

**ERP Buyer's Guide**

# For Discrete Manufacturers

10 questions to ask if you want to find the right ERP  
for your business.



# Choosing ERP: what do you need to know first?

Any new software is a big step-change, so it needs to deliver big value – and ERP does just that.

The right ERP solution will transform your discrete manufacturing business. How? By giving you real-time visibility over all your operations, so you can streamline every process throughout the shop floor and supply chain.


What's even more powerful, by making efficiencies you'll reduce costs and create new opportunities to grow and scale.

The secret to adding value through ERP is buying the right software. And what makes that software 'right' depends on your company's needs. Maybe you're using Excel and need something more robust. Maybe you're transitioning to the cloud and your current ERP system isn't part of this upgrade. Maybe you need an impressive piece of technology to simplify complex operational processes. You may even need something that covers all three challenges.

At Aptean, we want to set you on the path to transformation. That's why we've created this ERP buyer's guide for discrete manufacturers. Success is serious business for us, so we've looked closely at the features and functions you should evaluate to find the right ERP for your business.

Here are some questions you should be asking before signing on the dotted line...





Ready for  
**What's  
Next, Now™**

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## Can it create a tight-knit shop floor operation?

When you're looking at ERP value, a good place to start is the shop floor. Here, the aim is to give your people the real-time information and visibility they need to drive efficiencies and make smarter, more informed decisions. This will empower them to respond quickly and appropriately to changing demands.

Find ERP software that builds easy workflows by integrating data into one system. Ideally, your team should be able to share schedules, check and issue materials, and release work order instructions directly with the shop floor. And if something changes, they should have the communication tools to make labor changes, move inventory and reprioritize work.

By investing in ERP with these primary shop floor management functions, your workforce can streamline every element of shop floor production and manage everything in one place – for an efficient, tight-knit operation.



## Can it help me streamline spending?

Efficiency isn't just an operational goal. ERP should help you to streamline costs, by identifying where the highest spend takes place in your manufacturing process.

Make sure the ERP software you're investing in has full reporting capabilities built-in, so you can analyze all your costs. Ideally, it should cover job orders, sales orders, work in progress (WIP) and cost of goods sold.

The best ERP will give you a high-level overview to track spending trends, but also a quote-by-quote perspective to understand all aspects of your business in granular detail – saving you money in both the long-term and short-term.

Good software will also show estimated costs versus actual costs. So the next time there's a similar job, you can easily make adjustments for more accurate pricing.

It's these kinds of efficiencies that will keep your discrete manufacturing business competitive, so they're worth discussing in further detail...

## Can it generate accurate quotes and build my business pipeline?

As we've already mentioned, ERP simplifies the estimating and quoting process. For discrete manufacturers, it puts critical data at fingertip distance – so your staff can use one piece of software to look up prices, review previous orders to see how they were built, and monitor inventory components.

More importantly, all this data can be combined instantly to generate quotes, getting rid of time-consuming manual calculations. Plus, technology is much less prone to error, increasing accuracy.

Some ERP software is even more transformative, linking to BOMs, routings, configurations and price summaries, for truly reliable estimates. The system will allow you to look up order history, so you can requote based on the materials used for similar projects – building in pricing rules for add-ons and configurations. This is useful to quote accurately, and to make sure you're competitive in the market.

You can also use ERP to build your business pipeline, zeroing-in on hot prospects and in-demand products without having to collate huge volumes of data by hand. It's a simple way to identify and report on potential new customers.





## Can it optimize inventory – even when I’m building-to-order?

At Aptean, when we speak with discrete manufacturers, keeping material costs low is always high on their agenda. ERP can help with this challenge.

Forget outdated information – a good ERP solution will tell you what your inventory looks like in real-time, before you have to make a materials management decision. No more guesswork or gut instinct.

The trick with managing materials is to limit overbuying but maintain flexibility. ERP will allow you to plan the purchasing queue, while incorporating build-to-order and build-to-stock product structures. You’ll end up with just the right amount of material.

With this in mind, when you’re buying ERP, look for software that will help you decide what to buy and how often, for accurate purchasing decisions. The ideal system should update inventory quickly and automatically – synching data from everyday transactions like receipts, transfers and movements – for accurate materials management.



## Can it help me plan ahead without being too rigid?

In business, planning is everything. But when you're buying an ERP system, it needs to do more than just help you plan ahead – you need the flexibility to pivot easily, adapting to market demand.

As a discrete manufacturing business, it's important to look for software that enables you to sequence work center activities around due dates. And it shouldn't be too rigid; if new priority orders arise, they can be scheduled-in with minimal impact on other deadlines. This level of adaptability will have a huge impact on your customer service levels, helping you to minimize late jobs. It also enables you to optimize productivity day-in, day-out, which will increase profits.

Better scheduling will also help you identify critically constrained resources. If people power is the problem, additional staff can be deployed to any bottleneck work centers. If inventory is the issue, supplies can be buffered and protected by adjusting the schedule until further materials are available.

Flexible planning features are especially valuable to make-to-order, make-to-stock and mixed-mode manufacturers. ERP is a smart way to automate scheduling based on up-to-the-minute information, adjusting shop floor schedules based on real-time demand and availability of materials. The key is to find technology that's easy for employees to use, so they can quickly view job orders and peg individual job tasks to related sales orders or other top-level demands.



## Can it enhance my customer relationships?

Good customer relationships are the heart of your business. To keep that heart beating, they need to be nurtured through a customer relationship management (CRM) system.

When you're looking at ERP solutions, choosing one with built-in CRM will enable you to track accounts, contacts, opportunities and activities for all your customers in one place, linked to live order information.

What's more, tying all your consumer-related data together enables your sales team to progress opportunities down the funnel, and share reports with colleagues.

Important information about each customer is no longer tied up in someone's head – it's documented in a system that everyone can see and use.



## Can it improve quality control?

We've discussed how ERP can improve your knowledge of quantities within your business, but it can increase quality as well – provided the software you select integrates product traceability.

If you encounter a problem, quick response is key. You need to know where that product came from, what other products are affected, and where those products are located.

ERP provides a single source of truth in real-time, so you can track products back through the manufacturing process. More importantly, you can trace the source of the issue and correct it as a priority, to ensure it doesn't happen again.

Keeping a close eye on quality will help you turn out high standard products and manage compliance with ISO and FDA quality systems. And because all operations are controlled through one ERP system, it's easy to take corrective action.





## Can it support my service team in the field?

Technology you can take on tour is something all discrete manufacturing businesses should be striving for. It's far more convenient to buy one product that works in the factory and the field, rather than integrating separate solutions.

With this in mind, consider ERP software with a field service module, to manage off-site equipment installation, repair and servicing. This way, you can keep a full service history of your products, which can be accessed in a few clicks.

ERP will help you to improve customer service too, by enabling teams to review product configurations and complete service/warranty histories.

Field service features are particularly valuable if you manufacture complex products, such as industrial and commercial machinery equipment. You can use ERP to schedule installations, ongoing maintenance and servicing requirements.

Plus, it's a useful staff optimization tool, as you can use it view your service technicians' schedules and track their costs and billable rates, to see where you're spending the most money on field service.

## Will it improve my workflows?

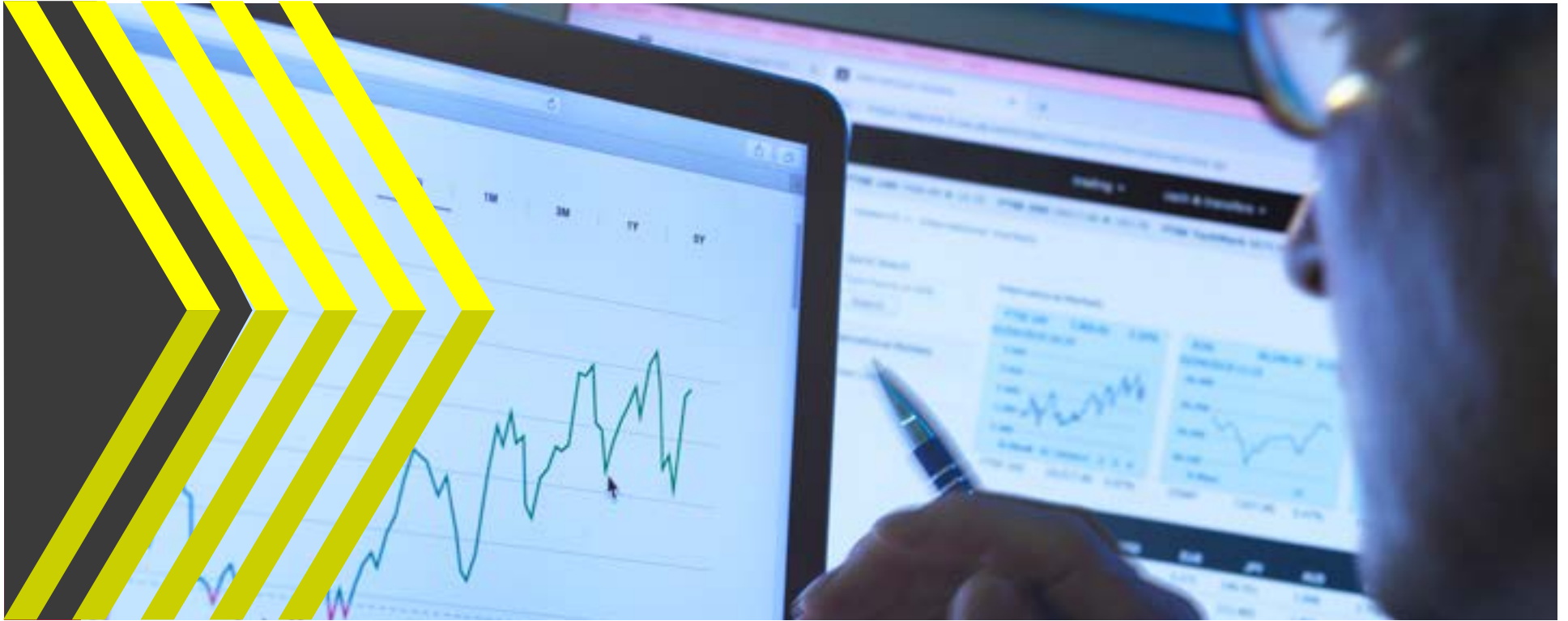
This is a quick and easy box to check, but a vital one too. A good ERP system should streamline your workflow process, so you can:

- › Make quicker, faster business decisions
- › Monitor your business metrics
- › Improve inter-departmental communications
- › Prioritize and review defined events

But more importantly, it should enable a two-way information flow. ERP technology is a really effective way to monitor processes, answer queries and automate communication with employees, customers and vendors.

The leading workflow process management tools won't just react to situations either – they'll predict them. This way, you can deliver critical information to those who need to know as quickly as possible, via automated notifications, texts or emails.





## Can it deliver clear insight?

We've talked about reporting as a sub-benefit to other improvements, but it's worth a standalone discussion.

When you're buying ERP software, look for technology that delivers powerful, standardized analysis tools. The best ERP has out-of-the-box reporting tools that deliver all the critical intelligence your business needs, so you can make sense of complex data. You want to establish baselines, thresholds and KPIs to easily identify bottlenecks or issues, and quickly correct them.

The most powerful reporting features have been built specifically for manufacturers. They include a discrete-specific toolset to manage your business efficiently, gaining insight into challenges and opportunities that exist – or in some cases, before they arise.

Choose ERP that ties in all aspects of your business, from sales and production to quality, inventory, finance and delivery is vital. Integrating this data makes it much easier to tailor reporting based on your own unique metrics and requirements.

Look at how insights are delivered as well. You want an ERP that can serve up data in straightforward charts, tables, dashboards and other advanced visuals. This paints a clear picture for everyone in your workforce to understand trends and take action.



## **I've answered these questions. What's next?**

Production environments are busy, chaotic places, so there's a lot that ERP software needs to do. Answering these questions will help you to decide which features will make the biggest difference, so you can invest in technology that enables change.

But whatever your priorities, one thing is clear. The best ERP is built specifically for you and your industry. A discrete manufacturing solution that centralizes data, offers you real-time visibility across your business, and gets rid of onerous data entry.

Step forward Aptean Industrial Manufacturing ERP. Our solution has been created for discrete manufacturers in job shops and dynamic 'to-order' environments. It's designed for businesses where flexibility and efficiency are critical.

With real-time scheduling, job costing and shop floor execution tools, Aptean Industrial Manufacturing ERP will empower your business to streamline operations, reduce costs and improve visibility throughout your supply chain. Sounds good, right?



# Book your free Aptean Industrial Manufacturing ERP demo

Get a firsthand view of how our software  
can empower your discrete manufacturing  
business.



Aptean provides very specific industries with very specific ERP, supply chain management, and customer experience solutions. In today's fast-paced, highly competitive economy, organizations don't have time to waste forcing homegrown software, spreadsheets, and one-size-fits-all solutions to do things they were never designed to do. Aptean is on a mission to end those work-arounds – with industry-specific solutions instead of generic software, expert support instead of making you go it alone, and a steady influx of new ideas instead of the status quo.

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