The User Group .org Interface

Welcome to Atlanta! Can you believe we're here?

Jim Schwantes, President, TheUserGroup.org

Greetings from theUserGroup.org and welcome to our Spring U2U Lite 2007 conference! It was just seven months ago that we met in Tucson for the last U2U event, although is seems like eons. At the time, the thought of putting together another conference in half the time was quite overwhelming. So we did what most good project managers do: We waited three months and did it in one quarter of the time! Never again! Yea, sure.

As you enjoy the conference this week, please take a few moments to truly appreciate what we have achieved for this gathering. With over 350 attendees, nearly 40 Infor personnel and 18 (at last count) supporting vendors, this event has exceeded every one of our expectations. Our concern was that the time between conferences was too short. People couldn't possibly justify attending another meeting so soon. Travel budgets and time were going to be our worst enemy. Boy, were we wrong on all counts! TUG U2U has proven that customers want to be heard. They want to go to the front lines and represent the issues most important to their companies. They are looking for a better way to get things done and our attendance at this event is positive proof. And Infor has noticed. TUG has ensured that the Special Interest Groups had access to the Infor people that they needed most. And Infor has stepped up and provided those resources.

TUG has developed efficient and productive connections with the Marketing, Development and Executive branches of Infor. And they are eager to work with us and appreciate our efforts. The reality is that we are gaining ground with this group and people are enjoying the results.

This conference is called U2U Lite. We had a short amount of time to work with, so we concentrated on the SIG's and their needs. We're missing some of the educational and third party content that our members have grown to expect from our events. But don't let the "Lite" fool you. The individual groups have worked hard on their agendas and much will be accomplished during the next three days.

We've also cutback on some of the social and evening events to help keep registration costs down. We'll continue to work on the costs, but you can expect to see many of these items return on next year's conference agenda. But at least we have a full year to pull it together. Wait. Strike that. We now have eleven months!!!! Gotta get moving now!

Thank you for coming to U2U and I personally appreciate the support of our group.

Have a wonderful time in Atlanta.

Who is this man--and why is he smiling?

Meet Roger Realsen, Director of IT for the Wareforce Corp in Irvine California, SX.enterprise user and winner of a free registration for '07 TUG U2U Lite! Roger's TUG 2006 U2U conference evaluation form was chosen at random from all of those received.

Want a chance to win your next registration for free? Be sure to log on to the TUG U2U website (www.tugu2u.com) and provide us with your thoughts: the good, the bad and the ugly about the '07 TUG U2U Lite!

SIG Updates

SX.enterprise Electrical User Group (EUG)

The EUG is a group of electrical distributors and wholesalers running the SX.enterprise ERP. Representing a broad range of company sizes and end-user markets, our members gather together a few times a year to discuss industry-related trends and market forces in a supportive and congenial atmosphere. Those trends and forces translate into requirements for our business and e-commerce systems, and our members work arm-in-arm with Infor to ensure SX.e and related products are up to the task of meeting them.

The EUG takes pride in the productive and cooperative relationship we have established with Infor's management and development teams, a relationship which has improved the bottom lines of our member companies through improved and expanded functionality, gained efficiency, and participation in industry efforts and standards. And which has made SX.enterprise a better and more marketable product for Infor, in whose success we all remain invested.

Membership in the Electrical Users Group is open to anyone with an interest; simply contact its current president, Don Harrington, at dharrington@hs-e.com.

Don Harrington
Horizon Solutions

@work Group Update

This week at the TUG U2U conference, the @work group will be meeting to accomplish three major priorities concerning the commerce@work application. Our first item is to finalize the list of enhancements currently in APLUS that should be migrated to c@w as well. Development has made it clear that we are making the decisions on product direction and the inclusion of several key features is the first step in keeping the application viable and marketable. Secondly, Infor will be updating the group with the current status of the RF Summit Initiative. Earlier this year, a group of customers met to layout the functionality they needed most from the RF module. Infor has created a statement of work on those changes and we are eagerly awaiting a timeline for completion so that we may begin planning our upgrade processes. Finally, our group will be developing a prioritized list of new enhancements that will go into the commerce@work product. Again, Infor's development team has asked for our help in determining the most productive and beneficial modifications. We will use our time in Atlanta this week to do just that. Our goal is to create a short but comprehensive list of issues that can be included on the next development cycle for commerce@work.

For more information on the @work group contact Jim Schwantes (jschwantes@pereztrading.com)

Jim Schwantes
Manager -
Information Systems
Perez Trading Company, Inc.
jschwantes@pereztrading.com
305-769-0761 x261

The TakeStock Special Interest Group (SIG)

was created during the 2006 TUG U2U conference. This was our first meeting together as a user group which was comprised of both end users and channel partners. During this meeting we shared our concerns and ideas about the future of TakeStock. Everyone had an opportunity to discuss these issues with the Infor management staff. What we got out of these discusses was a commitment from Infor that TakeStock 6 was to be released on time and that future TakeStock releases would come every 6 months there after.

The user group developed and voted on a list of enhancements that we wanted to see added to TakeStock. From this list we submitted 6 of them to Infor for consideration as part of the TakeStock 6.1 release. With the upcoming 2007 TUG U2U conference in Atlanta we hoping to continue our membership growth getting both users and channels partners involved.

Chris Rutz
John Henry Foster Co.
TakeStock SIG President

The SHIMS Wholesalers Association (SWA)

is comprised of people from within our industry using SHIMS. Our mission is primarily communication - providing a forum for exchange between well-informed SHIMS users, Infor and each distributor's top-level management. Our specific objectives are:

• To provide a forum for the exchange of ideas and experiences.
• To consolidate and voice the desires and concerns of the SHIMS users to Infor.
• To assist SWA members in maximizing the use of the SHIMS system.
• To provide a channel to assure the perpetuation of support for the SHIMS system.

SWA currently has an 11 member board of directors, and each member is involved in one of 4 committees: Agenda committee: responsible for preparing the agenda for our annual conference.

Membership committee: responsible for building a database of all know SHIMS users.

Technology committee: acts as a liaison for the successful deployment of new technology for SHIMS users through third party solution providers as well as Infor Global Solutions products.

Training committee: formed to study the various ways that companies provide SHIMS training to new and existing employees, and to develop utilities to enhance the processes and specific training agendas, so we can all do a better job getting employees up to speed.

Our board members are listed below:

President:
   Gary Perkins
   VP Supply
   gperkins@vpsupply.com

Secretary
   Nick Velonis
   Peabody Supply
   nvelonis@peabodysupply.com

Other members:
   Gary Brown,
   System Design Solutions
   gbrown@systemdesignsolutions.com

   Jeff Corrick
   Stoneway Electric Supply
   jcorrick@stoneway.com

   Stephen Coss
   The Blodgett Supply Co.
   coss@blodgettsupply.com

   Lee Goldman
   United Pipe & Steel Corp.
   lgoldman@united-pipe.com

   Paul Gooch
   Russell Belden Electric
   pgooch@beldenelectric.com

   Shane Grivna
   Russell Belden Electric
   sgrivna@beldenelectric.com

   Pete Huddleston
   Corken Steel Products
   phuddleston@corkensteel.com

   Paul Morris
   Kerr Controls Limited
   pmorris@kerrcontrols.ca

   Ken Plough
   Plough Electric Supply
   ken@plough-electric.com

Perez Trading makes CoDev a big part of their Upgrade

As with many customers, the largest hurdle in a software upgrade is the migration of the custom modifications. Although several customers are lightly modified, many of our implementations contain hundreds of mods, some deeply rooted into the core program groups.

At last year's U2U conference in Tucson, AZ, Infor announced a new initiative to encourage customers to upgrade. Initially called CDE or Customer Driven Enhancements, the overall concept was to review customer mods and when possible include them into the base package. This would decrease the amount of work on future upgrades, making it much easier for customers to run the latest releases.

It's a fact that all of us pay Annual License Fees. This entitles us to any new features and functionality included in the releases. By not upgrading for the past several years, Perez Trading has "missed-out" on these enhancements. Our intention was to wait for that one "Big Nugget" that would top the scales and get us to upgrade. However, the evolution of our business and the growth of the commerce@work application has crossed paths at smaller intersections, keeping us from moving forward. There are many items in the latest code that would be great for us, but no one individually worth the time and effort.

With the announcement of this new CoDevelopment process, we now have a way to minimize the impact of future upgrades, while at the same time planting some of the good ideas we have into the base package. It's clear that there are other companies that will benefit from our mods. In some cases they may replace other custom mods for them as well. The bottom line is that the base application is growing and maturing with our help.

On March 19th, I flew to Rhode Island and met with Kelly Squizzero, Brian Nigri, Seth Mayers and Tom Dillon to review our modification list. The goal was to "generalize" as many of these items and design them in a way that would work for anyone, not just Perez Trading. The results were extremely impressive. Not only did we walk away with having our major mods accepted, but all but one of the items on our list were considered candidates for the base package. We are quite happy with the results.

In the coming weeks/months, I will continue to add updates to the site so that all customers can benefit from our experience.

Stay Tuned!

Jim Schwantes
Manager - Information Systems
Perez Trading Company

UNILINK ANNOUNCES STRATEGIC ALLIANCE WITH TRS ASSOCIATES

ATLANTA, MAY 8, 2007 – The UniLink Group™, the leading provider of Supply Chain EDI management services, and TRS Associates, a leading integrator of business process outsourcing services, have formed a strategic sales and marketing alliance. TRS has a combined 100 plus years experience helping companies overcome document process and workflow issues and are very active in assisting them in the migration to digital environments. They see tremendous value in Unilink's EDI connectivity services and are now including Unilink in all future projects.

According to Randy Simmons, President of TRS, "We, at TRS & Associates, are thrilled to have a partner with the technology and know-how to facilitate the Supply Chain processes. With our knowledge of the paper-to-computer conversion processes, this partnership becomes a very powerful one that offers the following benefits to our clientele:
- Improved Productivity
- Business Process Automation, thereby driving
- Significantly Lower Costs

About The UniLink Group

Since 1996, the UniLink Group has been the leading outsourced service company, focused on automating and transmitting supply chain documents to and from supply chain partners. UniLink's historical markets has been in construction, manufacturing, distribution, and transportation.

Through UniLink, a company can have "100% Connectivity" with all their trading partners, even ones with no EDI capabilities on their end. Unilink either supplements our clients' existing EDI infrastructure, or manages all EDI connectivity on their behalf.

BuildingLinks® Delivers to the Bottom Line of Major Home Depot Supplier

Kessler-Sunbelt Distribution (KSD), a New Jersey based distributor of piping materials, has a success story that would make any company owner or general manager envious. KSD had built a successful relationship with The Home Depot, supplying 30 SKU numbers to over 250 stores. This successful track record gave them an opportunity to expand their relationship with The Home Depot to include an entirely new Home Depot region. This expansion allowed them to double their revenue with The Home Depot.

The high points of this successful management and sales coup on KSD's part include:

- Return on Investment in less than three months. KSD's initial investment was extremely low, allowing the immediate doubling of Home Depot revenue to quickly begin to offset the startup and ongoing maintenance cost of outsourcing this effort to The UniLink Group

- Allowed Sales to Close the Deal. The Home Depot valued KSD as a high quality, customer care focused supplier. KSD was able to close the deal to supply to a new Home Depot region with the assurance of being able to support over twice as many stores using EDI technology.

- Doubled Revenue While Reducing Overhead. While sounding almost too good to be true, KSD was able to expand their Home Depot business and move two customer care personnel to higher value direct customer care tasks. Once EDI with Home Depot freed them from data entry and data correction chores, they are now able to provide higher return to KSD in more in-depth customer contact with key accounts.

- Increased Customer Service and Quality. By receiving and processing all The Home Depot's orders and shipping notices electronically, KSD no longer encounters the occasional data entry and/or shipping problems that can be introduced by re-keying faxed information into KSD's computer systems. This generated the additional benefit to Home Depot and KSD of improved quality and service of shipments made to The Home Depot.

- No Capital Investment, No Steep Learning Curve. KSD's EDI Project Manager, Carol King, was able to negotiate and coordinate this effort in under two months, from initial contact to production "go-live" of the business transaction processing. There was no translation software to purchase and no extensive training or consulting engagements required. KSD also did not have to purchase VAN (Value Added Network) services. Outsourcing this project allowed Carol to effectively get their mission-critical EDI effort off the ground, while still attending to her other management and operational duties that she handles for KSD.

Background

KSD has been a valued and successful supplier to The Home Depot for many years. KSD began exploring the strategy to add as many additional stores as possible. Their sales force began contacting other Home Depot regions and was close to securing an additional 300 stores. However, they came across an issue that if not addressed, would reduce their opportunity of closing a new Home Depot region.

Kessler-Sunbelt Distribution utilized manual, paper processes to receive and process orders and invoices. This took two full time employees to process Home Depot orders alone. The Home Depot has sophisticated information systems in place and preferred to receive all transactions and correspondence electronically. KSD decided that taking the tact of converting their business processes to make use of electronic communications would allow them to expand their revenue without a commensurate increase in their internal operating and overhead cost.

Results

KSD chose to implement BuildingLinks® from The UniLink Group, a streamlined, outsourced data translation and connectivity service that converted their paper system to electronic and also created the link to Home Depot's information systems. This addressed Home Depot's requirement, paving the way to add the additional 300 stores. However, KSD started receiving several additional benefits they were not expecting:

- They no longer needed two full time employees involved and were able to refocus their time to providing customer service via phone and supporting other customers, which improved their overall customer satisfaction;

- The cost savings they began seeing from electronic transaction processing justified the hire of an EDI specialist assigned to manage all Home Depot transactions, again improving their level of service to a major client;

- Errors were practically eliminated, meaning orders were correct and shipments were sent to the proper location, reducing costs and again improving customer care;

KSD's ability to quickly and easily connect this type of technology to their existing business software systems not only allowed them to double their business with The Home Depot, it also provided them efficiency gains that reduced operation costs, improved customer care, and the ability to expand their business even further.

If you would like more information about BuildingLinks®, please contact **Gene Stewart** with **The UniLink Group** at 678-438-5195, or gstewart@unilinkgroup.com.

Converting to GUI: How SOA Will End 15 Years of Failure

It's 2007 and legacy systems have beaten the odds and won the battle. Here we are, still plugging away on our green screen applications, improving them, expanding them and making them work harder than ever before. How did this happen? Even after dozens of silver-bullet green-screen-to-GUI tools have wandered into, and back out of the marketplace, how have our legacy applications prevailed? Many conversions have been peformed; but there have been wildly varying degrees of success. I still see them in doctor's offices, insurance companies, auto parts stores, etc. They are GUI applications, but they are often old-school GUI, resembling Microsoft Windows 3.1, Delphi and Borland Visual C programs. It's hard to believe that even old GUI applications can be classified as "legacy" systems that need to be brought up to current technology. How disheartening it must be to have converted from character-based to GUI, only to be facing the same pressures all over again.

The tools that have been adopted over the past 15 years to allow us to modernize our legacy systems were unable to see beyond the technology of their day. Some of the GUI tools took so long to gain enough momentum that the planned result became obsolete midway through the product life-cycle. New tools are still available to those of us who waited, but can't we expect to end up in the same situation in 5 to 7 years? As fast as things are changing, the problem is likely accelerating at the same rate as mainstream technology.

I believe that the answer does not lie within a legacy-to-GUI tool; after 15 years of failure, we have to consider that the approach itself is flawed. Fortunately, today's software technology giants (IBM and Microsoft) have both agreed that the value of legacy systems should be preserved, not replaced. And, they have invested considerable engineering effort to make this concept a reality. That reality is encapsulated within SOA (Service Oriented Architecture), which addresses the problem in its entirety using an approach that could be sustained far into the future. The practical successes that we have seen using this approach have made me a believer. But what makes it different from everything else? The main difference is that SOA isn't a tool, it's a methodology with a deep tool chest. It doesn't attach itself to a specific back-end system or front-end user interface; which means it can be used within any legacy system and any user-interface. It won't pigeon-hole you into an exclusively web-interface or Windows-based application, and it won't exclude you from embracing the world-changing-user-interface that we won't dream up for another seven years. There isn't a single "get to GUI" tool out there that can make that claim.

Migrating your application to GUI via SOA is not a trivial task, but it could very well be your final effort in modernizing your application. The fact is, a modern application will never remain modern unless it can change and adapt to the technology that surrounds us. You still have to build the user interface you want, but with SOA you can build it using best-in-class tools like IBM's Rational Application Developer or Microsoft's Visual Studio while preserving the business logic you already have.

The SOA model consists of two major components - the web services themselves and the things that use (or consume) them. Let me provide a high-level overview of the SOA anatomy, starting with web services. A web service is very much like an interactive web site such as an auction site or your online banking site. The major difference being that a web service is designed to talk to programs instead of people. Therefore, the web service doesn't concern itself with the cosmetic look and feel or step-by-step business processes like a web site does. This makes web services much simpler than web sites. They are designed to carry out discrete tasks, acting as the ambassador of business logic and data management for the programs that consume them. Applications are then developed to use the web services, making application development simpler because the font-end applications are not responsible for data management or business rules. One major advantage of SOA is referred to as the "separation of concerns". The programs that interact with the user are separate from the programs that interact with the business systems. By separating the responsibility of user-interface programming and business logic

programming, the individual programmer's strengths can be maximized.

These two disciplines have historically been integrated within legacy systems, and this may be the primary reason that the applications built on them have not been easily migrated to more modern software technology. The new kids (web and Windows programmers) are often very talented user-interface programmers, but they are no match for business software developers with decades of experience. Talented legacy systems programmers have been too busy doing their jobs to take the time to build the years of solid web and Windows programming skills to carry the applications forward. Without separating the disciplines, you often end up with either a solid business application that doesn't have all the bells and whistles of a modern web or Windows application; or you settle for a modern-looking application that lacks the features and stability of a legacy business system.

With SOA, the legacy systems programmers can focus on what they do well- incorporate business rules and data management facilities that can support the enterprise. User-interface programmers can focus on creating a modern application that is intuitive and user-friendly without getting bogged down with complex business requirements. Furthermore, legacy systems are extremely capable of performing well in this type of environment. The web services (which actually live on the legacy systems) are responsible for receiving text-based requests and producing text-based responses. Sure, the text is delivered in the form of XML, but XML is just plain text. Text is a comfort food for legacy systems, so web services can be incorporated using existing legacy systems software, allowing the business system to carry out the tasks as if it were still 1986.

The web services are generally simplified versions of the existing legacy programs. Since they don't need to worry about interfacing with the user, they need only be concerned with one business process at a time. The end result is a catalog of web services on the legacy system including discrete services such as searching for a customer, producing a list of open invoices, producing an invoice record, providing product pricing and availability, etc. The catalog can be built up over time as services are built one project at a time. But once a service is added to the catalog, it can be used by a variety of applications. For example, a web service to provide a list of open invoices could be used by an application for a customer service representative; and it could also be used by a customer self-service web portal. In both cases, the user interface programmer did not need to understand the business logic required to find the invoices in the database and calculate open balances.

The heart of today's enterprise SOA is something called an Enterprise Service Bus (ESB). This the catalog of web services which includes the access point to the services themselves, as well as information that describes the features and requirements of each service. This is where the user-interface programmer can view the catalog and read the rules of engagement for each individual service. The software development tools that encapsulate the ESB make it pretty easy for the front-end application developer to make use of the web services by incorporating the "rules of engagement" directly into the native programming environment. By selecting the "Customer A/R" service, he can see exactly what he needs to provide to that service and he can see precisely what information he can expect to get in return.

The ESB "publishes" the web services as industry-standard objects, making them equally available to programmers in multiple environments such as Java, PHP and Microsoft .NET. These modern programming environments all work with an industry-standard method of identifying and consuming web services. So, once you have created some services and published them through an ESB, they can be used by different programmers building different applications in different programming languages. Therefore, there's no limitations on the types of front-end applications that can be built and there's no re-inventing the business logic for applications that share common tasks and data stores.

By embracing SOA, you can invest in a web service designed to process a sales order and use that service simultaneously in a Java-based online store, a .NET-based EDI system and a Windows-based sales order entry application. And, that same web service can be re-used in 7 years when "GoogleSoft's OmniBuyer 2014" finally becomes stable.

Luke Bucklin is the President of Sierra Bravo Corporation, which focuses on deploying mainstream web and Windows-based software solutions in legacy systems environments. For more information, call (800) 948-1211 or visit wwww.sierra-bravo.com

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Advancing the Science of Distribution

Between the PRICE and OVERRIDES files, pricing on SHIMS can be very flexible and allow for many variations in customer pricing structures. But wouldn't it be nice if the maintenance programs were a little easier to use? And for that matter, wouldn't it be great to be able to see related information right on the maintenance screen that would shed some light on your multipliers, such as the Gross Profit % associated with a multiplier, or even related sales and GP% figures for the past quarter or past year?

If your pricing structures are relatively simple and you don't spend a lot of time maintaining customer pricing, then these ideas may not appeal to you. But if your structures are complex and you spend a fair amount of keypunch time keeping your pricing up-to-date, here are a few ideas to simplify the process and integrate relevant information into the process that will make your pricing manager happy. You will need to spend a little money to make this happen, but don't worry, the payback will be quick and you'll have better control over your pricing procedures. A good programmer can build these programs without too much of an investment on your part.
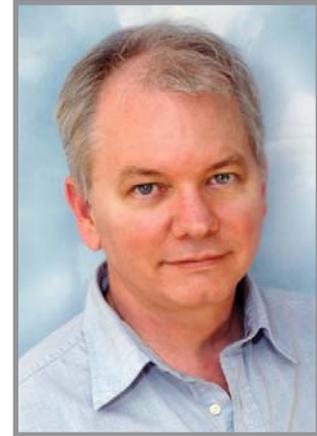
The idea behind a simpler maintenance program is to build a maintenance screen that shows only the information you need, preferably on one line per record. For example, for PRICE file maintenance, have a screen that shows the Class, Group, Group Description and Multiplier fields for each price record going across the screen, one line per record. Then add a field next to the Multiplier that shows the calculated Gross Profit % for that record, and two more fields that allow you to enter a new Multiplier and show the new calculated GP%. If you put all that on one line, you should be able to list at least 15 records on one screen, and

number them 1 to 15. Then add a utility that allows you to enter the line number you want to edit, and have the cursor go directly to the New Multiplier field and prompt for an entry.

The idea is to customize the program to show only the information that is important to you and that you use under normal circumstances. In the example above, you can have the program load up all your PRICE records sorted by Class by Group, or maybe prompt for a selected Price Class and then load up all the records with that particular Class, sorted by Group. Then add a utility that prompts you for a Line# or a Group#, so that the cursor will go directly to the record you want.

Adding relevant sales and GP information to this screen is trickier, but possible. The trick is to have a file that keeps summary sales and GP information in exactly the same format as your pricing file, and the answer is to use the SALES-HIST file. Not your primary SALES-HIST file, because you're probably using that for other purposes anyway. But you can build a second SALES-HIST file and make the keys to the file the PRICE CLASS and PRICE GROUP. This will build sales history in the same format as your PRICE file, and your new Price Maintenance program can then import that information right to the maintenance screen. And because the key to the new SALES-HIST file is the same as your PRICE file, the program won't have to do any calculations of sales information,

which will keep the program responsive.

The OVERRIDES file is harder to work with because it contains multi-valued fields, and you can maintain pricing on either Price Groups or Products. But the concept is exactly the same, and if you design it properly, the maintenance screen can be just as easy to use as the one for your PRICE file.

These ideas will greatly simplify the keypunch process and allow you to update multiple records from one screen, which will take a lot of overhead out of the maintenance process. But just as important, it will integrate the kind of information that your sales management needs to see in order to make intelligent pricing decisions.

Gary W. Brown, CMA *is a process improvement and project management consultant with over 22 years as CFO / CIO in a supply chain environment.*

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410.543.2158

Tips & Tricks:
Pricing Maintenance for Advanced SHIMS Users
Gary W. Brown

Rampart Supply Company
Avoiding the Chaos of In-House Billing

Background
Rampart Supply, headquartered in Colorado Springs, has been serving the wholesale plumbing industry since 1968. Rampart serves the residential and commercial plumbing markets as well as the industrial PVF (pipe, valve, and fitting) markets with a heavy emphasis on the mining industry.

Rampart was billing their customers either daily and weekly and found the process to be time consuming and at times, frustrating. They were considering hiring a person just to handle their billing as they were spending hours printing, folding, sorting, stuffing and sealing envelopes. Further, when customers called with billing questions it took considerable time to look up information and answer their questions.

According to Renee Keene, Office Manager at Rampart:
"Billing took time each and every day. Fridays were chaos in the office. All work would stop as we turned our attention towards getting out the bills. All the multi-page bills made things extra difficult for us."

Colin Perry, President of Rampart Supply, attended a WIT meeting and met with Billtrust. Colin knew that he needed to find a better solution for the delivery of bills but was skeptical of turning the process to an outside company. He was also concerned with the ability of Billtrust to integrate with their accounting software (Infor SXE).

Rampart Supply Company Objectives
- Reduce costs
- Simplify operations
- Improve customer satisfaction

Solution
Rampart implemented Billtrust's CompleteBilling™ solution. With CompleteBilling, Rampart's customers would be able to choose how they wanted to receive their bills: U.S. Mail, E-mail or Fax. Further, Rampart took advantage of Billtrust's CustomerCare system that let them easily look up customers billing information and answer questions.

The transition from doing bills in-house to using Billtrust took 4 weeks to implement. During this period, Billtrust redesigned Rampart's bill using their best practices and ensured a smooth transition from their current accounting system (InFor SXE). With Billtrust support, the SXE files were easily transferred without needing the help of Rampart's IT team.

Results
Rampart achieved cost reductions of over 30%. Along with the labor savings, Rampart realized material and postage savings as well. Rampart never had to hire an incremental person to handle the billing process.

According to Colin Perry, President Rampart Supply, and WIT Vice President
"Billing had truly become a headache for us and I knew something had to change. At first I was not comfortable with turning the billing to a third party. However, the more I spoke with Billtrust the more convinced I became that this was a way for us to save costs and simplify things in the office. The transition was easier than I expected and the savings in time and money were considerable."

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WORRY-FREE SOLUTIONS FOR DISTRIBUTORS AND DEALERS

Like many distributors and dealers, you are constantly searching for ways to give your company the technological edge it needs to succeed, without adding to the problems and worries you already face. This white paper provides a short-cut path to learn about cost-effective solutions to your current challenges. You'll receive strategic insights to improving your business today, advice on avoiding costly mistakes with ineffective and out-dated technologies, and guidance on the best uses of technology for today and tomorrow.

The solutions for distributors and dealers described in this white paper have enabled companies just like yours to unlock the opportunities and profits hiding in their business, giving them the power to improve performance and increase value in the face of dwindling resources and ever tightening markets. It also includes case studies of distributors and dealers who have cut hundreds-of-thousands of dollars out of their on-going costs.

Choosing the right technology solutions these days is not an easy task. It is no secret that many technology vendors offer legacy systems disguised as modern solutions. You definitely don't want the software support¬ing your company's critical payment, billing and warehouse management to run on outdated technology. You might already be running a legacy system, but are nervous to change because the best choice for their technology seems unclear. You may have also heard that the cost of modernizing a legacy system would be dramatic, and you want to make sure you make the right choice. Rest assured that the investment in a migration to a modern system is less than the cost of potential service-related failures should your database become corrupted, or the potential loss in sales by not having adequate order processing or inventory control capabilities.

Some legacy software users are writing their own modifications to increase speed and productivity, but there are almost always considerable manual and paper-based processes with these systems. As distributors and dealers have increased their product offerings and their businesses are more complex, the limitations of this legacy technology and the resulting inefficiencies are amplified. The staff of a distributor running a legacy system front office, back office, and warehouse are spending hours cross-referencing customer data between their legacy system and separate e-business or WMS systems, a time-consuming process at best.

If you are considering replacing your outdated system, you are not alone. The Internet has placed strong demands on most companies and computing systems, creating high-bandwidth demands that most applications built just a few years ago cannot handle. Perhaps you purchased the system before you realized how important open communications and Web services would be to your business strategy. In most cases, older distribution management applications cannot easily interact with the Web, resulting in efficiencies, reduced levels of customer service and an impaired ability for your company to grow.

Your company may have weathered organizational changes and marketplace shifts with flying colors, and you may be sure that all your computer systems are sufficiently patched up to tackle the next challenge.

Don't be fooled. While replacing worn out software can be difficult, running a company using old software can be dangerous. After a careful analysis of business operations and performance bottlenecks, the costs of keeping the status quo can be surprising. As your business dynamics and the scope of operations continue to expand, the opportunities for releasing your company from the limitations of legacy software have become too large for leading companies to ignore.

Migrate or Modernize?

There are typically two ways to address your issues. You can get rid of all the software that is currently causing you pain and migrate to a new and modern system. Or, you can modernize and find a way to use another software product to make your old systems Web friendly.

Either way has risks. Your current system is, in many ways, like the foundation of a house. How far you want to go

depends on how bad the foundation is. If the foundation is faulty, your house is going to collapse even if you upgrade the kitchen. Infor specializes in helping distributors and dealers modernize their current systems. In fact, many large distribution companies have already implemented our e-business suite and CRM solutions. You don't have to have other Infor software running, and you can still achieve new efficiencies and productivity by Web-enabling those old systems.

The Legacy System Millstone
Legacy applications underlie almost every enterprise. In general, the applications may be reliable, but they're expensive and difficult to maintain. According to Gartner, between 60 percent and 80 percent of an average company's IT budget is spent on maintaining existing systems and applications. That means that most of the money going to your IT department is not helping to improve your business.

Many distributors face the challenge of migrating from multiple and disparate legacy systems to a single software system that can link to the Web because they know they need the added efficiency and a clear way to cut costs. Disparate systems can't talk to each other so customer and vendor information has to be entered manually, which is very slow and has a greater chance of error. It becomes difficult and expensive to do simple routine sales tasks, such as administer new contracts or make changes to existing customer accounts. That makes it very difficult if not impossible for the company to be competitive and deliver to national accounts or other large customers that expect their suppliers to have fully integrated Web-enabled systems.

Infor's fully Web-enabled software is capable of communicating via almost any method currently demanded by the customer, such as EDI, XML, HTTP, JMS, e-mail or even fax. In addition to the competitive advantage you'll realize through automation, our robust solutions will immediately increase the ROI from technology because maintenance costs will be lower than with a legacy system. And by linking to the Web, you will put your company in closer contact with your best trading partners, customers and vendors.

Look Before You Leap
Before starting your migration to a modern system, distribution and IT executives must understand what their legacy system does and whether the way the system works actually matches the business strategy. You can avoid another migration in the future by picking the right technology today.

Work with your CIO and your new technology vendor to develop a vision of where you want your technology resources to be in two, four, six and eight years. Ask where your database support will be in each of those periods.

Assess what skills are available and know what your investments are for maintaining your legacy applications. Does your current system map the key business processes that are critical to your success, or are you changing your processes to fit inflexible technology?

Because Infor is committed to bringing ROI to each customer, we perform an in-depth value assessment survey before taking on any project.

Technology is a business partnership first and foremost, and improving the
bottom line is the primary goal. The margins in distribution are too tight to risk solutions that don't show immediate payoff. An Infor value assessment is a full analysis of a distributor's business process, their current system, and a comparison of key performance indicators (KPIs) for their industry. That baseline data is then compared to those of other Infor customers to determine the potential for enhancing the bottom line.

In a cost-cutting environment, it is important to understand that moving away from your legacy system will provide a competitive advantage. CEOs and CFOs have to look at both the short and the long run. Now is the time when you really want to push ahead of your competition. If you get ahead now, you will be better positioned in the future.

Too many distributors are wasting money. They realize their current system is failing them yet they stick with it in upgrade after upgrade. Migrating to an Infor system is easier than ever thanks to open architecture that respects your current business rules and an experienced team of business consultants who understand the distribution industry. Your legacy systems are the technical keystone of your company's business strategy.

INFOR COMMERCE CONNECT
Just a few years ago, the biggest obstacle you faced as a distributor was integrating your existing business operations and applications into one efficient process. Tracking orders through your warehouse and automating your purchasing were enough to dgive you a competitive advantage over the other suppliers in your community. But now the rules of business have changed.

Today's distributor must integrate business operations beyond their four walls. It's no longer enough to connect your back office to your warehouse. You now need to connect to your suppliers, customers and anyone providing value-added services to your supply chain.

❏ Your IT infrastructure must afford the partners within your community access to the information within your back office systems

❏ You must be able to accept information from your community in any format and integrate it so it can be processed seamlessly

❏ You cannot compromise your organization's security and internal controls or go through an expensive process of replacing your existing information system.

Infor Commerce Connect allows you to transmit EDI, XML, e-mail and flat file documents to any system, regardless of the technology used. Since it is a browser-based system, it is available anywhere you have Internet access. It's a realistic and worry-free e-business solution for single distributors and dealers.

Whether integrating to trading partners, applications or Web services, Infor Commerce Connect is the toolset for all your connectivity needs. It is your any-to-any messaging and connectivity solution, and provides a single superhighway to reduce the time and cost associated with developing and maintaining connections. Messaging, routing, translation and logging of transactions are all accomplished with the Commerce Connect Toolset.

ECOMMERCE CASE STUDY:
HISCO ACHIEVES ROI

Infor customer Hisco, a specialty distributor of products to the electrical, electronic and industrial OEM (Original Equipment Manufacture) market, thought it was spending too much money and time on manually entered purchase orders and network fees. It knew there had to be a better, faster and less expensive alternative.

Applied Materials, a customer of Hisco, went to an online purchase order system. This required Hisco to manually release orders through a secure Website and then manually compare its back office system in-stock products against release quantities in the online PO system. Once the items were released, Hisco manually entered orders. This was a very time-consuming process with a lot of room for errors. It was also hurting Hisco's bottom line, requiring additional personal resources and resulting in EDI charges and additional required hardware.

Hisco decided there had to be a better way to cut costs and streamline the process. It implemented Infor Commerce Connect software to automate the release quantities in the online PO system and the order entry process in its back office system.

By using Commerce Connect, Hisco saves $146,000 per year because it is not spending money for additional employees, EDI charges, or additional hardware.

Currently, Hisco has fifteen trading partners that perform EDI using traditional "Value Added Networks." Its goal is to move away from the traditional VANs and run all its EDI transactions through Infor Commerce Connect. Using Infor Commerce Connect, Hisco's goal and focus is to cut VAN charges, transactions cost and annual EDI support cost by 100%, a savings of $27,000 per year.
"Today we see more of our vendors implementing their own online ordering system, streamlining their order entry process, and causing duplicate entry on our end. Hisco's goal was to enter the order (in the back office system) and have Infor Commerce Connect talk directly to the vendor's online ordering system, streamlining business flow in both directions," stated Nelson Picard, IT Manager of Hisco.

"Hisco is looking at Infor Commerce Connect as an opportunity to bring added value to our customers,"

continued Picard. "We are turning manual processes and purchasing into automated processes with Infor Commerce Connect. Hisco brings a lot of added value to our customers and we are looking at Infor Commerce Connect to separate us from our competition."

As Hisco has discovered, Infor Commerce Connect offers a single, efficient solution for all transaction messaging needs. It is both robust and reliable, and offers a complete audit trail. A browser-based administrative user interface makes support a snap. Using industry standard development tools, there are many ways to configure Infor Commerce Connect to virtually any user's needs.

INFOR PROCUREMENT TOOLS

Infor's browser-based tools assist in the procurement process and reduce the time, cost and errors associated with manual processing of POs. Unlike other procurement tools, your vendors do not need to be hooked up via EDI, and the user does not need to run a specific proprietary back office system. It is a fast and simple way to connect to your disconnected vendors. This online ordering system integrates with your back office ERP system, creating an automated, real-time, and paperless ordering system.

Infor's procurement solutions save time and money in the automated purchasing chain because you no longer have to waste time at the fax machine, calling vendors, filing paperwork, posting invoices manually or correcting internal mistakes and vendor errors. This browser-based tool assists in the procurement process and addresses all your online vendor needs:

- ❑ Back office interface and integration capability

- ❑ Security authentication system

- ❑ E-mail notification system

- ❑ Customizable area for text and graphics relevant to a particular buyer commerce center

- ❑ Detailed e-mail text and subject line including PO number and the company names of the buyer and the vendor

- ❑ History log tracking of all changes made to PO and storage of PO in underling database

- ❑ Database independent (MySQL, SQL, Progress, Oracle)

- ❑ Purchase order filter and sort by capabilities

- ❑ Vendor access to change price, quantity, delivery date, and unit of measure for each line item

- ❑ Vendor access to view line item comments, including mandatory ones that must be viewed when Vendor acknowledges

- ❑ Vendor access to create or modify and send order text or HTML notes to the buyer

❑ Vendor-saved PO changes so acknowledgement can be finished later

❑ Validated PO submissions against tolerances set by vendor and buyer notification of "acknowledge by vendor" if outside of tolerances

PROCUREMENT CASE STUDY: ENDRIES INTERNATIONAL SAVES $75,000 PER YEAR

Endries International, a world leader in inventory management solutions, chose Infor's browser-based tools to assist with the procurement process and provide the technology to help it reduce costs and errors from manual entry. Endries has over 70 locations across North America, Europe and the United Kingdom.

"Infor's solution was chosen because we wanted to update the way we conduct business," said Todd Fischer, CIO and Vice President of Endries. "We had been taking a traditional EDI route, but it just didn't give us what we needed. We wanted an easy, fast and accurate way of communicating with our suppliers online."

By using Infor's browser-based tools to assist in the procurement process, Endries will be able to reduce the time it takes to place an order with its suppliers, because it won't have to re-key order information and clerks won't have to leave their desks to send a fax – all of their tasks will be performed online. This will decrease payroll costs and eliminate errors, while improving service. All communication with its suppliers will take place through the online system, so it will not matter what software suppliers use to place or receive orders. "We wanted to increase our ROI and decrease costly mistakes. We wanted to avoid postage, streamline our process and eliminate readability issues common with faxed invoices and acknowledgements. We wanted to get our invoices out quickly," continued Fischer. "Infor's solutions addressed every one of these issues."

Within the first two months of going live, over 100 of Endries' vendors had signed on. The vendors saw immediate benefits when Endries showed them the system and have found it easy to use and extremely flexible. Even loyal EDI users say they now prefer to use Infor's solution because of the ability to quickly update purchase orders and send acknowledgements.

Surprisingly, improving the collaborative and purchase order acknowledgement side of the procurement process has been one of the largest benefits to vendors (e-mail, PO discrepancies, note functionality, PO history, etc.). They can now make changes quickly, and send and receive feedback fast.

The bottom line result is probably the most important. While cost savings are still being discovered, Endries estimates that this tool has already saved $75,000 per year in personnel time.

Endries International turned to Infor Distribution Essentials eBusiness solutions because of our history of reliable distribution solutions. Endries, which already runs Infor Distribution Essentials ERP software, has built a trusting relationship with Infor. "They are the clear leader in e-business technology for distribution, and with so much at stake we knew we could count on Infor to deliver what we need," said Fischer. INFOR

DISTRIBUTION ESSENTIALS

Infor Distribution Essentials provides comprehensive solutions focused on solving distribution industry challenges, Infor Distribution Essentials are helping thousands of distributors optimize their operations and reduce costs. To address specific verticals within the industry, we rely on our deep domain expertise to deliver integrated, platform-independent components:

Enterprise Resource Planning
Supply Chain Management
eCommerce
Customer Relationship Management
Enterprise Asset Management
Enterprise Performance Management
Financial Management System
Product Lifecycle Management
Supplier Relationship Management

More than 4,500 distribution companies — from small and medium-sized firms to some of the largest distributors in the world — rely on Infor Distribution solutions. Our solutions prove their value every day, helping our customers reduce operating costs, drive revenue and gain competitive differentiation in the marketplace.

LOGISTICS CASE STUDY: THE REYNOLDS COMPANY

The Reynolds Company (TRC) of Dallas, Texas strives to be a leading-edge distributor by supplying the highest quality products and superior service. As a highly innovative distributor, TRC offers more than $8 million in electrical inventory to their customers online, and their warehouse includes over 18,000 SKUs and more than 45,000 items in their product file. TRC saved $330,000 in the first six months of using Infor Distribution Essentials logistics solution.

In receiving, TRC made improvements from the moment material was identified at the door to the time it was placed on the shelf. The amount of time required to update its quantity on hand for sale has reduced from an average of four hours to 30 minutes from time-of-receipt. The number of PO corrections made by purchasing has been reduced by 65%. The Infor solution allows TRC to perform many activities during the receiving process: receipt-entry automation, barcode labeling of inbound material, correcting mislabeled material, and the ability to backtrack a mistake after it is identified. The receiving capabilities in the solution help to improve the end goal of delivering the right product to the customer at the right time. In PO corrections alone, TRC saved over $28,000 in the first six months using Infor's Distribution Essentials logistics solution.

The Inventory Control (IC) group within TRC has witnessed the most change with the new solution. Historically, IC was

assigned the task of finding material that was lost in the warehouse. As a result, it could not effectively research discrepancies and would search trucks and make adjustments in the system. Thanks to Infor's solution, IC now has the information it needs to efficiently research inventory discrepancies. In addition to increasing accuracy, TRC has been able to use this information to improve the processes of their back office as well.

In addition, the IC team is responsible for TRC's two-pronged cycle count program. First, a traditional cycle-count program classifies products as A, B, C, D items and the standard 4, 3, 2, 1 count per year. Second, is a bay-count program that counts every item within a location and determines if all of the items within the bin are supposed to be there. TRC is now finding and correcting material that was not counted at inventory and correcting material that has been misplaced. The end result is the elimination of annual physicals and the increase of accuracy given by perpetual inventory.

One of the biggest areas of improvement is in warehouse service level. TRC calculates a warehouse service level by the lines and quantity requested to ship against the actual lines and quantity shipped. Several times a day, sales would have quantity to sell, but the warehouse wouldn't be able to find the quantity sold. Before Infor's Distribution Essentials Logistics solution, the shipping department was averaging 95.3% service level during the picking process. Inventory Control was then tasked with finding any material not found by shipping. It found an average of 47% of the material not found by the shipping department, increasing the total warehouse service level to 97.5%. In just the first thirty days on the new software, the shipping department achieved a 98.58% accuracy level.

The shipping department went from an average service level of 95.3% to 98.15%, a net gain of 2.85% in the first 30 days. Shipping is currently averaging greater than a 99% customer service level. Inventory Control no longer spends its time hunting for missing product, but can easily research why product is missing as well as perform the cycle count program. Shipping has seen savings of $330,000.

It was also discovered that an increase in volume had a severe impact in the warehouse service level. For every 10% increase in volume, TRC had a 1% decrease in the warehouse service level. The decrease in service level affected the total volume, not just the increased volume.

This means that if 1,000 lines were picked with a warehouse service level of 97%, then 30 lines did not get picked completely. An increase to 1,100 lines would result in a drop to 96% warehouse service level with 44 lines not picked completely. With the new logistics solution in place, TRC has experienced volumes as high as 150% with no impact to warehouse service level.

Before the new solution, when a customer reported a miss-ship, TRC had no other choice but to give the customer the benefit of the doubt. With the Infor logistics solution, not only have the customer calls decreased by 75%, but TRC has

the ability to track the order back to the exact location from which the product was pulled and to perform counts on material in real time to determine if the inventory count is correct.

The Reynolds Company has seen improvements in all aspects of warehouse operations with logistics solutions from Infor Distribution Essentials. Receiving has shown a 65% reduction in errors and shipping has improved a remarkable 89% since implementation.

The first six months on the new solution have resulted in a payback of over $350,000 in soft money. All of these benefits were achieved with a 13% reduction in operational personnel and the elimination of annual physicals.

THE RIGHT SYSTEMS ARE ESSENTIAL
As companies pass the critical stage where they go beyond the ad hoc use of isolated systems to power their business to accepting their reliance on technology as a strategic business driver, the opportunities available for working with their solution provider become quite clear. Have you dreamed of connecting your business to public marketplaces and private trading exchanges? What about transmitting data using XML, EDI, and other file formats? What would your business be like if you could take orders over the Web and allow employees and customers access to your back office data online? What would your customers think if you offered product information such as pricing and availability on your Website? Would your revenue increase if your sales team could access real-time account and product information while at a customer site? Would your sales increase if your project managers could track job information accurately and salespeople on a job site could place an order from a handheld device? Where could you take your organization if you had the right tools?

Infor's product vision is broad and our solutions are deep. We offer products that integrate not only with each other, but with every part of your business. We offer solutions for sales order management, purchasing and inventory management, finance and accounting, warehouse logistics, business intelligence and analytics, electronic commerce, customer relationship management, events and workflows, and mobile computing. We protect your investment from the first day through the life of your business. But don't just take our word for it, listen to our customers.

"They are known for easy implementations, deep integration and advanced technology," says Terry Powell, Vice President and Chief Financial Officer for Mueller Roofing Distributors. "They have a history in our industry of real return on technology investment and I know our partnership with them will be even more valuable in years to come."

Dave Lisowski, President of Denver Wholesale Florist seconds those sentiments. "I feel safe with them because they not only have the most advanced technology for distribution software today, they also are committed to the future of our company with their continued research and development."

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TUG Welcomes the New Enspire User Group

Bert Pedersen
Genreal Manager
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A user group is only as good as its users, and TUG is as good as it gets. It is in the best interest of everyone to have a strong user community, but not everyone realizes this, or they are not willing to invest into it. It takes long term thinking to understand the value in user groups, and thus it is that the cream of the crop supports user groups, and attends, and contributes to the conferences.

I have been involved with various user groups over the years, and I can confirm what an enormous benefit to A.E. Carter it has been to be involved. True, there were various times where we were giving more than we were getting. But, inevitably, we had a return" in spades" on our investment.

I would like to thank all those involved in this inaugural TUG conference for Enspire users.

Your TUG volunteers have done an amazing job, and deserve our appreciation, with a special THANKS to Karen & Gary Brown for their many hours of effort.

And, a HUGE Thank You! to our break out session instructors. We appreciate the value you have brought to all the attendees.

Bert V. Pedersen
(Temporary) Enspire SIG Leader