ERP NEWS
MAGAZINE
ISSUE #32 • 10 / 2022

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Pinar SENGUL

EDITOR'S NOTE

Investing in an ERP system is a critical step in digitalization, but finding a system that is a perfect fit for your business is the real challenge. The requirements change depending on the industry, but the question is always the same: out-of-the-box ERP software or custom software?

In this issue, we will dig a little deeper and explore the pros and cons of using a customized ERP solution and the factors to consider when choosing the right custom ERP software. Should you invest in customization to gain a competitive edge or is it just recreating the technology that is already there? There is no specific answer to this, so you should focus on finding the answer that is right for your business.

In this issue of ERP News magazine, thought leaders of the foremost ERP vendors have shared their ideas about why and when customization is necessary. Also do not miss out on the special interviews with Sage, Epicor, Nulogy, Prophix, Rootstock, and Unit4!

And Rohit Gupta, Founder, and CEO at Auditoria.AI will shed a light on the importance of automation in the finance office, and Mike Guay, VP, Customer Success Executive at Infor will give you some priceless insights on customizing your ERP.

The latest news on the ERP industry, customer studies, and much more are also awaiting you through the following pages as always!

Sincerely,

Pinar Sengul

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AUTOMATION IS A GAME CHANGER FOR THE FINANCE OFFICE

*Article By **Rohit Gupta,***
Founder and CEO, Auditoria

Everyone who is familiar with email understands the time that it takes to sort, read, and respond to even the most basic correspondences. Who has an inbox that is not overwhelmed with emails?

On average - employees spend 28% of their workweek reading and responding to emails, which translates to roughly 13 hours a week per employee.

Picture your team performing their daily responsibilities, while also handling hundreds of extra, and often redundant, email requests from clients. These requests could be for a copy of a lost invoice, a purchase order, general information about payment terms or due dates, and much more. This is the workload of two jobs and will inevitably lead to mistakes.

Now imagine that you have one employee who sorts and responds to general email inquiries, sends requested attachments, and escalates requests that need attention - all in record time with no mistakes. Sounds like a dream come true right? With automation, this dream is quickly becoming a reality.

Technology is advancing at a record pace and finance departments are finally getting their well-deserved turn in line, and at the peak time. The finance back office has lagged behind in technology and this new wave of finance automation is more than welcome to relieve an overburdened, overworked, and often exhausted finance office.

Helpdesk of the Future

Helpdesks have been around for decades, the concept is nothing new. Finance departments often have a helpdesk staffed by people who answer general phone and email inquiries. Finance helpdesks address concerns relating to billing, payments, and purchase orders from both clients and vendors. As companies scale, this task could become overwhelming, if not impossible to handle manually with any kind of efficiency or effectiveness.

With the team stretched thin, mistakes happen and requests are overlooked, costing the company time and money and causing frustration for clients and vendors. Humans are prone to error, especially when pressure mounts from an increased workload. Basic technology has relieved some of the pressure, but until now there has not been an option for a fully autonomous, automated helpdesk.

With the advent of artificial intelligence and natural language processing technologies, we now enter the world of intelligent and autonomous helpdesks. Automated helpdesks are run by intelligent software robots (bots) that are taught to independently handle basic functions of accounts receivable (AR) and accounts payable (AP). These bots review, respond to, and triage requests in a fraction of the time it would take a human.

Five Benefits of Automated Helpdesks

Automated helpdesks are reshaping the future of finance and the benefits are significant. With automation and smart bots, many daily tasks are handled through software, saving time, resources, and money that helps ensure optimal outcomes. Additionally, data relating to transactions is collected and stored for future reference, auditing purposes, and analytical insights. With a little time dedicated to setting up and programming, these bots will do their job all day, every day, with no downtime and no mistakes.

1.Automated responses

Bots are trained to understand the details of accounting and finance, and given permission to handle customer- and vendor-specific tasks. They respond to inquiries immediately, ensuring no downtime for the client or vendor. Technology offers the benefit of perfection, so you learn to trust that your bots aren't making mistakes or costly missteps.

Remember, you remain in control - the bots will only perform tasks that they are configured to do. Anything beyond their scope of action is escalated to the attention of the staff.

2.Analysis and insights

Accurate planning and decision-making rely heavily on up-to-date historical data. Software has the ability to provide insights instantly. An automated helpdesk goes beyond the day-to-day tasks. The same bots that serve clients and vendors also collect and collate data so that organizations observe trends and predict patterns. Prior to automation, this incredibly laborious type of activity was performed manually, which often yielded inaccurate and outdated information.

3.Better decision making

In addition to the array of insights that automation supplies for decision-making, using technology removes the human component where it makes sense. This is often helpful as people are prone to biases and take time to make a decision. Bots sift through the massive amounts of data and inputs in record time and predict outcomes. A bot recommends action to be taken, and allows the human to analyze and reflect on the data gathered to make judgements and decisions with increased accuracy and dependability.

4.Scale without adding headcount

Investing in bots is more cost-effective and productive than increasing headcount when staffing your finance helpdesk. Bots do not suffer from fatigue or burnout, they do not have the capacity to socialize, and they do not need breaks. Training a bot is much less costly than a human, and they will not leave the job after time has been invested in training them. Once you program a bot, it will work 24/7, every single day. Humans cannot compete with the volume of work that is handled by software nor could they achieve the same levels of accuracy and productivity.

5.Greater cash position visibility

When you employ one team member to do the job of 10, it automatically yields greater cash savings. The ability to handle a heavy workload is just the tip of the iceberg when considering the cost efficiencies associated with automation. Software does not make mistakes, it performs the task exactly as directed, every single time. The overhead of software is virtually non-existent, and the training process is much less time-consuming. Bots don't just perform tasks, they gather information that guides better decision-making for the future. Investing in software creates a more targeted approach to future growth and success.

"HUMANS CANNOT COMPETE WITH THE VOLUME OF WORK THAT IS HANDLED BY SOFTWARE NOR COULD THEY ACHIEVE THE SAME LEVELS OF ACCURACY AND PRODUCTIVITY.

Looking to the Future

Finance departments have sat idle for too long as the world of technology progresses around them. The inefficiencies of traditional business processes in revenue accounting are costing finance teams valuable time and money. With digital options becoming more readily available, there are plenty of solutions for all organizations.

We have arrived at a pivotal moment, with a looming recession ahead, where the impact of advanced technology on a company's operating cash flow is no longer a choice, but a necessity to combat growing economic concerns and allow for a brighter future for finance teams and organizations.

Rohit Gupta is a serial entrepreneur, active angel investor, venture capital limited partner and software executive having built, scaled and successfully acquired and sold over fifteen companies in his career. He is currently Founder and CEO at Auditoria.AI, the leading cognitive automation provider for ERP and Corporate Finance teams.

About Auditoria

Auditoria is the leader in natural language technologies for corporate finance, helping finance teams automate business processes in AP, AR, GL, and Vendor Management to accelerate cash performance. By leveraging natural language processing, artificial intelligence, and machine learning, Auditoria removes friction and repetition from mundane tasks while automating complex functions, and providing real-time visibility into cash performance. Corporate finance and accounting teams at leading companies including Armanino, Arrive Logistics, FreshWorks, LiveRamp, UserTesting, and more use Auditoria to accelerate business value while minimizing heavy IT involvement, improving business resilience, lowering attrition, and accelerating business insights.

CUSTOMIZED ERP

*Article By **Mike Guay,***
VP, Customer Success Executive, Infor

Customizations and ERP — Don't recreate the past

As long as there have been ERP suites there have been customizations to ERP. Most people hear "customized ERP" think of the massive on-premises suites sold in the past 10 to 20 years. Modern SaaS ERP doesn't permit the same type of customization, but there's a benefit to applying lessons learned from the past.

Customizing on-premises ERP

ERP suites emerged to solve the problems of nonintegrated business processes and data inconsistency prevalent in the 1980s and early 1990s. They were designed to enforce process disciplines and maintain referential data integrity and they did that well. However, ERP suites were not very easy to use and they definitely were not flexible.

ERP suites in the 1990s through 2010s were packaged applications that ran on a database in the organization's data center – referred to as "on-premises ERP." Vendors provided source code for the applications, which gave customers the ability to customize ERP as they desired. Depending on the organization and its approach to customizations and governance, this capability ranged from quite beneficial to really horrific.

The nature of on-premises ERP meant that upgrades were difficult and expensive. Due to the expense and disruption, many organizations only performed an upgrade every 3 to 5 years. This meant features not included in the initial deployment would not be enhanced by vendor-delivered code for years. Any functional gaps or enhancements were resolved by customizing the vendor's code – called "tightly-coupled" customizations. Customizing vendor-delivered code in this manner was a prevalent and often efficient way to deploy new capabilities – and became the standard.

The problem? The more customizations deployed, the more difficult and expensive upgrades became. This led to a vicious cycle of no upgrades and more customizations. Over years, customers without the right level of discipline and governance regarding customizations often found themselves in the role of a software development house with piles of "zombie code" that never died or went away.

The expense and difficulty of maintaining and upgrading a highly customized ERP led many organizations to adopt a no-customization approach when replacing or acquiring a new ERP suite. That's a nice concept but not really practical. I have implemented ERP in one form or another for decades, and no one implements ERP without some customizations.

> **THE EXPENSE AND DIFFICULTY OF MAINTAINING AND UPGRADING A HIGHLY CUSTOMIZED ERP LED MANY ORGANIZATIONS TO ADOPT A NO-CUSTOMIZATION APPROACH WHEN REPLACING OR ACQUIRING A NEW ERP SUITE. THAT'S A NICE CONCEPT BUT NOT REALLY PRACTICAL. I HAVE IMPLEMENTED ERP IN ONE FORM OR ANOTHER FOR DECADES, AND NO ONE IMPLEMENTS ERP WITHOUT SOME CUSTOMIZATIONS.**

While ERP customizations generally have a bad rap, there are some valid reasons for them:

- ***Usability / efficiency.*** ERP suites are notoriously unfriendly. Inefficient user interfaces can have a serious negative impact on productivity.
- ***Filling functional gaps.*** Almost all organizations will need to add functionality to an ERP suite — usually a feature particular to the organization or industry. The requirements of some vertical industries are sometimes not delivered with standard ERP suites. Make-to-order, pharmaceuticals, and food & beverage are good examples.
- ***Intellectual innovation.*** Many organizations use customizations to create processes and capabilities that give them a competitive advantage — essentially their own intellectual property in their ERP landscape.

Customizing MT SaaS ERP

Multi-tenant (MT) software-as-a-service (SaaS) ERP has a different dynamic. Vendors tout the advantage of much more frequent releases with much simpler upgrades. Customers get new features and functions much more rapidly because vendors no longer give them the ability to customize the core system. This eliminates the tightly-coupled customizations that are used to interfere with upgrades and enable faster adoption of vendor-delivered capabilities.

Although newer systems have much nicer interfaces and are designed for faster new feature delivery, some usability and gap resolution enhancements are often still required. The good news is that SaaS vendors provide very good capabilities for low-code / no-code development and integration through enterprise application platforms (EAPs), making adding new capabilities – modern customizations – much easier. This enables what is now called Composable ERP.

The bad news is that without proper governance and planning, this can lead to a new technology version of the highly customized messes of the past — code attached everywhere to the periphery of the ERP suite. Like dropping a ball of Velcro into a pile of lint. Good luck untangling it.

With the proper controls, SaaS ERP can be customized and tailored to the needs of an individual organization. Doing so correctly provides the best of both worlds. You can still provide the customizations you need and desire. And still leverage the massive investments that vendors are putting into making these systems more easily updatable, smarter, and easier to use.

You just need a different approach and understanding of the technology.

Newer MT SaaS ERP suites have characteristics that can minimize the need for customizations:

- ***Nicer UIs.*** User interfaces are much nicer and easier to configure without writing code.
- ***Systems are updated more frequently.*** Most SaaS ERP vendors deliver new features and functions several times per year. The cycle ranges from quarterly to semi-annually.
- ***Enterprise application platform capabilities.*** SaaS ERP runs on EAPs that provide low-code / no-code development and integration capabilities. This provides an easier plug-and-play type environment to fill functional gaps or add intellectual property-enhanced capabilities.
- ***Marketplaces.*** Leading SaaS ERP vendors provide a structured environment for any end user, partner or external developer to create and deploy capabilities in a supportable framework.

> **WITH THE PROPER CONTROLS, SAAS ERP CAN BE CUSTOMIZED AND TAILORED TO THE NEEDS OF AN INDIVIDUAL ORGANIZATION. DOING SO CORRECTLY PROVIDES THE BEST OF BOTH WORLDS. YOU CAN STILL PROVIDE THE CUSTOMIZATIONS YOU NEED AND DESIRE. AND STILL LEVERAGE THE MASSIVE INVESTMENTS THAT VENDORS ARE PUTTING INTO MAKING THESE SYSTEMS MORE EASILY UPDATABLE, SMARTER, AND EASIER TO USE.**

Guidelines for managing and customizing a modern ERP suite

- ***Adopt new vendor releases consistently.*** Standardize on consuming new vendor releases wherever possible. Don't fall behind in adopting new capabilities. Technology advances such as process analysis and intelligence in applications will be evolutionary and built on prior releases.
- ***Democratize governance – but keep it rigorous.*** Just because you can do something doesn't mean you should. Adopt a disciplined and democratized approach to customizations. Permit decision-making further down the org structure.

- ***Focus on user experiences rather than features.*** Value comes mostly from enhanced user experiences, so establish flexible end-user and experience-focused governance.
- ***Embrace change and a composable mindset.*** Encourage and embrace frequent changes. Keep in mind that many customizations should have a much shorter lifespan than in the past. Vendor features will arrive faster than in the past. Enforce the discipline to remove custom code when new vendor-delivered features are close enough.
- ***Reorganize and retool IT.*** Support democratized development and integration. Change the role of IT from controlling to advising, to enable business functions to be more self-sufficient.
- ***Leverage the capabilities of the EAP.*** Enterprise application platforms delivered by vendors enable a flexible, composable, enterprise application suite. Be sure IT and your internal support staff are trained on configuration and integration tools.
- ***Leverage marketplaces.*** Make use of marketplaces to buy vs. build when it makes sense.

Emerging new technologies and capabilities delivered by ERP vendors offer tremendous opportunities for enhanced productivity. Customizations still have a role to play and can add significant value, but remember not to live in the past. Don't recreate a modern technology version of the highly customized suites.

Guay started working with business systems decades ago – before they were called ERP. His career has spanned over 35 years as a user, a vendor, and system integrator. His expertise and experience with ERP systems crosses HR, Finance, Supply Management and technology. He has worked with customers in many verticals including Public Sector, K-12, Higher Ed and others. Prior to joining Infor in 2020 Guay spent over 7 years as a senior ERP Analyst at Gartner. He was the lead author of the first Cloud ERP Magic Quadrant in 2018. He has expertise in best practices for adopting MT SaaS ERP and how customers can maximize value from the investments Infor is making in products and technology.

About Infor

Infor is a global leader in business cloud software specialized by industry. Providing mission-critical enterprise applications to 65,000 customers in more than 175 countries, Infor software is designed to deliver more value and less risk, with more sustainable operational advantages. We empower our 17,000 employees to leverage their deep industry expertise and use data-driven insights to create, learn and adapt quickly to solve emerging business and industry challenges. Infor is committed to providing our customers with modern tools to transform their business and accelerate their own path to innovation. To learn more, please visit www.infor.com.

rootstock CLOUD ERP

MANUFACTURING ERP SUCCESS

*Interview with **David Stephans,***
CEO, Rootstock Software

*Interviewer **Bruce Richardson***
Chief Enterprise Strategist, Salesforce

Many in the ERP market have heard of Rootstock Software—a company offering a Cloud ERP that enables hundreds of manufacturers, distributors, and supply chain organizations to turbocharge their operations in today's dynamic, post-pandemic world. Ranked as a Leader in the Nucleus ERP Value Matrix, Rootstock has vertical expertise in discrete manufacturing, medical devices, and high-tech verticals.

Recently, the company welcomed a new majority investor, Gryphon Investors, and with this change, Rootstock also promoted David Stephans, formerly president of the company, to take the helm as CEO. With more than 25 years of manufacturing and technology experience and a proven track record of taking the customer experience to the next level, David has the right stuff to navigate the road ahead.

In fact, David is so committed he once made a round-the-world trip in just four days! This was before COVID in the hectic times of international business travel. On a Monday, he started his journey from his home base in Florida, landing at Rootstock's headquarters office in California. By Tuesday, he was in Sydney, Australia to meet with customers and colleagues, but then was called to an urgent Thursday meeting in London. Upon returning home on Friday, he had one thought: "What's next?"

To understand and learn more about the changes within Rootstock, Bruce Richardson, Chief Enterprise Strategist at Salesforce, set out to get to know what makes David tick, as well as to learn more about his vision and strategy for Rootstock.

1. David, what are some of your top priorities for the next 12 months?

Our main priority is growth. We can focus on expansion because we've made all the right investments in our product and service models, so we know we're primed and scaled to deliver value to new prospects.

In terms of our ERP, there's tremendous need among manufacturers, distributors, and supply chain organizations for solutions that will aid in their digital transformation journeys. We've met their needs during times of extreme change—including the pandemic, remote work, supply chain disruptions, inflation, and labor shortages—and we'll continue to help them navigate future challenges, particularly in light of today's geopolitical issues.

Through it all, customers have recognized the power of our ERP being built on this next-generation cloud platform, which of course, is Salesforce, especially when Rootstock is compared to legacy ERP solutions or lesser ERPs that might be offered as pseudo-cloud systems. They see the benefits of a single source of data and native connectivity with other solutions on the Salesforce Platform.

We also continually enhance our ERP so that customers have the latest capabilities. Earlier this year, we announced updates—from enabling a resilient supply chain and improving demand planning to further leverage Salesforce Lightning, Einstein AI, and natural language processing (NLP) to enrich our user experience.

As a result of all these efforts, our cloud ERP continues to be ranked by industry analysts in the leader category—both in terms of its depth of functionality and the value our customers reap from our solution.

In the months ahead, you'll see announcements from Rootstock, including additions to our team and new initiatives that support this plan for growth.

> **GRYPHON IS GOING TO PROVIDE NOT JUST AN INFUSION OF CAPITAL BUT ALSO SPECIALIZED RESOURCES AND OPERATIONAL EXPERTISE THAT WILL BE CRUCIAL IN GETTING US TO THAT NEXT LEVEL OF GROWTH AND SUCCESS.**

2. Your promotion occurred on the same day that Rootstock announced it had a new majority investor—Gryphon Investors. Can you tell us more about Gryphon's interest in Rootstock?

Let me start with Rootstock's perspective—then we can go to Gryphon Investors' interest in our company.

When we went looking for an investment partner, we did our homework; we looked at a lot of companies and various options. In Gryphon, we found an organization that checked all the boxes. The firm has a software group, and we fit nicely within this portfolio as a unique offering. They're going to provide not just an infusion of capital but also specialized resources and operational expertise that will be crucial in getting us to that next level of growth and success.

But don't just take our word for it. Jon Cheek, Deal Partner and Head of Gryphon's Software Group, had this to say about their interest in Rootstock: "Global supply chain challenges over the last two years have highlighted the need for manufacturers and distributors to modernize the technology that controls their core business operations and processes. Rootstock's ERP platform provides best-in-class cloud software that improves the connectivity between companies and their customers, suppliers, and employees. We're pleased to partner with Salesforce and the Rootstock management team to address strong and increasing market demand for the company's solutions."

3. In May, I attended Rooted-in, your first in-person customer conference held in Austin. The event opened with Boston Dynamic's robotic dog walking into a very engaged audience. I had the chance to meet Chad Wright, Boston Dynamics' CIO. Are advanced technology companies like Chad's part of a new vertical focus for Rootstock?

It's interesting you should mention Chad Wright from Boston Dynamics and their robot, Spot. It was a pleasure having them at our inaugural Rooted-in Customer Conference—they got our conference off to an exciting start.

And yes, advanced technology companies are a focus for us, but it's not a new one. These days, there are many companies—and even divisions of larger enterprises—that are taking a digital-first strategy.

We've had success with these types of companies wanting an innovative approach, and going forward, we'll be leveraging our wins in areas like medical device manufacturing, cannabis, and high-tech industries. We have a strong foundation in these verticals—and we have the success stories to demonstrate the value we deliver.

And, as you well know, Salesforce has a tremendous focus on manufacturing, automotive, and energy—its MAE division. This team has been doubling down on growth, and we've operated as a strong partner to this group. In those scenarios, it doesn't matter what solutions Salesforce is bringing to the table—whether it's Manufacturing Cloud, CRM, or Service Cloud—we provide a perfect complement with robust back-office and operational capabilities.

4. Speaking of Rooted-in, I had lunch with some of your new Customer Success employees. They love working for Rootstock. Customer Success has also been a huge differentiator for Salesforce. Can you tell us more about your program?

Our Customer Success team has established standards of excellence in how they interact with our customers. Many of our team members—myself included—have worked in manufacturing, so we've been in our customers' shoes. If we don't know their experience first-hand, then we're meeting with them and listening to their needs.

You spoke to a couple of our Customer Success team members, so you know how passionate they are about helping customers get the most value from our solution. To achieve value quickly, our Professional Services team has honed our implementation process so that customers are up and running in an accelerated time frame. Customer Success gets involved from the start. They're showing customers the latest capabilities and how to configure the system, so they're empowered to meet their own needs.

> **WE'VE INTEGRATED ENABLEMENT TO WORK HAND-IN-HAND WITH CUSTOMER SUCCESS, SO THERE'S SEAMLESS SUPPORT FOR OUR CUSTOMERS THROUGHOUT THEIR JOURNEY—FROM SALES, IMPLEMENTATION, AND ONGOING INNOVATION WITH OUR PRODUCT.**

In fact, a critical component of Customer Success is Enablement—this includes our Rootstock Online Community and our Learning Center. In particular, our Learning Center has grown by leaps and bounds with boot camps and various courses. It has become the cornerstone for product training, and we've integrated Enablement to work hand-in-hand with Customer Success, so there's seamless support for our customers throughout their journey—from sales, implementation, and ongoing innovation with our product.

And one more note on customers: There's been a groundswell of interest to start a users group. You previously brought up Chad Wright, CIO at Boston Dynamics. Around our customer conference, he stepped forward to help launch and chair this group. It's entirely customer-driven, so members are deciding on their objectives—but they have our complete support. I'm thrilled our customers want to come together, share success strategies, and unlock even greater value from the system.

5. I'm surprised that there are still a lot of companies running ERP on really old hardware. Any patterns in terms of a replacement market for legacy on-premises systems or other cloud-based systems?

Frankly, we're surprised by that as well. The pandemic laid bare the weakness of not having a cloud ERP as a business system of record. Anyone who didn't already have secure access to these systems for remote workers was challenged to continue operating through the shutdowns. But our customers—even those in the throes of implementation—didn't miss a beat. One of our customers deployed all over the world without having to host in-person meetings with us or any other vendors.

That's the power of the cloud, and because of it, more companies are moving to cloud ERP. As manufacturers take stock of their IT stack, they're beginning to realize that replacing one system at a time will be challenging. They need to digitally transform their whole enterprise, especially for companies in the mid-market who aren't equipped to run multiple IT replacement projects. Rather than struggle with which solution to switch out first, we're seeing companies choose a common platform approach, namely Salesforce. Once their teams are trained on the platform, adding the solutions that they need becomes much easier, and in the long run, much more cost-effective.

6. Rootstock has been offering its ERP software on the Salesforce platform for more than a decade. Is Cloud-based ERP now a given, or do you still have to answer questions about the cloud?

As I mentioned before, one of the unexpected benefits of the pandemic was it brought about wide adoption of cloud-based systems to support a remote workforce. So, cloud-based ERP is a given. But not all cloud ERPs are equal. Many are just hosted versions of the same old software, and they haven't kept up with the latest cloud-based capabilities. If you take this cloud discussion to an end-to-end business level, a next-generation cloud platform is really where we see manufacturers looking for true digital transformation, which they also want to stand the test of time. A unified cloud platform can be as transformative to manufacturing operations as cloud was to on-premises systems a decade ago.

That being said, we still get a lot of questions about the ROI and savings a cloud deployment can deliver. As a result, we worked with Nucleus Research to help us quantify the value of our cloud ERP on the Salesforce Platform. One of the chief benefits is native connectivity to other on-platform solutions, such as CRM or PLM—this means it doesn't require the traditional costs and complexities of traditional integration.

Through its research, Nucleus found that cloud solutions deliver over four times the ROI as on-premises deployments. The firm also specifically interviewed several of our customers and found that Rootstock accelerated typical ERP deployments by over six months, reduced IT overhead by 40 percent, and shortened the entire lead-to-cash journey by up to 75 percent. These are powerful findings specifically driven by our customer experience and a strong argument for cloud ERP.

7. David, how important is the international market for Rootstock?

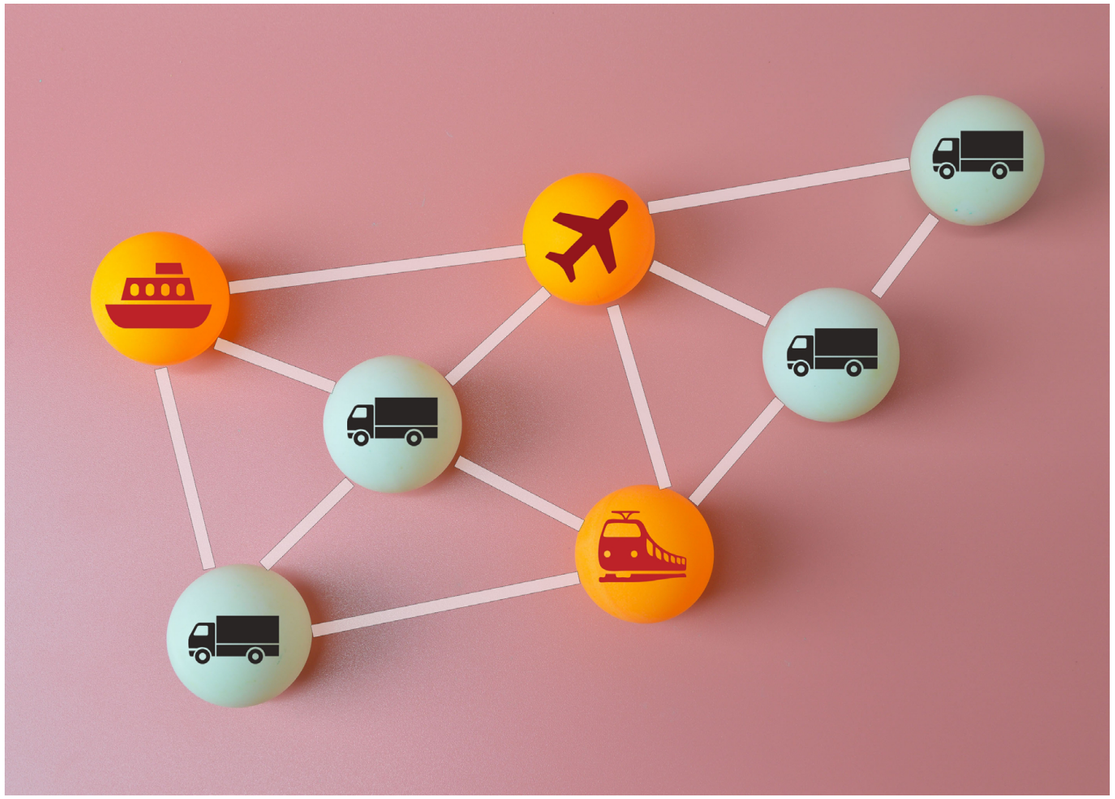
The international market continues to be important to us. Whereas in the past, we took a pretty broad approach to international growth, now we'll take a more focused strategy in specific geographies. For instance, we're focused on Northern Europe—in countries where we've already had success and built a strong customer base.

Japan is another area we're concentrating on, as it's the third-largest manufacturing market, and Salesforce has a strong presence there. There's a huge demand for modern cloud ERP in this country's manufacturing industry. We have momentum with our customer base, and we're seeing accelerated traction.

> **AS MANUFACTURERS TAKE STOCK OF THEIR IT STACK, THEY'RE BEGINNING TO REALIZE THAT REPLACING ONE SYSTEM AT A TIME WILL BE CHALLENGING. THEY NEED TO DIGITALLY TRANSFORM THEIR WHOLE ENTERPRISE, ESPECIALLY FOR COMPANIES IN THE MID-MARKET WHO AREN'T EQUIPPED TO RUN MULTIPLE IT REPLACEMENT PROJECTS.**

About Rootstock

Rootstock is ranked in the leader category of Cloud ERP solutions, and it helps manufacturers, distributors, and supply chain organizations digitally transform their operations. Since it's built on the Salesforce Platform, companies gain the benefit of an enterprise cloud environment and an ERP system that is intuitive, flexible, and digitally connected. Our team has in-depth expertise in manufacturing, and we're dedicated to customer success. We offer the training, product knowledge, and support customers need to configure Rootstock Cloud ERP to meet their needs. With this comprehensive offering, clients are empowered to deliver a superior customer experience, streamline and scale operations, and out-service the competition. As we continue to grow, stay tuned to our latest customers, career opportunities, and LinkedIn posts.



GREATER TRANSPARENCY AND DEDICATED SUPPORT

*Interview with **Andy Coussins,***
SVP, and Head of International, Epicor

Epicor, a global leader in the industry-specific enterprise software industry, has recently published the Epicor 2022 Industry Insights Report which surveyed 1,350 ERP users across automotive, construction, distribution, manufacturing, and retail / eCommerce sectors.

The report surprisingly reveals that hybrid businesses are actually thriving despite a challenging global economy and we have discussed the key findings of this report with Andy Coussins, SVP, and Head of International at Epicor.

1. Could you tell ERP News readers about yourself and your role at Epicor?

As the SVP and Head of International at Epicor, I lead my team in driving our go-to-market strategy, client support, and sales, with a focus on accelerating company growth for Epicor, and for all of our customers across Europe, the Middle East, and Africa (EMEA), as well as Asia Pacific (APAC) and India.

With over 25 years of leadership experience in the technology industry, a key part of my role is managing a large team of talented people with different skill sets, working closely with our clients and partners, and ensuring we are offering the best ERP products and services to our fast-growing global customer base.

2. Epicor has recently published the Epicor 2022 Industry Insights Report. Could you tell us about the key findings of the report?

Our 2022 Industry Insights Report surveyed 1,350 IT decision-makers from the U.S., U.K., Australia, and New Zealand, across automotive, construction, distribution, manufacturing, and retail sectors. One of the most interesting learnings is how businesses have adapted to the challenges of a post-pandemic economy and ongoing supply chain disruption, with more than two-thirds of respondents (78%) shifting their business models in the last year to better compete. It is great to see that 85% of them stated they have experienced growth from diversification.

Additionally, 82% are now operating in a hybrid cloud environment (a slight uptick from 2021, which saw a significant increase in cloud migrations driven by the pandemic). Yet despite 90% stating this strategy is worth the effort, nearly half (48%) cited a strong need for more support from their ERP providers during the latter stages of the purchasing journey; from implementation, go-live, and ongoing customer care, to ease the migration process and extract further value.

Overall, the findings emphasize that many businesses are pivoting into new areas and expanding their offerings

by adopting highly flexible cloud-based technologies and ERP solutions to improve agility, enhance operational performance and sharpen their competitive edge. The study also shows that businesses will switch to another ERP provider if they are not getting the support they expect.

3. For the last 2 years, industrial companies had to deal with disrupted supply chains, remote working, and the need for greater flexibility and agility. Switching to cloud-based ERP helped most businesses to be better prepared to face these challenges. What does this year's report reveal about their journey to the Cloud ERP?

The results of this year's report revealed that over half (56%) of distributors have adapted their business models to offer direct-to-customer sales, signifying the emergence of a new breed of hybrid businesses or 'distro-facturers'. Almost half (40%) are now also offering E-commerce via online ordering, with 39% adding Configure-Price-Quote (CPQ) solutions to their strategy - both of which would be extremely difficult to achieve without the power of cloud technology.

The cloud is fundamental for driving digital transformation in all parts of the industrial sector, by acting as a 'digital core' that can connect other areas of the business that were previously in silos. Cloud ERP solutions have proved to be even more valuable over the past two years, as they have helped businesses to overcome the challenges of hybrid working, by enabling staff to access systems remotely from wherever they're based and quickly obtain real-time insights that are vital for futureproofing and stress testing supply chain resiliency.

Although 90% of decision-makers indicated their move to the cloud was worth the effort, 48% cited a strong need for more support and partnership from their ERP providers during the latter stages of the purchase journey to ease the migration and realize faster time-to-value.

4. What makes businesses think about changing their ERP provider?

Businesses want ERP providers to be more than just technology partner. They must also collaborate throughout the entire purchasing journey to deliver customized, industry-specific solutions that fit their unique business needs. Common triggers for re-evaluation include better functionality from another provider, integration challenges, cybersecurity concerns, and stronger customer support elsewhere. The research reveals what businesses expect from their ERP partner:

- Industry-specific guidance to provide solutions curated to customers' specific needs.
- Interoperability and trusted data support for successful migration and integrations.
- Dedicated support staff training and onboarding materials.
- Greater clarity during evaluation and planning stages.
- Stronger partnerships - from initial contact to go-live and beyond.

We take this seriously, which is why Epicor provides greater transparency and dedicated support throughout each phase of the onboarding process, including after-sales. Respondents will actively consider moving to a new ERP solution every one to three years, due to industry innovation and the proliferation of new technologies, so for providers, there's certainly no room for complacency.

5. Switching an ERP solution is a major investment. What are the top priorities of businesses when choosing a Cloud ERP Solution?

Businesses usually consider switching their ERP system if data silos or lack of integration capabilities is causing information loss and lost orders. Another example is a lack of visibility into key operational processes and business units making it difficult to determine the profitability of a product, project, or customer. Finally, an ERP system that lacks the digital flexibility to easily scale up as the business grows is another typical motive for customers to start looking for a new ERP provider.

> **"BUSINESSES WANT ERP PROVIDERS TO BE MORE THAN JUST TECHNOLOGY PARTNERS. THEY MUST ALSO COLLABORATE THROUGHOUT THE ENTIRE PURCHASING JOURNEY TO DELIVER CUSTOMIZED, INDUSTRY-SPECIFIC SOLUTIONS THAT FIT THEIR UNIQUE BUSINESS NEEDS.**

Our research reveals the top priorities for businesses when choosing a cloud ERP provider, including 'interoperability' (31%) and 'specific features relevant to their industry (30%). Furthermore, 92% strongly or somewhat agree that 'specialist industry knowledge is important in the buying phase', 55% strongly agree they want 'an ERP solution that is specific to their industry, and 66% are deploying 'modular' ERP solutions.

Businesses do not want a standard 'one-size fits-all ERP offering and they have come to expect industry-specific solutions tailored to their unique business needs. If an ERP provider isn't offering the important industry-specific or modular features that customers really need, they will not hesitate to approach a competitor and adopt a better solution.

6. What does the future hold for ERP? How do you think the industry is evolving?

We believe the future of technology and software development is hybrid, with increasing demand for easy-to-use 'low-code' applications and platforms, as the industry will always embrace the technologies that are most accessible and provide maximum agility. 86% of businesses are changing their technologies and expanding capabilities to manage their diversified offering, with over half (56%) of distributors now supplying direct-to-customer sales. These new distro-facturers are also moving from just making

products to distributing them, and the industry is evolving to meet this increased demand for powerful cloud-based ERP solutions.

Our clients now expect ERP solutions to be interoperable, easy to integrate with other business intelligence platforms, and compatible with the latest industry 4.0 technologies. Advanced analytics capabilities are also required to report on fast-changing supply and value chains. This provides a clearer picture on stock availability, so businesses can quickly respond to potential supplier issues.

As we have seen from our research, if ERP providers are not meeting this evolving demand and offering ongoing product support, then those businesses will quickly switch to another provider.

7. Could you tell us about the future growth strategies of Epicor?

Epicor's future growth strategy is based on the diverse needs of businesses that make, sell, or move products on a local, national, or international scale, so we are continually improving our industry-specific expertise to support customers in specialized sectors, such as food & drink manufacturing or building materials suppliers. We intend to achieve this by forming deeper, long-lasting customer partnerships, investing in our employees, continually evolving our product offerings to better meet our customer's needs, and making tactical acquisitions to expand our products' capabilities.

Since March of this year, we have acquired three companies to enhance our industry 4.0 capabilities and modernize the manufacturing production process. These include Grow Inc. a low-stack business intelligence platform, Data Interchange, a UK-based provider of Electronic Data Interchange (EDI) cloud technologies and managed services, and eFlex Systems, a provider of cloud-based Manufacturing Execution System (MES) technologies.

Alongside these key acquisitions, we also launched Automation Studio, our game-changing Integration[1] Platform-as-a-service (iPaaS) which automates workflows by connecting data from external applications into the ERP system. We believe that by developing the best ERP solutions on the market, we will expand our customer base and realize our future growth strategy.

> **OUR CLIENTS NOW EXPECT ERP SOLUTIONS TO BE INTEROPERABLE, EASY TO INTEGRATE WITH OTHER BUSINESS INTELLIGENCE PLATFORMS, AND COMPATIBLE WITH THE LATEST INDUSTRY 4.0 TECHNOLOGIES.**

8. What are the benefits a mobile ERP app can offer every enterprise?

Interacting with an ERP solution should be simple and satisfying, not complex. Mobile solutions give people easy access to powerful digital tools at their fingertips, while they are on the move and wherever they are located, so businesses that use mobile devices can respond faster and stay competitive. There are many benefits of mobile ERP solutions, such as the ability to optimize service requests for technicians out in the field, or empower sales personnel while on the road.

As an example, our Kinetic ERP has been specifically developed for efficiency and productivity as a cloud-based mobile app that offers a consistent user experience across all Kinetic functions. The app makes it easy for new users to learn and provides better data accuracy, as transactions can be recorded immediately as they happen. We see that customers who are taking advantage of Kinetic's mobile capabilities are more agile, competitive, and resilient as a result.

Andy Coussins brings senior international sales, operations, and enterprise software industry executive experience to Epicor. He joined Epicor from Hewlett Packard Enterprise where he was vice president for the Alliance Business in EMEA. He has extensive international sales experience and a strong reputation for building high-performing teams that are instrumental in driving global growth.

About Epicor

Epicor equips hard-working businesses with enterprise solutions that keep the world turning. For 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 respond flexibly 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.

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BUILDING AN AGILE AND RESILIENT SUPPLY CHAIN

*Interview with **Christine Barnhart,***
VP of Product Marketing and GTM , Nulogy

Nulogy, a leading provider of supply chain collaboration solutions, will announce a new product at the Pack Expo in Chicago, and Christine Barnhart, VP of Product Marketing and GTM at Nulogy explained the benefits of this new product innovation and how it will help businesses to get the most out of their supply chain network.

1. Could you tell ERP News readers about yourself and your role at Nulogy?

I'm Christine Barnhart, the new VP of Product Marketing and GTM for Nulogy, a supply chain technology innovator focused on multi-enterprise supply chain orchestration and optimization. I have over 20 years of hands-on expertise in manufacturing, purchasing, and planning from companies including Berry Global, Mead Johnson Nutrition, and Whirlpool.

2. Nulogy is a provider of multi-enterprise supply chain solutions for the supply ecosystem and digitally enables brands to manage their supplier ecosystems as true networks, rather than linear chains. Could you explain how you can help organizations get the most out of their supply chain partnerships?

Nulogy accelerates supply chain response by enabling dynamic collaboration and bi-directional visibility between brands and their contract packaging and manufacturing suppliers using real-time production floor data. In a nutshell, we don't just break down silos across functions or within an enterprise but rather between supply ecosystem partners. This unlocks the data needed to uncover insights and

provides the tools required to improve both decision making and execution, creating the foundation needed to build an agile and resilient supply chain.

3. What differentiates Nulogy from other supply-chain software vendors?

We believe we are the only solution provider that has been strongly focused on providing value to both sides of the supply chain network, eg both the brands and their supply base.

> **IF COVID TAUGHT US NOTHING ELSE, IT HIGHLIGHTED THE CRITICAL NEED FOR CONTINUED INVESTMENT IN DATA AND ANALYTICS. WHILE MANY COMPANIES HAVE INVESTED IN ENTERPRISE SYSTEMS SUCH AS ERP OR WMS, ONLY A SMALL HANDFUL HAVE TRULY REVIEWED THE NEED FOR MULTI-PARTY DATA, ANALYSIS, AND ORCHESTRATION.**

4. Nulogy will be making a new product announcement at the Pack Expo in Chicago on Oct. 23-26. Could give us some hints about the new product innovation and its benefits for your customers?

If COVID taught us nothing else, it highlighted the critical need for continued investment in data and analytics. While many companies have invested in enterprise systems such as ERP or WMS, only a small handful have truly reviewed the need for multi-party data, analysis, and orchestration. This is an area of investment for Nulogy and we'll be making an announcement on a new product to support this critical supply chain need.

> **NULOGY ACCELERATES SUPPLY CHAIN RESPONSE BY ENABLING DYNAMIC COLLABORATION AND BI-DIRECTIONAL VISIBILITY BETWEEN BRANDS AND THEIR CONTRACT PACKAGING AND MANUFACTURING SUPPLIERS USING REAL-TIME PRODUCTION FLOOR DATA.**

5. What are the latest trends in the contract manufacturing/packaging supply chain software market?

Supply chain continues to be top of mind across all manufacturing industries including packaging with ongoing product availability issues due to material shortages, rising prices from inflation, rolling labor shortages, increasing climate impacts/disruptions, and expanding geo-political conflict. All of this is driving toward increased investment in both solutions that provide visibility into the current state of the supply chain but also better collaboration and orchestration tools.

We see companies in this space progressing beyond enterprise-oriented investments and into the multi-enterprise space where they are really focusing on improving communication and ensuring shared value through joint decision-making between themselves and their trading partners.

6. Could you tell us about your future growth strategies as Nulogy?

We will continue to be a multi-enterprise leader focused on improving the upstream side of the supply chain and delivering shared value to manufacturers and their suppliers. We hope you will stay tuned as we have investments in flight to enhance our bi-directional visibility, collaboration, and multi-echelon synchronization – many exciting announcements in the coming months!

About Nulogy

Nulogy, a leading supplier of digital supply chain solutions, enables customers and their supplier communities to collaborate on a multi-enterprise platform in order to deliver with excellence to an ever-changing consumer market. The Nulogy Multi-Enterprise Supply Chain Business Network Platform optimizes upstream supply ecosystems composed of brand manufacturers, contract manufacturers and packagers, third party logistics providers, raw material and packaging suppliers to accelerate supply chain responsiveness and collaborate at the speed of today's market.

WHAT ARE THE FACTORS TO CONSIDER WHEN CHOOSING THE RIGHT CUSTOM ERP SOFTWARE?

"

If your company is spending increasing time and money configuring your ERP to accommodate changes in your business processes, that's a sign it's time to adopt a customized (or "composable") ERP strategy. The first step to implementing a customized approach is to migrate to the cloud – companies must be operating on a real multi-instance cloud system to make composable ERP work.

The cloud allows organizations to choose the best point solutions for specific business needs, though it's critical to choose your vendors wisely. When you're vetting potential vendors, consider the following:

- What's the vendor's product roadmap and vision? Are they forward-looking in terms of interaction with software?
- Does the vendor understand your industry, the business applications you use, and your customers' needs?
- How open are the vendor's APIs?
- How user-friendly is the software? Will the end user be able to interface with the ERP indirectly through tooling?

Once you've considered these factors, you can choose a custom ERP solution that will increase productivity and advance your business goals.

"

Dave Dyer,
Dave Dyer, Regional President of North America at Unit4

Prophix

IMPROVE BUSINESS PERFORMANCE TODAY FOR THE UNCERTAINTY OF TOMORROW

*Interview with **Wayne Slater,***
Director of Product Marketing, Prophix

A CPM system monitors and manages an organization's performance according to finance-driven key performance indicators and they help CFOs manage strategy. Wayne Slater, Director of Product Marketing at Prophix shed a light on why a CPM system is critical for businesses and which actions should be taken by the CFOs to improve the business performance and gain a competitive edge in these strange times after the pandemic.

1. Could you tell ERP News readers about yourself and your role at Prophix?

A: Thanks and yes. My name is Wayne Slater and I'm the Director of Product Marketing here at Prophix. Prior to Prophix, I spent 25-plus years helping organizations solve their productivity and business growth challenges through the assessment and selection of business software solutions such as ERP, CRM, MES, and, most recently, Corporate Performance Management (CPM) software.

2. Prophix is a global leader in Corporate Performance Management (CPM) software. What is the goal of CPM software and why is corporate performance management important?

A: Corporate Performance Management (CPM), sometimes known as Business Performance Management (BPM) or Enterprise Performance Management (EPM), is a term used to describe the various processes and methodologies involved in aligning an organization's strategies and goals to its plans to guide the success of the company. CPM software solutions provide an organization with significant business insights by facilitating and streamlining financial planning and analysis (FP&A) processes, such as budgeting, planning, forecasting, scenario analysis, consolidation, and financial reporting. I'm sure you can imagine why doing FP&A better increased in importance over the past two and a half years.

> **ADVANCED TECHNOLOGY SOLUTIONS NOT ONLY HELP FINANCE TEAMS BUDGET, FORECAST, PLAN, AND REPORT FASTER, BUT THEY ALSO PROVIDE VALUABLE INSIGHTS THAT WILL ACCELERATE GOOD DECISIONS.**

3. Finance offices are the key departments within which an organization needs to obtain a competitive advantage especially post-pandemic over the past 12 months. Which actions should be taken by the CFOs in terms of improving the business performance?

A: In times of market uncertainty, and honestly, there's no foreseeable end in sight to this environment right now, Finance teams need to create stability and predictability where they can. But as the last two years have taught us, positive indicators of progress are also accompanied by harbingers of turmoil just around the corner. That's why it's more important than ever for Finance teams to be able to pivot on a moment's notice – and to bring the organization along with them.

Here are some things CFOs should consider to help improve business performance today for the uncertainty of tomorrow:

Invest in Digital Transformation

Finance leaders need to prioritize investing in performance management, automation, and artificial intelligence (AI) tools to help their teams and their organizations become nimbler. If you are still relying on repetitive manual tasks and siloed processes, it's time for an upgrade. Advanced technology solutions not only help Finance teams budget, forecast, plan, and report faster, but they also provide valuable insights that will accelerate good decisions. But volatile market dynamics could require quick pivot shifts as well. Having the ability to analyze the impacts, instantly, on financials, and then shift resources quickly – even within a given budget cycle – will become a strategic advantage to many companies.

Hire Smart, Train, and Retain

It's not enough to simply have automation systems in place. Finance leaders need a team they can rely on to use those tools to analyze the data—and then explain in compelling terms what it all means to their colleagues across the company. Also, a record number of employees are leaving jobs for more meaningful work; work that leverages the latest technology while giving them greater work and social flexibility. So, don't just talk about it – Do it! Empower your employees by training them on advanced FP&A processes like scenario modeling, rolling forecasts or zero-based budgeting. Then provide them access to cutting-edge technology that will not only enable them to successfully tackle those more advanced techniques but also help them build their careers. Lastly, include them in the decision-making process, solicit their insights and allow them to make mistakes.

Demonstrate Value

With modern tools and the right staff, Finance teams will be well-positioned to have an outsized impact on the organization. The Finance leader should use traditional Finance department skills like measuring and reporting alongside storytelling skills to illustrate the indispensable nature of the Finance function. Demonstrating the value of what finance can bring to the table is key to securing the confidence of the executive team and is often a prerequisite for obtaining the budget needed to help drive your financial transformation.

> **DEMONSTRATING THE VALUE OF WHAT FINANCE CAN BRING TO THE TABLE IS KEY TO SECURING THE CONFIDENCE OF THE EXECUTIVE TEAM AND IS OFTEN A PREREQUISITE FOR OBTAINING THE BUDGET NEEDED TO HELP DRIVE YOUR FINANCIAL TRANSFORMATION.**

4. What are the factors to consider when choosing the right CPM software?

A: Given the ongoing dynamic market conditions, the market for CPM software to help drive financial transformation has never been hotter. This has driven massive growth and investment in the segment. But no one-size fits all. So, as you start your research do some self-reflection and profile yourself first, so you can partner with a CPM vendor who is best suited to meet your organization's needs. Factors to consider are:

- The size of your business - There are solutions that better serve the enterprise, vs mid-market, and SME
- The industry that you are in – Some vendors offer deep industry knowledge that can add value faster
- The ERP / accounting system you use – Some CPM vendors partner with certain ERPs for more complimentary and easily implemented solutions
- The processes you need to automate

- Ideally, you'd like to reduce your dependence on manual processes and disconnected spreadsheets, so look at the vendors' approaches – Some offer purpose-built web interfaces complemented with automation and AI to streamline processes, while others offer a more basic, spreadsheet-first approach
- The number of users and department stakeholders both inside and outside of finance, as some CPM solutions scale better than others
- Your need for robust consolidation and close capabilities
- And of course "What is your budget"?

Using some or all of the points above will help you short-list the most appropriate vendors; those with the right experience at the right price for your business.

5. Planful, a Financial Performance Management solution vendor, recently announced the acquisition of Plannuh, a Marketing Performance Management (MPM) vendor. What do you think about this trend of adding-on operational planning functionality to the core financial CPM platforms? How does this reflect on the CPM market?

What we're seeing is a continuation of a trend on the part of some CPM vendors to add operational planning functionality to their core CPM platforms.

Simply put, vendors acquiring or building operational planning capabilities are attempting to unite non-finance functions, such as Sales, HR/workforce management, and Marketing, with specific FP&A applications, following a model popularized by Anaplan, a CPM vendor acquired this year by Thoma Bravo.

6. What is your strategy at Prophix? Would you rather stay the course and focus on serving the Office of Finance or are you planning to acquire or build operational planning capabilities for your platform? Why or why not?

In stark contrast to Planful, Anaplan, and Board, CPM vendors such as Prophix are resisting the siren call of being all things to all people and instead are staying the course, devoted to serving the Office of Finance. The deeper needs of CFOs, Finance VPs, and Controllers are best served, in our opinion, by vendors that focus on their issues and problems, exclusively. There are also practical reasons for Prophix's commitment to CFOs and the Office of Finance. Based on data from EY, in 2020 the total addressable global market for mid-market CPM solutions like Prophix was $9.5 billion. This included companies between $10 million to a billion in annual revenues. Much of this is untapped ('greenfield') market space, so it's not surprising that Prophix will continue its razor focus on the CFO and the Office of Finance, delivering the most relevant and complete CPM solution to them..

For more than 25 years, Wayne has been helping organizations solve their productivity and business growth challenges through the assessment and selection of business software solutions such as ERP, CRM, MES, and Corporate Performance Management (CPM/EPM). Described as an innovative marketer and results-driven business development specialist, Wayne has measurable success spanning multiple industries and channels with a proven track record for increasing awareness, driving engagement, and revenue creation.

About Prophix

To empower mid-market companies to achieve their goals, Prophix provides an integrated, cloud-based platform to the Office of Finance; one that delivers planning, budgeting, reporting, forecasting, and consolidation solutions. With Prophix, finance leaders improve profitability and minimize risk, and put the focus back on what matters most – uncovering business opportunities. Prophix supports the future with AI innovations that adapt to meet the strategic realities of more than 2,600 active customers, globally, who rely on Prophix to deliver tangible business outcomes and transform the way they work. For more information, visit www.prophix.com.

REACH YOUR FULL GROWTH POTENTIAL!

*Interview with **Dan Miller**, EVP of Sage Intacct, Sage*

Sage, the leader in accounting, financial, HR, and payroll technology for small and mid-sized businesses, has recently announced increased investment in Sage Intacct to enable customers to automate processes, boost productivity and free up time to focus on running their businesses. We discussed the reasons why Sage invested more in Sage Intacct and how these series of significant product updates and enhancements will help their customers to stay competitive post-pandemics with Dan Miller, EVP of Sage Intacct at Sage.

1. Could you tell ERP News readers about yourself and your role at Sage Intacct?

I am Dan Miller, Executive Vice President of the Sage Intacct Business Unit for Sage. I have had the great pleasuring of leading the team that builds the Sage Intacct set of solutions since 2010 when I joined Intacct (which was acquired by Sage in 2017). I now lead our strategy and delivery for new solutions serving mid-sized businesses globally. The key priority for me is to accelerate the pace of innovation for mid-sized businesses by becoming their trusted digital network. We are doing this by scaling Sage Intacct, in existing and new verticals and new geographies. We are also expanding beyond financials into broader business and operational systems for the customers we serve. Lastly, for our customers, we are laser focused on creating great end to end experiences. We believe that investing in customer success through innovation and great experience will drive overall business success for Sage.

2. Sage recently announced increased investment in Sage Intacct. What made Sage develop a strategy around increasing investment in Sage Intacct?

The Sage Intacct product line is a key growth driver for Sage. We have the ambition to become the trusted network for SMBs and Sage Intacct is a central component to that broader desire. The scale of Sage Intacct enables customers to automate processes, boost productivity and free up time to focus on running their businesses. Over the past year we have continued to deliver on our commitment to evolve our products and services, and we are constantly striving to meet our new and existing customers' needs through innovative solutions that help them make their businesses more efficient and focus on what matters most – reaching their full growth potential.

3. SMBs have been affected in several areas and had to embrace accelerated change over the past 12 months after the pandemic. In which areas will you evolve your products and services so that your customers can remain competitive for the coming months? Could you summarize the new product innovations announced?

Our main focus has been around making improvements to workflow and connecting processes for our customers across business functions. To that end, we announced a series of significant product updates and enhancements, enabling more customers to experience increased productivity and smoother business processes. For example, we launched Sage Intacct Inventory Automation, which empowers customers to automate inventory transactions with barcoding and mobile data capture for real-time, company-wide, visibility and control, improved accuracy, and reduced data entry. It will help businesses ensure their stock and inventory is utilized efficiently and keep the business flowing. We also launched Sage Intacct Lease Accounting, which helps businesses simplify compliance with ASC 842 lease accounting standards in the US. Organizations will now have access to all their lease accounting and compliance data in a centralized location and gain lease insights with multi-dimensional reports and dashboards.

> **WE HAVE THE AMBITION TO BECOME THE TRUSTED NETWORK FOR SMBS AND SAGE INTACCT IS A CENTRAL COMPONENT TO THAT BROADER DESIRE. THE SCALE OF SAGE INTACCT ENABLES CUSTOMERS TO AUTOMATE PROCESSES, BOOST PRODUCTIVITY AND FREE UP TIME TO FOCUS ON RUNNING THEIR BUSINESSES.**

We also continue to invest in our Accounts Payable solution with new AI-powered bull automation that by enables an automated end-to-end workflow from bill receipt to payment, reconciliation, and reporting. With Sage Intacct AP Automation, customers can receive, scans and populate draft bills, including matching to vendors, coding accounts and dimensions, and identifying duplicate bills and exceptions. It complements our automated payment functionality that was released earlier in 2022. The combination of bill automation and vendor payments helps customers streamline and simplify AP processing, spend less time on manual tasks and get payments out faster alongside paying vendors the way they prefer to be paid.

We're also pushing further into some key vertical industries. Following the launch of Sage Intacct Manufacturing in France and the UK earlier in 2022, Sage Intacct Manufacturing will be available for early adopters in the U.S. this year, and generally available in 2023. This is a cloud-native solution that extends Sage Intacct to deliver industry capabilities for businesses specializing in discrete manufacturing and distribution, enabling them to streamline end-to-end operations and increase productivity. We've also made enhancements in the Construction and Real Estate space. We continue to deliver deeper financials as well as broaden the solution with new financial, operational, and pre-construction modules for payroll, property management, field service operations, and construction estimating. By providing a rich and broad set of capabilities that seamlessly work together, Sage Intacct for Construction and Real-Estate enables construction customers to simplify managing the complexities of their business with greater insight and efficiencies.

As you can see, we've been very busy.

4. The product updates were shared at the annual Sage Transform event. How did the customers and partners react to the enhancements?

We've received incredible feedback on the announcements. As we just discussed, there was a lot of product news to share at this year's conference. The customers and partners who I spoke with at the event shared that what they really liked what how well aligned our product innovations are to their needs. Our customers are typically small and medium-sized businesses and all of them are on some aspect of their digital transformation journey. Most of our product enhancements really get to the heart of helping these customers to knock down the barriers they face in their business and with technology – enabling them to scale their business faster, make better business decision, and thrive in a tough business climate.

5. What are the future strategies of growth for Sage Intacct? Are you planning to expand to different locations globally?

Sage Intacct has always had strong capabilities to meet the needs of multi-national companies. While North America is where the Intacct product line was established, we've expanded the solution over the past few years into a variety of additional regions – including the UK, Canada, Australia, and South Africa. All of those were primarily English-speaking countries. Leveraging Sage's global presence and compliance expertise, we have announced that Sage Intacct is now expanding into continental Europe, starting with France by the end of the year. This will be our first non-English speaking country for Sage Intacct. This will enable multi-national customers, operating in France, to expand their operations with Sage Intacct faster and easier. It will also offer France-based companies the power of Sage Intacct's modern cloud capabilities to simplify and automate their multi-entity financial operations giving them data and insights to better run their business. But we aren't stopping there – you can expect to see additional expansion in Europe over time.

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. Learn more at www.sage.com/en-us/ and www.sageintacct.com.

UNIT4

COVID-19 CRISIS AS A DRIVER FOR THE ACCELERATION

*Interview with **Dave Dyer,***
Regional President of North America, Unit4

Unit4, a leader in enterprise cloud applications for mid-market services organizations, has recently released the results of its Business Future Index Report. We have discussed the key findings of the report with Dave Dyer, Regional President, North America at Unit4, and he explained how business performance over the past year has been impacted by the pandemic and which business priorities, people strategies, company policies, and technology adoption have accelerated.

1. Could you tell ERP News readers about yourself and your role at Unit4?

I serve as Regional President of North America for Unit4. My aim in this role is to assemble the most productive sales organization for our business. I strive to consistently deliver increased operational efficiency, improved employee experience, measurable organizational outcomes, and best-in-class mission effectiveness for our customers.

2. Unit4 announced the findings of its second annual Business Future Index. It surveyed 3,450 respondents across 12 global markets to understand how the pandemic affected business performance over the past 12 months. Could you please share the key findings of this study with us?

One of the key takeaways from our Business Future Index is that the COVID-19 crisis was a driver for acceleration – and presented a business opportunity for those organizations that rose to the challenge. Nine in 10 organizations in the U.S. reported great acceleration across their business as a reaction to the pandemic in areas including digital transformation efforts (48%), flexible working practices (51%), and the adoption of software and tools to aid employee productivity and experience (41%).

Organizations that embraced these changes have seen substantial benefits including improved well-being (76%), stronger team collaboration (75%), and enhanced customer/end-user experience (75%). These benefits were even more pronounced for companies that invested in workflow automation and real-time reporting.

While these organizations have seen the improved business performance, they cannot afford to be complacent. To continue this upward trajectory, they need to adapt their technology and processes to suit the way that they – and their people – now work.

The businesses that haven't adapted in the face of change offer evidence of the risks of falling behind. Among organizations that haven't focused on rapid growth since the pandemic, only 28% reported themselves as outperforming 2021 targets, compared to the global average (51%) who did embrace such changes.

3. According to the survey, in which areas should action be taken by the organizations if they are to remain competitive?

If an organization fails to engage with its employees and deliver improved customer experiences, it will struggle to compete and survive. And as we look ahead to potential global economic uncertainty, organizations must continue to focus on improving both.

The survey results reveal how intertwined employee engagement and technology adoption is. While a majority of respondents reported increased technology adoption as a result of the pandemic, 62% of respondents agreed that the tools to support flexible working are not adequate. Now that the ball is rolling on digital transformation, companies should focus on driving widespread adoption of productivity and efficiency-enhancing technologies and digitizing engagement tools.

> **COLLABORATION ALSO SPEEDS UP DECISION-MAKING – THE MORE AGILE AN ORGANIZATION IS, THE MORE EFFECTIVE AND EFFICIENT IT WILL BE.**

Such a shift requires greater emphasis on collaboration between the CFO, CIO, CTO, and other relevant business leaders as technology decisions cannot be separated from business goals, operational processes, and workforce planning. Collaboration also speeds up decision-making – the more agile an organization is, the more effective and efficient it will be.

From a policy perspective, Environmental, Social, and Governance (ESG) improvements are critical to organizations maintaining their competitive edge. While a majority of companies reported they have a better ability to meet ESG goals because of the Great Acceleration, only 24% of respondents felt their organization was doing very well when it came to meeting sustainability goals. Poor ESG credentials are seen as a factor affecting the ability to attract talent. This is compounded by another challenge that 36% of respondents reported – the ability to attract talent from a mix of generations. Stronger talent acquisition practices, a culture built to allow and encourage a diverse workforce and greater promotion of ESG credentials will help organizations to further benefit from the advancements that they've already felt with their corporate social responsibility (CSR) and sustainability efforts.

4. Do the priorities of the companies overlap with these areas that need to be improved?

Yes, the priorities companies identified mapped closely to these growth areas. Attracting and retaining talent (63%), building out new products and services (56%) and digital transformation (55%) were cited by organizations in the U.S. as the top priorities for the next 12 months. There were some differences in priorities based on sector, with attracting and retaining talent an even bigger priority for organizations in the public sector (68%) and education (70%).

5. How do you think the last 12 months have been for the ERP industry in terms of embracing accelerated change?

I think the ERP industry has embraced this accelerated change and migration to the cloud by shifting from monolithic systems to composable ERP. This plug-and-play approach gives customers more flexibility as they accelerate their digital transformations. Rather than forcing CIOs to adapt to the technology demands of the ERP, ERP becomes adaptable to the needs of the business – and could even reduce pressure on the IT team. Flexible ERP allows businesses to respond with confidence to changes, prioritize employee experience by removing administrative burdens and manage risk through greater agility with forecasting.

Dave Dyer leads Unit4's business in the high-growth North American market, in a role covering sales, operations, and services. His career has taken him through many software industry segments and regions and up the ranks from sales rep to Chief Revenue Officer. Before Unit4, he helped young SaaS software companies create and scale sales teams. Dave tries to experience everything positive that life has to offer – centered on family and friends, sports, and travel – and frequently enjoys a good conversation over a meal.

About Unit4

Unit4's next-generation enterprise solutions power many of the world's most people-centric mid-market organizations. Our state-of-the-art cloud platform, ERPx, brings together the capabilities of Financials, Procurement, Project Management, HR and FP&A onto a unified cloud platform that shares real-time information and is designed with a powerful, people-centric approach, so employees can benefit from better insight and become more effective and increasingly engaged. It supports rapid and continuous change while delivering individualized fit for customers at scale, delivering the right tools to unify the processes across their organization, and connect their people. Unit4 serves more than 6,000 customers globally including, Bravida, Havas, Migros Aare, Americares, Save the Children International, Action against Hunger, Metro Vancouver, Forest Research, Southampton City Council, Selkirk College, and FTI Consulting.

OptiProERP MANUFACTURING

CUSTOMIZING ERP SOFTWARE– WHEN SHOULD YOU DO IT?

*Article By **Allan Lessing,***
Director of Customer Solutions, OptiProERP

If you're looking at ERP solutions, you may wonder if the options you're considering will truly meet all your company's needs. A common concern, it's something you'll need to analyze carefully before making a purchase.

Some companies use an ERP system right out of the box, with little or no customization, to simplify and streamline their processes. However, this often leads to the company conforming to how the ERP solution operates rather than making the system work for them. They may even lack the functionality necessary to manage specific business processes. At any rate, you will need a good understanding of your company's goals and operations to determine how well an ERP system fits your business.

Generic vs. Industry-Specific ERP

Generic ERP is "vanilla" software with deep functionality for accounting, finance, and general business management, along with more basic functionality for operations. It typically includes modules that handle Human Resources, Inventory, Sales and Marketing, Purchasing, Finance and Accounting, Customer Relationship Management (CRM), Engineering/Production, and Supply Chain Management (SCM).

Industry-specific ERP has functionality for a particular industry– for example, manufacturing. An industry-specific ERP vendor will have extensive expertise in that industry. They will understand the challenges companies face in the industry and the best practices to tackle those challenges. As a result, the ERP system will have functionality that will fully handle both business and operational needs.

Even with industry-specific software, a company may have special needs not handled by the platform. When that occurs, customization is needed. The same is true for generic software. For example, a company may not need an industry-specific ERP system, but the generic version may need some tweaking to fit its needs.

Benefits of Customization

Meet Your Specific Needs

When you customize ERP software for your business, developers adjust it to fit your specific needs. Customization can make it easier for your employees to do their jobs, give you a competitive advantage, and open more opportunities for your business. The software meets your specific processes to help your business operate smoothly.

Address Your Unique Challenges

A customized ERP system provides your business with what you need to address your challenges. Later, as your operational needs evolve, you can have the software reconfigured to accommodate your new requirements. Having software that can work exactly as needed lets you work at top efficiency to achieve a competitive edge.

Gain Flexibility

Having ERP customized for your business allows you to obtain the necessary flexibility. You know what is necessary to achieve your goals. In addition, having your ERP system customized gives you greater agility to seize opportunities.

Grow Your Business

Software that fits your exact business needs can help you scale. Of course, the ERP system will need to be adjusted as you implement new processes and procedures. But again, you can make the software fit your current situation and accommodate your users, processes, and demands.

Own Your Software

When you purchase off-the-shelf software, the license belongs to the vendor. However, when you customize an ERP system, the software and the software license belong to your company. Therefore, no ongoing fees are paid to the vendor to use the software.

> **RATHER THAN ASSUME YOU NEED TO ADJUST THE SOFTWARE TO WORK WITH YOUR PROCESSES, SEE IF ITS FUNCTIONALITY MAY BE PRACTICAL FOR YOUR COMPANY.**

Disadvantages of Customization

Over-Customization

You don't want to modify the software too much when you customize it. If you do, it will cease functioning as originally intended. Therefore, it's critical to set objectives when purchasing an ERP system. Then, when you achieve those objectives, don't go any further.

Core Features Unusable

When you customize ERP, it's easy to overlook how features in the software work, and you could miss some that may perform well for your business. In addition, software updates and upgrades that remove errors and provide greater functionality are more challenging to install in a customized ERP system.

May Introduce Bugs

The more features you customize, the greater the potential is for defects. More time is spent debugging the system, which can result in delays and downtime, among other frustrations.

Internal IT Help Needed

When you customize software, it no longer works the same. You can't just call your vendor's support and expect them to help. Your IT staff will need to understand the software and its customizations to assist when there are difficulties. With highly customized ERP software, it gets expensive to rely on your developer to come in and help. Your IT staff will most likely need to become involved, and the support they can provide will depend on how well they understand the system. Assisting with the ERP system will also decrease the time IT has for their other tasks.

Increased Cost

To customize your ERP system, you need to hire an experienced developer that understands the inner workings of the software you are using. The fee scales according to the amount of work involved – the more customizations you add, the greater the cost. You'll also want to ensure you hire a reputable developer and check their references carefully. You will need them to make any future changes necessary, so be sure your developer will still be in business to help. Remember, each time the developer programs the software for you, they will charge for their services. That can become very costly.

Consider Changing Your Processes

Rather than assume you need to adjust the software to work with your processes, see if its functionality may be practical for your company. ERP software handles standard business practices, and industry-specific ERP incorporates industry best practices. As a result, you may discover a more productive way to do business.

Your software vendor may help you with customizations. When selecting a system, ensure you understand the software's functionality through a comprehensive demo. If a process works differently than how you do it, talk with the vendor about the differences and see if it makes sense to adjust how you operate. If not, see if the vendor can program the software to accommodate your needs.

Final Thoughts

Customization is timely and expensive. It also changes how the software works, which isn't always good. Keep your objectives in mind as you look for a solution that makes the most sense for your business. If you have to customize, make sure you do the minimal amount possible and have a trusted partner to help.

As the Director of Customer Solutions, Allan Lessing serves as OptiProERP's resident operational and business process advisor, ensuring that the global team from sales, implementation, and customer success, has a deep understanding of each customers' operations. Allan is also responsible for best practices to help customers optimize their business processes. Allan has more than 35 years of hands-on manufacturing operations and IT systems experience.

About OptiPro ERP

OptiProERP is an industry leading ERP solution for manufacturing and distribution. OptiProERP delivers best-in-class industry functionality embedded into SAP Business One, the market-leading business management platform for small and midsize enterprises. Customers gain an end-to-end business management solution, including financials, accounting, sales, CRM, and industry-specific functionality that fully leverages deep industry expertise of over 20 years dedicated to serving manufacturers and distributors. OptiProERP is an eWorkplace Manufacturing solution. eWorkplace Manufacturing is SAP's strategic industry partner for manufacturing and distribution and its first OEM partner as part of SAP's global PartnerEdge Program. Serving manufacturers and distributors for over 20 years with OptiProERP and BatchMaster as its two ERP solutions, eWorkplace Manufacturing has gained the trust of over 3,000 customers globally.

Global Shop SOLUTIONS ERP SOFTWARE

THE ULTIMATE GUIDE TO BUYING ERP SOFTWARE

Important Things to Consider

When you select an ERP solution, it's not just buying software off the shelf. You're entering into a partnership that will change your operations for several years if not a decade or more. Here are 4 C's to remember when you're evaluating ERP providers.

1. COMPLETE. Choose a fully-integrated system.

2. COMPREHENSIVE. Look for ERP that has the latest tech and features but is also easy to use.

3. CUSTOMIZABLE. It should allow you to create tailored reports and options without requiring modifications by the vendor.

4. COHESIVE. The best ERP has been developed by the same company, so all diff erent modules work together seamlessly. As you're researching and reaching out to ERP providers, here are some important things to remember and good questions to ask:

ABOUT THE COMPANY:

1. Are the people at the top great leaders that maintain good values within their company?
2. How long have they been in business?
3. Is this a culture you'd want to be to a part of?
4. Will their culture blend well with yours?
5. Can they help facilitate the growth I want and help me achieve my goals?
6. Is their staff happy and do they maintain a low turnover rate?
7. Are they financially stable?
8. Does this ERP provider have a lot of outside investment?
9. What does their debt ratio look like?

ABOUT THE SERVICE:

1. What are their average hold times when you call in?
2. Where is their support team based?
3. Do they offer 24-hour support?
4. Do they offer ongoing, free training after implementation?

ABOUT THE SOFTWARE:

1. Is their system easy to use and simple to navigate?
2. How frequently are updates made to the system?
3. Does the software have the ability to successfully integrate with software I am already using?
4. Will this ERP system run on what I already own or will I have to buy a new system?
5. Does this ERP system fit my budget?
6. Are there any hidden long-term costs or fees?
7. Is this shop floor module robust and inclusive?
8. How is the quality module?
9. Does the inventory module look complete and simple to use?

Research Tips

1. Use search engines like Google or Bing to get some initial research out of the way and eliminate bad fits quickly.

2. Check out their websites. Review their applications lists. Check out their integration options. See what options they have specific to your industry. See their pricing model. Read their latest blogs and case studies. Is their list of case studies impressive? Do they have a handful or dozens? See if they are providing product information or thought leadership – do they know manufacturing?

> **"THERE IS NO BETTER FEEDBACK THAN GOOD, OLD-FASHIONED NETWORKING. DON'T BE AFRAID TO REACH OUT TO OTHER MANUFACTURERS TO SEE WHAT THEY'RE DOING. ASK OTHERS IN YOUR INDUSTRY AND LOCALLY TO FIND OUT WHO THEY ARE USING AND WHY THEY CHOSE THAT COMPANY.**

3. Use business research sites to read about each software and customer reviews. There are many software and business websites out there for you to access detailed reviews on the ERP providers you're considering. Here are a few software review sites to get you started:

   a. Software Advice
   b. Business Software
   c. Top 10 ERP
   d. ERP Focus

4. There is no better feedback than good, old-fashioned networking. Don't be afraid to reach out to other manufacturers to see what they're doing. Ask others in your industry and locally to find out who they are using and why they chose that company.

5. Consider visiting a local or industry-specific tradeshow to meet with and talk to a lot of vendors at once. Here are the largest manufacturing tradeshows you can check out:
   a. International Manufacturing Technology Show (IMTS)
   b. FABTECH

6. Talk to your local industry associations. Many of them have lists of ERP vendors they are happy to share. Consider talking to or joining these associations:
   a. Fabricators & Manufacturers Association
   b. National Association of Manufacturers
   c. National Tooling & Machining Association
   d. Precision Machined Products Association

7. Check out your ERP provider social media pages. This will give you an idea of what kind of company they are, what kind of culture they have, and if they are responsive and involved with their customers online.

Navigating Your Online Demos

Your online demos will be like ERP speed-dates. At this stage, you've been able to narrow down your search with some research. Now it's time to see some systems in action. We recommend you start with a simple online demo from 5-7 vendors and let them show off and show you the best of what they offer. This will allow you to quickly rule out ones that won't work for your business, will push the contenders to the top, and should not cost anything but your time.

Here are some additional things to look for during your online demos:

1. Make sure they detail their pricing model and secure a rough cost estimate.

2. Make sure to get a complete, quote-to-cash overview of the system.

3. Let them show you how easy (or not) the software is to use.

4. Ask questions about company background.

5. Ask questions about any specialization the company has.

6. Find out about all of the products the company sells.

7. Ask what's included and what's not.

8. Learn about the ERP provider's partners and who you'll be working with.

9. Pay close attention to ease of use, system functionality and things like cost tracking, scheduling, and inventory.

10. Make sure buying their system moves you forward in areas you already excel in and won't set you back in those areas.

Navigating Their Visit to Your Facility

At this stage, you've likely narrowed your ERP choices down to a few final contenders and a buying decision is on the horizon. During your online demo, you learned if the software was a good match for your business or not.

A visit to your facility will give you the opportunity to see the software more in depth, meet the people behind the software you're buying, and learn how your specific processes work with their software. Facility visits are good for the following reasons:

- This is your opportunity to show them your current processes and facility
- Have them build a job in their system using your data before they arrive
- Take a deeper dive into the system and ask questions specific to your processes
- It allows you facetime with people at the ERP company
- Make sure you discuss any budget constraints or costs questions

During their visit to your facility, consider asking them to bring specific experts in areas that are important to you. Also, it is common for the buyer of ERP to visit the headquarters of the ERP vendor. We recommend taking the time to visit their facility as well.

Reference Checks

Once you've shortened your list of potential ERP providers, the next step is to conduct your reference checks of some of their existing customers to see how they feel about using the software. This will give you a real look into how the ERP solution works for businesses just like yours as well as help you vet the ERP software.

Ask the ERP vendor to provide you some other similar manufacturers (locally close to you and manufacturing similar product) using their ERP software that you can talk to. Reference checks can be done via phone, Zoom call or at their facility.

Here are some things to consider during your reference checks:

- Ask them what differences the system has made for their business
- Ask about their overall relationship with the vendor
- Find out how implementation went
- Ask them to rate or describe the quality of service they receive
- Find out if they feel valued as a customer
- Ask them to rate the provider's level of expertise
- Ask them what the system has changed to automate tasks
- Find out if they've completed any training and what their feedback is
- Ask them to take you through their use of the system. Be sure that the provider's reference is using the software from quote to cash and everything in between.

Securing ERP Proposals

Receiving and evaluating official proposals from a few ERP vendor s is one of the final steps before making your decision. Note, this step can be done as soon as you start talking to ERP vendors.

Once you layout all your ERP software needs with the ERP vendor, they will provide you a proposal that should include line item costs for everything such as users, modules, integrations, customizations, training, and any other items specific to your business.

You know your ERP budget. Now it's important to review their proposal to outline what is a need to have and what is a want to have. What items in an ERP package are necessary/ critical and what are things you want, but aren't necessarily critical for your operations?

Grading the Finalists

Use your answers from Important Things to Consider to grade your top contenders. We've provided a couple of pages for you to fill out for your top 3 contenders. Once you fill out these pages, the winner should be the one with the highest score and fits your budget.

About Global Shop Solutions

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

WHAT ARE THE FACTORS TO CONSIDER WHEN CHOOSING THE RIGHT CUSTOM ERP SOFTWARE?

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I think there are several key factors SMBs should consider when upgrading from an entry-level accounting solution to their first true ERP system, or when they are looking to make a switch from an existing ERP system. First and foremost are digitization and automation. Every business wants to be fully automated and improve its bottom line, so look for a solution that delivers in those areas. Look at whether the solution is delivered via the cloud and does it leverage modern technology like AI and machine learning to help automate some of the processes that bog down many finance teams.

Another key consideration is doing the solution offer you a full view of your financials. It is very important in the current business environment to know, in real-time, how the business is performing. To make informed business decisions, you need a solution with robust reporting and analytics that offers a full 360-degree view of your financial and operational performance. The last area I recommend companies focus on is compliance. You really need a solution that will keep your books in line and provides the tools and functionality to accomplish this.

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Walid Abu-Hadba,
Chief Product Officer, Sage

DIGITIZATION IS THE ENGINE TO ACHIEVE INCREASED PRODUCTIVITY AND GROWTH

*Interview with **Walid Abu-Hadba,***
Chief Product Officer , Sage

Sage and Microsoft announced an expanded partnership a couple of months ago and now, Sage has announced new product integration with Microsoft to simplify workflows for SMBs. Walid Abu-Hadba, Chief Product Officer at Sage explains the benefits of these product integrations and why Sage chose to develop a strategy around a partnership with Microsoft to provide these capabilities to customers.

1. Could you tell ERP News readers about yourself and your role at Sage?

I joined Sage in May 2021 and the Sage Executive Committee in January 2022, serving as Chief Product Officer. I am responsible for all product development and delivery at Sage. I am also passionate about driving strategy and building a culture that delivers tangible, customer-centric solutions. Prior to Sage, I spent time at Oracle working on developer tools, at ANSYS as chief product officer, and 20 years at Microsoft, where I was a corporate vice president responsible for the developer and platform evangelism group.

2. Sage recently announced that it now provides customers with enhanced capabilities integrated into Microsoft Teams. Could you tell us more about the benefits of these product integrations?

Sage and Microsoft announced our expanded partnership back in July. Now, just a few months later, we are already delivering on that relationship with several new product integrations. At Sage Transform, we announced that we are providing customers with enhanced capabilities integrated into Microsoft Office 365 and Teams to help simplify and automate workflows. For joint customers, this extends functionality beyond the user interface of Sage products, making it easier for customers to work across their organization and beyond. Customers can now take the friction out of their day-to-day tasks by submitting and approving accounting and people processes directly through Teams, rather than doing it in the Sage Intacct or Sage People application – reducing the need to toggle between solutions. This means customers can simply and securely approve expenses and review employee leave requests via a Teams notification.

> **CUSTOMERS CAN NOW TAKE THE FRICTION OUT OF THEIR DAY-TO-DAY TASKS BY SUBMITTING AND APPROVING ACCOUNTING AND PEOPLE PROCESSES DIRECTLY THROUGH TEAMS, RATHER THAN DOING IT IN THE SAGE INTACCT OR SAGE PEOPLE APPLICATION – REDUCING THE NEED TO TOGGLE BETWEEN SOLUTIONS.**

For example, with the Sage Intacct app for Microsoft Teams, SMBs will be able to simplify expense management for employees. The in-app Sage Digital Assistant guides expense entry within Microsoft Teams. They can also create expense entries from a mobile app and upload images of receipts from merchants, automatically populating expense information. This saves time and improves efficiency by freeing up teams from manual expense processes, with instant visibility into expenses once they are submitted.

On the Sage People side, managers can now make decisions about leave requests with ease and team members are automatically notified of decisions, within Microsoft Teams. Employee absence requests logged in Sage People automatically generate Microsoft Teams notifications for leaders. This integration will enable both managers and team members to manage time off balances in Microsoft Teams – improving awareness and supporting team planning.

3. Additionally, Sage Intacct and Sage Active are now available on Microsoft Azure. What does this mean for Microsoft customers?

Making Sage Intacct and Sage Active available on Microsoft Azure will give Microsoft customers access to Sage's award-winning cloud financial solutions in an easy-to-use, secure environment. This gives SMBs the opportunity to benefit from the flexibility and scalability that Microsoft's cloud provides when choosing Sage products. Multi-cloud access to Sage's flagship products is a cornerstone of our strategy, as meeting customers where they work is key to providing SMBs with new and innovative ways to be more productive. Now, Microsoft customers can access Sage solutions directly from the Azure cloud. The partnership also connects Sage customers to Microsoft's partner network of developers, offering opportunities to expand value for customers through added product functionality.

4. What made Sage develop a strategy around a partnership with Microsoft to provide these capabilities to customers through Teams applications?

At the end of the day, this is all about what's best for the small and mid-sized businesses that we work with. We want to knock down their barriers to execution and help these companies thrive. That includes a commitment to providing world-class products and services to our joint customers. Both companies have extensive product portfolios that support businesses, which puts us in a good position to work together for the benefit of our customers. Microsoft Teams is just the beginning of the integrations that we are working on with Microsoft.

5. SMBs have been affected in several areas and had to embrace accelerated change over the past 12 months after the pandemic. In which areas should action be taken by the organizations if they are to remain competitive in the next 12 months?

Digitization is the engine to achieve increased productivity and growth. Every small and mid-sized business is looking to grow its top line and manage costs effectively. With our Sage offerings, we give these companies the power to do that and provide them with a platform that scales with their business needs as they grow.

> **AT THE END OF THE DAY, THIS IS ALL ABOUT WHAT'S BEST FOR THE SMALL AND MID-SIZED BUSINESSES THAT WE WORK WITH. WE WANT TO KNOCK DOWN THEIR BARRIERS TO EXECUTION AND HELP THESE COMPANIES THRIVE.**

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. Learn more at www.sage.com/en-us/ and www.sageintacct.com.

TAKE CONTROL WITH LOW-CODE / NO-CODE SOLUTIONS!

*Interview with **Stephen Edginton,***
Chief Innovation Officer and Senior Vice President of Engineering , Epicor

As no-code or low-code ERP rises in popularity post-pandemic, businesses continue to see it as an exciting premise and a promising way to accelerate digital transformation. Stephen Edginton, Chief Innovation Officer and Senior Vice President of Engineering at Epicor shared his opinions on the future of low-code/no-code platforms and the advantages they bring to businesses.

1. Could you tell ERP News readers about yourself and your role at Epicor?

Before joining Epicor, I worked as Chief Technology Officer and Co-Founder of UK business solutions provider, Dot Net IT, which was acquired by Epicor in 2016 as part of its cloud strategy to support customer implementations, migrations, and upgrades to the latest version of Epicor ERP in the cloud or on-premises. I then went on to join Epicor in 2016 as Senior Director of Development, where I had the opportunity to leverage my experiences to shape our solutions.

With over twenty years in the driving seat of technology and innovation, I now hold the title of Chief Innovation Officer and Senior Vice President of Engineering which is a fancy way of saying I focus on solving our customers' hardest problems and helping shape Epicor's technology to enable a world of better business.

2. Epicor has been one of the most successful ERP software companies that could maintain its success in the ERP industry for many years. Could you tell us what is behind this success?

Epicor is unique, having a blend of talent and products that have been shaped and inspired by our customers in the industries we choose to serve. Our solutions have been at the heart of manufacturers, distributors, and retailers for over 50 years. Through a continuous cycle of customer feedback, product investment, focus and refinement, we have become best in class. However, unlike many of the competition, Epicor has stayed at the forefront of technological shifts, from green screen AS/400 terminals to client-server to n-tier smart clients, and now to the web and cloud, with open APIs, automation, and elastic compute.

Our solutions provide customers with a platform they can shape their business, instead of a rigid and prescriptive way of working. They are a better 'out-of-the-box' fit and act as a digital core for our customers to extend. As industries and economies change, our customers will have the power to adapt how they work and make data-driven decisions to maintain their edge.

> **"OUR SOLUTIONS PROVIDE CUSTOMERS WITH A PLATFORM THEY CAN SHAPE THEIR BUSINESS, INSTEAD OF A RIGID AND PRESCRIPTIVE WAY OF WORKING. THEY ARE A BETTER 'OUT-OF-THE-BOX' FIT AND ACT AS A DIGITAL CORE FOR OUR CUSTOMERS TO EXTEND.**

Finally, it's not just about releasing new versions of products or staying on the latest technology, it is about bringing our loyal customers along with us. We invest heavily in automation to deliver a seamless experience for our on-premises customers who are looking to move to the cloud. The nature of work has fundamentally changed with hybrid and remote working, but we do still provide a deployment choice if customers want on-premises solutions too.

3. Although low-code/no-code platforms seem like a new trend today, they've been around for decades. These platforms help businesses to meet the speed they need and offer a much more personalized structure, so the demand for them is still increasing. What are your opinions on the future of low-code/no-code platforms and the advantages they bring to businesses?

Excel is the original low-code/no-code platform and it has been helping people solve problems for decades. The key thing about low-code/no-code is it allows you to program without learning how to code in the traditional sense. However, even with programmers on hand, the real challenge is that of business context and understanding the problem. Low-code/no-code tools allow more people closer to the problem to shape the solution.
Before low-code/no-code, it was typical for ERP businesses to get a quote from their provider to make a change or log a suggestion for a future release. This process was slow and expensive, even in the best-run companies. As the pace of change increases, businesses need to adapt and react to stay competitive. Low-code/no-code solutions allow businesses to take control in a safe and resilient way. If they need to capture additional data, present a user with more context, or automate an action, they can do so without needing a highly skilled developer to make the change.

At Epicor, our solutions have embedded low-code/no-code capabilities that we continue to evolve.
For example, Application Studio allows our customers to change how their applications work by adding a layer to change the data displayed in the 'Order Entry' app, or a button to automate a process for a group of users – and this layer continues to work after upgrades.

Epicor Automation Studio, our embedded Integration Platform-as-a-Service (iPaaS) offering allows our customers to connect the dots between systems, and integrate our solutions with thousands of other SaaS solutions, such as Salesforce or Airtable, and can be deployed instantly.

Today's low-code/no-code solutions still require some knowledge of the tool and someone to translate the business needs into a set of actions to click, drag or configure how the system works. In the future, we will see an expansion of applied AI where you can describe in natural language what you need, and AI will chain together these actions.

4. The software industry has a very dynamic structure. How does the Self Service & Low / No-Code ERP trend affect the software industry?

When you empower customers through software and data they can get more done and this increases productivity across the board. As we all leverage technology like Amazon, Uber, and Twitter, it reshapes our expectations, so we expect the same level of real-time visibility, prediction, and insight in the other technologies that we use, even in a business environment.

> **"LOW-CODE/NO-CODE SOLUTIONS ALLOW BUSINESSES TO TAKE CONTROL IN A SAFE AND RESILIENT WAY. IF THEY NEED TO CAPTURE ADDITIONAL DATA, PRESENT A USER WITH MORE CONTEXT, OR AUTOMATE AN ACTION, THEY CAN DO SO WITHOUT NEEDING A HIGHLY SKILLED DEVELOPER TO MAKE THE CHANGE.**

Although the self-service trend did not begin in ERP, self-service will become the natural evolution of choice as we move towards a more AI-based future. The essence behind the low-code/no-code, the self-service trend is to allow customers to do more with less, which is critical given the extremely high demand for IT skills and developers, and the rising bar of expectations when doing business.

5. Last March, Epicor announced that it has acquired Grow Inc., which provides a low-code business intelligence tool that has flexible and easy-to-use analytical capabilities. Could you tell us about the benefits of this acquisition and the low-code business intelligence tool for Epicor users?

At Epicor, we built our own business intelligence solutions to show charts and graphs embedded within our ERP solution, and while this worked well over the last decade, it lacked one key ingredient: data from outside the ERP. When making the best decisions you need to have all the data available to you.

Grow Inc is a low-code/no-code business intelligence platform that empowers everyone in the business to make data-driven decisions. It works by having connectors that pull in data from disparate sources, such as combining your ERP sales data with forecasts from Excel, or your ad spends from Google with e-commerce sales.

Having connectors feed your data warehouse and verified datasets means your team can get to the data they need, without second-guessing the validity. Combined with powerful transformations and visualizations, data insights can be shared across the business, driving decisions, and directing focus on what the business really cares about. Owning this platform allows us to also embed these capabilities within our solutions to give contextually specific analytics alongside the business data.

It is becoming a bit of a cliché to say that data is the new oil, but the fact remains that in today's digital-first world, all organizations need to streamline and connect disparate data sources across their enterprise as a priority.

6. It is getting harder to set goals and take the right steps toward those goals in the ever-changing software industry. Could you tell us about your future goals and strategies as Epicor?

At Epicor, our mission is to enable a world of better business and we strive to do that for our customers through software. We focus on our key industries with companies that make, move, and sell physical things, and continuously evaluate the landscape of technology. Our strategy is focused on making significant investments in our customers, our technologies, and our employees. From a technology standpoint, we are continually evolving and improving our product offering to meet customers' needs, in both product innovation and the strategic acquisitions of capabilities.

Epicor Automation Studio, powered by our partners Workato, allows us to focus on the experience while they continue to invest in the connectors we integrate to. Epicor CPQ (formally KBMax) provides a best-in-class Configure-Price-Quote (CPQ) solution, supporting customers who see the trend in configure-to-order personalization. Data Interchange was also an acquisition of a UK and European electronic data interchange (EDI) platform that powers business-to-business transactions and trade, allowing us to expand the Epicor EDI business across the globe. Finally, in early October, we acquired eFlex Systems, a provider of cloud[1]based Manufacturing Execution Systems (MES) and low[1]code/no-code technology, bringing together digital work instructions interlocked with machines and tools to the factory floor. Our focus and strategy are on capabilities that work across industries where possible, unlock productivity and give our customers an edge. We continue to buy, partner, and invest in our solutions to ensure our customers have the right tools for the job.

7. How does the new Automation Studio support low code/ no code?

Epicor Automation Studio allows users to intelligently automate their world, connecting their Epicor solutions with other SaaS solutions in a seamless and frictionless way. We refer to it as a low-code/no-code embedded iPaaS and it has two main constructs: Connectors and Recipes. Connectors connect to things, such as Epicor Kinetic (our manufacturing product), or Epicor P21 (our distribution product), but it can also connect to thousands of other SaaS solutions like Workday, Salesforce, SugarCRM, and anything that has open APIs. Users can build a recipe to automate things from scratch through 'drag and drop' connectors or copy existing industry templates from thousands of popular pre-built automation.

Integrating your ERP system to other systems used to be a complex problem to solve. Tools like Epicor Automation Studio embed best practices and provide an intuitive experience, so it's about using the best tools for the job.

About Epicor

Epicor equips hard-working businesses with enterprise solutions that keep the world turning. For 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 respond flexibly 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.

WHAT ARE THE FACTORS TO CONSIDER WHEN CHOOSING THE RIGHT CUSTOM ERP SOFTWARE?

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There are three factors to consider. First, you need to know the critical capabilities that your business requires to have automated are available from your ERP solution. It is important to look at a solution with the needs of your business as the primary lens. A generic list of capabilities is useful to spur thinking, but it is more important to look at the current and future needs of your business to decide on which capabilities are critical. Second, is vision and direction of the ERP solution. Ask yourself if the direction the ERP solution is going to align with your future needs. Are they innovating in ways that will make your business thrive. And third, is the ERP provider a partner for your organization. Is the company going to stand by your side and help you achieve your current and future goals. It isn't sufficient to choose just a technology provider. You need an ERP provider that will consider how to help your business scale, onboard new talent, and adapt to future changes.

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Dan Miller,
Executive Vice President, Sage

Sage

WHAT ARE THE FACTORS TO CONSIDER WHEN CHOOSING THE RIGHT SUPPLY-CHAIN SOFTWARE?

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Such a great question and an area where many folks struggle – how to find a great technology partner. When I look at analysts and thought leaders, they all recommend finding solutions that provide connectivity and visualization along with ensuring the solution is both cloud-enabled and has robust security. Additionally, your solution should provide easy-to-understand and regularly updated reporting. These are the foundational capabilities — table stakes or order qualifiers if you will. But to be a great partner, your technologist needs to understand the problem or challenge you are trying to solve. They should employ SMEs that have deep functional and/or industry experience related to your business. A strong partner will also be able to create a network effect whereby they are not just learning from your data and employees but also improving results based on data and decisions from others on the platform both within your industry and beyond.

Finally, I think it is important to keep some other factors top of mind. A great solution delivers the results promised, is "always up to date", requires minimal training, and is easy to use.

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Christine Barnhart,
VP of Product Marketing and GTM, Nulogy

NULOGY LAUNCHES "DATA AS A SERVICE" SOLUTION FOR USERS OF SUPPLIER COLLABORATION AND SHOP FLOOR PRODUCTS

Enables Nulogy customers to gain valuable insights into end-to-end supply chain operations

Nulogy, a leading provider of supply chain collaboration solutions, today announced the launch of the company's newest addition to its Multi-Enterprise Supply Chain Business Network Platform (MESCBN): the Nulogy Data as a Service (DaaS) Solution. The company is unveiling the new solution today at the PACK EXPO International tradeshow and conference in Chicago, Illinois.

The Nulogy DaaS solution makes available new self-serve analytics options for Nulogy users. Data accessed via DaaS will enable clients to build analytics capabilities to explore complex data at scale and have complete control over the end analytics output for data-driven decision making.

Jason Tham, Nulogy CEO and co-founder, said, "Supply chain leaders are clamoring for access to data of all types, and Nulogy's focus on upstream suppliers makes this offering especially important for these companies. In many cases, this is the ONLY upstream supplier data they have access to. Combining this data into their existing analytics or AI solutions will provide strong, actionable insights that will translate into hard dollar savings and operational efficiencies."

With near real-time data from Nulogy systems, Nulogy DaaS users can:

- Create dashboards powered by near-real time analytics, e.g. OTIF, variance to plan, OEE, etc.
- Query and export data to an organization's own data warehouse for analytics and reporting
- Feed machine learning models for predictive and prescriptive analytics
- Conduct root cause analyses of operational issues
- Track changes in data over time for trend analysis, and variance analysis - comparing estimated versus actual values
- Provide a 360-degree view of the business, tracking production operations from start to finish

"MSI Express has a vision to use data to drive improvements across all of our operations," said David Freed, CIO at Nulogy customer MSI Express. "We joined the beta program for Nulogy's DaaS solution earlier this year and have already started to reap benefits from the solution. The Nulogy DaaS solution provides us with the data we need to identify waste, increase quality, and improve our customer service levels."

The solution is available immediately for existing Nulogy customers and prospective customers. For more information (including pricing), companies should contact their Nulogy Customer Success Manager or Account Executive.

About Nulogy

Nulogy, a leading supplier of digital supply chain solutions, enables customers and their supplier communities to collaborate on a multi-enterprise platform in order to deliver with excellence to an ever-changing consumer market. The Nulogy Multi-Enterprise Supply Chain Business Network Platform optimizes upstream supply ecosystems composed of brand manufacturers, contract manufacturers and packagers, third party logistics providers, raw material and packaging suppliers to accelerate supply chain responsiveness and collaborate at the speed of today's market.

LATEST RELEASE OF EPICOR KINETIC FOR MANUFACTURING DELIVERS NEW INDUSTRY FEATURES AND CONNECTED SERVICES

Epicor, a global leader of industry-specific enterprise software to promote business growth, introduced a variety of features in its Fall 2022 release for Epicor Kinetic for Manufacturing, part of the Epicor Industry ERP Cloud portfolio. The updates will help manufacturers better compete with deep industry-specific functionality, connected services to integrate and optimize workflows, and deliver a smoother user experience journey.

"Now more than ever, manufacturers need people-centric, open, and connected technologies to gain visibility across their business and optimize supply chain processes," said Vaibhav Vohra, Chief Product Officer at Epicor. "The latest release of Epicor Kinetic empowers our customers with a variety of fit-for-purpose features and integrations that deliver on that, helping them grow their business and compete in today's global marketplace."

New capabilities across the latest release of Epicor Kinetic for Manufacturing include:

Deep Industry-Specific Functionality

- The ability to track inventory by part and revision allows customers to reduce part number maintenance time, ensure component compatibility, and have full visibility into inventory segmentation
- Improved API connection between Epicor Kinetic and Epicor Advanced MES that includes passing of Downtime and Scrap codes
- Embedded electronic signature capability that can be used with Business Process Management (BPM) on any business object to support compliance and quality management needs
- Enhancements to fulfillment improve visibility of Make-to-Orders, streamlining the release of sales orders to picking
- Improved financial reporting capabilities, aligning the Procurement to pay trackers and GL reporting showing valuable data that will help customers easily reconcile their data across different areas

Connected Services to Optimize Workflows

- Epicor Commerce Connect customers can rate shop at checkout by pulling the best freight rates from Quick Ship, eliminating the need to maintain shipping rates in both applications
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- Deeper integration between Epicor Kinetic and Epicor CPQ, including new features such as 3D Sketch & Extrude and a MoM Viewer Widget to view MoM calculations in real-time while users are configuring

Smoother User Experience Journey

- Built to engage employees across the enterprise with a digital messaging and notification engine
- Enhanced collaboration offers an optimized mobile experience

About Epicor

Epicor equips hard-working businesses with enterprise solutions that keep the world turning. For 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 respond flexibly 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.

QAD ADAPTIVE ERP 2022.1 ENHANCES SUPPLY CHAIN VISIBILITY AND HELPS TO MANAGE AND REDUCE RISK

Latest enhancements help enterprises on their journey to becoming more adaptive and resilient

QAD Inc., a leading provider of next-generation manufacturing and supply chain solutions in the cloud, has released the latest enhancements to QAD Adaptive ERP, along with other QAD Adaptive Applications.

Global manufacturers face ever-increasing disruption. Global supply chains face unrelenting fluctuations in supply and demand. In order to survive and thrive, these enterprises must be able to innovate, change their business models, and seamlessly optimize for agility, efficiency and resilience.

"Our second release of 2022 exemplifies QAD's focus on the user experience and timely access to business insights," said QAD CEO Anton Chilton. "These latest enhancements help enterprises on their journey to becoming Adaptive Manufacturing Enterprises and Adaptive Supply Chains."

New embedded analytics capabilities deliver more data visualizations for users to better view data and make informed decisions. With the importance of sourcing and supplier management increasing, QAD SRM delivers further integration to deliver business insights for improved sourcing and supplier management decision-making. For existing ERP customers, the QAD Elevate Program reduces risk as well as the time and cost to upgrade to QAD Adaptive ERP in the cloud.

QAD's acquisition of WebJaguar has progressed to provide a complete digital transformation of the customer journey. Now called QAD Digital Commerce, the solution helps our clients improve cash flow, increase sales and boost customer retention.

In addition to these key enhancements to QAD Adaptive ERP, QAD has enhanced other solutions in its Adaptive Applications portfolio, including QAD EQMS, Financials, QAD Internationalization, QAD SRM, QAD Digital Supply Chain Planning and QAD Global Trade and Transportation Execution.

For details of the specific enhancements made to QAD Adaptive ERP and its related solutions, please visit the QAD Blog.

About QAD

QAD Inc. is a leading provider of next-generation manufacturing and supply chain solutions in the cloud. Global manufacturers face ever-increasing disruption caused by technology-driven innovation and changing consumer preferences. In order to survive and thrive, manufacturers must be able to innovate and change business models at unprecedented rates of speed. QAD calls these companies Adaptive Manufacturing Enterprises. QAD solutions help customers in the automotive, life sciences, consumer products, food and beverage, high tech and industrial manufacturing industries rapidly adapt to change and innovate for competitive advantage.

Founded in 1979 and headquartered in Santa Barbara, California, QAD has 30 offices globally. Over 2,000 manufacturing companies have deployed QAD solutions including enterprise resource planning (ERP), digital supply chain planning (DSCP), global trade and transportation execution (GTTE), quality management system (QMS) and strategic sourcing and supplier management to become an Adaptive Manufacturing Enterprise. To learn more visit www.qad.com or call +1 805-566-6100. Find us on Twitter, LinkedIn, Facebook, Instagram and Pinterest.

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ORACLE NETSUITE

NETSUITE ANNOUNCES SUITEBANKING, THE FIRST CLOUD ERP TO INTEGRATE FINTECH INTO A UNIFIED SUITE

SuiteBanking Alliance Partner HSBC will Provide Services to Enable International Payments and Expense Management

To help organizations improve forecasting and make more strategic cash decisions, Oracle NetSuite announced SuiteBanking. As the first unified suite that embeds fintech into cloud ERP, SuiteBanking helps customers automate key financial processes and gain full visibility into cash flow. By bringing together automated accounts payable and accounts receivable processes, SuiteBanking makes it fast and easy to pay bills, send invoices, and get paid, all from within NetSuite.

"Growing organizations cannot afford to have teams of people entering data, dealing with banks, monitoring transactions from multiple systems, and manually processing vendor payments. The time saved from automating these processes could be spent on strategic projects that help drive further growth for the organization," said Evan Goldberg, EVP, Oracle NetSuite. "SuiteBanking is the first step in bringing the worlds of ERP and fintech together. It will help our customers automate all of these processes in one single suite and increase visibility and control so they can maintain healthy cash flow as they grow."

SuiteBanking improves cash flow by accelerating accounts payable and accounts receivable processes. Enhanced automation gives organizations greater control over expenses, increases the effectiveness of accounting processes, and provides detailed insights all in one system. By providing a unified system, NetSuite eliminates the need to collect and normalize data from other departments and systems, saving finance teams dozens of hours every month. In addition, integration with banking partners like HSBC gives NetSuite customers convenient access to a variety of financial services, including a global digital wallet and virtual payment card. HSBC, a leading international bank that is embracing fintech innovation, is the first SuiteBanking alliance partner.

With SuiteBanking, NetSuite customers are able to improve the following cash flow processes:

- ***Accounts Payable:*** Helps customers accelerate accounts payable processes with automated invoice scanning and general ledger code assignment, three-way invoice matching, and automated outbound payments. Customers can see multiple payment options and select the preferred method for each vendor. For example, they can choose either the fastest or the least expensive option.

- ***Accounts Receivable:*** Helps customers increase on-time payments, reduce days sales outstanding, and improve the efficiency of billing staff. The new Payment Link feature makes it easier for customers to receive payment by including a "pay now" option on electronic invoices. Multiple payment methods are supported, including credit/debit card, ACH transfer, or a third-party payment provider like PayPal. In addition, customers can automate the creation and scheduling of invoices and increase collections by sending payment reminders automatically.

- ***Bank Reconciliation:*** Helps customers eliminate manual, error-prone, and time-consuming tasks and accurately match transactions with their organization's bank account. Customers gain improved cash flow visibility through real-time insight into the status of inbound and outbound payments. In addition, customers are able to increase the accuracy of accounting data by matching and reconciling cleared transactions more often and are able to gain a better understanding of their current cash position so they know how much cash is available in their accounts at all times.

- ***Spend Management:*** Helps customers control corporate spend through better visibility and reporting capabilities. It enables customers to create approval workflows to fit their organization's structure and customize expense policy rules to flag expenses that need a manager's review. In addition, budget validation capabilities help managers avoid overspending by automatically comparing open purchase requests to available budget and alerting to potential budget overages prior to approval. Budget versus actuals reporting also helps managers control spending by comparing actual expenses against budgets in real time.

- ***Expense Management:*** Helps customers control costs, enforce internal policies and procedures, and improve the timeliness and accuracy of employee expense reports. Customers can pay vendors that accept credit cards directly out of NetSuite via their SuiteBanking virtual payment card, which extends payment terms and relieves cash flow. Customers can also better manage business expenses by using the virtual card to cover employee expenses or corporate credit card charges. Expenses are captured and submitted electronically and automatically flow into NetSuite, eliminating double entry and accounting errors. In addition, customers receive cash back rewards on all transactions when using the virtual card to make payments.

- ***International Payments:*** Provides customers with a global digital wallet to make and accept payments from a single account, utilizing HSBC's global footprint and presence in more than 60 countries, instead of using country-specific payment providers that result in separate AP processes. This makes it easy for customers to make and receive international payments and removes the complexities of opening and managing multiple foreign bank accounts.

- ***Access to Working Capital:*** Helps improve cash flow by giving customers a convenient way to convert unpaid invoices into cash. NetSuite enables quick, convenient access to additional working capital with accounts receivable financing.

For more information, read the latest NetSuite blog.

About Oracle Netsuite

For more than 20 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 27,000 customers in 215 countries and dependent territories.

Learn more at https://www.netsuite.com. Like us on Facebook, and follow us on LinkedIn, Instagram, and Twitter.

AUTOMOTOR MODERNIZES ITS INFORMATION SYSTEM IN THE CLOUD WITH INFOR AND ITS PARTNER AUTHENTIC GROUP

Automotive parts distribution specialist streamlines business processes with Infor CloudSuite Distribution Enterprise and Authentic Group's ADS solution

Infor®, the industry cloud provider, announced that Automotor, a French market leader in the export of automotive parts, has chosen to deploy the Infor CloudSuite Distribution Enterprise ERP (enterprise resource planning) solution to cover all of its business needs in a single, centralized platform. In addition, Automotor opted for the Authentic Distribution Solution (ADS), developed by Infor's partner Authentic Group, to support the implementation and enrich it with high value-added services for the automotive distribution sector.

Founded in 1972, Automotor is the leading independent French exporter in the automotive parts industry, with a presence in more than 70 countries. Its increased focus on business activities in emerging markets, mainly outside Europe via its group AMERIGO International, has enabled the company to consolidate its turnover. A modernized information system is needed to support this growth.

The project to implement Infor's solution, hosted by Amazon Web Services in the cloud and with the help of technology partner Authentic Group, replaces a previously failed ERP project, which was, as Automotor's management admits, poorly prepared. "We started a process transformation program in 2018," says Jérôme Cambray, Automotor's IT manager. "Unfortunately, at the time, we had poorly defined our needs both around the businesses related to the management of our logistics warehouse, which requires a lot of agility, but also in terms of our support and administration activities. We interrupted the project in order to resume it in a rational and strategic way on much healthier bases, by relying on a solution dedicated to our business and with a much more serious business commitment."

The project resumed at Automotor in 2021 with a precise analysis of all the company's business processes carried out with its internal users. The resulting document served as the basis for the call for tenders submitted to solution integrators, including Authentic Group, which took charge of the project. Authentic Group suggested to Automotor's teams that they opt for the Infor CloudSuite Distribution Enterprise solution, which is widely used among distribution professionals in France.

"After our first aborted project, we were able to define a double objective. The first was to improve our productivity in terms of transit flows in our warehouses and to optimize our replenishment orders. The second was to be able to capitalize on our data and share some of it — in the form of a catalog and a diagnostic tool — via a platform open to our network of wholesale distributors. This had to be done with a tool that spoke our business language and that evolved with our growth. Infor's solution met these requirements exactly, and the fact that it is available in the cloud also allowed us to focus 100% on our business and to free ourselves from IT maintenance constraints," Cambray says.

The support of a true industry specialist, Authentic Group, was crucial in the conduct of the project. "When we were approached by Automotor, it was clear to us that Infor's solution, with which we have a very close relationship, was perfectly suited to Automotor's business requirements, its need for agility and growth ambitions," says Fabrice Caumette, Authentic Group's executive delivery manager. "We were so convinced that we even developed a dedicated preconfigured model to implement Infor's solution easily in order to reassure a customer that was coming out of a difficult experience."

From the Infor point of view, the project further solidifies the relevance of its portfolio of solutions dedicated to some of the most specific verticals. "The Infor CloudSuite Distribution Enterprise solution, on AWS, is both comprehensive and scalable. Dedicated specifically to distribution professionals, it supports their growth and strengthens their commitment to their customers via, in particular, the development of high value-added services," said Philippe Maillet, Infor sales director in France for SMB & channel. "We are therefore particularly pleased with our technology partnership on this ambitious Automator project, conducted jointly with Authentic Group, whose rigor and expertise in the distribution sector is a perfect recipe for a successful business transformation."

Infor CloudSuite Distribution Enterprise is a multi-location, multi-company, multi-currency, multi-lingual solution that covers inventory and warehouse management, financial management, omnichannel order management, purchasing, services and more. Supporting 49 locations and 24 languages, the solution provides Automotor with the flexibility and scalability to easily enter new markets and adapt quickly to change.

About Authentic Group

Created in 2004, Authentic Group implements IT solutions and offers innovative services to support companies in their development. Authentic Group works with companies specialized in distribution in Europe, Canada and the United States and offers services and solutions around:
- Infor M3, Infor OS, Infor CloudSuite Distribution Enterprise: implementation, deployment, migration, support.
- Methodology: agility and reactivity for shorter and less expensive projects
- Micro-vertical business line automotive parts distribution (ADS)
To learn more about Authentic Group, visit https://www.authentic-grp.com

About Infor

Infor is a global leader in business cloud software specialized by industry. Providing mission-critical enterprise applications to 65,000 customers in more than 175 countries, Infor software is designed to deliver more value and less risk, with more sustainable operational advantages. We empower our 17,000 employees to leverage their deep industry expertise and use data-driven insights to create, learn and adapt quickly to solve emerging business and industry challenges. Infor is committed to providing our customers with modern tools to transform their business and accelerate their own path to innovation. To learn more, please visit www.infor.com.

UNIT4 ANNOUNCES STRATEGIC RELATIONSHIP WITH BDO USA LLP TO HELP NONPROFIT, PROFESSIONAL SERVICES, HIGHER EDUCATION, AND STATE AND LOCAL GOVERNMENT SECTORS INCREASE AGILITY AND EFFICIENCY

Unit4 and BDO will work together to help organizations in these industries navigate complex technology and business process challenges

Unit4, a leader in enterprise cloud software for people-centric organizations, announced a strategic relationship with BDO USA, LLP, one of the nation's leading accounting and advisory firms.

The relationship brings together Unit4's purpose-built technology solutions and BDO's deep industry experience and solution capabilities around organizational strategy, enterprise transformation, and technology enablement. Together, Unit4 and BDO will help organizations in the nonprofit, international development, professional services, higher education, and state and local government sectors navigate some of the most complex technology and business process challenges.

"Organizations in these sectors must constantly adapt to new and complex challenges," said Andrea Espinola Wilson, Managing Partner and National Co-Leader of BDO's Nonprofit and Education Practice. "Together with Unit4, we will help organizations improve resilience and deliver on their mission."

Funding and growth constraints are requiring organizations to stretch resources further. Various pressures – such as the need for stronger impact management, cybersecurity threats, a competitive landscape, and increased digitization – are compounding this challenge. As a result, it is especially important for organizations to have the data and insights needed to improve efficiencies, remain agile and make decisions swiftly.

Unit4 and BDO will help organizations better manage their enterprise resource planning (ERP), human capital management (HCM), and financial planning and analysis (FP&A) needs. Specialized guidance in systems integration, change management, finance optimization, digital transformation, compliance, and business consulting will help drive greater mission impact through people-centric processes.

"I am delighted to welcome BDO to our partner ecosystem. Their experience and reputation in the nonprofit, professional services, higher education, and state and local markets are globally unmatched," said Beata Wright, EVP & Global Head of Partner Ecosystems, of Unit4. "Both Unit4 and BDO share the belief that people are at the heart of everything we do, understand the challenges that nonprofit organizations face, and have the teams in place to assist them in transforming their business. Unit4 and BDO will offer services that will best serve these firms in their transformation journey."

About Unit4

Unit4's next-generation enterprise solutions power many of the world's most people-centric mid-market organizations. Our state-of-the-art cloud platform, ERPx, brings together the capabilities of Financials, Procurement, Project Management, HR, and FP&A onto a unified cloud platform that shares real-time information and is designed with a powerful, people-centric approach, so employees can benefit from better insight and become more effective and increasingly engaged. It supports rapid and continuous change while delivering individualized fit for customers at scale, delivering the right tools to unify the processes across their organization, and connect their people. Unit4 serves more than 6,000 customers globally including, Bravida, Havas, Migros Aare, Americares, Save the Children International, Action against Hunger, Metro Vancouver, Forest Research, Southampton City Council, Habitat for Humanity, Selkirk College, FTI Consulting, and Surrey County Council.
For more information please visit https://www.unit4.com/, follow us on Twitter @Unit4global, or visit our LinkedIn page

NTT DATA INTENDS TO ACQUIRE DATA ANALYTICS FIRM ASPIRENT

NTT DATA, a digital business and IT services leader, announced it has signed a definitive agreement to acquire Aspirent, a leading data, analytics and advisory firm headquartered in Atlanta.

Aspirent, a leading data, analytics and advisory firm headquartered in Atlanta.

"As we help our clients navigate critical business challenges through the use of data, this acquisition expands and strengthens NTT DATA's analytics and advisory capabilities," said Wayne Busch, Group President, Consulting and Digital Transformation, NTT DATA Services. "Aspirent continues our targeted focus on becoming a trusted advisor for our clients following our acquisitions of Hashmap and Chainalytics."

Aspirent will add over 230 data advisors and technologists to NTT DATA's digital transformation services team and bolster its data engineering capabilities across key data partners such as Azure, AWS, Databricks, and Snowflake. This acquisition supports and accelerates NTT DATA's strategy to be the preferred digital innovation partner for enterprises globally.

"As a purpose-built analytics consulting firm focused on solving complex data-driven business challenges, we have spent a decade helping our clients run towards change," said Andrew Wells, CEO, Aspirent. "The opportunity to join NTT DATA will strengthen our ability to deliver the end-to-end global solutions our clients require and bring exciting new opportunities to our colleagues and communities."

Aspirent clients and employees will benefit from access to NTT DATA's powerhouse of innovation resources and broader digital transformation capabilities including a $3.6 billion average annual R&D investment. NTT DATA recently announced the launch of six innovation centers across the globe to focus on bringing advanced technologies to clients, with an Innovation Studio co-located in Plano, TX.

Pillsbury Winthrop Shaw Pittman LLP served as the legal counsel to NTT DATA, and Canaccord Genuity Petsky Prunier LLC served as the exclusive financial advisor to Aspirent and Summit Park, the majority shareholder of Aspirent, in connection with this transaction. The transaction is subject to customary closing conditions, including regulatory approval and is expected to close within the next 30 days.

About Aspirent

Aspirent partners with the world's largest organizations to simplify their most complex data and digital challenges. Through a combination of proven frameworks, experienced teams, and unbiased technology expertise we deliver custom-fit, data-driven solutions focused on the outcomes that matter most to our clients. Aspirent was named Inc.'s Best Workplaces 2022, Atlanta's Best and Brightest Company to Work seven years in a row and Atlanta's Top Places to Work five of the last seven years and is considered one of the fastest growing companies by Inc. Magazine. Visit Aspirent.com to learn more about their capabilities.

About NTT DATA

NTT DATA – a part of NTT Group – is a trusted global innovator of IT and business services headquartered in Tokyo. We help clients transform through consulting, industry solutions, business process services, IT modernization and managed services. NTT DATA enables clients, as well as society, to move confidently into the digital future. We are committed to our clients' long-term success and combine global reach with local client attention to serve them in over 50 countries. Visit us at nttdata.com.

SAGE ENHANCES ITS END-TO-END SOLUTION FOR ACCOUNTANTS TO SUPPORT SOLE TRADERS AND LANDLORDS THROUGH EVERY STEP OF MAKING TAX DIGITAL

Sage, the leader in accounting, financial, HR, and payroll technology for small and mid-sized businesses, has launched a series of new tools to help accountants support the 4.2 million sole traders and landlords impacted by one of the UK's biggest tax changes.

MTD for ITSA will apply to unincorporated sole traders and landlords from April 2024, if their annual business or property income exceeds £10,000 in a tax year and to be compliant, businesses and property owners will need to make records and income tax self-assessment submissions digital using compatible software.

92% of SMBs use the service of an accountant, with half (49%) using their services at least weekly, according to Sage research*. With the demand on accountancy and tax services set to increase with the introduction of MTD for ITSA, accountancy practices need to properly prepare to support their clients through the changes.

NEW Sage Accounting Individual – supporting businesses with the simplest of tax needs

Sage has launched a new, easy to use and affordable solution tailored to the needs of sole traders and the self-employed with the simplest tax requirements. Key details include:

- Automated data extraction and categorisation means time is saved and errors reduced, direct access to the data allows timely adjustments and corrections, while seamless submissions direct to HMRC by the accountant or the client for quarterly returns, end of period statements and final declarations provides peace of mind.
- The creation and and maintaining of digital records with bank feeds, coupled with digital storage, means records are securely stored for future ease of reference.
- Device agnostic, allowing the end-to-end workflow to be completed on mobile, tablet, web or interchangeably across these to suit user preference
- Connection and collaboration tools between accountant and client to help manage the MTD ITSA process.
- Accountants can sign up to this from today to start preparing clients ahead of the next tax year starts in April 2023.
- Watch demo here.

NEW Supporting landlords through Hammock

A new strategic partnership with Hammock, the accounting platform for landlords to manage rental property transactions, will offer a dedicated solution to the 1.3m UK property owners impacted by MTD for ITSA. Key details include:

Providing an end-to-end solution for accountants to manage their landlord clients' tax and compliance needs in one workflow.

Allowing accountants to simplify, streamline and systemise all inputs required by landlords for MTD for ITSA reporting.

All landlord information available in one place including income, expenses, yield, arrears and equity.

The partnership with Sage is available now. Sage accountants can sign up and access Hammock from S4A, leading up to the legislative deadline in April 2024.

NEW Volume Purchase Agreement (VPA) – accountants can benefit from discounts now

To help accountants plan, prepare and get ahead of the legislation, Sage has introduced a VPA. This allows practices to forward plan for the right solutions for their clients. In addition, they can benefit from Sage for Accountants membership discounts in a fair and transparent way now, without having to buy in bulk upfront and incur costs before they or their clients use the solutions.

A Digital End to End Solution

Delivered via Sage for Accountants, these new launches give accountants all the tools they need in one place to support with MTD for ITSA - no matter the size or nature of their business records and filing requirements. This was crucial to Sage as the largest technology provider to UK accountants, who need a complete digitised end-to-end solution, from proposal to advisory.

Since the launch of Sage for Accountants in November 2021, more than 2,000 accountancy and bookkeeping practices have signed up to the solution. Sage has continued to work with them to refine and expand the tools available, supported by strategic acquisitions and partnerships. The announcement today builds on the capabilities within the solution, which already include:

- Personalised membership benefits such as a 4 Step Success Plan – together with Sage experts, practices will have support to plan with confidence and prepare their clients for MTD for ITSA, while training their own teams and preparing their business for the legislative change.
- GoProposal & Oversuite – ongoing investment and deeper integration of these solutions into Sage for Accountants will help practices manage the increased demand from clients who need support to comply with the legislation, this includes reviewing, repricing and re-engaging new and existing clients to ensure they run a profitable practice
- Client Management – the new legislation will bring more deadlines and tasks to be completed for each client, and this solution helps accountants effectively manage their clients, collaborate with teammates, while giving time back by automating workflows.
- AutoEntry, Accounting and Payroll – helps clients to keep digital records on the move, increases automation, provide client accounting, ledger categorisation and manages client payroll where required.
- Final Accounts, Personal Tax & Corporation Tax – can prepare year financial statements, calculate and submit tax returns, all available free of charge through Sage for Accountants.
- Smart Reporting & Futrli – provides rich and powerful business insight and forecasting to clients, helping to showcase the true value of the work accountants do and grow practice profitability through the provision of higher margin advisory services

Manoj Varsani MBE, CEO and Founder – Hammock, said: "Sage has an unrivalled history of supporting accountants with all their compliance needs and, through this partnership, we are integrating Hammock's services to provide the complete solution to support practices with landlord clients.

"Accountants are landlords' closest ally in the management of finances and compliance. This partnership allows accountants to add a dedicated offering to landlords, enhancing real-time collaboration and unlocking access to deep insights into the clients' property finances."

Andrew dick of Chartered Accountants, G W Dick & Co, said "It's rare a company listens to its customers and acts on it. Thankfully, Sage understood the brief and what accountants need to make this implementation successful.

"There's a need for an end-to end solution that caters to all client types to ensure that practices are not approaching this in a fragmented way, (particularly with Making Tax Digital for Income Tax coming).

"Sage for Accountants, coupled with the New Individual solution and the partnership with Hammock, supported by the VPA, now gives accountancy and bookkeeping practices the support and motivation to embark on their MTD ITSA journey. This is a game changer for them."

Andreas Georgiou, VP Product - Accountants, Sage, said: "The vast majority of the 4.2m sole traders and landlords impacted by MTD ITSA still use manual paper records and wait until the last minute to submit their income tax self-assessment returns. The huge dependency these individuals have on accountants is set to grow with the introduction of MTD ITSA and create even greater pressure on the accountancy sector to truly digitise their practices to handle the increased workload as efficiently and profitably as possible.

"We've listened to these challenges and want to send a strong message to accountants across the UK that 'we hear you, we've got your back and we're doing everything we can to help you prepare'".

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. Learn more at www.sage.com/en-us/ and www.sageintacct.com.

CONSORTIUM LED BY AIRBUS AND CAPGEMINI SELECTED BY THE FRENCH MINISTRY OF THE INTERIOR FOR THE RADIO NETWORK OF THE FUTURE (RRF)

A consortium led by Airbus and Capgemini has been selected by the French Ministry of the Interior and Overseas Territories as the integrator for 'Lot 2'1 of the "Réseau Radio du Futur" (RRF - Radio Network of the Future), the secure and resilient broadband network for emergency and French homeland security forces.

This pioneering project is essential to the modernization of homeland security forces. This contract reinforces Airbus Secure Land Communications' position as the European leader in mission-critical communications and Capgemini's position as a trusted partner in the transformation and modernization of public services and the integration of sovereign services.

The Radio Network of the Future will be a national, secure, high-speed (4G and 5G), high-priority mobile communications system with a high level of resiliency to help ensure the continuity of security and rescue missions, including in the event of a crisis or major event. The RRF is designed to equip up to 400,000 security and rescue force users in France such as the national gendarmerie, national police, firefighters and civil security personnel.

It will allow these users to benefit from many new multimedia services enabled by broadband, including video.

As part of RRF, Airbus Secure Land Communications will provide the solution that will enable the various players to communicate through this new network supported by a variety of partners such as Econocom, Prescom, Samsung and Streamwide. Capgemini will integrate the various technologies provided by all of the project partners, including Dell Technologies and Ericsson, which will provide the telecommunications services deployed on a virtualized infrastructure.

Guillaume Faury, President of Airbus: "The Airbus Group is proud of the renewed confidence of the French Ministry of the Interior. The Group will continue to put its innovative power and skills at the service of the Ministry of the Interior to offer a unique solution in France and meet the needs of French security forces, both in the short and long term. We will be working alongside users to deploy our expertise and support them in the progressive deployment of these new technologies over the coming years."

Aiman Ezzat, CEO of the Capgemini Group : "We are proud to be appointed the French government's trusted partner for this major project. RRF will be an essential gateway for the operational efficiency of security forces and future digital uses. It is dimension of national sovereignty and the starting point for a European industry of excellence. Capgemini is a reference player for a critical project of this size and complexity, given its deep experience, industrial capacity and unique expertise in the field of secure networks, telecoms and 5G."

With RRF, the Ministry of the Interior is modernizing the tools available to security and rescue forces to help them carry out both day-to-day missions and major diplomatic or sporting events. It is a new step towards improving increasingly complex interventions.

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 350,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2021 global revenues of €18 billion. Get The Future You Want | www.capgemini.com

T. ROWE PRICE MODERNIZES LONG-RANGE FINANCIAL PLANS WITH ORACLE CLOUD EPM

Financial services provider streamlines financial consolidation and close as well as account reconciliation processes using Oracle Cloud EPM and ERP.

Business challenges

The global asset management firm, which had been a longtime Oracle E-Business Suite customer, was looking to move all finance technology solutions to the cloud. However, the company also relied heavily on Excel for reconciliation, financial close, and consolidation processes. This prompted the company to look for a solution that would add capabilities that could efficiently solve for some of its many manual processes. The goal was to provide a single source of truth for its financial processes and help ensure data integrity.

Why T. Rowe Price chose Oracle

T. Rowe Price selected Oracle Cloud ERP and Oracle Cloud EPM to complement its digital transformation. The applications provided the necessary tools to consolidate financial data, including account reconciliation and financial consolidation and close.

The company also valued the analytics and detailed reporting capabilities, features essential in increasing the ability to outpace market changes with ease.

As a user of Oracle E-Business Suite on-premises, T. Rowe Price identified Oracle Cloud as its next natural step toward cloud innovation and future business growth.

Results

By deploying Oracle Cloud ERP and Oracle Cloud EPM, T. Rowe Price created a solid foundation for streamlining its financial processes. With a single source of truth for its financial data provided by Oracle Financials, the company used Oracle Accounting Hub to standardize accounting through an enterprise-wide chart of accounts.

Furthermore, the financial services provider created a transparent, auditable process for tracking investment trades, gain and losses, as well as market-to-market entries for the general ledger.

The organization automated the allocation of journal entries to legal entities using Oracle Cloud EPM Profitability and Cost Management, which provided more visibility and additional data tagging to support intercompany eliminations.

Using Oracle Cloud EPM Financial Consolidation and Close, T. Rowe Price streamlined the consolidation of its investment products, eliminations, and creation of financial reports. Today, the finance teams spend less time compiling data and more time analyzing data and delivering monthly management reporting.

Using Oracle Cloud EPM Account Reconciliation, the firm automated account reconciliations to increase transparency into the status of the close process and reduce risks, which were previously associated with the manual reconciliation process.

The company also streamlined its tax provisioning process by directly accessing its financial data from the general ledgers or financial consolidation system through Oracle Cloud EPM Tax Reporting.

In addition, T. Rowe Price improved the data management process, using Oracle Enterprise Data Management. Fueled by a single source of trusted information, the company used the embedded collaboration capabilities to effectively manage all changes to enterprise data. As a result, the asset management group decreased the risk of human errors and manual controls required in the process.

Partners

To deploy Oracle Cloud ERP and Oracle Cloud EPM, T. Rowe Price collaborated with Oracle Partner Grant Thornton. The project kicked off in early 2020 under a phased approach and took one year to implement. The projects were completed on time and on budget.

"Grant Thornton was a great partner for us. What makes T. Rowe Price unique is our culture, and it is really in alignment with Grant Thornton's culture. We were able to work very collaboratively together as a single team," says Lindsay Kutzer

BELGIAN CONSTRUCTION GIANT DENYS OPTS FOR IFS CLOUD TO DRIVE PROCUREMENT, PLANNING AND GROWTH

IFS, the global cloud enterprise software company, announced that Denys, the multidisciplinary construction and engineering group, has purchased IFS CloudTM to help drive future growth and navigate market disruption. The solution will enable Denys to eliminate duplication of processes, drive operational efficiencies, and provide knowledge and insights across the organization, resulting in higher levels of customer satisfaction.

Through IFS Cloud, Denys will benefit from robust and standard procurement, warehouse and logistic processes. It will also provide them with a finance solution capable of processing and generating financial transactions, reporting, consolidation, and forecasting automatically and seamlessly.

Denys found that its existing IT applications did not have enough integrated functionality, therefore, it became increasingly difficult to gain insight into the performance of its main operational processes. IFS Cloud, by contrast, has innovation embedded and supports best practice processes in bid-to-contract, procurement and material supply, planning and pre-construction, construction and execution and periodic project review.

Denys also plans to leverage IFS Cloud to help drive employee engagement. It aims to achieve this goal by using the IFS solution to better support its HR department in the recruitment process, as well as for employer branding and talent development. Additionally, Denys will enable its workforce to participate in administrative processes, aiding in information sharing through streamlining the organization's services. Denys has also purchased IFS Cloud Services – this covers the installation and initialization of the solution and its management and monitoring over time.

The recently launched joint venture between IFS and BearingPoint, Arcwide will roll the solution out to 400 users, initially at Denys' headquarters in Belgium and to its facilities in France, the Netherlands, Germany and a range of other European countries.

Denys CEO, Bruno Geltmeyer, said "Implementing the IFS solution will allow us to gain a better insight into our operations enterprise-wide and enable us to make faster and more informed decisions to support our plans to grow the business, while continuing to digitalize at the same time. Opting for IFS allows us to do all that without us having to commit to costly development or system integration efforts."

Looking to the future, Denys looks to invest in a platform that delivers ease of integration with multiple third-party applications and the ability to bring the latest, cutting-edge advanced technologies onboard as and when required. IFS Cloud fits the bill perfectly in this context as a modern, future-proof solution with integrated AI-abilities (and/or capable of integrating AI concepts as and when required).

Frank Beerlage, managing director, IFS Benelux, said: "Denys is focused on evolving rapidly across international markets and on building its capability in important functions from logistics to finance in line with that. IFS is ideally placed to deliver the advanced resource planning and management capabilities that Denys needs to address the complex market challenges it is facing today and to optimise its capabilities to meet the fast-emerging demands of the future."

About Denys

Denys with HQ in Belgium has evolved into an international construction group employing 1800 people and strives for organic growth. This growth model is based on three pillars: diversification, innovation and internationalization.

Denys doesn't innovate in one specialism, but as a total business in several disciplines: water, energy, mobility, infrastructure, refurbishment, civil engineering, special techniques, and other specialized building techniques. In each of those complementary areas of expertise, Denys has confirmed its position as a niche player and has shown itself to be a global reference with high added value.

In order to provide maximum space for that diversified growth, Denys has been working steadily on expanding internationally. Today Denys has a firm foothold in Europe, North Africa and Sub-Saharan Africa and is busy exploring markets such as Asia, Central and South America and Canada. The world is Denys' building site, especially within the markets of infrastructure, water works (complex projects in potable water supply and water treatment) and high pressure pipelines (energy).In addition, Denys is not shy of forming constructive partnerships in public-private ventures, where the responsibility of the contractor is much greater. www.denys.com

About IFS

IFS develops and delivers cloud enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers—at the Moment of Service™. The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our team of 5,000 employees every day live our values of agility, trustworthiness and collaboration in how we support our 10,000+ customers. Learn more about how our enterprise software solutions can help your business today at ifs.com.

UBS AND MICROSOFT ANNOUNCE LANDMARK EXPANSION OF CLOUD PARTNERSHIP

- *UBS plans to have more than 50% of its applications running in the Microsoft Azure cloud*
- *Initiative will help UBS provide innovative products and services to clients, further empower employees and advance sustainability goals*
- *UBS and Microsoft co-develop products and solutions to meet the digital needs of the bank and financial services industry*

UBS and Microsoft Corp. announced a landmark expansion of their partnership to accelerate UBS's public cloud footprint over the next five years. Through this transformational initiative, UBS plans to have more than 50% of its applications, including critical workloads, running on Microsoft Azure, now UBS's primary cloud platform. The partnership furthers UBS's "cloud-first" strategy and the modernization of its global technology estate.

Through this partnership, UBS will have access to the most comprehensive cloud platform, trusted by more than 95% of Fortune 500 companies, with a rich set of productivity and collaboration tools, enabling the firm to increase the speed at which it can deliver and improve upon its digital experiences for clients and employees. At the same time, Azure will help advance UBS's sustainability initiatives, drive operational efficiencies, and maintain its standards for compliance and security — providing strong foundations on which to scale UBS's rate of cloud adoption.

"Our cloud strategy has fundamentally changed the way we operate, allowing us to reinvigorate our technology estate and reimagine how we build applications for our clients," said Mike Dargan, UBS Group chief digital and information officer. "Closely partnering and collaborating with Microsoft has and will continue to create tremendous value for our clients, our employees, the firm and our shareholders. The developments and learnings that stem from this partnership will benefit the financial services industry and beyond."

In 2018, when UBS announced its cloud strategy, leveraging its strategic partnership with Microsoft, it planned to move one-third of its applications to public cloud within four years, but accomplished this goal early in February 2021. Now, the partnership goes beyond just consuming cloud services to include the co-development of innovations and greater collaboration in areas like carbon reduction.

"UBS is a forward-thinking leader in the financial services industry, and Microsoft has been fortunate to co-develop innovative applications that meet complex, regulatory requirements with their engineering teams over the past

several years," said Scott Guthrie, executive vice president, Cloud + AI, Microsoft. "Our expanded partnership will continue to accelerate the organization's ambitious digital transformation plans, applying the power of the Microsoft Cloud to equip UBS with the agility and reliability to deliver for their clients."

Advancing digital sustainability

In line with the firm's sustainability goals, UBS continues to move certain technology platform workloads from its on-premises and private cloud servers to Azure. In some use cases, this has resulted in the energy consumption of these workloads to be reduced by up to 30% to date.

Together, UBS and Microsoft also co-developed a Carbon Aware API, an open-source solution that provides recommendations on how to schedule workloads that require heavy compute power during times when clean, renewable or low-carbon sources of electricity are most available. They then provided their solution to the Green Software Foundation so it could be shared with large and small companies around the world.

Enhancing client and employee experiences with artificial intelligence

UBS and Microsoft are implementing and further exploring ways in which artificial intelligence and data can be used to enhance services for clients and employees. For example, in Switzerland, UBS is currently operating two applications that utilize conversational AI capabilities to respond to client e-mail inquiries.

Unleashing innovation and driving greater business insights on a trusted platform

To support UBS's "cloud-first" strategy and further drive innovation, Microsoft actively brought its Azure confidential computing services to Switzerland. This provided UBS with a new functionality to protect and secure data sharing internally across all of UBS's business divisions, while maintaining the bank's compliance and security standards. As a result, UBS can now develop additional business insights and uncover new opportunities for innovation for its clients and employees.

In addition, UBS will leverage Microsoft Power Platform — including Power Apps and Power Automate — which will provide employees with the ability to quickly build professional-grade applications, create automated workflows and connect disparate data sources.

About UBS

UBS convenes the global ecosystem for investing, where people and ideas are connected and opportunities brought to life, and provides financial advice and solutions to wealthy, institutional and corporate clients worldwide, as well as to private clients in Switzerland. UBS offers investment solutions, products and impactful thought leadership, is the leading global wealth manager, provides large-scale and diversified asset management, focused investment banking capabilities, and personal and corporate banking services in Switzerland. The firm focuses on businesses that have a strong competitive position in their target markets, are capital efficient and have an attractive long-term structural growth or profitability outlook.

UBS is present in all major financial centers worldwide. It has offices in more than 50 regions and locations, with about 30% of its employees working in the Americas, 30% in Switzerland, 19% in the rest of Europe, the Middle East and Africa and 21% in Asia Pacific. UBS Group AG employs more than 72,000 people around the world. Its shares are listed on the SIX Swiss Exchange and the New York Stock Exchange (NYSE).

About Microsoft

Microsoft (Nasdaq "MSFT" @microsoft) enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

ORACLE NETSUITE

LOVESAC COZIES UP TO NETSUITE ON ITS JOURNEY TO BECOME A BILLION-DOLLAR COMPANY

NetSuite Supports Lovesac through Every Stage of its Rapid Growth Story from Expanded Product Lines and New Sales Models to a Highly-Successful IPO

The Lovesac Company, the home furnishing brand best known for its Sactionals, The World's Most Adaptable Couch™, has scaled its operations to become a billion-dollar company while running on Oracle NetSuite. With NetSuite, Lovesac has been able to take advantage of an integrated business platform at every stage of its impressive growth story to support new product lines, meet changing customer expectations, adapt its business and sales models, and manage the rigorous demands of becoming a publicly traded company.

Founded in 1998 in a basement in Utah, Lovesac has grown into a billion-dollar company. Over that time, Lovesac has expanded its product lines to offer a wide range of adaptable couches and accessories and changed the way it engages with customers by adopting a direct-to-consumer business model. In 2018, Lovesac executed a highly successful IPO and in 2020, as the global pandemic took hold, Lovesac was able to adapt its sales model to meet increasing demand and continue delivering a high-touch customer experience – all while its physical showrooms were closed for varying periods of time. Today, Lovesac continues to adapt its business model to deliver the best possible customer experience, and earlier this year it debuted Mobile Concierge, a fully-equipped mobile showroom aimed to engage customers in a new and convenient way. As Lovesac grows towards becoming a billion-dollar company, NetSuite has supported it in every step of its journey.

"Since our founding, we've been on an incredible growth trajectory, and the breadth, depth, and scalability of NetSuite has played a crucial role in helping us achieve our growth goals," said Shawn Nelson, CEO and founder, Lovesac. "By providing a single software platform that can help us with everything from launching new product lines to going public and becoming a billion-dollar company, NetSuite has been an invaluable partner. Ultimately, NetSuite is the centerpiece of our entire business operations."

With NetSuite, Lovesac 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 Lovesac to optimize financial processes, including financial planning, budgeting, and reconciliation, and helped improve the accuracy of its bookkeeping. As Lovesac expanded its product lines, NetSuite served as the hub for its order management and inventory management functions. This helped ensure that Lovesac was able to manage high order volumes across its supply chain from its ecommerce website and showrooms, in addition to gaining deep, real-time visibility into stock levels across multiple warehouse and store locations. NetSuite also helped Lovesac adapt its business to meet new customer expectations during the global pandemic. This included providing Lovesac's field sales team with the real-time information they needed to serve customers remotely and helping Lovesac identify skills and resource gaps across its workforce.

"We're proud to be part of Lovesac's impressive story," said Evan Goldberg, EVP, Oracle NetSuite. "We've worked closely with the Lovesac team as their business has grown and have helped ensure their core business processes are able to meet changing demands. We look forward to supporting them as they unlock even more success."

About Oracle Netsuite

For more than 20 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 27,000 customers in 215 countries and dependent territories.

Learn more at https://www.netsuite.com. Like us on Facebook, and follow us on LinkedIn, Instagram, and Twitter.

nextworld

ANNOUNCING LAUNCH OF INTUIFLOW INTEGRATION WITH DEMAND DRIVEN TECHNOLOGIES

Nextworld® and Demand Driven Technologies, a leading provider of Demand Driven Material Requirements Planning (DDMRP), announced the launch of their integrated solutions.

The integration between Nextworld ERP and Intuiflow by Demand Driven Technologies brings together the latest functional and technical innovations in a seamless experience for manufacturing companies to manage their supply chains. The Intuiflow integration is API-based; it allows customers to configure the Intuiflow system as needed right from Nextworld's Enterprise Resource Platform.

Erik Bush, CEO of Demand Driven Technologies, commented, "So many companies today are running ERP code that was developed several decades ago, and therefore, face age-old impediments to innovation. Nextworld is the only cloud-based company to be truly innovating in this space from the ground up." Erik continues, "Nextworld delivers best-in-class applications built on a no-code platform. This allows their users to customize without penalty, adopt latest advances in technology, and as a result, gain true business agility."

Ten years ago, Demand Driven Technologies launched the world's first demand driven supply chain solution, a game-changing methodology that promotes the smooth flow of materials through even the most complex global supply chains.

"Business agility is paramount in today's supply chain environments," says Mark Goode, President of Nextworld. "Demand Driven Technologies brings an unprecedented level of agility to DDMRP solutions. Our shared commitment is to bring next-generation, integrated MRP solutions to our manufacturing customers."

About Demand Driven Technologies

Demand Driven Technologies was founded in 2011 to help manufacturing and distribution companies build more responsive operations. Intuiflow, our Demand Driven supply chain solution — the world's first — continues to set an industry standard for reliability and performance. With end-to-end supply chain planning, management, and execution capabilities, it fuses disruptive demand driven methods and AI/ML to bring agility and resiliency to complex global operations. From strategy to the shop floor.

Headquartered in Atlanta, GA, we serve over 130 of the world's most respected leaders in automotive, industrial, healthcare, consumer goods, and more.

About Nextworld®

Nextworld is the only company that offers a modern ERP built on an enterprise, no-code platform. Nextworld delivers the agility, speed, and intelligence required to modernize business processes and gain value from your application investment – from the edge to the core of your operations. With Nextworld, businesses can focus resources on innovative opportunities that further their mission both now and into the future. Nextworld keeps its customers ahead of what's next®

CIRQUE DU SOLEIL®: GROWING THE BUSINESS WITH HIGH-FLYING OPERATIONS

Explore Cirque du Soleil's journey with SAP

While the world was in the middle of a global health crisis, Cirque du Soleil Entertainment Group reimagined its entire business from the big top down. Now, it's leaping forward and moving its core systems to the cloud with the RISE with SAP solution.

The Challenge:
Taking an opportunity to reimagine international operations

Cirque du Soleil has come a long way since a small troupe of circus performers got together in Quebec back in 1984. It has grown into one of the biggest live entertainment companies in the world, reinventing circus arts and live entertainment along the way.

Known for wowing more than 220 million spectators in 450 cities and over 60 countries, the touring shows and permanent productions created by Cirque du Soleil are massive undertakings. They require a workforce of 3,600 people, including 1,100 artists from 50 different countries who speak more than 25 different languages. And behind the scenes, every show is driven by countless business operations.

So when all that activity was threatened by the recent global health crisis, Cirque du Soleil turned that moment into an opportunity to rethink its core business processes and search for new ways to expand operations and keep audiences spellbound.

The Solution
Rebooting on a cloud-based digital platform

Cirque du Soleil chose to move to the cloud with a business transformation enabled by RISE with SAP.

At the foundation of the transformation is SAP S/4HANA Cloud, which provides a single source of truth and support for integrated processes across business areas.

"Having the ability to quickly pivot, scale, and create new and engaging fan experiences has never been more important," said Philippe Lalumière, Vice President of Information Technology, Cirque du Soleil Entertainment Group. "RISE with SAP and SAP S/4HANA Cloud will help power our ability to deliver on these goals." This move has expanded the relationship between Cirque du Soleil and SAP.

For example, SAP Ariba solutions help Cirque du Soleil manage the thousands of astonishing costumes and specialized equipment that make the shows so special. It also relies on SAP Concur solutions to manage travel and expenses around the world.

In addition, Experience Management solutions from SAP and Qualtrics provide insights that company leaders use to further improve the fan experience.

The Result
Growing in the cloud and creating new forms of entertainment

The company's intelligent enterprise strategy unleashes the kind of operational efficiency Cirque du Soleil needs to drive future growth.

SAP S/4HANA Cloud provides an integrated platform for streamlining business functions such as finance and merchandising across its international operations.

Meanwhile, with SAP Ariba solutions, the company's costume workshop tracks every component of each customized costume kit by act, artist, and show. In full production, that's 5,000 costumes, replaced on average every three months. With the cloud, each item is traced in real time, enabling more-efficient inventory management.

SAP Concur solutions drive greater budgetary control with visibility into how and where the company spends its money. Furthermore, experience management capabilities continue to inspire the creative minds at Cirque du Soleil to find new ways to engage adoring fans.

Please take your seats. The show is about to begin.

SAP helps Cirque du Soleil run better

Key business outcomes and benefits

- Established a cloud-based platform with the security, flexibility, and scalability needed to support future growth
- Improved control over core business functions, such as finance and merchandising
- Increased quality and speed of purchasing decisions with near-real-time visibility into the complete purchase process
- Standardized the process for worldwide travel and expense
- Greater ability to create new fan experiences with insights gained from customer feedback

Featured solutions and services

- RISE with SAP comprises key products and services from SAP and its partners to help customers migrate to the cloud with a leading modular cloud ERP.
- SAP S/4HANA Cloud is a comprehensive ERP system with built-in intelligent technologies, including AI, machine learning, and advanced analytics.
- SAP Ariba solutions help large and midsize companies realize fast time to value in the cloud.
- SAP Concur solutions connect travel, expense, and invoice management for total visibility and control.
- Experience Management solutions from SAP and Qualtrics support continuous listening, understanding, and actioning wrapped around key moments in the customer experience.

About Cirque du Soleil

Cirque du Soleil creates some of the world's most-striking live entertainment with unforgettable shows, multimedia experiences, theme parks, and special events. It aims to make a positive impact on people, communities, and the planet with its most important tools: creativity and art. For more information please visit the official Cirque du Soleil website.

About SAP

As a market leader in enterprise software, SAP turns businesses into intelligent, sustainable enterprises. Our applications and services enable business and public customers across 25 industries globally to operate profitably and adapt continuously. With a global network of customers, partners, and employees, SAP helps the world run better and improve people's lives. For more information, visit www.sap.com.

SYSPRO™

TOP 4 TRENDS IMPACTING THE METAL FABRICATION INDUSTRY

*Article by **Roger Landman,***
Head of Product Management, SYSPRO

The metal fabrication industry has been more competitive than it has ever been. For this reason, many businesses in the sector will need to invest in technology, research, and development to expand their capabilities and stay ahead of the manufacturing market. As the global markets shift and change in the coming years, the metal fabrication industry will greatly benefit by maintaining an attitude of versatility, flexibility, and growth.

1. Reshoring

This seems to be the first trend that everyone picks up. In the metal fabrication market, "reshoring" refers to the trend of outsourced jobs and industries returning to the place from which they originated. Unlike other industries, which have flourished overseas, in recent years metal fabricating has participated in the reshoring trend. Due to the rising cost of global freight transportation, as well as increasing labor costs in many countries —such as China and India —many manufacturers have found that overseas operations are no longer as cost-effective as they once were. The resulting trend of reshoring has emerged in part as an antidote to these issues. Not only can reshoring save businesses money, in many cases, it also results in more oversight and opportunities for in-the-moment creativity and innovation.

> **"UNLIKE OTHER INDUSTRIES, WHICH HAVE FLOURISHED OVERSEAS, IN RECENT YEARS METAL FABRICATING HAS PARTICIPATED IN THE RESHORING TREND. DUE TO THE RISING COST OF GLOBAL FREIGHT TRANSPORTATION, AS WELL AS INCREASING LABOR COSTS IN MANY COUNTRIES —SUCH AS CHINA AND INDIA —MANY MANUFACTURERS HAVE FOUND THAT OVERSEAS OPERATIONS ARE NO LONGER AS COST-EFFECTIVE AS THEY ONCE WERE.**

2. Automation for metal fabrication

Automation isn't necessarily a new trend, but its adoption is accelerating in response to the difficulties many metal fabrication companies have in recruiting skilled labor. As a result of emerging, innovative technologies like robotics, additive manufacturing and automation, many skilled workers and tradespeople are drawn to the metal fabrication industry like never before. Working in this industry is safer now than it ever has been in the past, with more opportunities for career training and progression. Much automation in the industry is performed by computer numerical control (CNC) machines. CNC machines can perform many repetitive tasks, and as such, they can play an important role in reducing, and in some cases eliminating some of the most common repetitive stress injuries that plague many employees. In addition, automation technology can increase overall productivity, efficiency, and high-quality as well as versatile outputs with nearly endless possibilities for customization. CNS machines are likely just the beginning for automation technological advances throughout the metal fabrication industry.

> **"THE WAY THAT DIGITIZATION PRACTICES ARE CAPABLE OF GATHERING, MEASURING AND ANALYZING DATA IS CRUCIAL TO ENSURING THE FUTURE OF THE METAL FABRICATION INDUSTRY — THESE METRICS NOT ONLY SHINE LIGHT ONTO OVERALL EFFICIENCY, BUT THEY ALSO ALLOW FOR GREATER TRANSPARENCY WHEN IT COMES TO EVALUATING EMPLOYEES' SKILLS AND OVERALL PRODUCTIVITY.**

3. Digitization for metal fabrication

Like many industries, metal fabrication has been slow to adopt the digitization that is quickly defining the rest of the world. It's essential to know that building a technology-based platform doesn't mean eliminating the human factor. Rather, it's a step in the right direction regarding efficiency and productivity.

Data-based decision-making is another key benefit of digitization. Technologies ERP systems allow manufacturers to assess the functionality and efficiency across nearly every aspect of their organizations. This information can support streamlining efforts and data sharing throughout both specific companies and the industry as a whole. The way that digitization practices are capable of gathering, measuring and analyzing data is crucial to ensuring the future of the metal fabrication industry — these metrics not only shine light onto overall efficiency, but they also allow for greater transparency when it comes to evaluating employees' skills and overall productivity.

4. Cybersecurity for metal fabrication

As manufacturers incorporate more and more automation and digitization into their organizations, the need for cybersecurity has never been greater. ERP hacks can lead to breaches of sensitive information, from financials to productivity metrics and industry secrets.

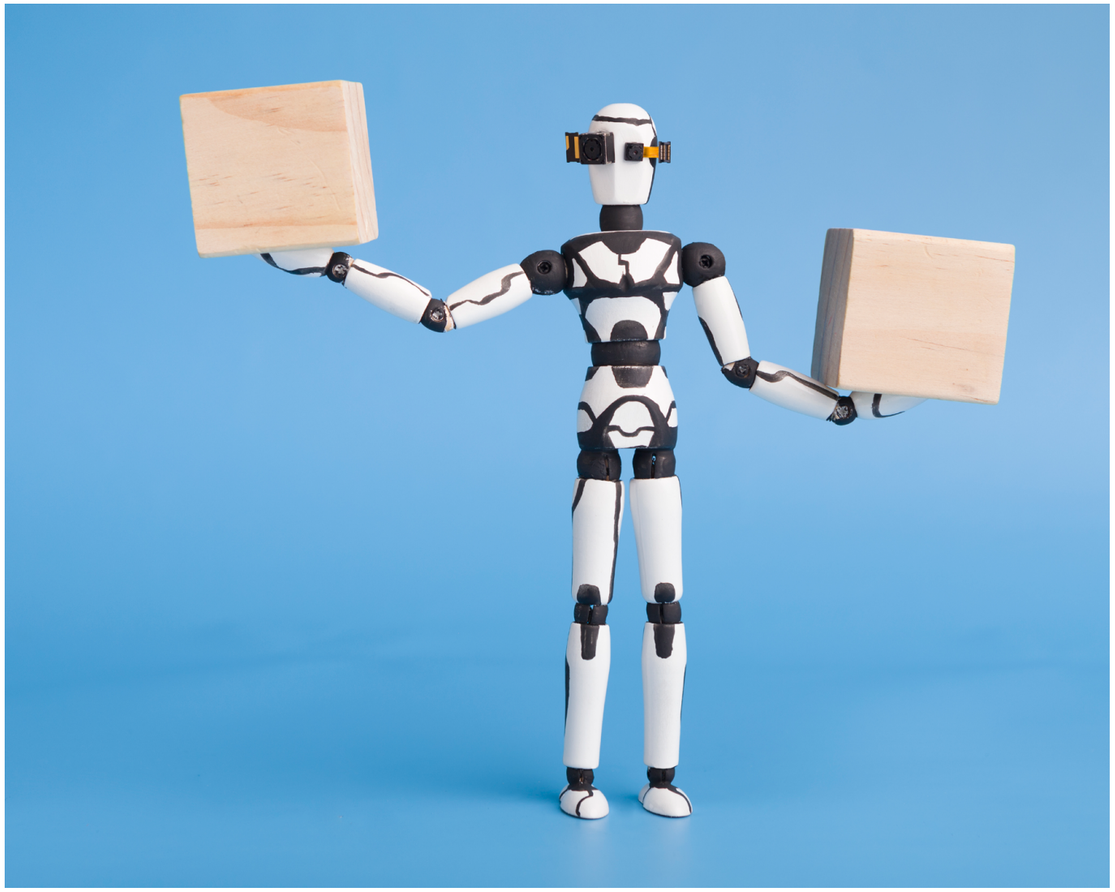
There are several common tips that manufacturers can look to support the cybersecurity efforts of their organizations and manufacturing. Educating employees about common hacking tactics, like phishing, is a great first step. In addition, identifying the location of the company's most important and/or sensitive information — and then securing and backing it up — can protect businesses from ransomware attacks. Likewise, manufacturers will benefit from disaster planning — essentially, the creation and implementation of a disaster protocol as it relates to cybersecurity. This will safeguard information in case of a cyberattack.

There are those businesses in the metal fabrication industry that are experiencing growth that is far outside of the average. Companies that fabricate aluminum, for instance, are seeing greater demand due to rising consumption, as are those that fabricate parts for automotive industry, commercial construction, and the aerospace sector. Essentially, there are still several incredible opportunities for growth; it's simply a matter of staying nimble enough to adapt to what the market wants at any given time.

Roger Landman is the Head of Product Management at SYSPRO. Roger is a specialist in the operations field after having worked in several industries all around the globe. With his skill in operations, he became a corporate trouble-shooter for underperforming businesses, and eventually began his own consultancy specializing in this. His passion remains Lean Manufacturing.

About SYSPRO

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



PANORAMA CONSULTING GROUP

DISADVANTAGES OF CUSTOMIZING AN ERP SYSTEM

*Article by **Bill Baumann,***
Director, Panorama

We live in an age where customization is king. You can get almost everything tailored to your unique specifications, from your coffee order to your house blueprint.

Naturally, people like to customize their enterprise resource planning (ERP) systems, as well.

While customization can be advantageous to an extent, it's easy to overdo it. In fact, over-customization is one of the most common themes we see in ERP failures.

Today, we're sharing the disadvantages of customizing an ERP system.

5 Disadvantages of Customizing an ERP System

1. It Can Impede Your Implementation

By nature, ERP customizations are complex. Customized ERP systems tend to take longer to implement than out-of-the-box solutions. They also come at a higher price point.

If you need to go live with your system as soon as possible, then you could be looking at a major setback if you decide to make additional customizations outside of your initial scope.

In these cases, you'd have to go back to the drawing board and make changes that impact every aspect of your workflows, which could heap time and costs onto the implementation.

While you don't want to rush into an implementation, you also don't want to unnecessarily slow it down or make it more expensive than it needs to be.

2. It Might Not Meet Your Business Goals

With too much customization, a system that was once designed to align perfectly with your business goals becomes a monolithic beast that's basically non-functional. It might technically work, but it does little to help you reach your short-term and long-term objectives.

While you don't have to keep every aspect of your platform exactly as-is, consider only customizing areas that will give your company a competitive advantage.

3. It Could Disrupt Core Software Features

When you're overly focused on augmenting your core ERP system, you could miss out on the main features that the basic solution provides.

Most ERP software comes with built-in best practices that are designed to make the software work for your industry. If you alter it too significantly, you may lose the ability to make use of those practices.

4. It Could Introduce Bugs

With the right team members by your side, you don't have to worry as much about introducing bugs into your ERP solution.

However, it becomes more difficult to manage this risk as you add more features to the product. When you stray too far away from the system's core features, it's easier to run into operability issues, including errors and defects.

This is simply the nature of software development. When you make the work more involved, it's harder to maintain oversight and keep project controls in place.

5. It Can Ma
ke Post-Implementation Upgrades More Difficult

ERP vendors regularly release new versions of their ERP platforms. These upgrades offer significant changes and improvements over the current versions, making the solutions more usable, secure, and functional.

While you need to stay on top of upgrades to keep your system operating as it should, it can be difficult if your system is overly-customized. Upgrades require you to rewrite portions of the software code, which becomes riskier if yours is complex.

For this reason, many companies with custom ERP solutions choose to hold off on software upgrades, sometimes even deferring them indefinitely. While doing so might save you a headache in the short-term, it can lead to a host of operability issues down the road.

Then, employees will be less likely to use the system, and you'll struggle to derive business benefits from it.

Over-Customizing Causes More Difficulty Than it's Worth

ERP customization allows you to ensure the end product is one that meets your organizational needs, and this can make the change more palpable for employees.

However, the disadvantages of customizing an ERP system often outweigh any special features that the bespoke platform might offer.

If you're unsure how much to customize your solution, it's always best to trust the opinion of an experienced ERP consulting team. Contact us below for a free consultation.

> "
> **MOST ERP SOFTWARE COMES WITH BUILT-IN BEST PRACTICES THAT ARE DESIGNED TO MAKE THE SOFTWARE WORK FOR YOUR INDUSTRY. IF YOU ALTER IT TOO SIGNIFICANTLY, YOU MAY LOSE THE ABILITY TO MAKE USE OF THOSE PRACTICES.**

As Director of Panorama's Expert Witness Practice, Bill oversees all expert witness engagements. In addition, he concurrently provides oversight on a number of ERP selection and implementation projects for manufacturing, distribution, healthcare, and public sector clients.

About Panorama Cosulting Group

Panorama Consulting Group is an independent, niche consulting firm specializing in business transformation and ERP system implementations for mid- to large-sized private- and public-sector organizations worldwide. One-hundred percent technology agnostic and independent of vendor affiliation, Panorama offers a phased, top-down strategic alignment approach and a bottom-up tactical approach, enabling each client to achieve its unique business transformation objectives by transforming its people, processes and technology. Panorama's services include ERP Selection, ERP Implementation, ERP Contract Negotiation, ERP University, Digital Strategy, Technology Assessment, Change Management, Human Capital Management, Business Process Management, M&A Integration, Turnaround Analysis, Crisis Management, Financial Restructuring, Operational Restructuring, Project Auditing & Recovery and Software Expert Witness Testimony.

WHAT ARE THE BENEFITS OF CUSTOMIZING ERP?

*Article by **Vijay Ural***

Enterprise resource planning (ERP customization) is the need of hour for businesses across industries, no matter the size, big or small. It helps streamline and simplify the operational process for maximum efficiency and high return on investment.

Enterprise resource planning helps a business with:

- Reduces operational cost
- Streamlines processing
- Boosts Collaboration
- Standardizes processes
- Promotes scalability
- Enriches customer experience
- Ensures compliance
- Improves supply chain management

But a general ERP system will only solve general problems that are common to all businesses. Thus, to resolve specific issues, you need a ERP solution customization like the one which ERP experts at Tayana Solutions design and implement. You design ERP customization on a macro scale to meet the specific requirements of the business. Thus, this may include modifying or enhancing existing features, adding management processes, modifying the system in a way that it can support functions it was not designed to and more.

Customizing ERP has the following advantages:

No matter how versatile an ERP system you have put in place, a generic ERP will never be able to meet 100% of the business's requirements. The one size fits all approach does not resolve issues across different departments. Hence, organizations invest in a an ERP customization solution. With custom-made ERP software, your system is highly-target in place. Therefore, you no longer will be wasting money or allocating unnecessary resources.

- You can rest assured that your specific business issues will be resolved without violating any standards or protocols pertaining to the functions.
- Since the custom–made ERP keeps the business specifications in mind. Thus you can automate the operations and there would be no change in the workflow.
- Customized ERP provides better performance and a higher possibility of scalability. Thus, you can reconfigure it as per the increasing/decreasing demands.
- Customize ERP ensured an improved user interface since the implementation and design keeps the particular business's specification in consideration
- With a customized ERP, you automate and unify reports of all the department's work status on a single system. Thus, this helps with analysis and gaining a better insight into how the different departments are performing.

- Furthermore, you have a high level of control over the development and increased productivity with the system designed to your specifications
- Moreover, you are offered quick, and easy integration with third-party services.

> **CUSTOMIZED ERP PROVIDES BETTER PERFORMANCE AND A HIGHER POSSIBILITY OF SCALABILITY. THUS, YOU CAN RECONFIGURE IT AS PER THE INCREASING/ DECREASING DEMANDS.**

Wondering how to decide when should you implement customized ERP system?

- Looking for resolving specific business problems
- You are looking for a quick access to the business insights
- Your customer experience is being adversely affected due to operational issue
- Employees across different department make use of different software which confuses the employees and affects productivity
- Accountants are having a hard time processing invoices and sales order
- Inventory management failure s becoming a regular thing which is affecting the customer experience

Vijay comes with a vast experience in ERP and enterprise solutions space with about 20 years of experience in various packaged application like Acumatica, SAP, Orion, Salesforce.com, SugarCRM and, SalesLogix.

About Tayana Solutions

Tayana Solutions provides end-to-end software consulting, ranging from eCommerce, Production, Quality, to Customization. We specialize in Process Manufacturing domain catering to their unique set of demands that is not understood by general manufacturing products. They are Gold Certified VAR and ISV partner for Acumatica. Please visit www.TayanaSolutions.com to learn more about compassionate & reasonable service provider to experience the benefits of digital transformation.

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