

# epitome advantage

THE NEWSLETTER OF EPITOME SOFTWARE

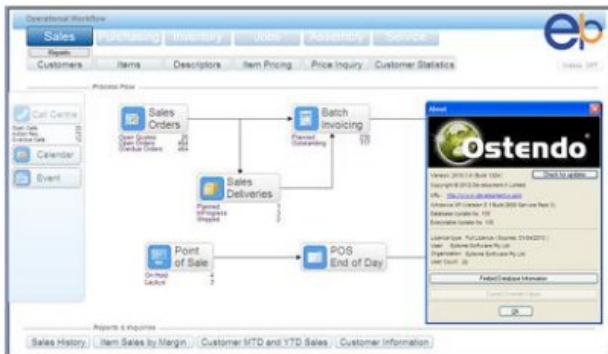
Transitioning MYOB & QuickBooks Users to ERP  
**epitome software**



## IN THIS EDITION

- ➔ Coming Soon! Latest Ostendo Customer Release
- ➔ Epitome ERP: Automation of Email Order Forms to Automated Sales Orders & Picking
- ➔ Managing Complex Warehouse Requirements with Distributed Resource Planning (DRP)
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### Coming Soon! Latest Ostendo Customer Release



The latest Ostendo Update will be announced to Ostendo users shortly. Development-X will send you a communication and download link shortly.

Besides the excellent new features in Ostendo, this update is also a "technology" update, as there is a requirement to update the Firebird Server to version 2.5 BEFORE the update can be applied. It is recommended that you contact Epitome Software before applying the latest Ostendo update.

Our friendly support consultants will discuss your upgrade plans, and advise the best course of action, what is involved, and how to schedule arrangements with you to go through the update process. Please refer to the following link for further information:

Please click here for our Epitome Software Customer Bulletin on the latest Ostendo Update and a summary of the new features.

Click here for further information and the information sheet on our Advantage Assist initiatives.



Epitome +Advantage Assist support packages are a great way to plan your support & customisation requirements and save money. Click here to download the brochure on our Support Plans.

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## Epitome ERP. Sales Order Automation from Scheduled Email Order to Picking Slip

Looking to improve your customer service, increase sales revenue opportunities and streamline sales order processing? Who wouldn't?

Epitome's eREP automated email sales order solution completely automates the sales order process from sending to receiving, taking the heart-ache (and mistakes) out of repeat order processing. You won't have to waste money on order sheets, faxing order templates to customers, shuffling paper-work and most importantly, data entry by operators that can be prone to error. This is a paperless, automated process . . .

Your customers will appreciate that you've made the purchasing life so much easier (and faster), it's available 24/7, and they can select from new products and specials you send using Epitome's List feature. The scheduler can be established for daily and overnight delivery.

Your repeat customers won't have to use a shopping cart system where they endlessly search for codes & descriptions. This is a far more personalised service, and their email order form is priced with their special or negotiated pricing if you've set this up for them in Epitome. When they open their email order form (sample below) they simply fill-in the quantities, and click "send". It's that easy . . .

Unit	Items	Description	Unit Price	Unit Price Ext	Qty	Line Total	Disc
<b>E-Rep Web Order Form</b> 98430 Order From: MANDER GOURMET, 15 Main Street 5084 SA, Generated Date: 17/02/2012, Salesperson/Staff: Mander, Order Instructions: Please deliver after 9AM Bill To: MANDER GOURMET, 15 Main Street 5084 SA, Required Date: 17/02/2012, PO Ref: 3214670, Shipping Method: N/A, Order Total (Ext. Incl): \$0.0							



"Epitome eREP automates the entire sales order process from scheduled customer email order through to . . ."

			Unit	Price	Qty	Total
2	BUR001	Kitchenware Buns Single	Each	\$1.85	23	\$0.0
2	BUN001	Honey Bun Log	Each	\$0.98	16	\$0.0
3	CAK302	CAKE LIME FROG	Each	\$4.75	10	\$0.0
4	PRE03	P/E CURRY & VEG	Each	\$1.718	7	\$0.0

This reduces the risk of your customer shopping elsewhere whilst on-line. They're likely to order more too, when they see the list of products they've bought previously.

Epitome automatically creates the Ostendo sales order for you when it's received by your email system (and can even make it print the picking slips), removing inefficient data entry processes and ensuring accuracy. This saves an enormous amount of Admin time and money. Orders sent by customers late at night (chefs) are created in Epitome over-night, and picking slips can be ready for packing staff first thing in the morning . .

eREP and the Epitome Scheduler are INCLUDED features of Epitome ERP, with only a token fee applying to received sales orders. Prices for tokens are dependant on the volume of automated sales orders you receive so call Epitome Software today to get pricing on our eREP tokens.

[Click here to contact Epitome Software about Epitome eREP](#)

customer email order through to automatic creation of sales orders in Epitome ERP."

"eREP saves on phone & fax call time & costs, stationery & order forms, administration & order entry time, but most importantly for customer service - our automatically created orders from the customer replay email are 100% accurate."

**SPECIAL OFFER**

To get you under-way with eREP automated email Sales Orders, we'll give you the first 200 eREP tokens for free!

Call our friendly support staff on 1800 776 to get eREP organised for your company today.

## Manage Complex Warehouse Requirements with Distributed Resource Planning

Complex warehouse management has been made much simpler with Epitome ERP's Distributed Resource Planning (DRP), now included in the latest release.

Epitome ERP's DRP functionality provides for the ability to manage your multiple warehouses within the one Epitome ERP system, with each warehouse able to maintain its own inventory purchasing and re-order levels.

Nationally distributed warehouses for example often need to respond to the unique buying, selling & distribution patterns for each location given the differing size of the markets relevant to those locations. Where centralised purchasing is in place (due to better pricing for volume purchasing) but where costs are involved when distributing from the central warehouse to other warehouses, then DRP handles those additional inventory costs by allowing sites to be configured through the Costs by Site feature in DRP.

Default warehouses can be established for each site to speed up picking, with the ability to over-ride the default and allow picking from other sites. Inventory Replenishment and Purchasing in DRP also respond to the requirements of individual warehouses, their re-order levels and supplier arrangements.

[Click here to contact Epitome Software about DRP](#)



"Distribution systems today need to reflect the unique purchasing, stocking and distribution requirements for each stocking location."

"Epitome's DRP solution provides individual warehouse costing, configuration & reorder flexibility providing improved analysis of costs & profit by warehouse site."

## Learning About Epitome's Custom Report & Development Services

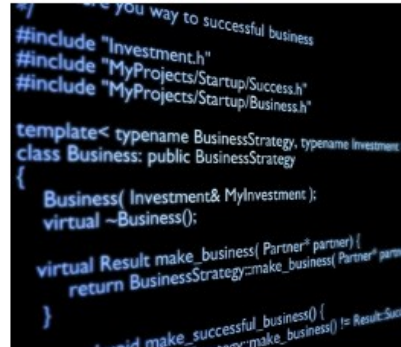
Epitome's ERP is a business information rich environment, with over 300 standard reports, pivots, and views across its many modules.

Every organisation has a special way of viewing information, so it makes sense that your business process technology allows you to set-up, write and maintain your very own reports, forms, queries and even custom scripts that modify the program behaviour with triggers based on Ostendo data and your own Additional Fields that can be added to tables in the system.

Epitome ERP's Report & View Developer makes it easy for IT literate staff to customise standard reports, or create entirely new reports. The screens are easy to use, and with some reasonable knowledge of Structured Query Language (SQL) and scripting or programming knowledge, you can create some purposeful reports, queries and views.

For companies that do not have an internal resource for this, then the friendly team at Epitome Software are certainly able to guide you and inform you of the various options available to you from the Epitome Consulting & Development team.

Epitome Software is an Ostendo Centre of Excellence thanks to our strong development experience. Epitome has produced several industry verticals as a testament to our capability to understand business process and our programming expertise with Ostendo. From simple report customisations, to complete work-flow developments, and through to web and smart device interfaces, there is no challenge we won't take up at Epitome!



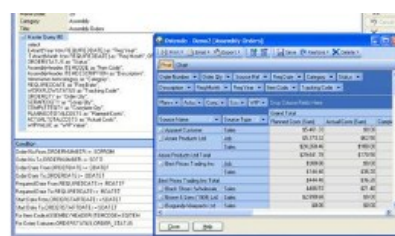
"The Epitome Software development team have created over five industry verticals demonstrating our experience and competency with Ostendo, hence our Centre of Excellence accreditation."



We've recently done some excellent bar-coding reports that have dramatically improved the efficiency and productivity of staff through the use of scanners when picking orders with batch control inventory. We have many customers who have commented positively on our ability to understand and fine-tune their companies exact requirements, utilising the already work-flow rich Ostendo platform, but taking it to a far higher level of productivity.

If it's simple (or complex) reporting or views & pivots, send us a sample of the output you are after, and we'll contact you and discuss the customisation you are after in detail and provide you with a quote. If it's about changing the work-flow of Ostendo to better suit your company, then contact us and we will get your requirements documented and signed off, and get to work on really maximising the productivity of Ostendo for you.

**Please click here to contact Epitome Software about our development services.**



*"Epitome consultants specialise in the customisation of simple reports, pivots and queries through to significant & business specific work-flow solutions to ensure our customers utilise the depth of Ostendo and maximise productivity with their ERP investment."*

## Epitome InTouch. Managing Client & Supplier Communication Effectively with ERP

Microsoft Outlook and eMail have become the core of business communications today. It just makes sense that a professional ERP solution integrates your business Outlook email directly to your ERP Customer records, so that you can easily find the relevant Customer emails via your Customer Relationship Manager (CRM).

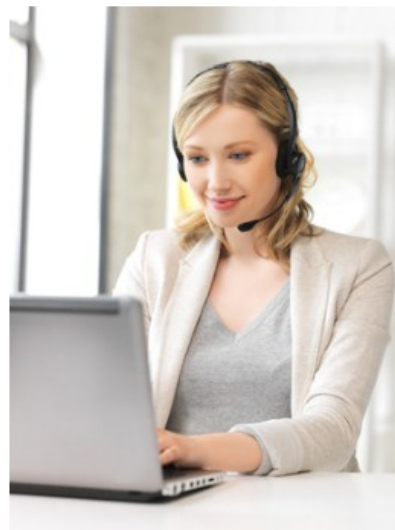
The problem is, not many ERP systems integrate directly with Outlook . . . until now. Epitome ERP's InTouch CRM module helps you keep track of Customer (and Supplier) communications, by creating Outlook emails starting from templates either you or Epitome design, and these get populated with the contact details. Like regular email, these can be adapted to suit, and can have attachments added.

Once they are sent, there is a record of these for later retrieval from the CRM for the Customer/Supplier. Should the customer reply, the "ticket ID" helps to attach the reply email (and any attachments such as PDF's) to that call ticket. Thus there is a track of related email communication for your Customers and Suppliers. This ensures good system tracking of your client emails (helping with compliance for some organisations), related to the Call Centre record in the Epitome CRM. InTouch means you have client emails easily and quickly to hand, improving Customer/Supplier service. They are no longer lost to a particular staff member's Outlook Inbox. InTouch ensures all authorised CRM users can find related emails by simply searching your relevant CRM/Call centre records.

Epitome Software is currently testing & implementing InTouch for its own systems, and we're excited about the productivity gains we are already experiencing by staying "in touch" with our valuable Customers and Suppliers and how quickly it is to send specialised emails and track responses.

Simply click here to **REGISTER YOUR INTEREST** in Epitome InTouch and from that email we will create a Call Ticket in our CRM for your contact with us. We'll even send you an Epitome InTouch email reply and keep track of the email conversation from there.

**Please click here to contact Epitome Software about Epitome InTouch**



*"InTouch takes the head-ache out of tracking client and supplier emails, by integrating with the CRM/Call centre facility in Epitome ERP."*

*"InTouch keeps all relevant emails (and their attachments) grouped to the call ticket so that our customers receive a quicker response and are much happier with the faster service we provide."*

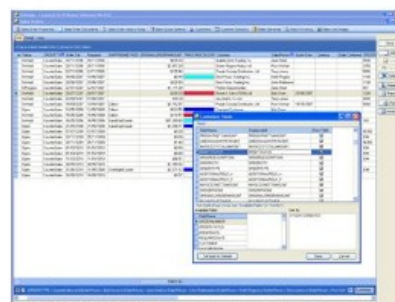
## Hints & Tips: Feature Rich List Screens - Well Beyond Just Lists

When using the Sales, Jobs, Inventory and Purchasing modules in Epitome ERP the first screen typically is the current list of orders, items and other "header line information".

This is a feature rich environment that provides excellent ability to both sort/filter and select, well beyond the usual search box at the bottom right of the screen. Each user is able to filter (click filter) the records displayed, sort the columns of data, and drag the column headings to your preferred column layout.

To select other header fields, simply right-click and click Customise Fields. This will open a dialogue box allowing you to select/deselect the various columns that display on your operator list view. Select say "Original Order Value" (the value of the original order irrespective of subsequent delivery orders off of the original order). That column will be at the end of the list display, you can drag that from the end to wherever you want it in your operator view.

Lists can also calculate, count, average & sum data in the columns. If you have a selection of e.g. Sales Orders (e.g. Original Order Value), and you want to know the value of that filtered list, simply right-click on the blue footer bar under that column and you will see a prompt for sum. Click that and the footer will display the value total of ALL the selected orders and their original ordered value. You can also click on the column header to do special column filters such as "between",



*"Epitome ERP's lists screens provide excellent adhoc reporting and data extraction to Excel."*



"like" and so on.

Essentially, you are creating an adhoc report on the fly from this feature rich, list facility. Once you have your selection just right, you can export that as a PDF report, Excel file for future use e.g. external accountant. You can also save your filter/sort settings as a file that you can recall later. Simply click on the Customise button at the bottom, and use Save As . . . to save your filter.

Please click [here](#) to contact Epitome Software for further information



*"Save sort/selection filters so that you can easily recall complex criteria for later use such as Excel exports for mail-merge or PDFs to other staff".*

## IN THE NEXT EDITION OF EPITOME **ADVANTAGE** . . .

**LATEST OSTENDO UPDATE:** Introduction to Constraint Based Scheduling.

**LATEST OSTENDO UPDATE:** Introduction to Jobs, Sales & Purchasing Budgets

**CUSTOMER ASSET SERVICING:** Service Plans, Service Reminders, Creating Service Jobs

**CRM CALL CENTRE:** How Customer Relationship Management (CRM) Improves Service & Sales

**JOB TEMPLATES:** Saving Time with Job Templates.

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