

## A CURE FOR THE COMMON ERP

Reduce Manual Effort and Paperwork  
While Increasing Productivity

## Multi-symptom ERP Relief for Errors and Inefficiencies

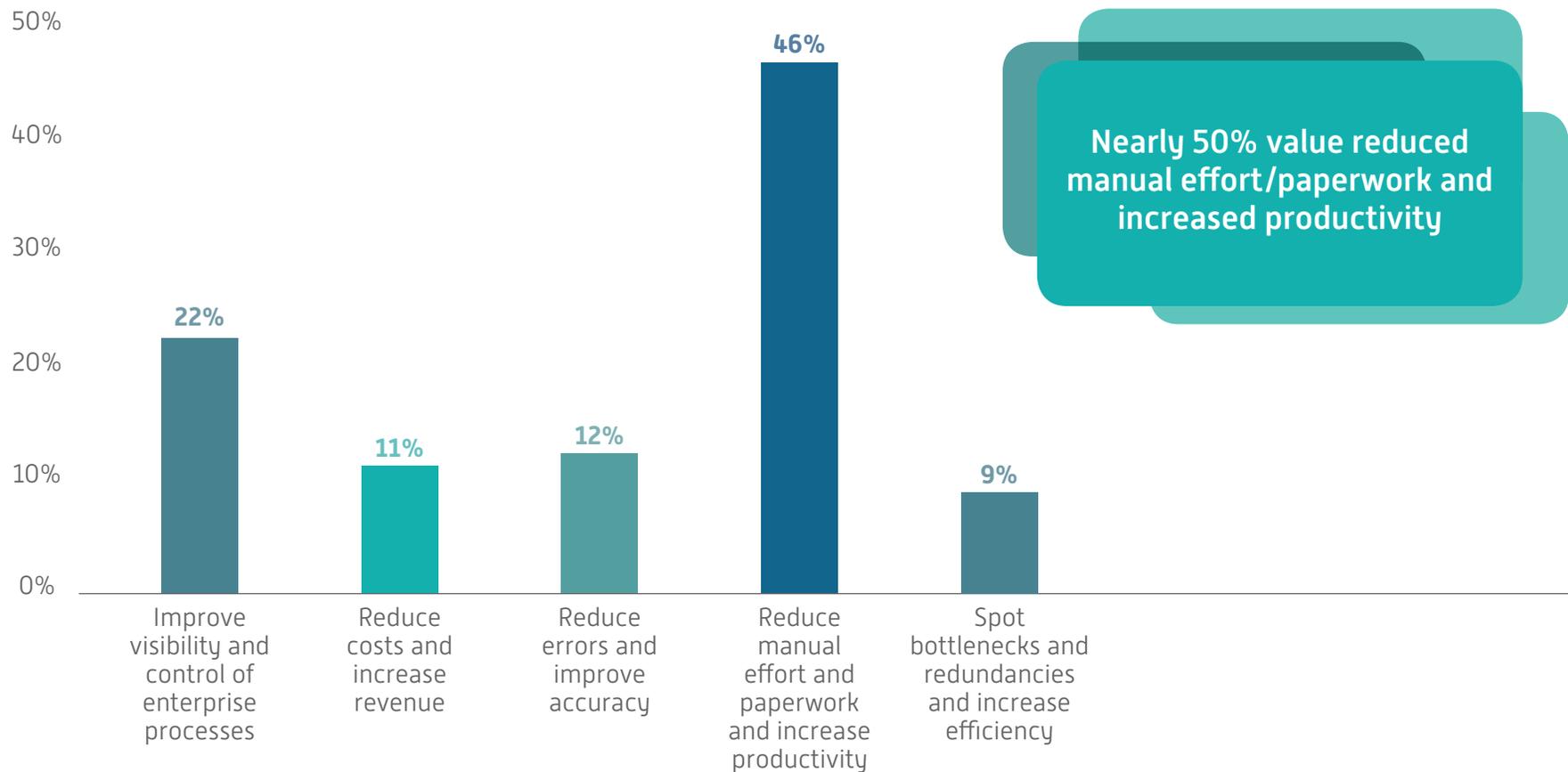
Think about the last time you had a bad cold. Maybe you had a cough, or a stuffy nose, or a sore throat. More than likely, you had all three of these symptoms...and then some. And chances are, you took some cold medicine to feel better.

Just as taking that medicine alleviated your symptoms so you could function normally, using automated workflows in your ERP can address various pain points that keep your business from functioning with full operational efficiency.



We asked attendees of a recent webinar to tell us what they felt would be the most valuable benefit of automated workloads in addressing their business' pain points.

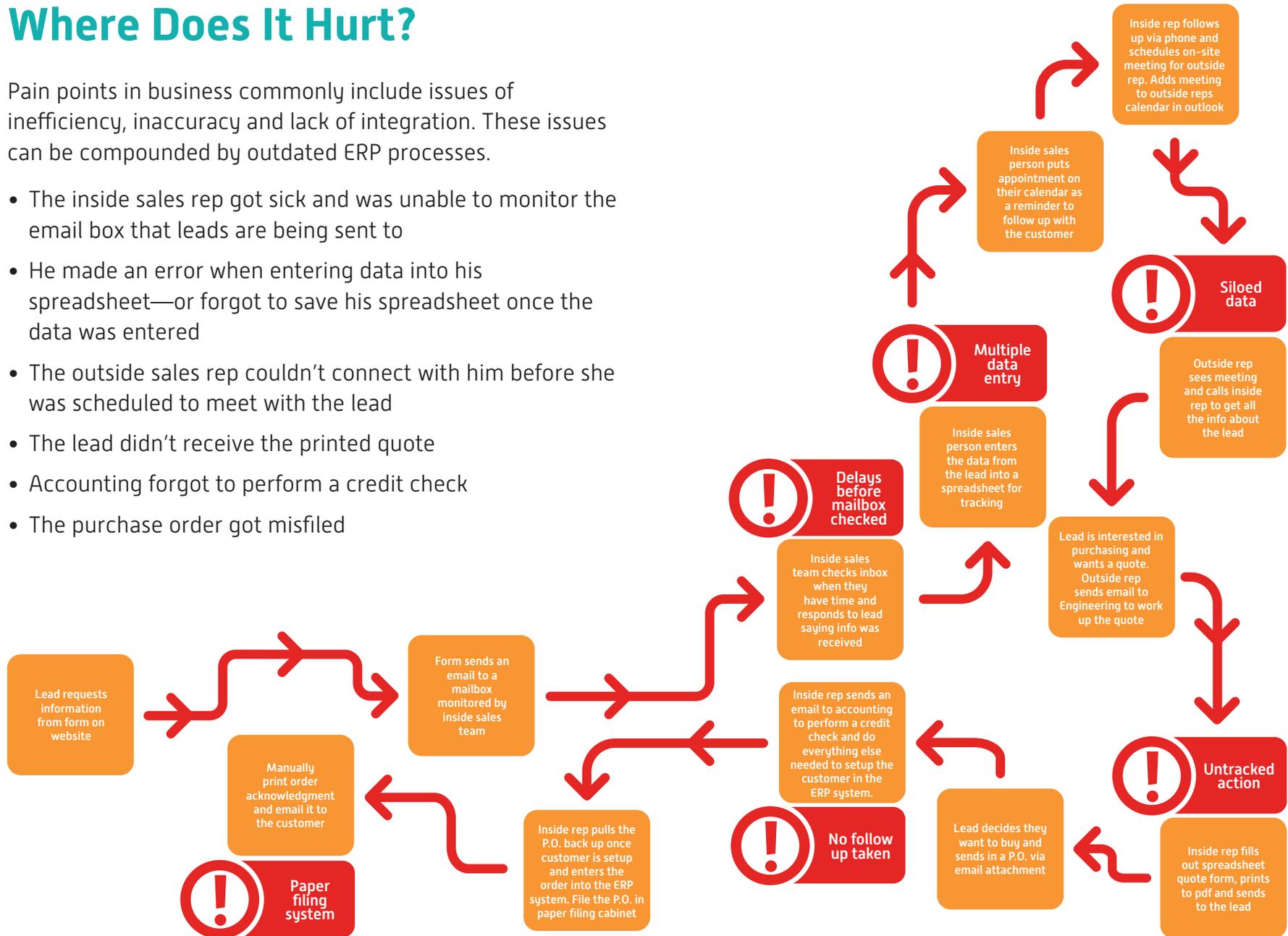
### “What would be the most valuable benefit of automated workflows for your business?”



# Where Does It Hurt?

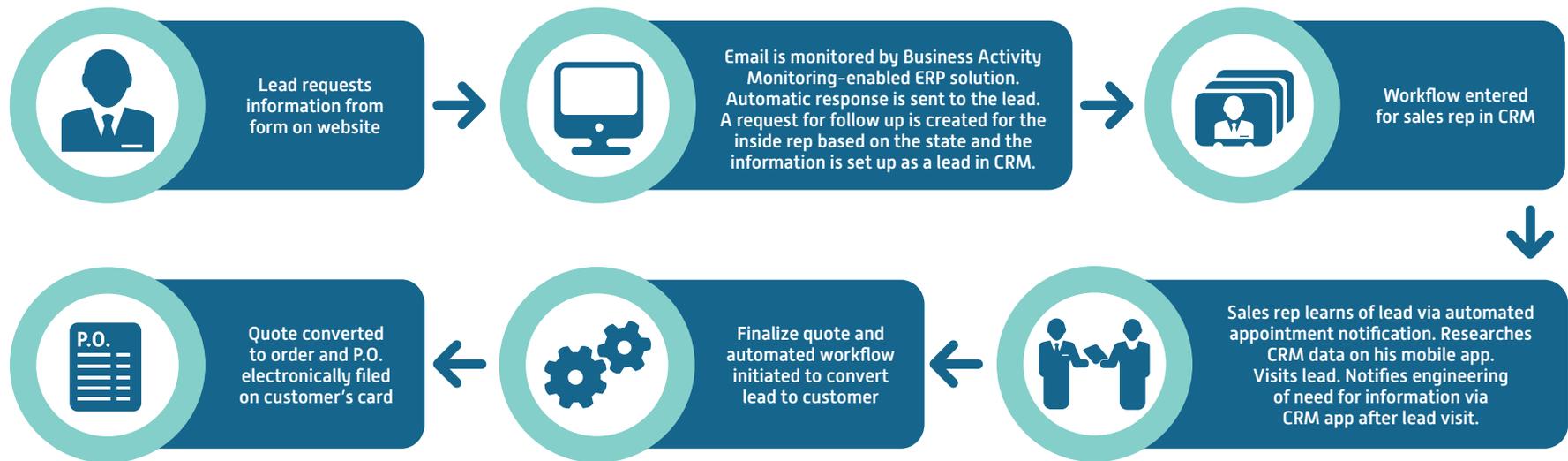
Pain points in business commonly include issues of inefficiency, inaccuracy and lack of integration. These issues can be compounded by outdated ERP processes.

- The inside sales rep got sick and was unable to monitor the email box that leads are being sent to
- He made an error when entering data into his spreadsheet—or forgot to save his spreadsheet once the data was entered
- The outside sales rep couldn't connect with him before she was scheduled to meet with the lead
- The lead didn't receive the printed quote
- Accounting forgot to perform a credit check
- The purchase order got misfiled



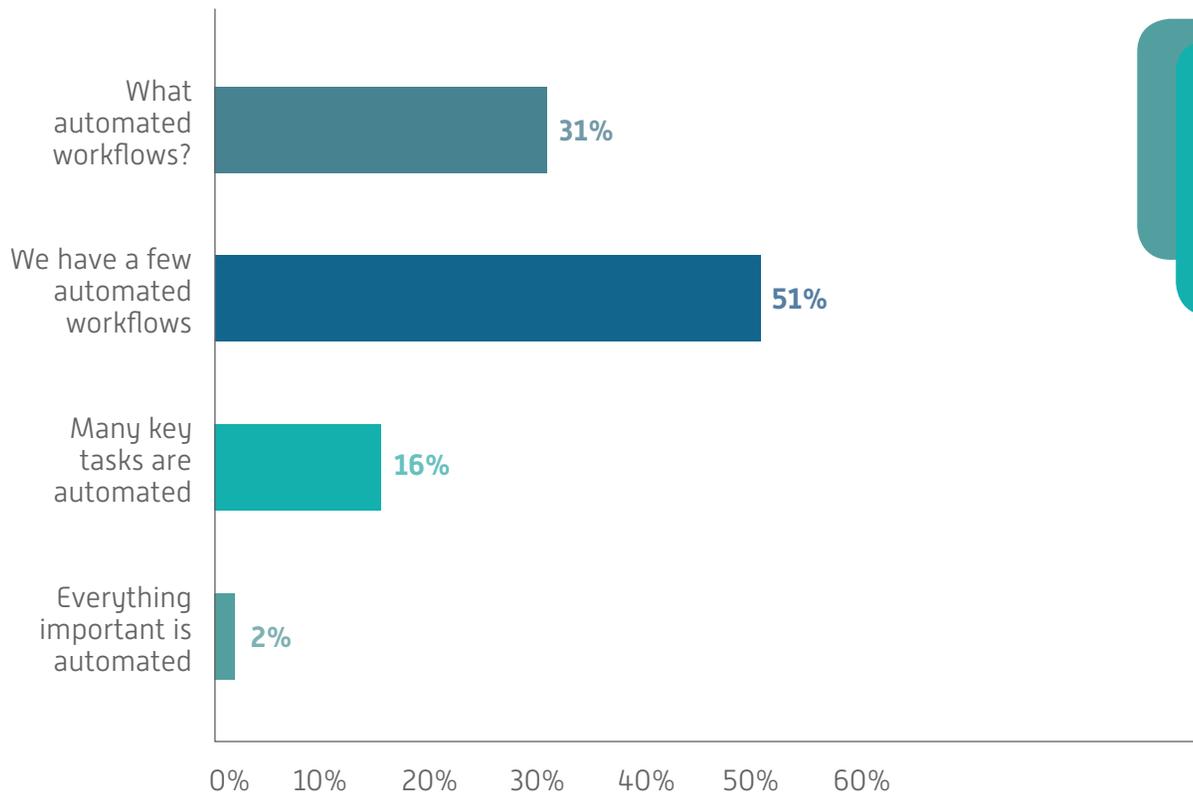
# From Pain to Gain

ERP solutions that incorporate automated workflows eliminate many of the more manual parts of the workflow while streamlining steps to make it more efficient.



Yet, despite the obvious value this type of workflow automation brings to the table, many businesses are not taking advantage of it. In fact, the overwhelming majority of our webinar attendees said they have few (if any) automated workflows in place.

**“How many automated workflows does your business currently have in place?”**



**A combined 82% have few (if any) automated workflows in place.**

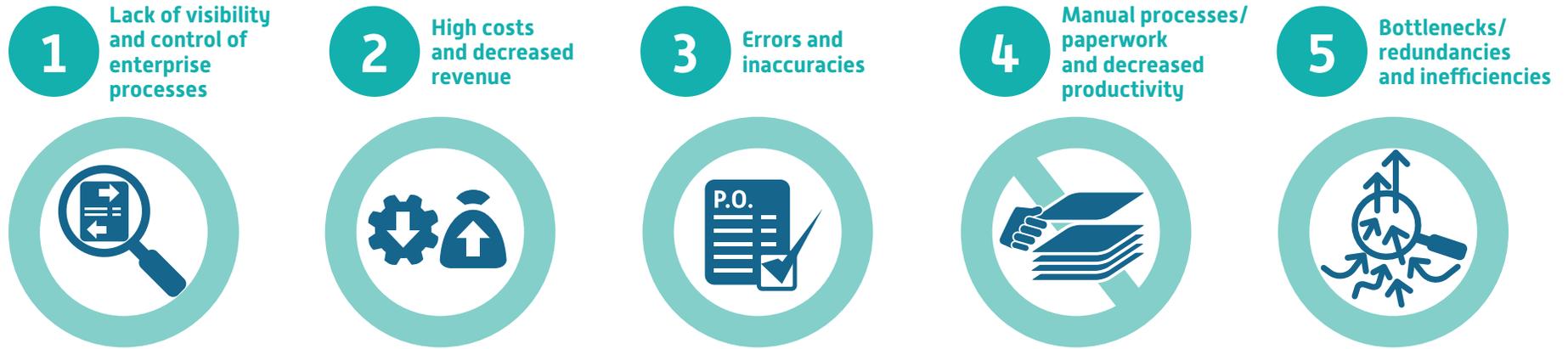


**“In one department, we dropped four hours every day on one task, and that’s really just by using workflows and document management.”**

**-Don McCall, Director of IT, G.L. Mezzetta, Inc.**

# The Five Pain Points Automated Workflows Address

Just as each active ingredient in a cold medication treats a different symptom, the benefits of automated workflows address five different pain points:



## AUTOMATED WORKFLOWS HELP:





**“Taking paper from departments—like production—and actually putting it into an electronic format...there was familiarity for the user going from paper straight to the screen, so that kept the training necessary to get the product off the ground at a bare minimum.”**

**-Todd Keske, President, Foam Supplies, Inc.**

# Mechanisms of Action

Whether it's a simple autoresponder or a more advanced workflow, automation is all about triggers and their corresponding actions. The list below shows the types of actions that you can trigger:



## Actions

- Create tasks/workflows
- Create documents
- Update data



## Outside connectivity via web services



## Notifications

- SMS Text
- Email
- Fax

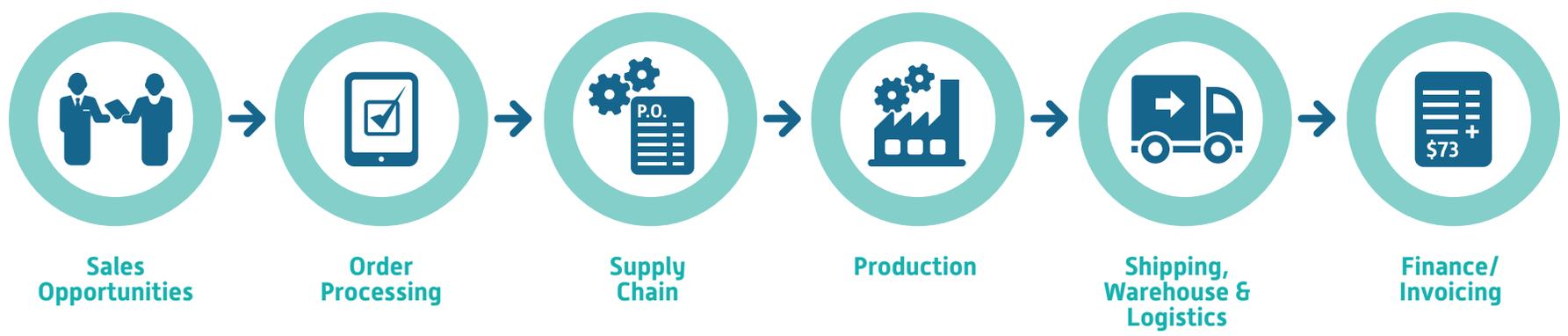


## Logs and Reports

- Create/Add messages to error logs
- Generate Crystal Reports (PDF)

# From Quote to Cash, Leverage Automated Workflows for Maximum Results

The sky's the limit when you start combining triggers with actions. To give you an idea of the diverse possibilities of automated workflows, we've outlined some examples of how KPIs could benefit by incorporating various automated workflows into your ERP solution throughout the quote-to-cash process:



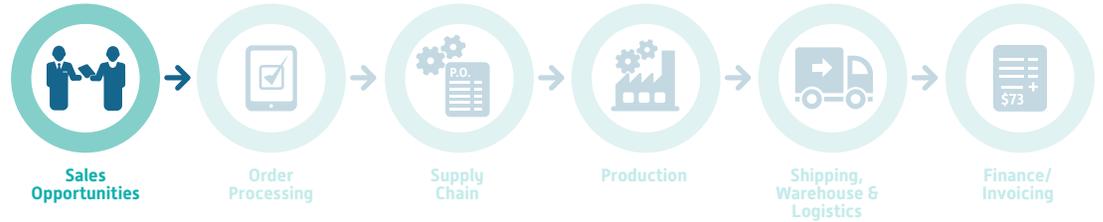
## Sales Opportunities

### KPIs

- Customer interactions/appointments
- Lead response time
- Frequency of contact

### Applications

- Automatically flag emails from existing customers and forwards to assigned rep
- Automatically create email with FAQ and common information documents
- Automatically save all emails to customer record
- Automatically create follow-up reminders or schedule follow-up appointments
- Flag sales reps with fewer than x appointments on their calendar
- Flag sales reps whose average sale price is <\$X or >\$X



### Example

- Trigger: lead from website
- Action: create contact in CRM

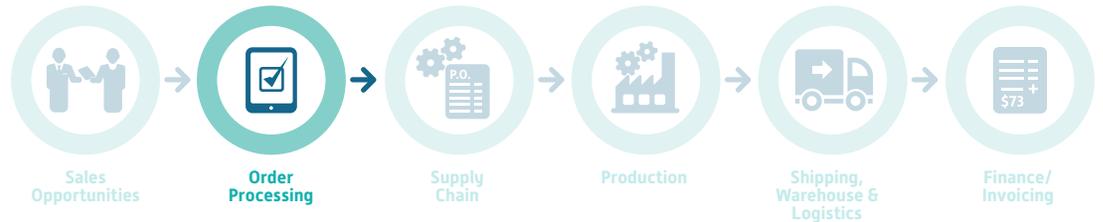
## Order Processing

### KPIs

- Win/loss
- On time delivery
- Sales order fill rates

### Applications

- Alert finance/sales of large orders
- Alert finance if a certain payment methodology is requested
- Alert finance if quote does not allow for proper margin—automatically deny quote internally
- Notify accounting manager when proposal turns into order
- Email/fax order confirmation to customer and account manager and attach to customer record
- Automatically create and send invoice and shipping confirmation to customer and attach to customer record
- Automatically reach out to customers who have not ordered in X months and attach to customer record



### Example

- Trigger: order placed
- Action: order acknowledgement sent

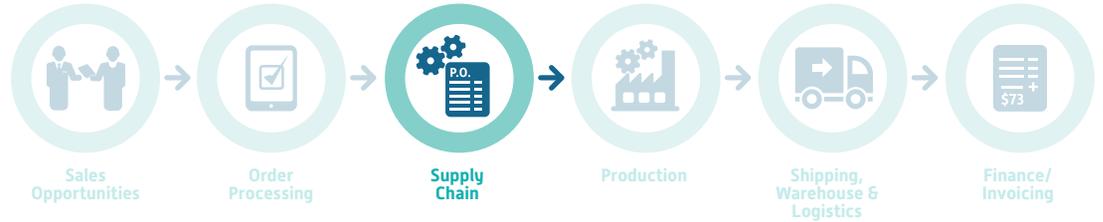
## Supply Chain

### KPIs

- Inventory turns
- Stock to sales ratio

### Applications

- Automatic email when invoice (request) is outstanding for more than X days at budget holder
- Automatic reminder (email) when number of invoices in workflow is greater than X
- Automatic email when the number of invoices to be approved has exceeded an amount of X
- Know when the delivery of a specific component needed for a project has been delayed
- Identify orders with configuration errors (such as missing parts)
- Monitor product cost and price variances



**Example**

- Trigger: material needed for new order
- Action: materials purchase request

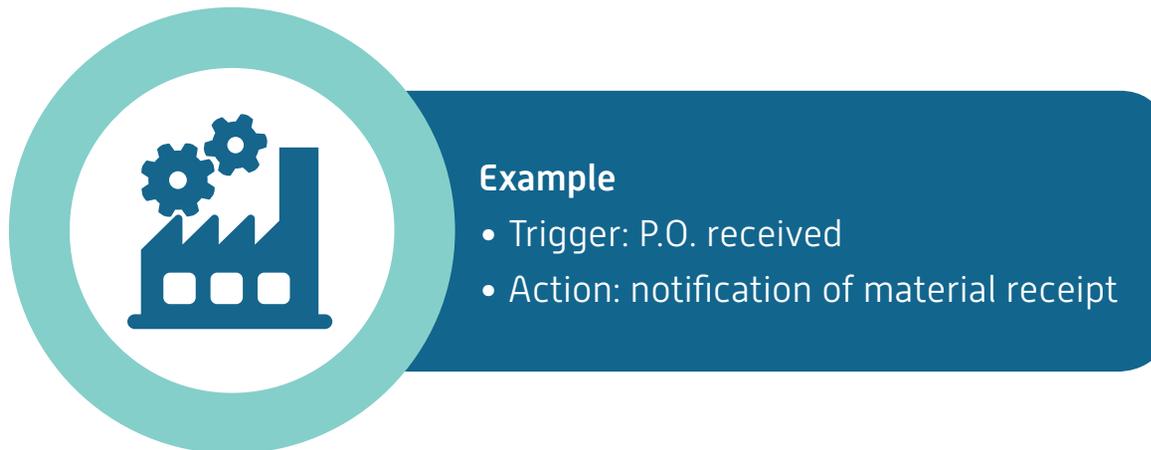
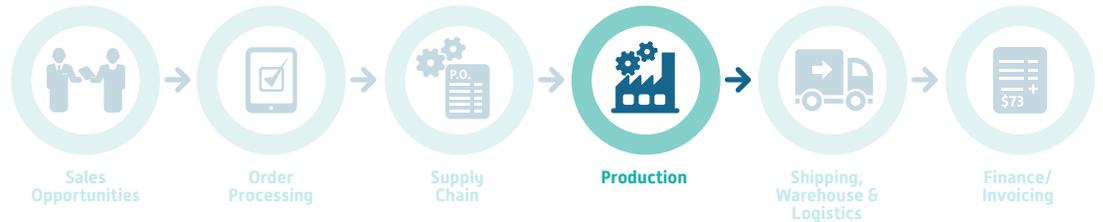
## Production

### KPIs

- Throughput yield
- Order lead time
- Percent on-time delivery reliability

### Applications

- Flag components that haven't arrived for pending production runs
- Monitor cost variances
- Track damaged/defective rates from specific suppliers
- Issue standing orders to vendors
- Set notifications for machine maintenance schedules
- Set alerts for exchange rates fluctuations
- Set alerts for materials wastage > X%



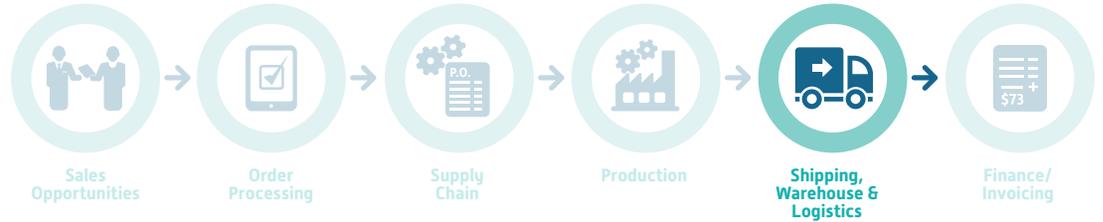
## Shipping, Warehouse & Logistics

### KPIs

- Delivery to promise date
- Delivery to requested date
- Returns due to improper shipments and defective items

### Applications

- Warning for items that were ordered from supplier and have not arrived
- Alert when inventory is above/below max/min
- Warnings when batches are nearing expiration
- Alert for items that have not been picked/packaged/shipped X hours after order
- Save tracking/delivery confirmation notices to customer record
- Alert for items that were shipped and have not received delivery confirmation from shipping company



**Example**

- Trigger: order shipped
- Action: auto email to customer notifying of shipment

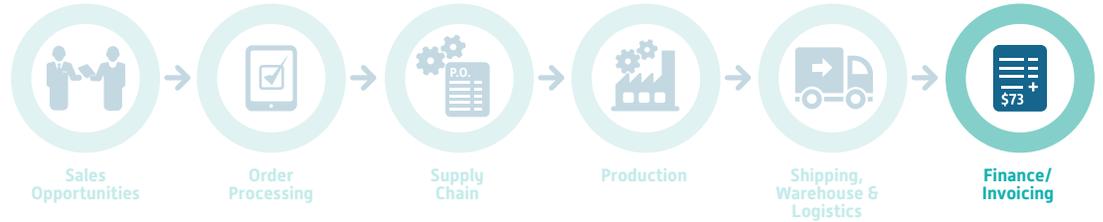
## Finance/Invoicing

### KPIs

- Accounts payable turnover
- Accounts receivable turnover

### Applications

- Check for customer credit holds before processing orders
- Alert customers via email when credit has been approved
- Flag accounts which are 30, 60, 90 days past due
- Set alerts around currency fluctuations which impact outstanding invoices
- Automatically send out payment reminders to customers approaching due date
- Alert when customers approaching/exceed credit limit



**Example**

- Trigger: order invoiced
- Action: invoice sent to customer

# Automated Workflows and Macola 10: The Remedy for Inefficiency

There are countless ways that automated workflows can be used to make your business more efficient and more profitable:

- Reduces errors
- Informs the right people at the right time
- Reduces risk by detecting problems early
- Gets rid of the paper chase by internalizing actions in your ERP system
- Creates actions that extend beyond the ERP by creating email, creating/uploading files and calling external programs
- Generates an auditable log of all automated actions taken
- Can create unlimited triggers and actions

Automated workflows can be a time saver, an error reducer, a risk mitigator and a paper conserver. And best of all, this functionality is built into Macola 10 and available at no extra cost.



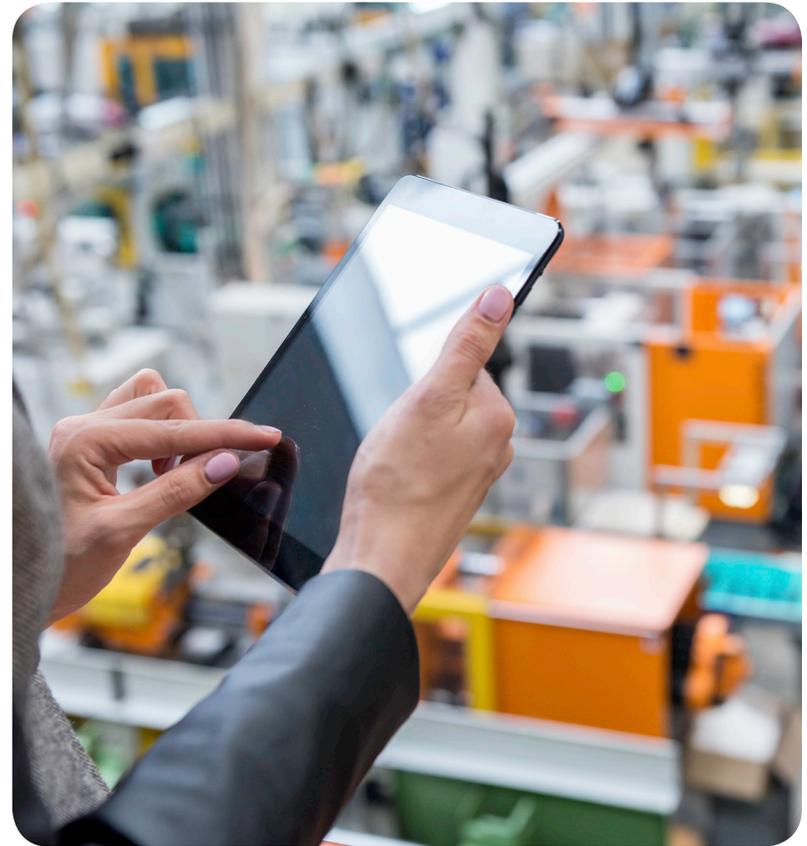
## About Exceptional Software Solutions, LLC

Exceptional Software Solutions LLC is an ERP software solution provider of Exact Macola software, serving SMB manufacturers & distributors across the U.S. and Canada. The firm sells, services and trains customers on each ERP and CRM product line offered by Exact, including Exact Macola 10, Exact Macola ES, Exact Globe Next, Exact Synergy and companion solutions. With more than 300 years combined experience and some of the world's leading Exact Macola and Synergy experts on its team, the firm creates solutions for complex ERP technology problems. [www.esoftsol.net](http://www.esoftsol.net)

Macola is ERP and business software that manufacturers and distributors use to automate, manage and grow their businesses. The software empowers companies to take control of cost and complexity at every critical stage from design through delivery and see all facets of their business from a single application.

Macola is an Exact product. Exact builds business software for SMEs and their accountants. Our innovative technology is aimed at specific business needs, providing an overview of today and insights into the opportunities of tomorrow. Exact inspires businesses to grow. Our 1,600 employees love, share and support our customers' ambition. Like them, we aim high. Like them, we aspire to lead the way. That's how we know it's a bumpy road to success. And that's why we build software to help smooth it out, enabling our customers from all over the world to grow.

**Macola. ERP and business software.**



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