CodaBears, Inc.   BREAKING CODA

EDUCATION WHEN YOU NEED IT!

Epicor 10 comes with some changes. CodaBears has developed courses to help get you quickly oriented with these technologies so that you don't waste time struggling to keep up. Instead you can race ahead. We offer training in SQL management, SQL Queries (basic & advanced), SQL Reports (basic & advanced), C# programming (basic and advanced), Migrating Customizations from VB.NET to C#, and Migrating Crystal Reports to SSRS. Courses are taught in our offices as well as remotely. If you're interested, call our office to find the next available date for the courses you are interested in and we'll get you signed up.

We're also trying something new at CodaBears. Do you have 30 spare minutes to learn something? Try one of our Lunch & Learns. Each week we'll be hosting an online meeting covering a quick topic such as BAQs, Screen Customizations, ERP 10 Navigation, Zone BAQ, Progress DB maintenance, SQL DB Maintenance. Lunch & Learn dates are June 17th, 25th, & 30th. If you are interested in attending, please call our office to reserve your spot! CodaBears (630) 672-7688

BENCHMARKING YOUR ERP USAGE

Have your ERP users slipped down the Leadership scale of Maslow's Hierarchy from Committed to Contributing or merely Compliant? Worse yet, have they become Disengaged and generally look for solutions outside or as add-ons to that pricey ERP system you spent money, time and resources to implement?

Sometimes the answer isn't an upgrade or a new customization. CodaBears has a solution to identify for you where to best focus resources to improve ERP functionality and user commitment. Our on-site, intensive Benchmarking process (also commonly referred to as a Business Process Review) takes a multi-level approach to both determine issues with compliance and identify where improvements (many at no cost) are available.

The process begins with the documentation of the ERP system: modules, database size, customizations are all detailed. Next, intensive, detailed on-site interviews are held with key users and managers to document how the system is truly being utilized. It is common to find immediate fixes and answers during these meetings that provide instant reinforcement of the benefits of greater utilization of the ERP system. CodaBears actually sends multiple staff members for the meetings, so that one is able to focus on questions/ interaction with your team and the additional member is able to document and actively listen for some of those areas that are easily glossed over in surveys or group interaction.
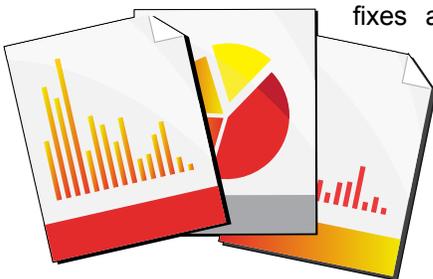
The documentation following the on-site meetings includes transcribed meeting notes as well as numerous hints and tips for the actual users. These useful notes serve as a usable reference document for all users and an immediate "win" for improved efficiency and ease of use of the ERP. This section of the review provides actual information as a direct benefit to the end users. User names are not identified within any of the documentation. Rather, the focus is to provide short and long terms answers for Key Users, Managers and the Executive Team that promote not only compliance but ultimately Commitment to the ERP.

The other main portion of documentation is a separate Executive Summary. If company ERP stop-gaps exist, they are identified along with potential solutions. Recommendations are compiled and upon completion of the documentation phase, findings are then reviewed during an Executive Team debriefing held during another onsite meeting.

Throughout the process, CodaBears' focus is on listening, documenting and problem-solving. The goal is to find areas for improvement whether in ERP usage or assessing a company policy so that regardless what version software is being used or slated for implementation, your company will achieve the most financial benefit from its software investment while also being rewarded with more efficient, highly satisfied ERP users.

For more information on the process and benefits to your organization, call Dana Rick at CodaBears (630) 672-7688

CHECK OUT THE NEW LOOK OF....

CodaBears.com

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SUPPLIER PERFORMANCE REPORT CARD

Do you know which suppliers are providing you materials on time? How much are you spending with each of your suppliers? Are the materials you are receiving of good quality or are they being returned? These are questions the Supplier Performance Report Card can help you answer. Not only does it tell you how well (or poorly) a vendor is meeting your needs, but you can also use this information when negotiating with a vendor to help ensure they are meeting their promised services levels.

The report card is an SSRS report allowing users to view the report with a web browser. The information can also be exported to one of several standard types such as PDF, Excel, or Word. If desired, you can even have the report automatically emailed so that it is delivered to you at specific intervals for your review.

Call (630) 672-7688 to schedule a demo and learn more about this product.

EPICOR.IO

If you have not heard, Epicor 10 is out of Beta as a "controlled release". You'll need to do a little legwork to get the software.

Step 1:
Fill out the request form at EpicWeb.↗

Step 2:
Schedule a meeting with your CAM

Step 3:
Wait for the software & new license.

Ready for installation? CodaBears was involved with the Beta program and we are ready to help you install, upgrade, or re-implement as you need.

MIDWEST USERS GROUP
EPICORMIDWESTUSERSGROUP.COM

Next Meeting
August 22, 2014
Register today!

Contact Jane Leslie for details.

janeleslie@codabears.com

(630) 672-7688 x1474

STREAMLINING REPETITIVE EMAILS

Taking advantage of the data stored in your ERP system is on every users' wish list. CodaBears staff repeats that mantra daily and develops solutions that offer 1) a rapid return on investment for the customer and 2) a real-life usable solution that makes daily operation easier.

For quite some time now, we've been offering an Automated Communication tool that takes a key document and streamlines the email process to the customer/vendor for your employee. This tool not only saves employee time (and company financial resources), it streamlines workload, ensures company protocol is maintained and offers a greater service level to your customers and vendors.

Essentially, the program converts printouts directly into PDF documents. One "copy" is stored on the server and then a "copy" is automatically attached to an e-mail as well as linked to the originating record in the ERP system. The email body can be customized and even include some key data. Further, users have the option of reviewing emails before they are sent, or having the system automatically send the email without review.

Automated Communication now covers Quotations, Sales Order Acknowledgments, Packing Slips, Purchase Orders, Discrepant Material Reports, and Invoices. Why waste valuable resource time? Call CodaBears and ask Bill Golis how we can quickly implement this inexpensive, time-saving solution for you: (630) 672-7688.

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