



How Everything Ties Together

*Integrated ERP, Workflows, First Contact, Order Entry & Billing,
How Things Tie Together*

Engage 2019
EBMS User Conference

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Solutions Consultant

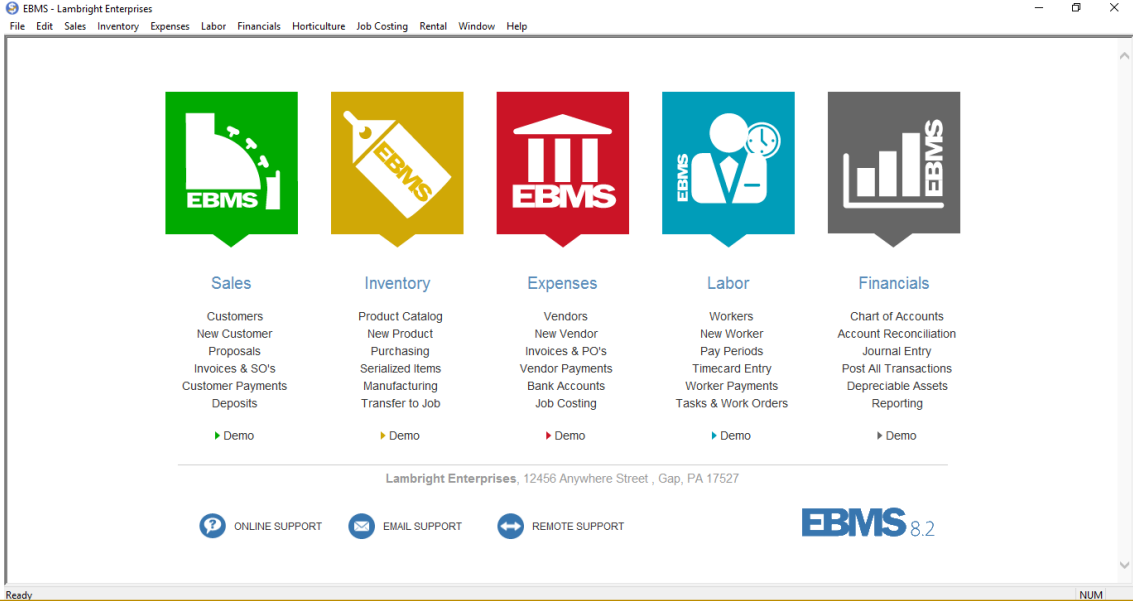
Expert in Eagle Solutions Services:

EBMS Training, Consulting, Setup, & Customization Services

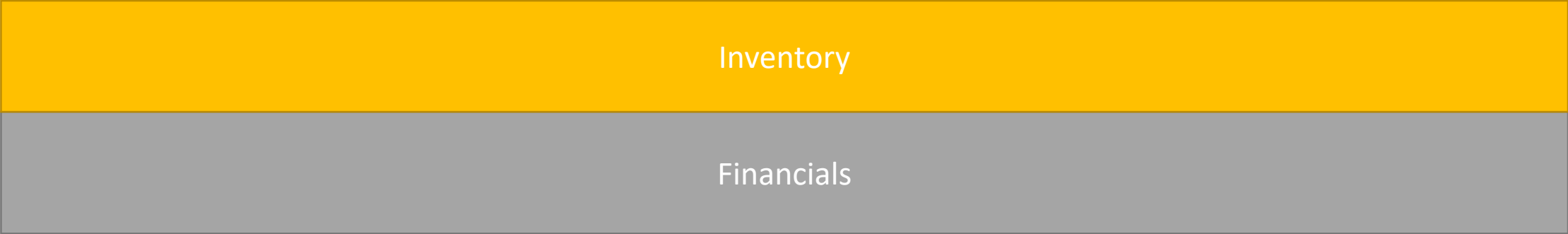


I. Integrated ERP

- Enterprise
- Resource
- Planning



- Suite a set of programs with a uniform design and the ability to share data.



When Things Impact Financials

- Processing
- Unprocessing
- Adjustments
- Monthly Process Utilities
- Payments

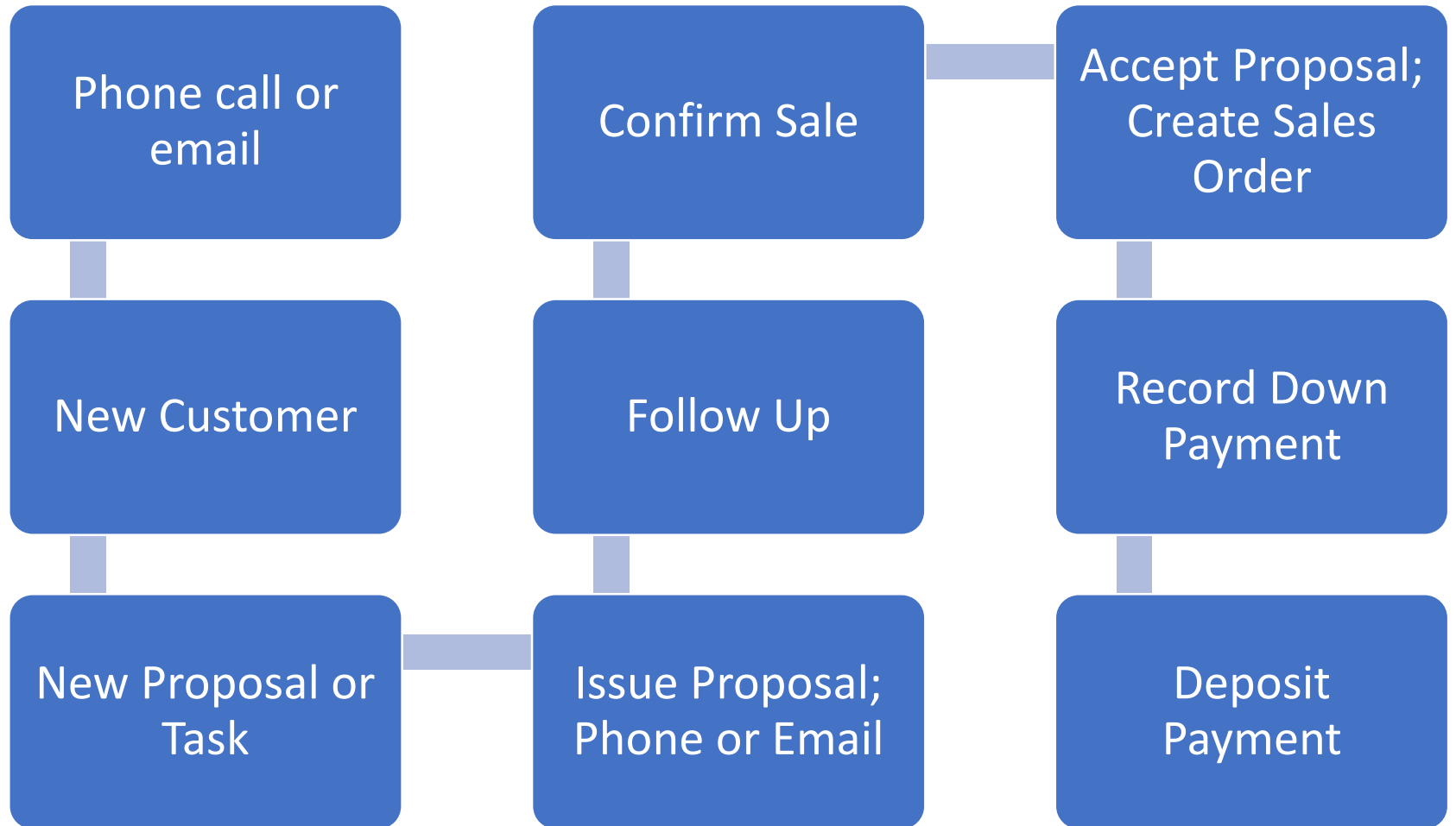


II. Workflows

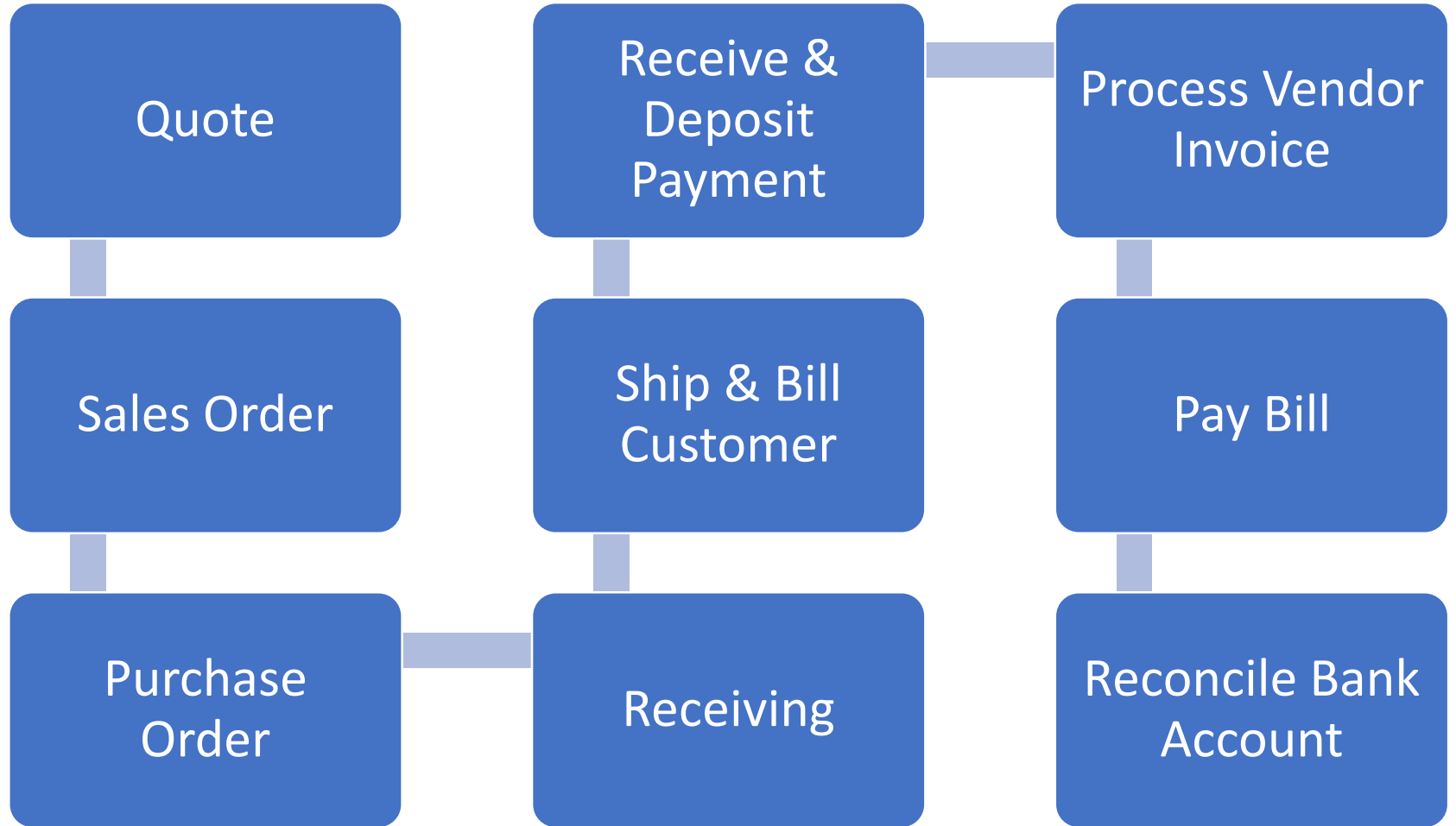
Try to make your workflows fit your software tools...



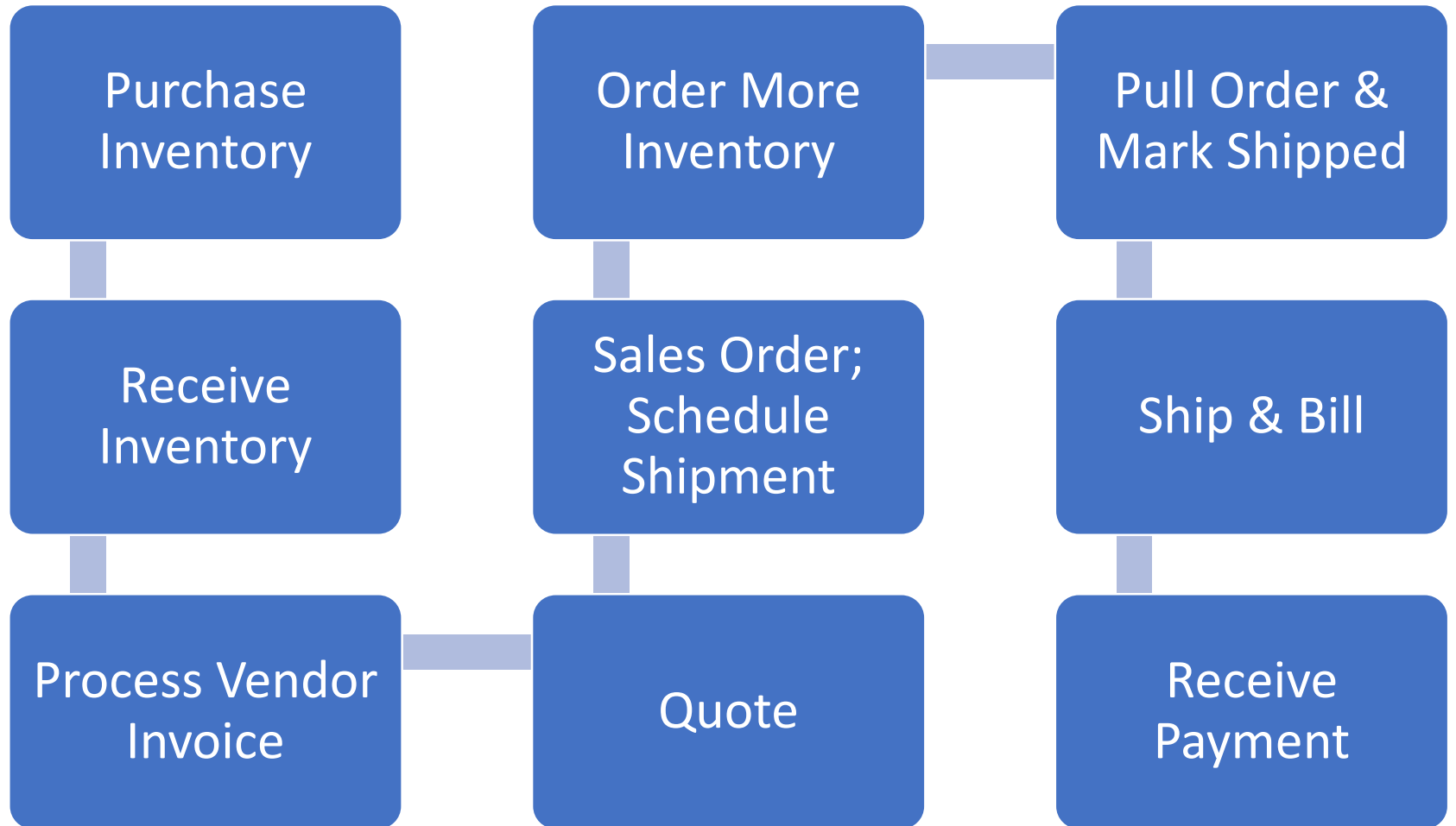
- Quotes



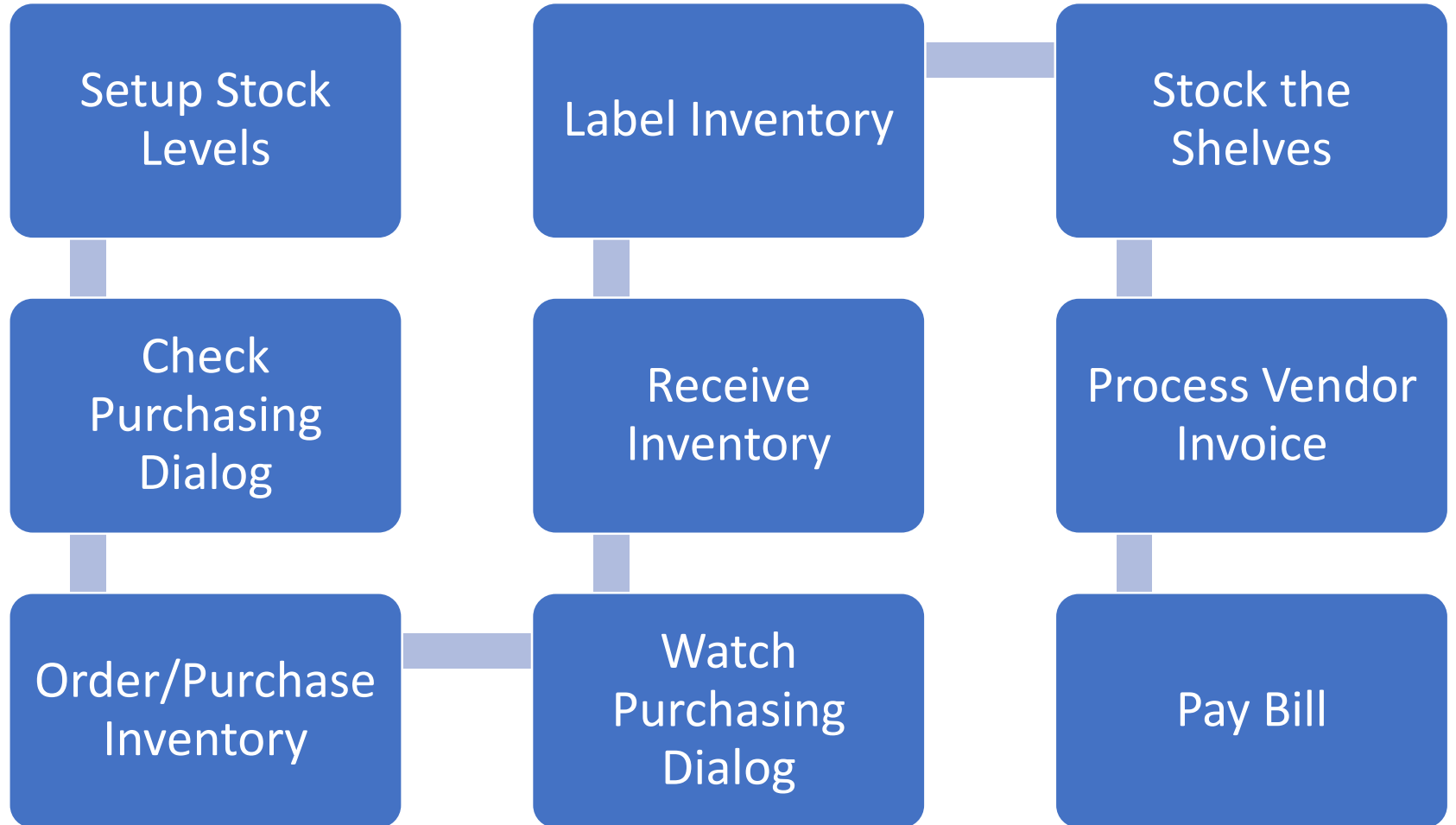
- Special Orders



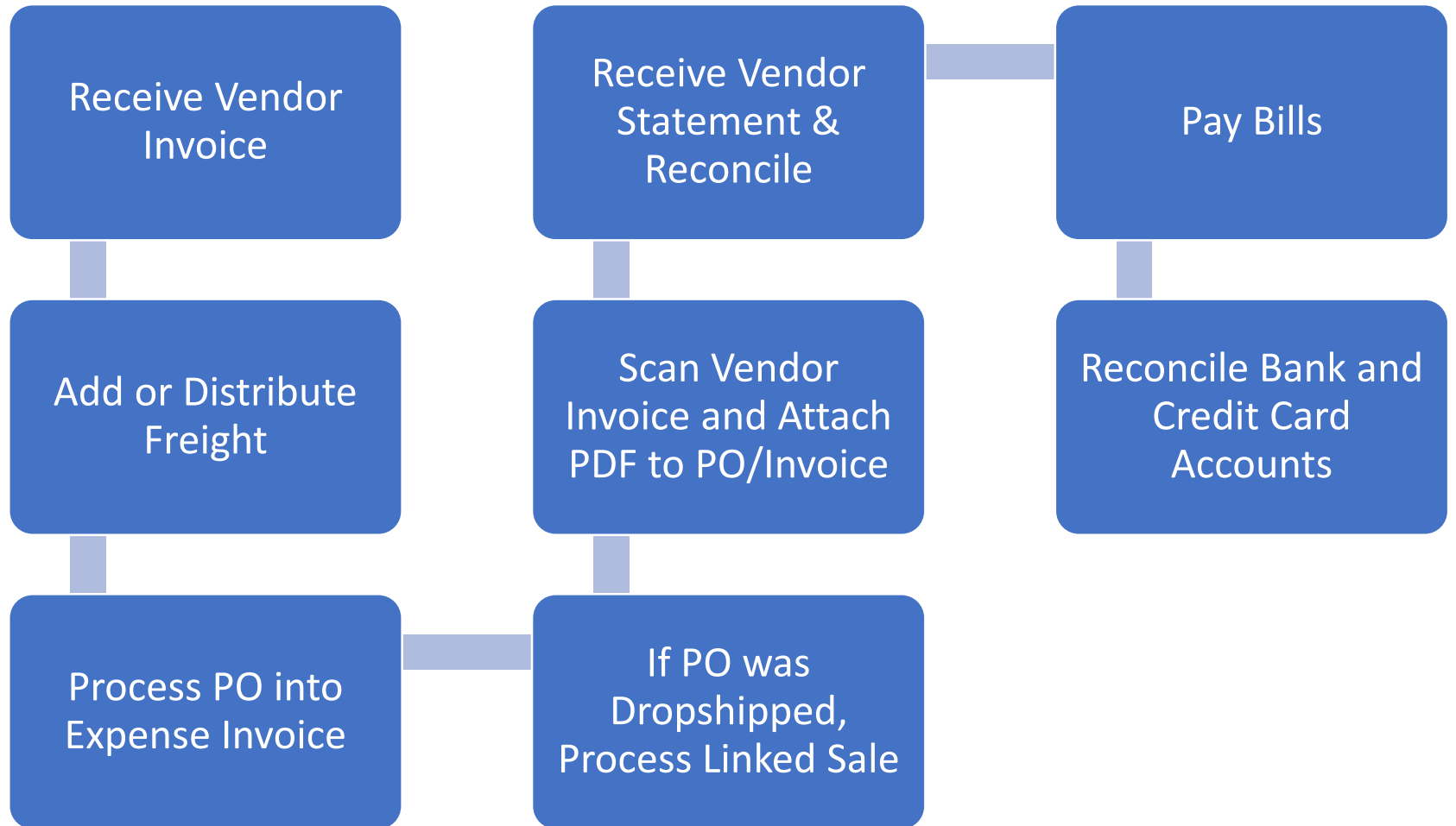
- Sale of Stock



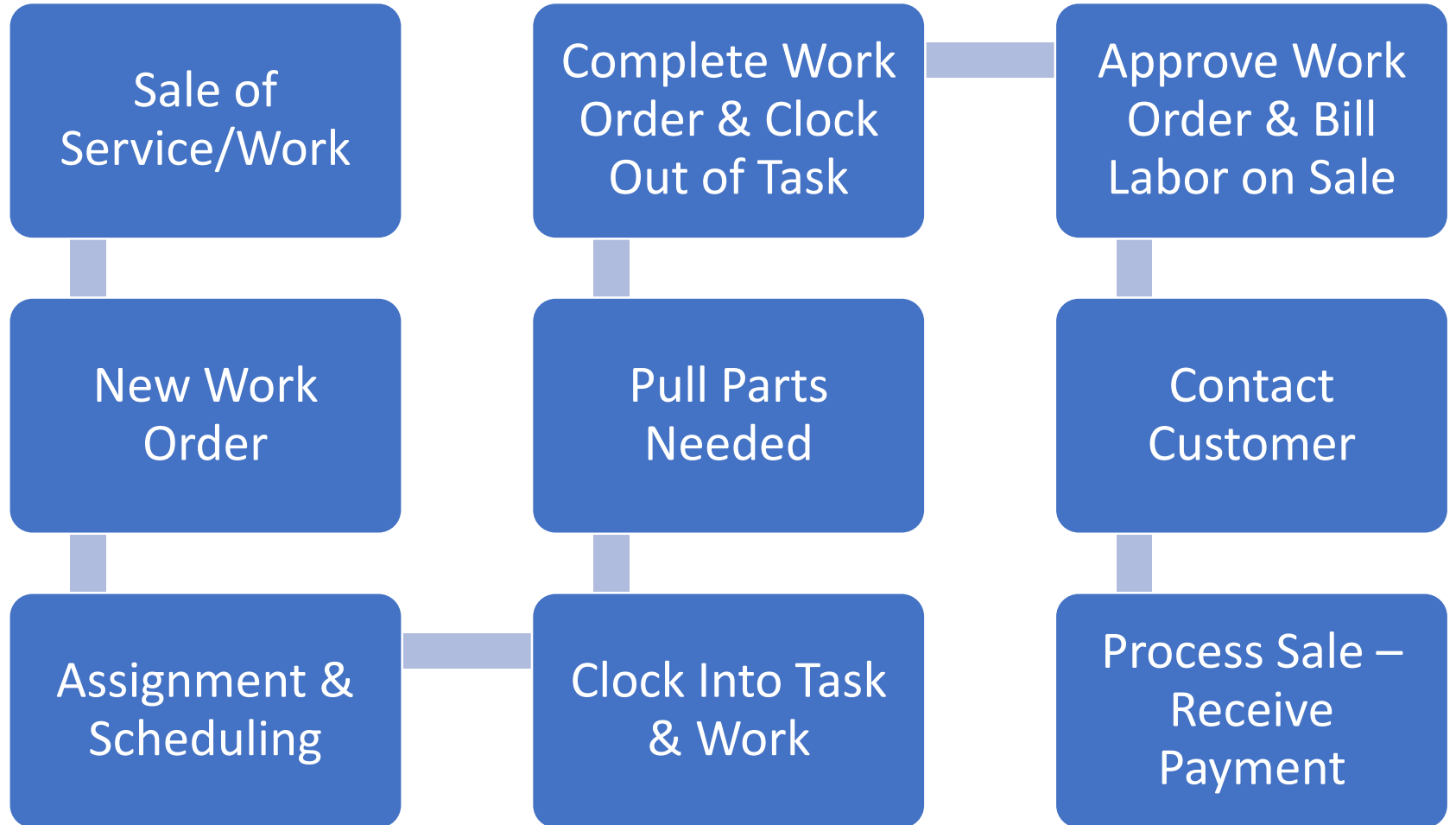
- Purchasing



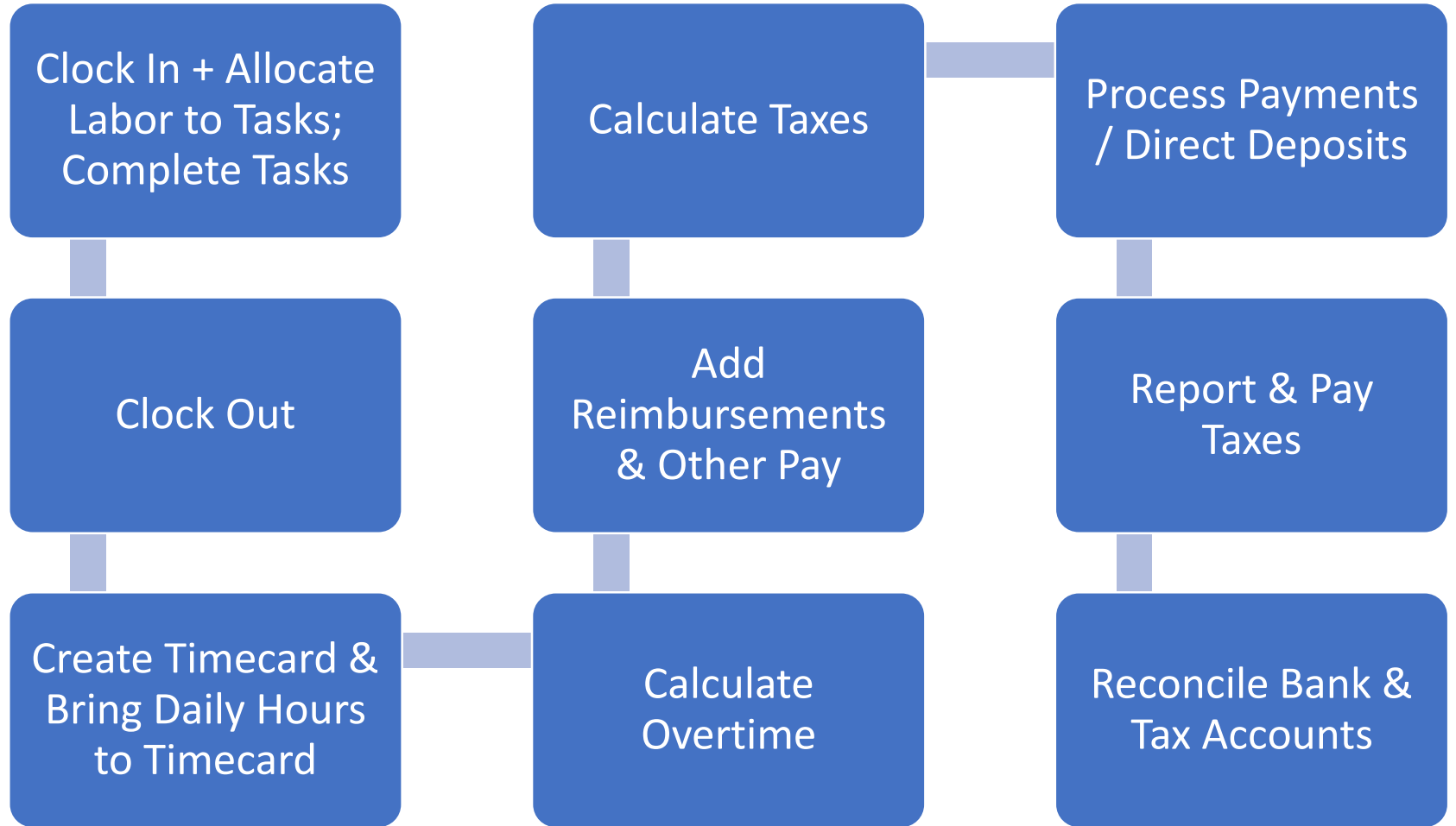
- Expenses










- Tasks/Work Orders



- Labor/Payroll



- Daily Stuff

-  Reconcile Cash Drawers
-  Email AR Invoices
-  Record AR Payments
-  Deposit Monies in Bank
-  Pay Bills
-  Reconcile Bank Statements
-  Post All Financial Transactions



- Monthly Stuff



Manage Payroll Pay Periods



Email Customer AR Statements



Calculate Finance Charges



Close Previous Fiscal Month



Report & Pay Sales Tax



Reconciliations



III. First Contact



Print - Customer List

Choose Printer
 Default Printer HP48C6B4 (HP Officejet Pro 8610)
 Specific Printer HP48C6B4 (HP Officejet Pro 8610)
 Data Source: Live EBMS Database

Report Options
 Customer Category: Customers
 Shipping Customers

Include subfolders
 Include Inactive

All Customers
 Range [] To: []
 Show Only "Include in Mailing List"
 Show Only "Include in Email List"

Buttons: Print, Print Preview, Printer Setup, Page Setup, Cancel, Set Query, Use Query, Collate, Copies: 1, Save as Default

Set Query

Database Field	Operator	Value	And/Or
E_DATE	on or after	01/01/2019 Tue	and
*			

Use Advanced Formula OK Cancel Check Formula

Focused Other By Date

10% Discount just for you
 Hello Brian, As a token of appreciation for being recently added to our customer list, show this email to a clerk for a 10% Discount on us. That's just how we roll around here. All the very best, The Team at Lambright Enterprises

EBMS - Lambright Enterprises, Melvin - [Customers]

File Edit Sales Inventory Expenses Labor Financials Horticulture Job Costing Rental Window Help

All Search For Id: DQEBRI
 Use Category

Id	Last Name	First Name	Address 1
DQEBRI	Doe	Brian	184 First Street

Find

Find words

Text will be searched in the following fields:
 ID, L_NAME, F_NAME, CONTACT_1, CONTACT_2, CONTACT_3, CONTACT_4, CONTACT_5, TYPE, ADDRESS1, ADDRESS2, CITY, STATE, ZIP

Buttons: OK, Cancel, Advanced



Follow Up & Analysis

Proposals - Brian Doe

File Edit Materials Process View Documents Customer Documents Action

Customer ID: Proposal: Ship To: Date: Memo Terms Contact Info Approval Job Info Recuring Frequency Serial No. Internal Notes Print Log

Bill To: Ship To: Next Contact: Proposal is valid for days

Process:

Salesperson: Decision Maker: Ship Date: Ship Via: Price Level: Department: Warehouse: Job ID:

Quantity	Warehouse	Product	Measure	On Hand	Description	Unit	Amount	Tax Group	Taxed	G/L Account	Cost
100.00	MAIN	2420	EA	793.00	2X4-20 SPF	8.13	813.00	Taxable		51000-010	650.00

Tax: Table: No Tax Amount: \$0.00

Est. Shipping: Handling: Freight: \$0.00 Weight: 0.00

Products: 100.000000 Hours: 0.00 Cost: \$650.00 Profit: \$163.00 Percent Markup: 25.1%

Subtotal: \$813.00 Total: **\$813.00**

Retail Sales - Lumber Department

Print - Call Back by Sales Person Report

Choose Printer: Default Printer HP48C6B4 (HP Officejet Pro 8610) Specific Printer HP48C6B4 (HP Officejet Pro 8610)

Data Source: Live EBMS Database

Report Options

Call Back Date:

All Sales Persons (Case Sensitive)

Range: To:

Include Quotes with no Call Back Date

Sort by Contact Date

New Page for each Sales Person

Use Query

Call Back by Sales Person Report Tuesday, April 16, 2019 4:32:04PM Page: 1

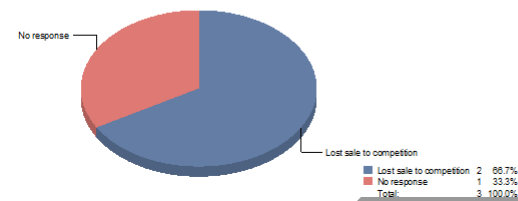
Lambright Enterprises
Call back date of 4/17/2019 or before
Sales Person: Melvin

MELVIN					
Customer Info:	Brian Doe DOEBRI	Phone Fax E-Mail:	(123) 123-1234 mlambright@eaglebusiness	Contact Other:	Brian Doe
Quote:	104	2X4-20 SPF		Total:	813.00
Date Quoted:	4/16/2019				
Call Back Date:	4/17/2019				
Customer Info:	Jane Doe DOEJAN	Phone Fax E-Mail:		Contact Other:	
Quote:	105	2X4-8 SPF		Total:	4,160.00
Date Quoted:	4/16/2019				
Call Back Date:	4/17/2019				
Customer Info:	My Business, Inc. MYBUS	Phone Fax E-Mail:	() -	Contact Other:	
Quote:	106	2X4-20 SPF		Total:	1,365.10
Date Quoted:	4/16/2019				
Call Back Date:	4/17/2019				

Unaccepted Proposals Tuesday, April 16, 2019 4:38:34PM Page: 1

Lambright Enterprises
All Unaccepted Proposals
All Reasons
All Sales Persons

Date	Proposal ID	Description	Customer ID - Name	Sales Person	Amount
Lost sale to competition					
4/16/2019	104	2X4-20 SPF	DOEBRI - Brian Doe	MELVIN	\$13.00
4/16/2019	105	2X4-8 SPF	DOEJAN - Jane Doe	MELVIN	4,160.00
2 proposals were not accepted because: Lost sale to competition					4,973.00
No response					
4/16/2019	106	2X4-20 SPF	MYBUS - My Business, Inc.	MELVIN	1,365.10
1 proposal was not accepted because: No response					1,365.10
					6,338.10



Follow Up & Analysis

- Manage
- Schedule
- Monitor
- Quantify

The screenshot displays the EBMS software interface for task scheduling and analysis. The main window is titled "Task - My Business, Inc. (John Doe)" and shows a "Sales" task. The task details include:

- Customer: MYBUS
- Ticket: 12
- Description: First Contact follow up
- Start Date: 04/17/2019 Wed
- Start Time: 11:00 AM
- End Time: 11:30 AM
- Hours: 0.50
- Priority: Normal
- Confirmed:

The interface also shows a table of tasks and a summary of totals for the day:

Ticket	Customer	Worker	Description	Start Date	Start Time	End Time	Hours	Billable Time	Actual Hours
12	MYBUS	DOEJOH	First Contact follow up	04/17/2019 Wed	11:00 AM	11:30 AM	0.50		

Totals for This Day:

- Appt. Confirmed: 0.50
- Time Off: 0.00
- Non-Flexible Sched: 0.00
- Working: 0.50
- Flexible Schedule: 0.00
- Total of Above: 0.50
- Overscheduled: 0.50

The interface also includes a calendar view for April 2019, a list of workers (DOEJOH, DOEJOS), and a summary of employee schedule per day and week.



IV. Order Entry & Billing

Sales Invoice Entry - John Doe

File Edit Materials Process View Tasks Documents Customer Documents Action

Customer ID: DOEJOH Invoice: 1052 Ship To: DOEJOH Date: 04/16/2019 Tue

Bill To: John Doe, 123 Right Down There Street, Lincoln, MO 65338, USA

Payment: Cash, Check, Credit / Debit Card, Gift Card, Process

Process Invoice as: Cash Charge

Discount: (None) Due: Net 30 days

Sales Person: MELVIN P.O./Job: Ship Date: 04/17/2019 Wed Ship Via: Delivery Price Level: Retail Warehouse: MAIN Job ID: Department: 010

Ordered	Shipped	Product	On Hand	Description	Price	Amount	Taxed	G/L Account	Purchase Method	Vendor
50.00		2420	793.00	Z4-20 SPF	8.13		✓	51000-010	Stocked (standard)	BLUCOR

Tax: Table: Multiple S.O.: \$64.73 Invoice: \$0.00

Est. Shipping: Handling: Freight: \$0.00 Weight: 0.00

Finance: Discount: %

☑ Show Cost

Costs:	\$0.00	S.O. Subtotal:	\$406.50	Subtotal:	\$0.00	Shipped / Invoice Total
Total Markup:	\$0.00	S.O. Total:	\$471.23	Paid:	\$0.00	0.00
Percent Markup:	0.0%	S.O.:	\$471.23	Balance:	\$0.00	
Shipped Products:	0.000000					

Ready Entry Date: 04/16/2019 Tue Sales Order

Low Inventory

There are only 788.00 items on hand for item 2515 using unit of measure "EA".

Count:	788.00
P.O. Ordered:	0.00
P.O. Received:	0.00
S.O. Ordered:	0.00
S.O. Shipped:	0.00

There is no substitute product.

Do you wish to continue?

Ship 788.00 items Yes No Use Substitute

Eagle Business Management

Credit limit information:
-Credit limit: 10000.00
-Charged: 4.82
-Available: 9995.18

This is message regarding Bill To customer Tammy Doe (DOETAM).

OK

Eagle Business Management

This customer has 1 overdue invoice(s) totaling to \$4.82. The oldest one is 392 days overdue.

Are you sure you wish to continue?

Yes No

Options

General Invoices and S.O.s Payment Point of Sale Devices Proposal Reports Sales Person Messages Customer Catalog

Use Preferences

☑ Warn when inventory is low ☐ Default the quantity shipped to equal quantity ordered

☑ Default sales person to user name ☑ Select special items, serial numbers and lots on item entry

☐ Default invoice ship date to entry date ☑ Prompt before automatically creating a backorder

☑ Copy the invoice memo to back-orders ☐ Do not skip to next line after entering product

☐ Show existing sales orders upon entry of the customer ☑ Warn when the materials list tax group is not the same as the header

☐ Always create a new line with each scan ☐ Always combine lines when scanning the same item consecutively

Never combine lines when duplicate items are entered Set shipped quantity when scanning or entering item from programmable button

Ask to update single lot assignment when invoice quantity changes

Global System Settings

☑ Create back orders automatically when processing a sales order

☑ Create back orders with an extension to the S.O. number (e: xxx1)

☑ Show a message upon customer entry for customer overdue invoices

☐ Calculate freight based on the ordered amount

Backorders are created with no freight charges

☑ Include cash receipts in the deposit window

☐ Default sales customer to:

Next invoice number: 1062

Calculate finance charges from the Invoice Date

Default live credit card action to: Charge credit card now

Always prompt user to configure components to order

☐ Use Outside City Limits on Tax-Related Addresses

Note on Printed Document:





Shipping Orders

- Time saving
- Convenient

The top row shows configuration windows for a customer named 'DOENAN'. The left window is 'Customers/Nancy Doe' with tabs for General, Terms, Advanced, Directions, Invoices, Proposals, Serialized Items, Rentals, Tasks, Jobs, Special Pricing, Messages, Website, and Advanced Security. The 'General' tab is active, showing 'Allowed Payment Methods' (Cash, Check, Credit Card, Charge) and 'Shipping Information' (Ship To ID, Shipping Method: Pickup, Freight Charge: \$0.00). The right window is 'Options' for 'Customer Categories' and 'S.O. To Proposal', showing 'Default invoice line tax group: Taxable' and 'Shipping Method' (UPS Ground). A 'Default From Customer' dialog box is also visible, showing shipping method details like 'Description: UPS Ground' and 'Rate Type: UPS'.

The screenshot shows the 'Sales Invoice Entry - Nancy Doe' window. The 'Shipping' tab is highlighted in red. It displays shipping details for 'Ship To: Nancy Doe' and 'Ship Via: UPS Ground'. A table of packages is shown with columns for Date, Tracking Number, Service Type, Weight, and Cost. The 'Actual Freight' is \$0.00. Below the shipping details is a table of ordered items:

Ordered	Shipped	Product	On Hand	Description	Price	Amount	Tax Group	Taxed	G/L Account	Purchase Method
1.00	1.00	2420	777.00	2x4-20 SPF	8.13	8.13	Taxable		51000-010	Stocked (standard)
2.00	1.00	2408	397.00	2x4-8 SPF	4.16	4.16	Taxable		51000-010	Stocked (standard)

At the bottom, a summary table shows:

Table: No Tax	Est. Shipping:	Finance:	✓ Show Cost	Costs: \$9.83	S.O. Subtotal: \$12.29	Subtotal: \$12.29	Shipped / Invoice Total
S.O.: \$0.00	Handling:	Discount: 2.00 %	Total Markup: \$2.46	S.O. Total: \$12.04	Paid: \$0.00	Balance: \$12.04	12.04
Invoice: \$0.00	Freight: \$0.00		Percent Markup: 25.0 %	S.O.:			
	Weight: 0.00		Shipped Products: 2.000000				

The screenshot shows a 'Sales Order' document for 'Lambricht Enterprises'. It includes the company logo, address (12456 Anywhere Street, Gap, PA 17527), and contact information. The order details are as follows:

Customer ID	Sales Person	P.O. Number	Ship Date	Ship Via	Terms
DOENAN	MELVIN		4/18/2019	UPS Ground	Cash/Check/Credit Card

The ordered items table is:

Ordered	UOM	Description	Unit Price	Extended
1.00	EA	2x4-20 SPF	8.13	8.13
1.00	EA	2x4-8 SPF	4.16	4.16

The tracking number ABCE61985198198198 is highlighted in red.

The screenshot shows a 'Shipping Schedule' document for 'Lambricht Enterprises'. It includes the company logo and the date 'Friday, April 19, 2019 9:11:26AM Page: 1'. The schedule is for the week of 4/13/2019 to 4/19/2019.

Day	Date	Order ID	Customer Name	Product
Wednesday	4/17/2019	1051	Jane Doe	2x4-12 SPF
		1052	John Doe	2x4-20 SPF
		1056	Nancy Doe	2x4-20 SPF
Friday	4/19/2019	1057	Brian Doe	2x4-10 SPF
		1061	Tammy Doe	2x6-16 SPF



Managing & Billing Orders

- Monitor
- Manage
- Process

The screenshot displays the EBMS software interface for managing orders. The main window shows a table of sales orders with columns for Process, Sales Order, Id, Name, Description, Date, Total, Sales Person, P.O. Number, Ship Date, and Price Level. Two orders are listed: one for '2x4-12 MCA' and another for '2x4-12 SPF'. Overlaid on this are two dialog boxes: 'Queries' and 'Set Query'. The 'Queries' dialog lists various query types, with 'SPECIAL ORDER SHIPPE - Special Orders Ready to bill' selected. The 'Set Query' dialog shows a table for defining query criteria with columns for Database Field, Operator, Value, and And/Or. The criteria table contains two rows: 'PURC_METH is not equal to' and 'SHIP is not empty', both connected by 'and' operators. At the bottom of the main window, there are fields for 'Selected Sales Orders' and 'Total Sales Orders: 2', along with buttons for 'Select All', 'Unselect All', 'View Sales Order', 'Process', and 'Print'.

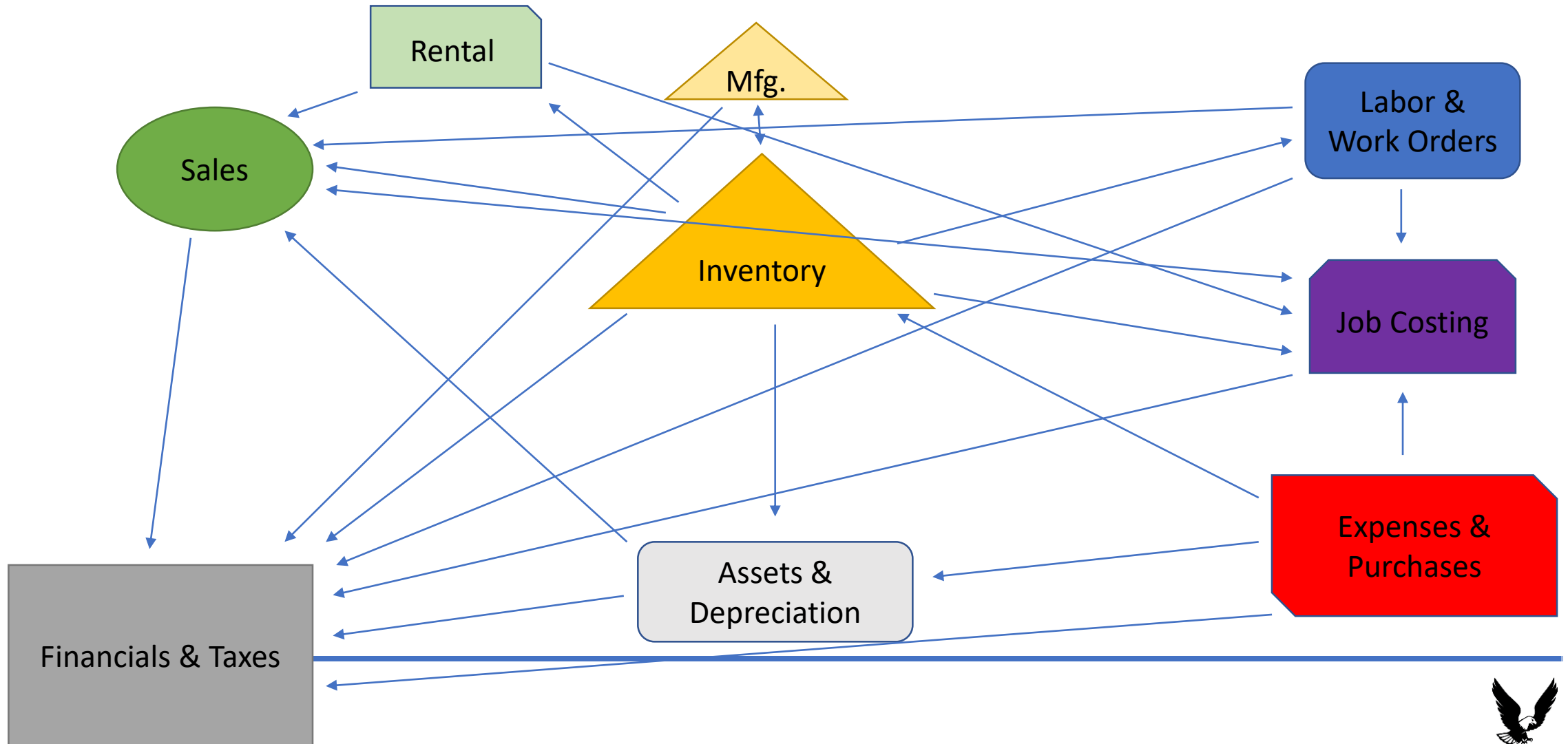
Process	Sales Order	Id	Name	Description	Date	Total	Sales Person	P.O. Number	Ship Date	Price Level
	1026	DDEJAN	Jane Doe	2x4-12 MCA	04/05/2019 Fri	6.37	MELVIN			Retail
	1027	DDEJAN	Jane Doe	2x4-12 SPF	04/05/2019 Fri	171.65	MELVIN		05/08/2019 V	Retail

Query Id	Description
ALL	All Sales Orders
ORDERS TO SHIP	Order's to Ship
SHIPPED ORDERS	Shipped Orders
SPECIAL ORDER SHIPPE	Special Orders Ready to bill
SPECIAL ORDERS	Melvin's Special Order Sales

Database Field	Operator	Value	And/Or
PURC_METH	is not equal to		and
SHIP	is not empty		and
*			



V. How Things Tie Together



The End

Information technology and business are becoming inextricable interwoven. I don't think anybody can talk meaningfully about one without talking about the other. – Bill Gates, Microsoft

Thank you for attending How Everything Ties Together

