts New AI Capabilities to Drive Meaningful Productivity Gains in Manufacturing at Pack Expo 2024

Launches Champion AI, an AI solution that enables the connected worker

QAD Redzone, the most trusted connected workforce solution for the manufacturing sector, announced the launch of Champion AI, a groundbreaking suite of AI-driven capabilities designed to empower the frontlines with predictions, recommendations, proactive problem solving, and enhanced productivity. Introduced at *Pack Expo 2024*, Champion AI goes beyond traditional AI applications by solving specific problems on the plant floor in a new way.

QAD Redzone has long included AI to overcome language barriers, transcribe and translate video content, and streamline support processes—all with a focus on tangible results and critical information that frontline workers need to excel.

Champion AI, the company's next generation of AI, provides predictive and prescriptive analytics through Generative AI to address daily challenges in manufacturing such as detecting plant-wide outliers, delivering daily operational summaries, predicting run durations and identifying potential run problems before they happen. The pragmatic AI solution equips workers with the tools to anticipate issues, optimize changeovers, and analyze performance data -- setting new standards for engagement and productivity. Redzone's automated productivity data collection provides a feedback loop so that Champion AI knows which recommendations drive the best outcome.

"Champion AI represents our commitment to practical AI solutions that assist workers in achieving higher productivity, not by overwhelming or replacing them with technology but by acting as an accessible, intelligent assistant," said Ron Davis, senior vice president of product engineering at QAD Redzone. "This is the AI champion that factory teams have been waiting for because it provides meaningful insights to address real issues they are facing on the factory floor."

Visitors at Pack Expo 2024 can experience Champion AI firsthand at the QAD Redzone booth- Lakeside Upper — LU-8518.

About QAD

QAD Inc. is a leading provider of next-generation manufacturing and supply chain solutions in the cloud. To succeed in a turbulent world, facing disruptions in supply and fluctuations in demand, manufacturers and supply chains must rapidly respond to change and seamlessly optimize agility, efficiency, and resilience for effective customer service. QAD delivers Adaptive Applications to enable these Adaptive Enterprises. Founded in Santa Barbara, California, QAD has customers in 84 countries around the world. Thousands of companies have deployed QAD enterprise solutions including enterprise resource planning (ERP), digital commerce (DC), supplier relationship management (SRM), digital supply chain planning (DSCP), global trade and transportation execution (GTTE) and enterprise quality management system (EQMS). To learn more, visit www.qad.com or call +1 805-566-6100. Find us on LinkedIn, Twitter, Facebook and Instagram.

ECI Software Solutions Wins Six 2024 "Buyer's Choice" Awards from TrustRadius

Industry-leading ERP, ecommerce and proof-of-delivery platforms recognized for excellence in capabilities, value and customer relationships, reflecting ECI's commitment to innovation and customer success

ECI Software Solutions, a global provider of cloud-based business management software and services, announced six of its products have received a 2024 Buyer's Choice Award from TrustRadius, a leading platform for independent business technology reviews. ECI's products named to this year's Buyer's Choice list include: *M1®* and *Ridder iQ®* enterprise resource planning (ERP) solutions for manufacturers; *EvolutionX®* B2B ecommerce platform and *Red Falcon®* ERP for distributors; *e-automate®* ERP for office technology dealers; and *JumpTrack®*, ECI's last mile delivery software.

"Congratulations to Ridder iQ, M1, EvolutionX, JumpTrack, Red Falcon and e-automate for winning the TrustRadius Buyer's Choice Award," said Allyson Havener, SVP of Marketing and Community at TrustRadius. "This recognition highlights the impact these solutions are making across a wide range of industries like manufacturing and distribution. Based on vetted customer reviews, it's clear that these platforms are empowering businesses to streamline operations, enhance productivity, and drive growth."

The Buyer's Choice Awards, formerly known as Best of Awards, are based entirely on vetted, unbiased customer reviews with even higher standards for qualification than previous years. Before, winners could qualify in one of three categories. Now, buyer's choice winners must be selected by 75% of reviewers in all three categories, including best capabilities, best value for price and best customer relationship.

"We're incredibly honored to be recognized as a six-time 2024 Buyer's Choice Award winner," said Trevor Gruenewald, CEO at ECI Software Solutions. "These awards are especially meaningful because they reflect the direct voice of our customers and the tangible value our industry-specific solutions bring to their businesses. The awards also validate our strategic focus on delivering reliable, high-impact technology, reinforce our commitment to continuous innovation and motivate us to continue delivering exceptional value to our customers."

TrustRadius delivers the most credible buyer intelligence platform, helping business technology buyers confidently make decisions with comprehensive, vetted product information and customer-generated content.

ECI also earned a number of 2024 awards from TrustRadius, including:

A Tech Cares Award for demonstrating exceptional Corporate Social Responsibility in support of its communities and employees
Four Top Rated Awards for JobBOSS2®, Ridder iQ, EvolutionX and JumpTrack
Two Most Loved Awards for JobBOSS2 and JumpTrack
Learn more about M1, Ridder iQ, EvolutionX, Red Falcon, e-automate, JumpTrack and other industry-focused solutions on *ECI's 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.

Innovations in Spend Management from SAP Help Customers Improve Productivity, Gain Insights and Boost Growth

SAP announced updates to its spend management solutions to help companies collaborate strategically, increase productivity, manage compliance effortlessly and gain business insights.

The announcements were made at SAP Spend Connect Live, the industry's premier spend management conference, held October 14-16 in Las Vegas.

SAP Embeds Generative AI Across Spend Management and Business Network Solutions

SAP is embedding its generative AI copilot Joule across the SAP Ariba source-to-pay solution portfolio to make it easier for customers to manage routine inquiries, such as status updates, summarization and frequently asked questions. Generative AI will be further infused in SAP Ariba solutions to recommend buying bundles and provide comprehensive supplier summaries.

Joule will help SAP Fieldglass solutions customers perform time-consuming hiring tasks and service requests with speed and accuracy. Joule can recommend best-fit templates to generate job postings and statements of work (SOWs) with prefilled information such as start date and the number of skilled workers needed.

Joule embedded across SAP Business Network will facilitate tasks in logistics and asset management. Generative AI will analyze, categorize and transform

unstructured invoice rejection errors into structured, actionable insights to reduce the cost of resolving exceptions. Generative AI capabilities within the SAP Business Network Discovery solution will help match suppliers with new business opportunities.

Joule is currently available within SAP Ariba solutions and will debut in SAP Fieldglass solutions and SAP Business Network in the fourth quarter 2024. Joule will manage 80% of the most frequently performed tasks in the portfolio of intelligent spend management and business network solutions from SAP starting in the fourth quarter 2024 with a phased approach.

New SAP Ariba Intake Management Solution Delivers Simplicity in Procurement

SAP introduces the SAP Ariba Intake Management solution to help transform how businesses handle employee requests and process orchestration, starting with procurement.

With SAP Ariba Intake Management, employees have one place to go for procurement inquiries and visibility on status. The solution collects employee requests, orchestrates processes across heterogenous landscapes and applications, including all necessary stakeholders, and provides visibility on status while shielding employees from process complexity yet keeping them informed. This simpler, more intuitive user experience is designed to help drive adoption and improve compliance.

SAP plans to make SAP Ariba Intake Management available in the first quarter 2025.

New SAP Business Network, Promote Subscription to Help Suppliers Grow their Businesses

SAP Business Network in the first quarter 2025 will launch a new promote subscription with value-added features to help suppliers differentiate themselves, attract new buyers and grow their businesses. With millions of companies conducting nearly $6 trillion in commerce annually on the SAP Business Network, promote presents a sizable opportunity for suppliers to accelerate growth.

SAP Unveils Analytics Add-On for External Workforce Management

The new analytics add-on with AI capabilities for SAP Fieldglass solutions helps procurement, vendor management and HR professionals to quickly implement more agile multi-channel talent strategies. This add-on enables business users to benchmark and predict external talent scenarios.

The analytics add-on for SAP Fieldglass solutions lets users:

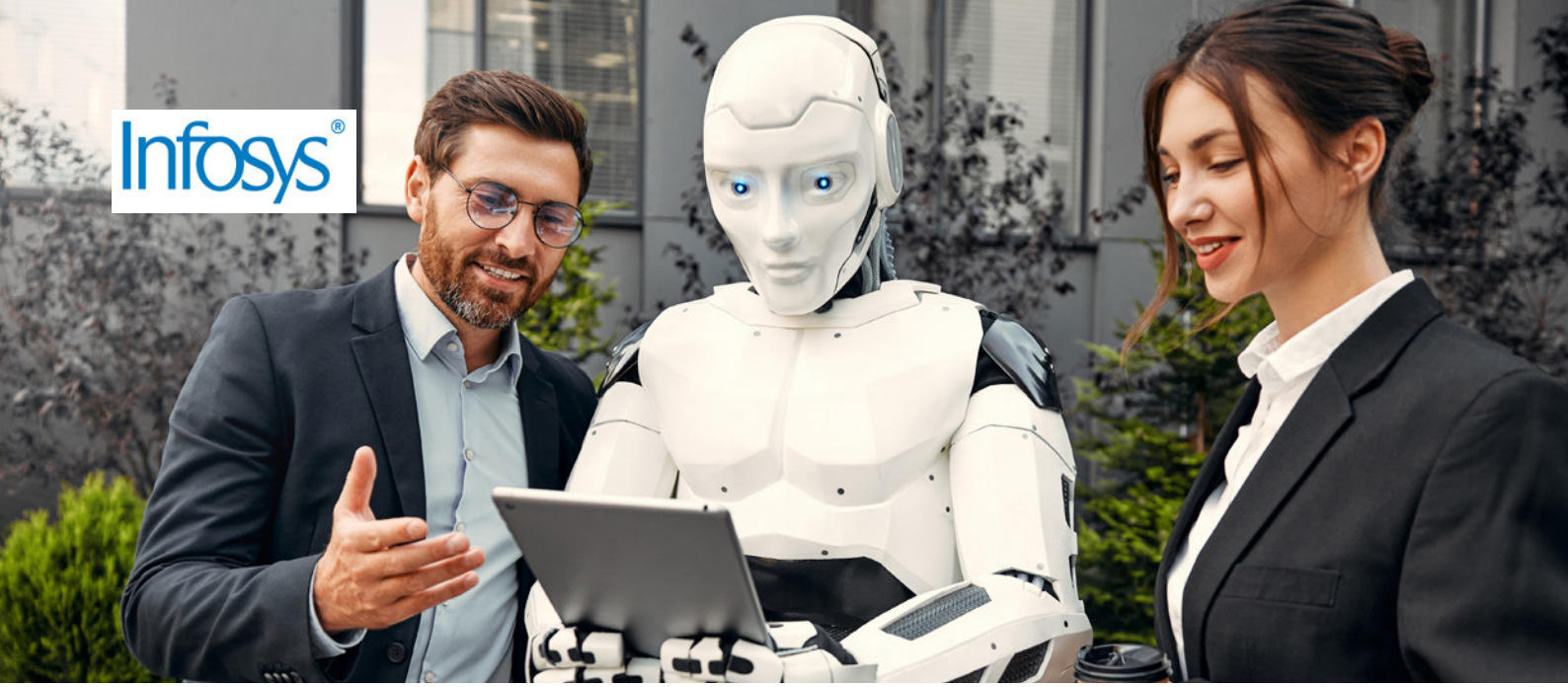
- Review performance against over 50 external workforce key performance indicators.
- Access global market intelligence including rates, talent supply and demand, and time-to-hire trends.
- Track sustainability initiatives such as spend with diverse suppliers and worker health and safety, while observing cost overruns, worker fatigue, and on- and offboarding compliance.

"With SAP Business AI as the foundation of our intelligent products, customers can improve productivity and gain insights from their spend data no matter where it sits," said Manoj Swaminathan, President and Chief Product Officer, Intelligent Spend and Business Network, SAP. "Whether it is managing cost, mitigating risk or supporting scope three emission reduction, SAP empowers companies with the right solutions for agile and effective spend management and supply chain functions."

Visit the *SAP News Center*. Follow SAP at *@SAPNews*.

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.



Infosys Finacle Launches Data and AI Suite to Help Banks Accelerate their AI Journey

Infosys Finacle, part of EdgeVerve Systems, a wholly-owned subsidiary of Infosys, announced the launch of the Finacle Data and AI Suite, a set of solutions to empower banks to infuse AI into their digital operations and accelerate their enterprise AI journey. The suite will offer a comprehensive set of platforms that enable banks to build low-code, predictive as well as generative AI solutions from the ground up with high transparency and explainability. It will help banks scale their data readiness, industrialize AI model development, apply generative AI technologies, and deliver actionable insights across their entire ecosystem.

The Finacle Data and AI Suite is a part of *Infosys Topaz* – an AI-first set of offerings using generative AI technologies and steered by a 'responsible by design' approach that ensures strong standards of AI ethics, trust, privacy, security and regulatory compliance. The suite consists of three components.

- ***Finacle Data Platform:*** It includes an automated data pipeline to clean, transform, and deliver data for AI and other organizational requirements. This sits alongside a modular data lakehouse with BIAN (Banking Industry Architecture Network) inspired data models and domain-specific data marts for rapid, interoperable access.
- ***Finacle AI Platform:*** It allows banks to build, train, deploy, monitor, and optimize AI solutions from a unified interface. It features a wide range of pre-trained models and ML techniques, combined with a no-code, generative AI-driven approach, allowing both technical and business users to rapidly create explainable AI solutions. The platform's extensive library of pre-built use cases facilitates seamless AI integration into various business processes and user journeys. Features such as model comparators, what-if simulations and pattern analysis, help refine and elevate modelling sophistication. The platform promotes responsible AI practices with capabilities for detecting biases and drifts and includes a patent-pending synthetic data generation feature to safeguard data privacy during training.

- ***Finacle Generative AI Offerings:*** These encompass a diverse range of AI assistants designed for both enterprise and customer-centric applications, including the Finacle Knowledge AI Assistant, designed to facilitate NLP-based information extraction from document repositories, and the Finacle Support AI Assistant, which enhances ticket resolution for support teams. Additionally, generative AI technology plays a foundational role in Finacle AI Platform, empowering users with an interactive interface to select and build the right models for their AI use cases.

Sajit Vijayakumar, Chief Business Officer and Global Head, Infosys Finacle, said, "AI is transforming banking by redefining the future of customer experience, risk management, and decision-making. By leveraging data at scale, AI empowers banks to anticipate needs, personalize solutions, and drive growth with unprecedented agility. We are excited to introduce the Finacle Data and AI Suite as a definitive solution for banks seeking to harness the power of AI. The Finacle Data Platform lays out a robust data foundation, and the Finacle AI Platform abstracts the complexities of AI development, putting power in the hands of banks' business teams to unlock the true potential of AI."

"Finacle's cutting-edge AI Suite for the banking industry harnesses the power of Microsoft Azure and Azure OpenAI Service to enable banks to scale AI initiatives and drive innovation across critical areas such as customer interactions, operations, and strategic decision-making," said ***Marianne Roling, Vice President, Systems Integrators, Microsoft***. "By leveraging AI, Infosys Finacle is laying the groundwork for a smarter, more agile, and resilient banking ecosystem."

Jerry Silva, Program Vice President, IDC Financial Insights, said, "AI-fueled business is the next revolution in the financial services industry. But success will be predicated on how quickly banks can integrate AI into their operations while maintaining governance and compliance. While generative AI has raised the urgency for adoption, long-term differentiation will come from a strong commitment to robust data readiness and responsible AI practice. Platforms like Finacle Data and AI Suite can support the banks' goals of faster adoption of AI as a tool to respond quickly and effectively in a fast-evolving landscape."

About Infosys Finacle

Finacle is an industry leader in digital banking solutions. We are a unit of EdgeVerve Systems, a wholly-owned product subsidiary of Infosys (NSE, BSE, NYSE: INFY). We partner with emerging and established financial institutions to help inspire better banking. Our cloud-native solution suite and SaaS services help banks engage, innovate, operate, and transform better to scale digital transformation with confidence. Finacle solutions address the core banking, lending, digital engagement, payments, cash management, wealth management, treasury, analytics, AI, and blockchain requirements of financial institutions. Today, banks in over 100 countries rely on Finacle to help more than a billion people and millions of businesses to save, pay, borrow, and invest better. For more information, visit www.finacle.com.

About Safe Harbor

Certain statements in this release concerning our future growth prospects, or our future financial or operating performance, are forward-looking statements intended to qualify for the 'safe harbor' under the Private Securities Litigation Reform Act of 1995, which involve a number of risks and uncertainties that could cause actual results or outcomes to differ materially from those in such forward-looking statements. The risks and uncertainties relating to these statements include, but are not limited to, risks and uncertainties regarding the execution of our business strategy, increased competition for talent, our ability to attract and retain personnel, increase in wages, investments to reskill our employees, our ability to effectively implement a hybrid work model, economic uncertainties and geo-political situations, technological disruptions and innovations such as Generative AI, the complex and evolving regulatory landscape including immigration regulation changes, our ESG vision, our capital allocation policy and expectations concerning our market position, future operations, margins, profitability, liquidity, capital resources, our corporate actions including acquisitions, and cybersecurity matters. Important factors that may cause actual results or outcomes to differ from those implied by the forward-looking statements are discussed in more detail in our US Securities and Exchange Commission filings including our Annual Report on Form 20-F for the fiscal year ended March 31, 2024. These filings are available at www.sec.gov.

Rootstock Software to Host "FABTECH Feud" and Showcase Its Innovative ERP Solution

Manufacturing leaders can learn about key tech trends from Rootstock's 2024 Manufacturing Tech Survey

Rootstock Software, a recognized leader in the Manufacturing ERP space, is excited to showcase its latest ERP capabilities at FABTECH 2024, being held October 15-17 at the Orange County Convention Center in Orlando, Florida. Manufacturing professionals can engage with the Rootstock team by receiving ERP demos at the Rootstock booth, attending an interactive emerging leaders' session, and participating in an exclusive happy hour for networking.

FABTECH is the premier event for professionals in metal forming, fabricating, welding, and finishing. Attendees will discover the latest innovations driving productivity and efficiency across various manufacturing industries.

"We're thrilled to exhibit at FABTECH, showcasing our award-winning ERP and how it has helped manufacturers scale for growth and enhance decisioning across the enterprise," said *Raj Badarinath*, Chief Product & Marketing

Officer at Rootstock Software. "This year, we'll also be hosting 'FABTECH Feud' as part of the conference's Emerging Leadership track. This will be an interactive session, where attendees can participate while also learning valuable insights from our *2024 State of Manufacturing Technology Survey.*"

In the popular TV game show, two families compete to predict popular answers to survey questions. In the FABTECH Feud version scheduled for October 16, 3:00 pm ET, *David Burton*, Senior Director of Solution Consulting at Rootstock, will serve as the game show host, and two Rootstock customers—Kevin Wampler, Director of Operations at *Alumination Architectural Products*, and Tarik Shaheen, Director of ERP Strategy, *Demountable Concepts, Inc.*—will serve as team captains. The audience will be divided into two corresponding teams, feeding answers to their respective captains.

"I'm excited to participate in this session and to share our company's experience in utilizing modern technologies to improve our operations. This session is a great way to engage with attendees and to discuss the real-world challenges and opportunities that we all face," said *Kevin Wampler*.

"The FABTECH Feud format will be a fun way to review the latest manufacturing tech trends. I'm looking forward to bringing my perspective as a leader in ERP strategy and from my background in engineering, and to be able to blend that with the input I receive from audience participants," said *Tarik Shaheen*.

Other ways to engage with Rootstock at FABTECH 2024:

- ***Visit the Rootstock Booth.*** Attendees are also invited to visit Rootstock's booth S11154 to discover how Rootstock ERP can streamline manufacturing processes, enhance data visibility, and balance demand, supply, and production capacity. Rootstock's team of experts will be on hand to discuss and demonstrate the power of Rootstock's unified ERP platform and application ecosystem.
- ***ICEBAR Happy Hour.*** Attendees can also attend Rootstock's networking event on October 16 from 5:30 pm to 8:30 pm ET at the world-renowned *Orlando ICEBAR*. Guests will enjoy exclusive access to this venue for gourmet hors d'oeuvres and premium cocktails—all while connecting with fellow industry professionals. Shuttle service from the convention center will be available.

If you're not attending FABTECH but want to meet Rootstock experts, be sure to check out the company's other upcoming events at *https://www.rootstock.com/erp-events/* or schedule a demo here: *https://www.rootstock.com/erp-software-demo/*.

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.

NetSuite Announces Innovations to Help Businesses Increase Efficiency and Accelerate Growth

New embedded AI capabilities, product offerings, integrations, and user experience innovations help businesses gain insights, improve productivity, and promote collaboration

Oracle NetSuite announced a series of new product updates and AI innovations across the suite to help organizations increase efficiency and accelerate growth. The latest innovations build on the comprehensive AI capabilities, including generative AI, embedded in NetSuite by adding powerful new AI updates, a new procurement solution, new partner integrations, updated project management capabilities, user experience enhancements, new training resources, and an integrated benefits offering.

"We designed NetSuite to be the foundation of business growth, with a platform that can evolve and expand to meet changing needs and a data model that connects a customer's entire business," said Evan Goldberg, founder and executive vice president, Oracle NetSuite. "We continue to extend NetSuite's capabilities to further strengthen that foundation. As customers scale their businesses on NetSuite, AI innovations and workflow optimizations help them gain intelligent insights, improve productivity, and simplify collaboration."

To help customers gain insights to inform decision making, identify growth opportunities, and solve business challenges, NetSuite is introducing innovations across the suite. The latest capabilities include:

- ***AI updates embedded across the suite:*** Help organizations increase efficiency, mitigate risk, and reach their goals faster. With financial exception management, a new digital assistant in NetSuite SuiteAnalytics, and tools to enhance the quality of AI-generated content and embed generative AI in NetSuite extensions, customers can gain more value from the suite. To learn more about the latest NetSuite AI updates, please visit: *Oracle NetSuite Helps Accelerate Development, Processes, and Insights with New AI Offerings.*

- ***NetSuite SuiteProcurement:*** Helps organizations streamline indirect procurement processes, control costs, and gain access to preferred pricing and benefits from suppliers, including Amazon Business and Staples Business Advantage. With features to help automate purchasing approvals, order creation, invoicing, and reporting, customers can optimize spending and efficiently buy goods and services needed to support growth. To learn more about NetSuite SuiteProcurement, please visit: *NetSuite Introduces SuiteProcurement to Help Customers Reduce the Cost of Doing Business.*

- ***NetSuite Connector for Salesforce:*** Helps joint customers automatically share data between NetSuite and Salesforce. With real-time data flow, customers can align data in both applications to expand visibility into order and fulfillment details and financial, customer and contact information, accelerate order-to-cash and revenue recognition processes, and

make more informed decisions. To learn more about NetSuite Connector for Salesforce, please visit: *NetSuite Connector for Salesforce Helps Organizations Gain More Value From Their Data.*

- ***NetSuite Analytics Warehouse:*** Helps organizations accelerate data analysis and gain contextual insights with new embedded AI capabilities. With updates that enable business driver identification, scenario predictions such as customer churn and inventory stockouts, and custom machine learning models, customers can uncover opportunities to improve efficiency and drive growth. To learn about NetSuite Analytics Warehouse updates, please visit: *NetSuite Expands AI Capabilities for NetSuite Analytics Warehouse.*

- ***NetSuite Enterprise Performance Management (EPM):*** Helps organizations streamline financial reporting and quickly capitalize on growth opportunities. With updates that enable generative AI for narrative reporting, AI-powered narratives in NetSuite Planning and Budgeting, enhanced predictive forecasting, and a digital assistant to assist with EPM workflows, customers can improve productivity and further enhance decision making. To learn about NetSuite Enterprise Performance Management (EPM) updates, please visit: *NetSuite Introduces New Enterprise Performance Management AI Capabilities to Help Finance Teams Accelerate Processes.*

- ***NetSuite SuiteProjects Pro:*** Helps organizations reduce risk, optimize resource allocation, increase profitability, and scale operations. Formerly NetSuite OpenAir, SuiteProjects Pro delivers new user experience enhancements and AI capabilities to help customers monitor the health of projects, accelerate project planning, and increase productivity. To learn about NetSuite SuiteProjects Pro, please visit: *NetSuite Introduces New AI-Powered Project Management Capabilities.*

- ***Oracle Redwood Design System:*** Helps customers accomplish tasks more efficiently and drive adoption with Oracle's award-winning application design system by providing a modern user experience across the suite. NetSuite Enterprise Performance Management and NetSuite Analytics Warehouse already use the Redwood user experience. The design system is planned for roll out to NetSuite SuiteProjects Pro, Customer 360, and to the entire NetSuite application starting with the most widely used areas of the suite like dashboards, lists and forms, to further enhance productivity.

- ***NetSuite Guided Learning Managed Service:*** Helps organizations tailor learning resources to maximize the value of the suite. Building on *NetSuite Guided Learning*, the new managed service includes support from NetSuite Education experts to create step-by-step guidance embedded in NetSuite that is tailored to a customer's unique business processes. In addition, analytics reports help customers further tailor training and ensure teams are using the suite productively by evaluating interactions with learning guides.

- ***NetSuite SuitePeople integrated benefits offering:*** Helps organizations *improve the benefits experience* by embedding *SimplyInsured*'s small business-focused health benefits marketplace directly within NetSuite to enable employers to shop for benefits plans and support employees to enroll. With costs deducted seamlessly from employee's pay and posted directly to the general ledger, customers can simplify benefits management and improve financial insights.

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 40,000 customers in 219 countries and dependent territories.

About Future Product Disclaimer

The preceding is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

CVC and CD&R Close Transaction for Strategic Investment in Epicor

CVC and Clayton, Dubilier & Rice ("CD&R") confirmed the completion of the previously announced investment in Epicor, a global provider of industry-specific enterprise software to promote business growth, following the receipt of all customary approvals. Financial terms of the transaction were not disclosed.

In August 2024, Epicor announced that its existing investment partner, CD&R, had entered into a definitive agreement to sell a significant ownership position in the company to funds managed by CVC. CD&R and CVC will have joint Board governance in Epicor.

"We look forward to working with CVC and CD&R as we continue to invest in our people, portfolio and AI-powered cognitive ERP capabilities to enhance the value we bring to our customers and communities," said Steve Murphy, Epicor CEO. "We anticipate this strategic partnership will enable us to accelerate our growth into new markets, continue to develop new cloud-ready products and support our focus in delivering for the Make, Move and Sell industries worldwide. We believe CD&R and CVC's combined operating expertise in the technology and software space will be a key driver of innovation and expansion of our business."

Barclays served as lead financial advisor, Goldman Sachs & Co. LLC served as financial advisor, and Debevoise & Plimpton served as legal advisor to CD&R and Epicor. Jefferies LLC and Evercore served as financial advisors and White & Case served as legal advisor to CVC.

About Epicor

Epicor Software Corporation equips hard-working businesses with enterprise solutions that keep the world turning. For more than 50 years, Epicor customers in the automotive, building supply, distribution, manufacturing, and retail industries have trusted Epicor to help them do business better. Innovative Epicor solution sets are carefully curated to fit customer needs and built to flexibly respond to their fast-changing reality. With deep industry knowledge and experience, Epicor accelerates its customers' ambitions, whether to grow and transform, or simply become more productive and effective. Visit www.epicor.com for more information.

About Clayton, Dubilier & Rice

Founded in 1978, Clayton, Dubilier & Rice (CD&R) is a leading private investment firm with a strategy of generating strong investment returns by building more robust and sustainable businesses through the combination of skilled investment experience and deep operating capabilities. In partnership with the management teams of its portfolio companies, CD&R takes a long-term view of value creation and emphasizes positive stewardship and impact. The firm invests in businesses that span a broad range of industries, including industrial, healthcare, consumer, technology and financial services end markets. CD&R is privately owned by its partners and has offices in New York and London. For more information, please visit www.cdr-inc.com and follow the firm's activities through LinkedIn and @CDRBuilds on X/ Twitter.

About CVC

CVC is a leading global private markets manager with a network of 30 office locations throughout EMEA, the Americas, and Asia, with approximately €193 billion of assets under management. CVC has seven complementary strategies across private equity, secondaries, credit and infrastructure, for which CVC funds have secured commitments of approximately €235 billion from some of the world's leading pension funds and other institutional investors. Funds managed or advised by CVC's private equity strategy are invested in approximately 130 companies worldwide, which have combined annual sales of over €155 billion and employ more than 600,000 people. For further information about CVC please visit: www.cvc.com. Follow us on LinkedIn.

Acumatica Launches Comprehensive Cloud ERP Solution for Professional Services Firms

Professional Services Edition Built to Enhance Collaboration and Efficiency, Enabling Firms to Manage Projects, Optimize Resources and Ensure Financial Control

Leading cloud ERP provider, *Acumatica*, launched its new *Professional Services Edition*, built to enable small and midsized professional services firms to increase efficiency and accelerate growth. This new solution marks an important expansion of the company's industry-specific product line, delivering tailored features and capabilities designed to enhance collaboration and boost operational efficiency for firms in architecture, engineering, IT and beyond.

The signs that Professional Services firms are increasingly reliant on technology are confirmed by the latest research. A recent survey from *S&P Global Market Intelligence* revealed that 85% of professional services leaders believe the tools and technologies they rely on significantly impact the quality of their work. An *SMB Group survey* further confirmed this trend, noting that 66% of professional services leaders indicated that technology is "very important" to overall business strategy.

"These industry trends and direct feedback from the Acumatica Community were the main drivers for creating the Professional Services Edition, with customers, partners and developers voting it a must-have solution," said Jeremy Larsen, vice president of product management at Acumatica. "The professional services industry is an underserved market for technology companies, providing a significant opportunity for innovation. As the fourth-largest vertical of customers we already serve, our partners have expressed strong enthusiasm about the potential impact of this release."

The Professional Services Edition supports critical processes for firms where project-based accounting and resource management and optimization are essential for success. The company's core offerings include resource management, CRM, project planning, scheduling, accounting and time and expense management. By delivering real-time insights and fostering collaboration, Acumatica's new edition is designed to empower firms to complete projects on time, within budget and to the highest industry standards.

"Professional services firms face intense competition and require advanced business management technology to enhance operations and drive future growth," said Jason Leveson, principal at *Revive ERP*, an Acumatica partner. "Acumatica's Professional Services Edition is a smart step in providing these firms with the tools they need to stay agile, scale effectively and maintain a competitive edge in an ever-evolving market."

The Professional Services Edition joins Acumatica's existing suite, which includes the Construction Edition, Manufacturing Edition, Distribution Edition, Retail Edition and General Business Edition. Acumatica's commitment to delivering industry-specific solutions highlights its understanding of the distinct challenges businesses face across various sectors. Business services and software review platform G2 *recently recognized* Acumatica's dedication by awarding the company top positions in categories such as the Construction Relationship Index, Distribution ERP and Project-Based ERP. The Professional Services Edition reinforces Acumatica's approach to specialized technology that is capable of managing complex, project-driven environments with precision and efficiency.

Request a demo to learn more about Acumatica Professional Services Edition.

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.

Sage and Artis Trade Join Forces to Accelerate Document Automation and Drive Efficiency in Secured Finance

Sage, the leader in accounting, financial, HR and payroll technology for small and mid-sized businesses (SMBs), announce a landmark partnership with Artis Trade Systems "Artis", to automate document data entry and accelerate financial and document workflows for Secured Finance Lenders, Transportation and Commercial Companies.

Artis is a technology company that provides performance tools for Secured Finance Lenders to increase efficiency, reduce costs, generate new sources of revenue and reduce credit risk. Artis also serves transportation, manufacturing, construction and other companies that are looking to reduce costs and improve their efficiency through document management and offering early payments at a discount.

Through Sage's AI Document Services, Artis' customers will benefit from faster, more efficient and accurate processing of critical financial documents, reducing manual work and enhancing speed in Factoring, Asset-Based Lending and Supply Chain Financing.

This collaboration marks the first time Sage is delivering AI services to a partner's platform, highlighting its strategy to extend the reach of its proven AI capabilities beyond its own product ecosystem.

Known for empowering SMBs with innovative technology, Sage is now making its AI solutions available to a broader partner ecosystem, including Financial Technology companies, Independent Software Vendors (ISVs), and banks. By partnering with companies like Artis, Sage enables these organizations to drive operational efficiency, improve accuracy, and create new revenue streams by integrating AI into their platforms. This partnership represents a significant step in Sage's broader innovation strategy, with plans to introduce additional AI services, such as fraud detection and generative AI, in the near future.

"Our partnership with Artis is an exciting step forward in bringing our AI innovations to new markets. These AI capabilities are already embedded within Sage's products and are trusted by our SMB customers to save them hundreds of hours annually. By automating document processing for Artis, we're not only delivering faster, more efficient workflows for their customers but also enabling significant time savings and greater accuracy. This partnership shows how reliable and effective our AI has become through the work we've done in our own products," said David Dickson, SVP of Sage AI.

Sage's AI document processing solution is a key component of its strategy to make AI capabilities more accessible to its partner ecosystem. By leveraging Sage's trusted technology, partners can quickly integrate sophisticated AI into their own platforms, streamlining operations without the need for costly in-house development. Sage goes beyond offering basic Optical Character Recognition (OCR) by providing a comprehensive solution that includes built-in security, privacy safeguards, and dedicated ongoing support.

By collaborating with Sage, partners can integrate AI services faster and more efficiently, solving critical customer challenges while reducing the complexities and risks associated with adopting advanced technologies. Sage's long-term commitment to innovation ensures partners have access to reliable, cutting-edge solutions that drive growth and enhance competitiveness.

The implementation of Sage's Document Extraction and Document Split services will enable Artis to automate the reading, extraction, and classification of data from various document types. This innovation eliminates manual data entry, streamlines financial workflows, and provides access to new data that can further refine AI performance.

"Partnering with Sage will empower us to enhance our customers' overall experience by providing best-in-class document scanning, accounting, and fraud detection. By embedding Sage's proven AI solutions within ArtisPro, we will enable our clients to process documents more efficiently with fewer errors, make better real-time credit decisions, and help them combat fraud. We're excited to collaborate with Sage, a trusted leader in tech innovation, and see significant potential in this partnership to drive even more impactful solutions for the secured finance industry and their customers," said Jamie Clemons, CEO, Artis.

Key Benefits of the Partnership for Customers:

Time Savings: Automating manual data entry reduces processing times, enabling customers to focus on more value-added tasks.

Increased Efficiency: Document Extraction and Document Split services ensure that critical financial documents are processed quickly and accurately, minimizing delays in financial workflows.

Improved Accuracy: By reducing human error in document handling, customers benefit from more accurate data processing, which is essential in supply chain financing.

Scalability: With Sage's proven AI technology, businesses can scale their operations without the burden of increasing manual processing tasks.

Data-Driven Insights: Access to new data sets through automated processing can help customers refine decision-making and improve AI service outcomes.

The potential of Sage's AI technology through the Artis platform is very promising. Automating document handling has the capacity to significantly reduce manual processes, improve accuracy, and speed up our operational workflows. We're excited to explore how this innovation can streamline AR processes for us and our customers," said Erin Kennah, VP Lending Operations, TAB Bank.

*For more information on Sage's AI Document Services see: *https://developer.sage.com/ai/*

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 make work and money 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.

About Artis

Artis's mission is to equip Secured Lenders—such as Factors, Asset-Based Lenders, and Supply Chain Finance providers—and their customers with tools that improve efficiency, reduce labor costs, generate additional revenue streams, and minimize credit risk. Our clients range from large publicly traded banks to owner-operated transportation companies, all of whom rely on our software to manage their client relationships, credit risk, documents, collateral, invoices, and day-to-day operations. Artis represents the next generation of technology and solutions for Secured Lenders and their customers.

How One of the Largest Independent Suppliers of Managed Print Devices in Ireland Improved Performance Through Automation

Bryan S Ryan faced several challenges, including reducing the time spent manually inputting data across different, unconnected systems, ensuring complete oversight of business performance, and providing field engineers with real-time information to improve customer service.

OVERVIEW

Bryan S Ryan
bryansryan.ie
Dublin, Ireland

INDUSTRY

Workflow, information, and print management solutions provider

IMPACT

-One central source of data truth
- Maximizing existing resources
- Reduction in customer enquiries
- Cyber security peace of mind

SOLUTIONS

e-automate
Printanista
KnowledgeSync
MobileTech

By addressing these challenges, Bryan S Ryan was able to respond to customer requests more efficiently, as all key details are now stored in one place. This allowed for improved reporting to customers, with access to detailed device histories, sales orders, and service call information. Additionally, sales opportunities could be identified by analyzing machine model statistics, highlighting potential upgrades based on life and usage. The business also gained the ability to analyze internal profitability through standard reports, using tools like E-Views or KnowledgeSync to gather and share critical data with relevant teams.

Who is Bryan S Ryan?

Established in 1949 as the first typewriter seller in Ireland, Bryan S Ryan now serves over 2,000 customers.

Employing a dedicated and knowledgeable team, Bryan S Ryan works with businesses of all sizes, across both the public and private sector.

As well as supporting digital transformation projects and helping to improve workflow management, Bryan S Ryan provides vital security, information and print management solutions.

As the largest and most technically advanced supplier of managed print devices to Ireland's corporate and SME sectors, Bryan S Ryan prides itself on helping customers better capture, organize and distribute documents and data.

The challenge

Identifying and offering the best, tailor-made solutions is at the heart of everything Bryan S Ryan does as a business. However, as the number of customers increased, a reliance on multiple, disjointed systems started to hinder overall productivity.

It became apparent that managing service packages and billings separately was draining hours of staff time each month, with the team having to manually review two different systems and input meter reading data.

This was most apparent at month end, when three members of the team had to manually enter over 6,000 meter readings. Gaining an accurate overview of business performance was also becoming challenging.

It was becoming difficult to track machines that were supposed to have been returned and on the sales side was difficult to ensure service contracts were set up and signed ahead of deliveries. While the team could see sales and return order slips, these weren't connected to the Service package and this could result in confusion or delays both with contracts and also returns and in turn with correct billing dates.

Preparing for peaks and valleys in demand was virtually impossible and the systems that were previously in place struggled to cope during exceptionally busy periods.

The solution

Having implemented *e-automate* in April 2018 a number of benefits have been noticed. "The fact we switch from an on-premise solution to the cloud means that we now have access to the latest releases and upgrades. Previously, we were missing out on some enhancements as we lacked the internal resources to keep on top of this. Moving to the cloud has also given us peace of mind when it comes to cyber security, as we know ECI is constantly investing in ensuring their solutions are secure."

With all information around orders, returns and collection calls linked to each customer's account, any member of the team - whether that be sales or accounts - can quickly log in to find what they need. A full history of all devices, accounts and contracts is now all in one place. Should they see that a machine has left the customer's site, they can check the expected return date to ensure that everything is progressing as it should and contract details are up to date quickly.

Since implementing e-automate, the number of customer requests relating to bills and invoices has significantly decreased. This is not only important from a customer service perspective, but it has also freed up the team to focus on my value-add activity rather than resolving simple administrative errors or oversights.

Despite Bryan S Ryan's customer base growing year-on-year, e-automate has enabled the same number of support staff to cope with an increased workload. For example, two people continue to monitor incoming calls and messages, despite these volumes having increased substantially over the past few years.

More recently, Bryan S Ryan wanted to upgrade how it managed its team of busy field engineers and decided to implement ECI's *MobileTech service tech app* in 2023.

This added functionality means that technicians now arrive on-site fully equipped with all of the information they need.

> "It's by no means a case of doing more with less, it's about doing more with the same and as we grow I know ECI's software will help us continue to drive more efficient ways of working."

The impact

From a board level, having all key business data in one place has improved reporting and enabled smarter decision making, as well as forward planning.

While I spend most of my time reviewing equipment and contracts, it's also really easy for me to gather detailed information about other areas of the business - all within just a few clicks.

Those working on the service desk, responsible for tracking over 10,000 machines, can now access a real-time overview of machine status rather than relying on manual record keeping or having to navigate their way through complicated paper-trails.

For our field technicians, the ability to access everything they need via a smartphone or tablet has streamlined how they work day-to-day and removed the need for endless paperwork.

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 Xservice, 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.

DoorDash Delivers America's #1 On-Demand Delivery Service with NetSuite

NetSuite supports DoorDash on incredible growth journey – from start-up through IPO to acquisitions, new services, and subscriptions supporting 37+ million customers

DoorDash, a leading food delivery and local commerce platform, has scaled its operations to serve more than 37 million active consumers across more than 30 countries each month, while running on *Oracle NetSuite*. With NetSuite, DoorDash has been able to take advantage of an integrated business system to efficiently support its mission to empower local economies. DoorDash connects consumers with more than 500,000 local businesses on its Marketplace, and more than two million Dashers who leverage its platform to earn, each month.

Founded in 2013, DoorDash builds products and services to help businesses innovate, grow, and reach more customers. To support its rapidly growing operations and establish a platform for future growth, DoorDash selected NetSuite in 2015 as its *enterprise resource planning* (ERP) system. With NetSuite, DoorDash was able to automate business processes, improve the speed and accuracy of reporting, and efficiently scale its operations as it expanded its services, added new subscription business models, and executed a highly successful IPO in 2020. In the same year, DoorDash became the U.S. category leader for food delivery. The company has since expanded to include grocery, convenience, and retail delivery, all of which have been rapidly growing categories.

"With NetSuite's scalable and flexible platform, we have grown from a startup to a publicly traded company, integrated numerous acquisitions, delivered new services and subscriptions, and expanded our offerings to tens-of-millions of customers around the world," said Gordon Lee, chief accounting officer, DoorDash. "NetSuite has been a valuable partner as we've evolved our business for each stage of growth."

With NetSuite, DoorDash has been able to adapt and scale its core business processes to support its rapid growth. To help ensure a successful initial public offering, NetSuite enabled DoorDash to optimize financial processes, including financial planning, budgeting, and reconciliation, and helped improve the accuracy of its bookkeeping. In addition, NetSuite's *learning and support services* have helped DoorDash maximize its investment in NetSuite at each stage of growth, by providing hands-on technical support to help solve growth-related business challenges.

"We're incredibly proud of supporting DoorDash's journey to become the number one food delivery operator in the United States," said Evan Goldberg, founder and executive vice president, Oracle NetSuite. "We look forward to continuing our partnership with the DoorDash team as they unlock even more success, and we'll work to ensure their core business processes evolve with changing customer demands so they can grow efficiently.

Webster Industries

Streamlining Business Processes, Reducing Costs and Leveraging Automation

Make-to-order industrial equipment manufacturer leverages automation to gain process efficiencies in all areas, from customer purchase orders to production operations and on through invoicing.

Solutions

- *Manufacturing*
- *Epicor Kinetic*
- *Epicor EDI*

Company

- Location: Tiffin, OH
- Industry: Industrial Machinery, Manufacturing
- *www.websterchain.com*

Challenges

- Streamline manufacturing processes.
- Improve business-to-business document exchange.
- Optimize operations from the shop floor to the office.

Solutions

- Enhanced functionality, improved ease-of-use and lower costs.
- Real-time transmission of inbound and outbound documents has increased process efficiency and decreased EDI errors by 50%.
- Modern user interface and robust reporting helped to provide exceptional visibility and alerts that reduce issue resolution time by 90%.

Maximizing Efficiencies with Epicor Kinetic and Epicor EDI

Webster went live on Epicor ERP (now known as Epicor Kinetic) in May 2017. The system has provided the company with key capabilities to streamline its make-to-order manufacturing processes.

Today, more than half of the company's quotes and orders are generated via 11 different Epicor product configurators. Based upon user input, these configurators helped to enable on-the-fly order configuration by automatically creating bills of materials (BOM), routings, selling prices, and part numbers.

Webster has improved the efficiency of its processes for handling sales orders, invoices, and other transaction documentation. The company recently migrated to Epicor EDI to support electronic document exchange after its existing EDI provider made the sunset of its solution.

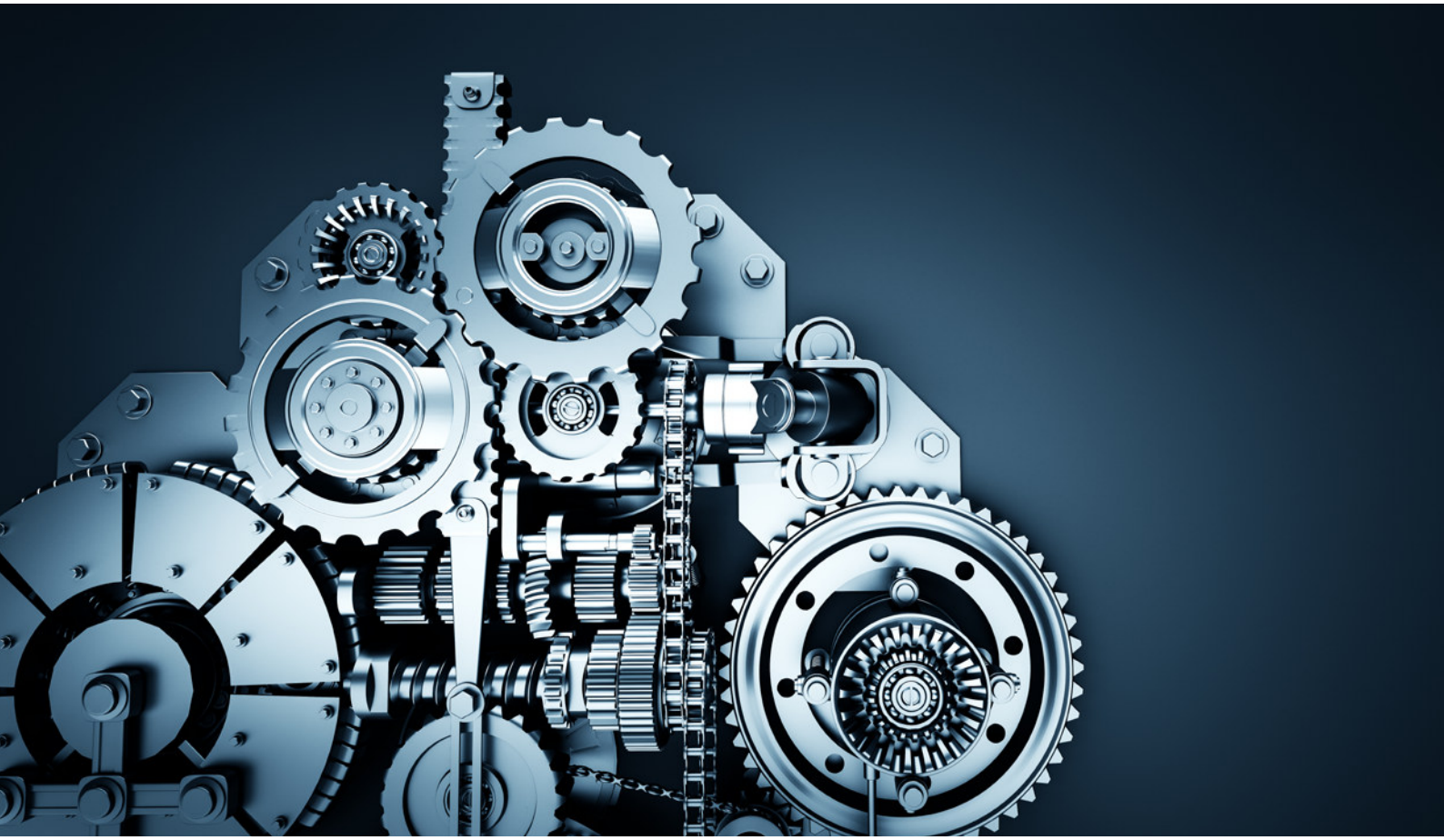
Also, Webster just recently implemented the Epicor Maintenance module to automate production and facilities equipment maintenance. Armed with Advanced Material Management, Webster employees on the shop floor use mobile tablet devices to request materials and have complete inventory-level visibility. These are just a few of the benefits the company has experienced working with Epicor, says Sharla Cline, ERP & IT Systems Manager, Webster Industries, Inc., adds that these efficiencies have also helped the company mitigate skilled labor shortages—an issue that nearly all manufacturers face.

HQXchange: Making EDI Intuitive and Easy

As an Epicor Kinetic user, Webster decided to move to Epicor EDI. "Working with Epicor EDI was a great experience from the start," Cline said. "The system is much more intuitive and easier to work with than our previous EDI solution. The normal pains of implementing a new EDI software were minimized after seeing the HQX change user interface and how easy it was to set up and change the mappings and transaction settings," she said, referring to the Epicor EDI platform portal.

HQXchange helps to offer a modern user interface that is built to support optimal visibility and ease of operation. A "one-click" trading partner set-up process minimizes trading partner setup time and configuration errors.

An intuitive and flexible EDI data mapper allows for fully automated business-to-business document processes aligned with each business operation, while unparalleled reporting helps offer complete transparency and notifications of EDI errors.



> "The ability to monitor and configure the entire EDI solution from one program is amazing...we no longer have to babysit our EDI software."

"The ability to monitor and configure the entire EDI solution from one program is amazing," Cline said. "The software is intuitive, and making changes is straightforward. The automatic monitoring and alerting capabilities allow us to be mostly hands-off, only handling exceptions when they arise. We no longer have to babysit our EDI software."

Easy Implementation

Working with a single vendor in Epicor, the EDI implementation and training was completed in about 100 days, creating a fast migration process with a lot of confidence in the EDI solution heading into the go-live.

"The implementation team was very knowledgeable and responsive, and it led to a successful go-live. The team was quite accommodating, tailoring the training to the needs of our users," Cline said. "This helped us to hit the ground running when we went live, making additional changes with ease. Another huge benefit for us was having a separate non-production environment to support complete end-to-end testing."

> "Our experience with Epicor EDI has been great. Additionally, the solution was much more cost-effective than our previous EDI vendor, so that was an added benefit."

"The support staff was friendly and efficiently answered our questions. They even checked in with us after the case was closed to make sure everything was still working as expected and that we did not have any follow-up questions," she added.

Soaring with Newfound Synergies

Real-time transmission of inbound and outbound documents has increased process efficiency, enabling Webster to decrease EDI errors by 75%. Now, the team operates via a true management-by-exception approach.

When error instances do arise, they receive an error code in an email with a PDF attached; this allows for easy issue identification as opposed to having to review hundreds of lines of code, as was required previously. "HQXchange provides exceptional visibility for all our transactions, greatly decreasing the time it takes for analysis," Cline said. "In the past, each exception took approximately five minutes to analyze and address; now, each takes only about 30 seconds."

On the synergies of Epicor Kinetic and Epicor EDI, Cline said, "it's great from an end user perspective that everything is integrated. A customer purchase order automatically creates a sales order in the Epicor Kinetic system."

About Epicor

Epicor Software Corporation equips hard-working businesses with enterprise solutions that keep the world turning. For more than 50 years, Epicor customers in the automotive, building supply, distribution, manufacturing, and retail industries have trusted Epicor to help them do business better. Innovative Epicor solution sets are carefully curated to fit customer needs and built to flexibly respond to their fast-changing reality. With deep industry knowledge and experience, Epicor accelerates its customers' ambitions, whether to grow and transform, or simply become more productive and effective. Visit www.epicor.com for more information.

Aon

Leveraging Data to Enhance Business Operations & Customer Experience

OVERVIEW

Aon is a leading risk consulting firm providing a broad range of solutions across Commercial Risk, Health, Reinsurance, and Wealth. Its 50,000 colleagues in 120 countries get results for clients by using proprietary data and analytics to deliver insights that reduce volatility and improve performance. With a goal to protect and enrich lives for people around the world, Aon provides advice and solutions that give clients the clarity and confidence to make better decisions to protect and grow their businesses.

In order to maintain its position as a leader in the financial services industry, the organization knew it had to adopt modern data integration practices that would enhance internal operations and customer experience. Aon needed to establish a global environment to store and process strategic proprietary data in batch or near real-time, to create differentiating value for its clients.

> "StreamSets is helping Aon build its view of the client, including relevant data such as industry risk attributes, insurance programs, internal revenue, commercial claims, health benefits, and investment portfolios, to name a few."

Challenge

Since 2018, Aon has been focused on building its enterprise-level Data & Analytic Services Platform to provide insights that ensure continued success for its clients. This environment has become the home for hundreds of data engineers, data scientists, and data analysts who need early access to data from disparate internal and external systems, driving discovery analytics and ultimately the delivery of new datadriven solutions that reach their clients. A successful strategy for DataOps depended on three factors in particular:

1. ***Multi-tenancy:*** Aon needed to enable dozens of Data Engineering teams to build pipelines side-byside with each other, isolated from data through security controls, but sharing common compute clusters for economies of scale. With StreamSets, they were able to assign roles and permissions so each team could achieve this level of isolation, without impeding governed data sharing whenever appropriate. This represented a huge significant benefit in cost savings and operational scale since it eliminated the need to spin up separate environments for each team.

2. ***Connectors:*** Aon ingests data from multiple systems, requiring a DataOps platform that supports a wide range of destinations and analytics platforms, including Hadoop, SQL Server, Postgres, Oracle, and Snowflake. StreamSets has hundreds of prebuilt connectors for various origins and destinations that allows Aon the flexibility to build their data pipelines with ease.

3. ***Democratization of Data Engineering:*** Aon had a need to quickly onboard and skill-up new members across data engineering teams, helping them shorten the development time of their first pipelines – a need well suited to the low-code ETL tool. StreamSets Control Hub provides Aon's data engineers with an intuitive design canvas to develop their pipelines, greatly increasing productivity compared to hand-coded solutions. This also helped ensure minimum design standards for new projects.

Solution

The StreamSets platform has enabled Aon to strengthen its DataOps practice to gain better insights from its market-leading proprietary data. By helping data engineers build pipelines to supply strategic client data of varying types and from various sources, StreamSets is helping Aon build its view of the client, including relevant data such as industry risk attributes, insurance programs, internal revenue, commercial claims, health benefits, investment portfolios, to name a few.

Furthermore, as Aon ingests data coming from various disparate sources, StreamSets pipelines help to clean and augment the data in flight. Not only has this helped the organization centralize the data, but they are also able to run, better connect, and expose it for analytics through Snowflake. StreamSets is a key component in establishing a mature development lifecycle and support posture within data engineering as they build, monitor, and manage their data pipelines via StreamSets Control Hub and adjacent monitoring tools provided within Aon.

Results

Before adopting the StreamSets platform, lead time to acquire data from various sources for projects could take months, as the teams that needed that data would have to go through a project intake process, buy and install ETL tools, spin up SQL databases, and then begin their work. With StreamSets, not only has Aon's time for data ingestion significantly reduced, but the organization now also has a team onboarding process that takes weeks or less. Aon has been able to remove the need to provision dedicated infrastructure to teams, which enables data engineers to land data quicker. This benefit is passed downstream as the time from ideation to first exploration of data by data scientists and data analysts is dramatically improved.

About StreamSets

StreamSets, a Software AG company, eliminates data integration friction in complex hybrid and multi-cloud environments to keep pace with need-it-now business data demands. Our platform lets data teams unlock data—without ceding control—to enable a data-driven enterprise. Resilient and repeatable pipelines deliver analytics-ready data that improve real-time decision-making and reduce the costs and risks associated with data flow across an organization. That's why the largest companies in the world trust StreamSets to power millions of data pipelines for modern analytics, smart applications, and hybrid integration.

Coffee-Enthusiast Clive Coffee Takes the Home Espresso Experience to the Next Level with Acumatica Cloud ERP

CLIVE COFFEE

OVERVIEW

Espresso and coffee-enthusiast Clive Coffee took the home barista experience to the next level when its online sales business grew during the pandemic and it added a subscription service and an educational component. But it soon became obvious that they couldn't use QuickBooks, a separate eCommerce system, and order processing with inventory and go through the manual rotations needed to consolidate all the data. So, Clive Coffee implemented Acumatica Cloud ERP, gaining a single integrated platform that provides real-time financial visibility, increased inventory accuracy, and helps Clive continue in its mission to guide its clients in their pursuit of great espresso, design, and quality that lasts.

KEY RESULTS

- Acquired a single, integrated, cloud-based solution, eliminating manual reconciliation processes
- Provided instant and accurate financial reporting, improving decision making
- Gained deep and connected data transparency, streamlining operations
- Avoided hiring additional staff in finance, scaling transaction volume more efficiently
- Improved the customer experience, shipping products 50 percent faster, exceeding consumer expectations
- Obtained a connected platform for growth that can scale rapidly as the business continues to evolve
- Acquired remote access from anywhere, increasing productivity while saving time

Challenges

Founded in Portland, OR in 2008, Clive Coffee sells luxury home espresso machines and accessories, operates a personalized coffee subscription service, and runs a virtual coffee school. The 45 person staff strives to provide the equipment and knowledge to help consumers attain the perfect barista experience at home.

Initially, the company sold its espresso machines through its showroom and in-person sales in Portland, Oregon as well as through its website. Later, Clive Coffee began offering personalized coffee subscriptions connecting consumers with roasters all over the country when it acquired Mistobox. In 2020, the company launched its Coffee School to help those working from home learn how to become baristas, and adapted its sales efforts to better serve consumers during the pandemic, a move that also included adding a warehouse in Nashville, TN.

"A lot changed for Clive in 2020," says Amanda Datte, Clive Coffee's CFO. "Before, we had a showroom and some in-person sales. But now that everybody is working from home and wanting coffee, we're now 100 percent online and our business has really taken off."

Home espresso can seem very overwhelming, but Clive Coffee demystifies it, providing education from the moment a customer calls or emails and pulls their first espresso shot. "As the pandemic hit, people were missing their daily espresso or latte, which really began the search for a home barista set up," says Emily Sloan, Director of Marketing. "We had to be flexible and pivot quickly. As consumer preferences changed to home espresso, so did their expectations. We had to be equipped and ready to have inventory on hand and be able to ship it to them within the expected two-to-three-day timeline."

Need to Replace Disconnected Systems

Clive Coffee couldn't meet those expectations because it used QuickBooks for accounting and bookkeeping, separate inventory software, a different order processing system, and an eCommerce system. None of the systems were connected. "On a monthly basis, we had a laundry list of processes to get the information accurately into our accounting system," says Datte. "There were lots of checks and balances and lots of reconciliations because we manually inputted data."

The company didn't have accurate, up-to-date information or visibility into sales, revenue, inventory, or payment statuses. It would take up to 15 days to close a month, Datte says. "We were growing so fast, and it never felt like we were caught up. As soon as we finished one month, got all the details aligned, got them into QuickBooks, and got our balance sheet up to date, another month had already gone by. It was just a stressful environment."

Data was similarly messy in the warehouse.

"Before Acumatica, we had an inventory management system, a separate finance system and a separate shipping station," says Jessica Yutrzenka, Supply Chain and Operations Manager at Clive Coffee. "A lot of our systems were decentralized from an operational standpoint."

When systems are decentralized, she says, "you spend a lot of time analyzing: Why didn't one thing talk to the other? We spent a lot of time either making our data look the same in both systems and understanding why it didn't connect."

Inventory Hard to Track

As a result, tracking inventory was difficult. "It was really not easy to tell how much we shipped of one product or how many orders were canceled," says Yutrzenka. "Uncovering what day we shipped a product out on was even challenging to get."

As transaction volumes increased, the staff realized they couldn't handle all the manual processes and have multiple siloed systems. "We knew technology could help us grow and become more efficient and so we started looking for an ERP," Datte says.

Solution

Versatile, Flexible, Connected

The Clive Coffee ERP selection team researched the big-name ERPs like SAP and Oracle NetSuite and smaller players. "We found a perfect size for us in terms of cost and flexibility, which was Acumatica," Datte says. "As soon as we saw Acumatica demos and heard everything about how versatile it could be, it was hard to keep looking at anything else."

"We knew Acumatica was a solution that we could grow with. We knew that it wasn't going to limit us to what we could do. There is a lot of possibility for Clive and how we want to continue to expand." Clive Coffee deployed Acumatica Cloud ERP in just six months.

Benefits

Streamlined Workflow, Real-Time Data

With Acumatica, Clive Coffee gained instant and accurate financial reporting, and deep data visibility. "As our business is growing so quickly, it's really important to have up-to-date information at our fingertips, at any point, any day, and at any moment," says Datte. "I can look at any point in time to see, 'Are we meeting our forecasted projections? And do we have the right infrastructure to continue to stabilize this growth?'"

"For month-end accounting it's night and day," she adds. "When we integrated Acumatica, I reviewed a checklist we had for our month-end procedures and was surprised that over half of them were eliminated, so it allows us to scale our business without having to hire more people to do this type of work."

Clive Coffee is run by a distributed team located in several states, and Acumatica Cloud ERP's secure cloud access allows the executive team to view financial data at any time. Previously they would have to wait until Datte emailed them a report. "We have our owners in Utah. We have some employees in Arizona and California, and now in this new distribution location in Nashville. It was absolutely a requirement that we have a tool that we can use anywhere and everywhere as we go."

With all data now in Acumatica, a single modern business platform, everything is connected, and many manual financial processes have been automated. "With everything built-in, our invoices now directly populate into our revenue and onto our P&L, and executives can pull information at any point in time," Datte says. "They can see how profitable we are this month. They can see what we're purchasing. They can have many questions answered at any point in time."

> "When we switched to Acumatica, it really created a seamless experience for our consumer, because our data accuracy, our inventory, and the way we communicated with our customers was in one spot and created a single source of truth."
>
> -Emily Sloan,
> Director of Marketing,
> Clive Coffee

Access from Anywhere

Anyone with internet access logs into Acumatica and is instantly productive. "I've been in positions where you had to log into a remote server to get to your books, and anybody who has done that before knows the nightmare because it locks you into a particular physical location," Datte says. "Having a system that's in the Cloud where we can use it on a laptop, a desktop, your phone, anywhere that you're traveling at any point in time, is absolutely crucial."

Improved Customer Experience

"When we switched to Acumatica, it really created a seamless experience for our consumer because our data accuracy, our inventory and the way we communicated with our customers was in one spot and created a single source of truth," says Sloan. "Our department could spend less time monitoring the backend and more time creating marketing content to grow the brand."

With all data housed in a single platform and updated as transactions happen in Acumatica, Clive Coffee can now meet its increased customer expectations. "We're in this era of, you buy something online, you want it at your doorstep the next day," says Datte. "Because our inventory is tied to our eCommerce site, a customer can now see what's available and be able to predict when they're actually going to have it in their house and ready to use."

"If you're in Florida, you no longer must wait five, six days to get something from us. It's going to be two days, which is amazing."

Real Time Inventory Insight

Having all data centralized has made Clive Coffee much more efficient.

"Because our inventory system is in the same system as our distribution, we are able to receive products in real time and then sell it the second we receive it," says Yutrzenka. "Order cancellations and order edits all happen in that very moment. And distribution is a lot smoother because we have one place for everyone to go to get all the answers they need. How much stock do we have? How much did we ship? How much product did we receive this month? We're able to get that data really quickly."

Excited for the Future with a Modern Platform for Growth

Because of Acumatica, Clive Coffee quickly opened its Nashville warehouse to serve customers better. "At this point, it's about getting all of our operations up to speed along with continually improving our processes. We are looking at potentially implementing bin locations and serial tracking," says Yutrzenka. "We are looking at other modules and distribution opportunities, as well as the manufacturing and field service modules Acumatica has."

The company is exploring new programs such as refurbishing older machines, opening pop-up retail stores, and offering a mobile educational component. In addition, because Acumatica houses all data in a single system, Clive Coffee executives can focus on the company's future rather than running its back-office infrastructure. "We're really focused on getting to know Acumatica and make use of all its features," says Yutrzenka. "It's extremely intuitive and has so many different modules so you are able to scale your business in whatever direction you want to go."

Datte concludes by adding, "The world is your oyster in terms of possibilities for efficiency and having seamless operations. We feel like we are prepared by using Acumatica for whatever the market has to offer. It's going to be a big part of our company now and into the future and we're very excited to continue growing that."

"We knew Acumatica was a solution that we could grow with. We knew that it wasn't going to limit us to what we could do. There is a lot of possibility for Clive and how we want to continue to expand."

-Amanda Datte,
CFO, Clive Coffee

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