



## IBT Implementation Case Study

**IBT** Industrial Solutions is a Midwestern distributor of industrial maintenance, repair and operations products, and consulting services.

IBT chose to upgrade their existing ERP system AS400 to more advanced solutions like **Epicor P21 ERP**, which offers enhanced features and improved functionality. At **ESS Inc.**, we specialize in guiding businesses through seamless ERP upgrades and implementations, ensuring maximum value and minimal disruption.

### Background

IBT upgraded their existing ERP system AS400 to EPICOR P21 to modernize the following:

#### Order to Cash

- Manual entry of quote value from HubSpot to Salesforce
- Manual SO value from ERP into SF
- Manual price verification
- Manual download of A+ invoices to be uploaded or keyed to EDI or customer portal (130 accounts on portals)
- Manual remittance and payment matching

#### Procure to Pay

- Manual monitoring of min/max at CDC and branches. Usage changes have to be “caught” in the normal workflow of day-to-day work or through a custom report.
- No PO acknowledgment – even if the PO does not get delivered to email.
- Different item numbers per vendor for the same item.
- Supplier portal ordering – dual entry into portal and A+.
- PO to Sales order link and tracking.
- Very manual process for tracking and following up on supplier delivery commitment/shipments. Not easy to see consolidated purchases by vendor or by commodity class/item.
- Pricing and availability visibility at suppliers for non-stocked items. (Supplier Portals)
- Rebate tracking and validation.
- Ability to manage all supplier information in the vendor record (SimHub data)
- Ability to manage all item data in the item record
- Vendor returns visibility/tracking/credit management



## The Epicor P21 ERP Upgrade Process

The upgrade to Epicor P21 ERP involved several critical steps to ensure a smooth transition and maximize benefits:

1. **Initial Assessment and Planning:** This phase involved evaluating the existing ERP system A+, understanding the business's specific needs of IBT, and defining the upgrade's scope and objectives.
2. **System Design and Customization:** The next step was to design a customized Epicor P21 ERP solution that met the unique requirements of the business. This included configuring modules, setting up workflows, and ensuring the system aligned with IBT's strategic goals.

ESS Inc. implemented customizations in Epicor P21, including business rules, a DynaChange screen and menu design, and portal creation. ESS implemented more than 90 business rules and workflows to smoothly perform IBT's business process and provide a valuable service to their customers.

Major business rules were customer credit review and approval process by the regional and store manager, alert the buyer to source from another supplier or close PO, alert the accounting admin for unapproved journal entries, downpayment invoices generating order notes and temporary field update for downpayment data to get displayed in the other screens, business rule for phone number format changes, business rules for new customer, and more.

3. **Data Migration and Integration:** A crucial part of the upgrade process was data migration, where data was securely transferred from the A+ ERP system with AS400 in IBM DB2 to the new ERP Epicor P21.

ESS Inc. mapped data from AS400 to the Pre-Staging DB (A+ DB), then migrated a large amount of data from Source A+ DB (Pre-Staging DB) to Destination EPICOR Staging DB. Epicor then migrated data from the Epicor Staging DB to the Epicor DB. Millions of records were migrated with master data including customer, customer contacts, vendors, suppliers, items, and transactional data like sales orders, purchase orders, transfers, inventory adjustments, service orders, etc.

This step also involved integrating other existing business systems to ensure data flowed seamlessly.

The integration of EPICOR with the legacy system, A+, has transformed business operations for a prominent client, enabling seamless collaboration between EPICOR and various third-party systems like Salesforce, EDI, Carixa, Unishippers, Uptime, Opti, Amaze, and Rubber tree.



- Salesforce: Streamlined CRM with EPICOR via robust data cleaning and normalization.
- EDI: Automated exchange of documents; addressed data validation and interoperability.
- Carixa: Cash automation with streamlined billing and deduction resolution.
- Unishippers: Automated logistics and shipment tracking for efficient operations.
- Uptime: Ensured accurate customer data synchronization across systems.
- Opti: Enhanced e-commerce pricing and order placement via EPICOR's pricing engine.
- Amaze: Synchronized product information for consistent item catalogs.
- Rubber tree: Connected sales history to maintain data integrity during migration.

4. **User Training and Change Management:** Training users and managing organizational change effectively are key to ensuring the smooth adoption of the new system.

ESS Inc. attended UAT testing sessions done in four phases CRP-1,2,3,4. CRP sessions were done in a QA environment where migrated data was tested, integrations with other systems were checked, and order-to-cash and procure-to-pay workflows were tested and moved to the production environment.

Tailored training programs helped users become familiar with the new ERP system and its features.

5. **Go-Live and Post-Implementation Support:** Once IBT deployed the system, ESS Inc. provided ongoing support to resolve issues and optimize system performance. Continuous monitoring helped in making necessary adjustments and improvements.

## Practical Advice

There are specific needs and ways to connect business rules to the DLLS. Multiple events had to be handled on the same screen to handle different functionality. Coordination between various developers was required to handle functional changes on the same screen. Moving the business rules across the landscape had to be done manually and had to be tracked efficiently. There is a provision to disable a business rule in production in case the feature is not required.

## The Future

Considering that the business involves a distribution system, additional features are provided in the ESS Inc. portal for IBT to make limited modifications. Further gaps in business processes will need to be addressed as part of phase two.