

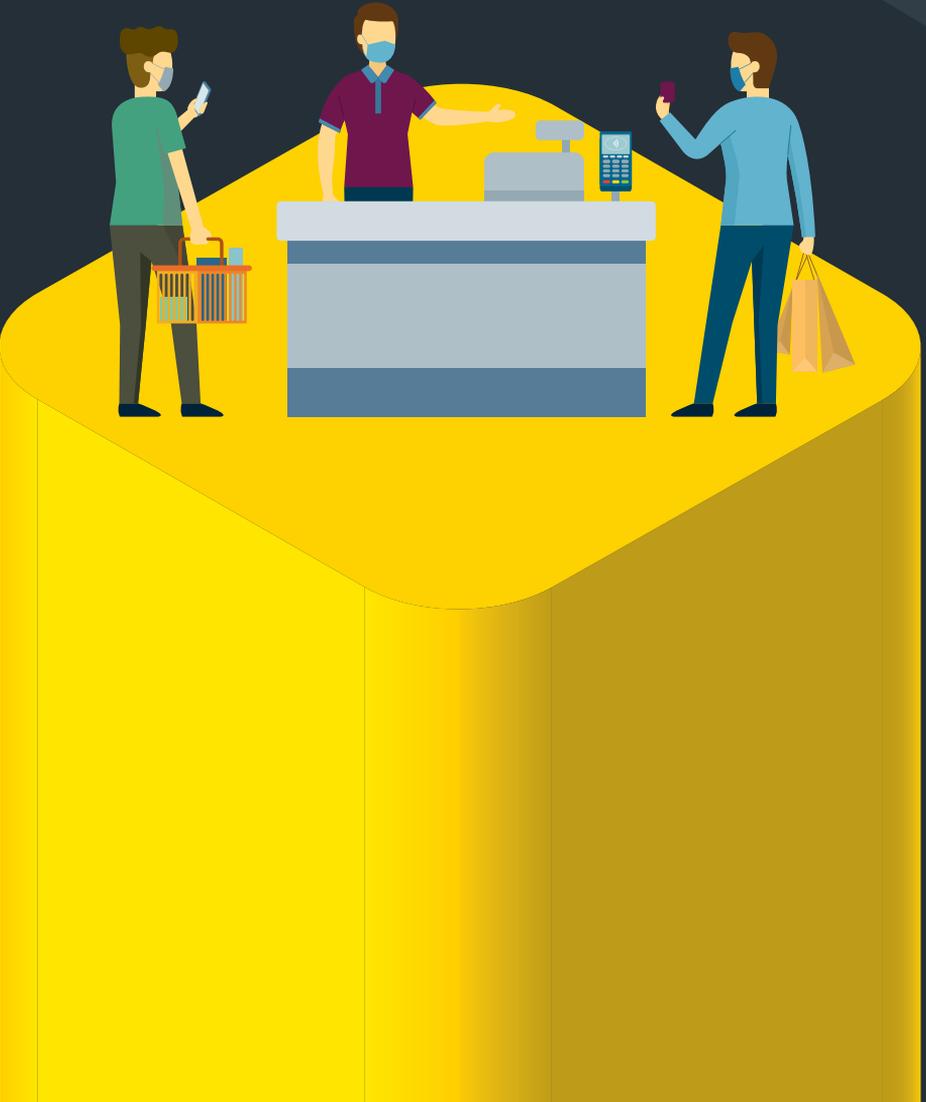


# 7 Essential **'New World'** ERP Features & Capabilities Businesses Should Optimise



## **We're living in a new world now.**

**We're calling it the 'new normal', 'low touch economy' and businesses are seeking to understand how their ERP/business software systems can adapt to the new norms of doing business during a global pandemic. How they can save you time, simplify and automate processes and enable your business to emerge in a stronger position to that of your competitors.**



**Customer behaviour and working practices have fundamentally changed and the adaptability of your business software to handle unprecedented and challenging times has never before taken such centre-stage.**

## **Many business have...**

**Discovered inefficiencies in their business**

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**Realised there's too much 'human glue' required to optimally run their business or,**

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**Been unable to pivot to reflect changing customer behaviour and working practices**

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They're not alone. Since the Covid 19 pandemic started prospective customers have contacted us as they look to **trade online or integrate their eCommerce presence, simplify & automate their processes to reduce manual interaction, use software capabilities to help reduce operational costs and extract actionable insights from their data.**

Business owners now appreciate that in today's world the first 'technology port of call' to get in order is their baseline technology; your ERP or business software. This has never been more important. It's imperative that it has the in-built adaptability to ensure and enhance business continuity and success during challenging times.

Perhaps you've already looked into adopting a new business model, decided on new markets to target or used the time to figure out ways to emerge stronger? Either way, this ebook draws on our customers' experiences; the areas they've looked to improve in their businesses and how they've adapted their Intact iQ ERP solution to adjust to this new world.

## Areas of focus:



Capitalising on the new wave of online selling



Integrating with 3rd party providers



Letting their software do the walking



Adapting to the new 'low-touch' economy



Up-selling at every opportunity



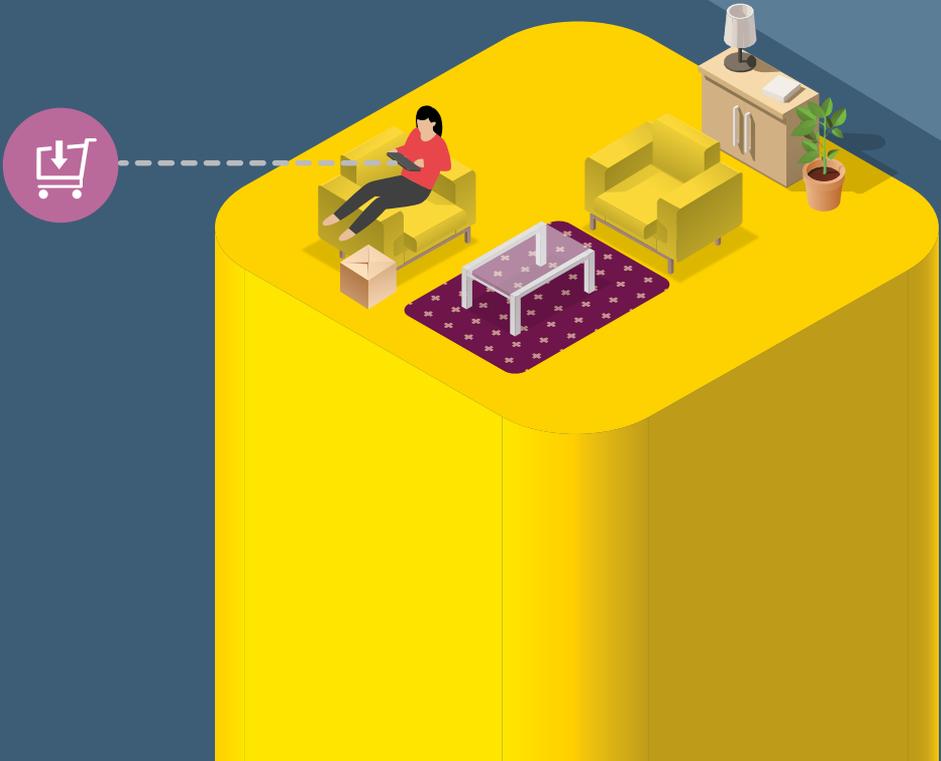
Using system data to deliver actionable insights and improve forecasting



Getting in line with Making Tax Digital (UK specific)

1.

# Capitalising on the new wave of online selling



**Without a shadow of a doubt, enabling customers to trade online or seamlessly integrate their eCommerce site with their ERP solution has generated the most enquiries since the start of the pandemic.**

**eCommerce is the trend of the future and everyone we're talking to wants it.** Previously, it was a 'Phase 2' requirement but now it is very much an integral part of our customers' ERP implementations. Today, the website is where the business is.

From fully integrated B2B and B2C eCommerce solutions that automatically update your back-office system to a simple plug and play solution, there are many options available.

But if you are thinking of trading online, there are a number of things you need to consider. Firstly, you need to decide whether your eCommerce site should adopt a 'zero' or 'high' level of integration with your business system. The more integrated it is, the more seamless it will be, and the fewer misalignments that are likely to happen.

Secondly, in order to ensure your eCommerce site is trading to a suitable standard, you need to ensure you have the appropriate technology and system requirements in place.

And of course, you also need to carefully plan and allocate adequate resources to run a successful eCommerce solution.

There are obvious benefits to running a fully integrated eCommerce solution when compared to a low level or zero integration site. When implemented correctly, an integrated webshop will see you managing a single database where all stock information, pricing and products are updated in real-time on your eCommerce site as changes are made in your back office system. This ensures you retain a one stop shop so to speak to manage all your orders and deliveries whether they be online, in-store or via telesales.

But in current circumstances, there is a place for the plug and play website too. One of our customers is testament to this. They took on our newly introduced 'pop-up' eCommerce solution and their sales went through the roof!

We would suggest however that you think about your long-term goals when considering the best eCommerce solution for your business. If you go with a zero-integration option now but down the line you want to fully integrate it to your back-office system, then spend your time and money wisely.

A simple plug and play webshop is certainly a cheaper alternative if you are just looking to capitalise on a short spell of high demand for certain products that you sell.





Our Intact CliQx product portfolio satisfies many of our customers' eCommerce requirements. But some larger merchants and distributors look to our REST API to integrate their front-end website that might be run on WooCommerce, Magento etc., to their Intact iQ ERP Solution backend. The Intact REST API is there to give our customers more power to use what they want.

We've highlighted just some of the questions you should be asking of your ERP provider if you are considering trading online.

- **What eCommerce options do you offer? B2B and/or B2C**
- **What level of integration to my back-office system does it offer?**
- **Is your eCommerce offering in-house or via a 3rd party provider?**
- **If an in-house solution, how much will the eCommerce module cost?**
- **If 3rd party integrated, do you work with recommended suppliers?**
- **What is involved on our side in implementing an eCommerce site?**

**We have seen first-hand the opportunities and challenges eCommerce solutions can bring. And we would never recommend a solution for your business that is not appropriate. We would therefore strongly advise you to take the time to consider your route to online trading very carefully. [Our Selling Online ebook](#) offers some practical advice and tips if you are considering going down this route.**

**2.**

**Integrating  
to 3<sup>rd</sup> party  
solutions**

**Integrating 3rd party software solutions with our software is the second biggest query coming in to our staff.** While the majority of queries are coming from web agencies looking to integrate an eCommerce solution into one of our customers' sites, there are others enquiring about integrating industry specific best of breed solutions.

In today's world, businesses require limitless integration capabilities and modern ERP systems that use REST API technology to facilitate this. Those who've been involved in integration projects before know how painful this can be. But REST API technology is a game changer in this area and is enabling our customers to embrace 3rd party applications into their ERP solution to retain that one version of the truth.

A modern ERP system will enable you to use best in breed tech solutions for any specific problems not addressed by your ERP e.g. unique warehouse functions or logistics etc. And they can and should be fully integrated in line with the business system you use across your organisation. This is important as all your technology solutions should be talking to each other in real-time and feeding back into one unified platform.

If your system provider has a REST API, then integrating with your own eCommerce site or best of breed solutions shouldn't be a problem. If it's still using old technology to integrate 3rd party applications, then it may not be as easy or cost effective to integrate the solutions that could benefit your business.



# 3.

## Letting their software do the walking!

**We've encountered 2 types of businesses over the past few months. The ones who have never been busier; primarily due to the fact that they sell products that are currently in huge demand e.g. PPE, plastics etc. And there are the businesses who have slowed drastically.**

One thing they both have in common however, is that they have noted inefficiencies in how they do things. The busy customers are looking to streamline processes and improve automation to reduce human interaction. The not-so-busy customers are looking at where they are falling down and have the time now to see where automation and simplification of their processes can help them prosper in better times.

Key to enabling the above is your baseline technology; your ERP or business management software. The adaptability of your business software can make a big difference in how well you can handle the unprecedented times we are now living in. Ensuring continuity of operations is paramount. But so too is your ability to pivot your business if, and when, required.

Perhaps an area of your business has become exceptionally busy and you decide to capitalise on it. How quickly can you adapt your business software to take advantage of this?

The good run may not last so it's vital your software allows you to jump on the bandwagon while it's in town!

Recently, one of our customers found themselves inundated selling parts of a particular product; as they were the only business open in Europe at the time. They found they needed to streamline their processes so that they could handle more orders. They did this by automating, simplifying and reducing the steps involved and ultimately driving more sales.

Recently we've also seen growing interest for modules such as courier integration, document scanning and telephone integration. Basically anything that improves the 3 P's – people, processes and paperwork!

- **People**  
Optimise their talents
- **Processes**  
Simplify, Enhance and Automate
- **Paperwork**  
Reduce, Reduce, Reduce

**Some examples might include;**

## **Courier Integration**

With Intact's courier integration you get a seamless one stop shop that enables you to review product tracking numbers quickly and easily from your system without having to go into the courier's website. A great time-saver!

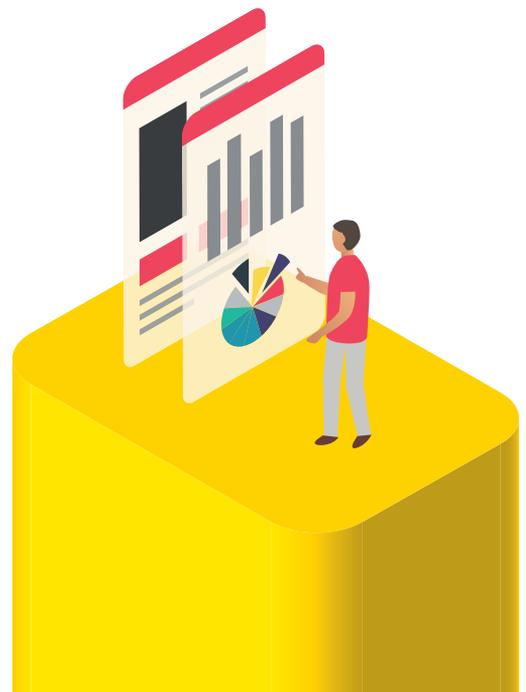
## **Telephone Integration**

With Intact's telephone integration you can reduce call handling times and eliminate screen switching with intuitive interfaces that display caller information and relevant tasks automatically when your agent answers the phone. The system identifies a customer, a box pop-up asks you if you want to view accounts, put a quote on, an order, add a task activity or edit the phone interaction. Or if a supplier rings, you can add a PO with all supplier details automatically filled in. It's a great way to save time, improve customer satisfaction and increase productivity. In addition, management and staff can view call metrics easily via dashboards or control panels, facilitating more informed decisions.

## **Document Management**

And of course, the move towards the paperless office is well and truly on. With many still working from home and the increasing demand on supply chains, the need to increase visibility and switch to paper-free, document management tools has never been greater. Less paper, means less handling, reduced errors, lower carbon foot-print and lower costs.

While it can take time to go completely paperless, in the long run your processes will be easier and faster (oh, and your bottom line will be happier!).



# 4.

## Adapting to the new 'low-touch' economy

The world's changed as we know it. Social/physical distancing is here to stay and will be a part of our society until a vaccine is created to reduce the risks of contracting COVID-19.

For our customers this has meant trading online, introducing cashless and contactless payments and deliveries with photo capture. They have also been looking closely at supply chains, managing working from home (WFH) and turning to all things remote/digital.

Key to adapting to the new normal is the systems you have in place. We've seen an upsurge in customers looking to take orders online, introducing click and collect facilities and using apps, such as

our Intact Access, to provide photo capture proof of delivery rather than signature capture.

Adapting mobile ERP apps to facilitate new working conditions has been a quick way to accommodate new processes – everyone has an 'always on' smartphone after all. For instance, Intact Access (our mobile ERP app) has a menu option called Intact Trace that is used to track colleague's whereabouts daily (office, home or customer site) to facilitate contact tracing should it be required. This is just one example of course but embracing the new 'low touch' economy doesn't have to be a daunting task – use technology to adapt and embrace the changes it is enforcing.

# 5.

## Up-selling at every opportunity!

You should never miss an opportunity to up-sell, even in current times. With some of our customers doing very well at the minute, they are looking at ways their system can enable them to become a better supplier to their customers. Offering related, alternative or associated products at the point of contact, whether that be in-store, online or via the phone, ensures they never miss an opportunity to up-sell.

This was a very popular topic in one of our recent Intact iQ training webinars to our customers.

We talked about how your system should prompt you with products that are normally purchased with a particular item – if you are selling a strimmer for example, your sales person should be prompted to sell protective eye-wear, spare strimmer cord and two stroke oil mixture.

Or if a particular item isn't in stock, it is useful for your system to prompt your staff member with alternatives available. You may have a customer who is purchasing a drill from a well-known brand name but there may be a higher spec drill available at a cheaper price (and higher margin to you!) that you could offer if in front of the customer. Your system should prompt the user with this information so that it can be used to please both customer and owner. The alternative product information is also very valuable where there is a stock shortage of a particular item.

**If you don't ask, you won't get!**



# 6.

## Using system data to deliver actionable insights and improve forecasting

Data is powerful and more so than ever before. It doesn't matter what systems you have in place if you don't utilise the data that is built up on a daily basis.

The companies that will succeed at the end of COVID-19 are the ones who use their data to develop well thought out plans and put the preparations in place to grow past this pandemic.

It's time like these that you need to get a grip on what your customers are buying from you. What are they not buying from you?

These are the questions you should be asking from your business intelligence tools.

Our customers have been looking into our advanced forecasting module because they want to look at their data in detail and help their purchasing teams buy better for the future.

When we explain how our Exponential Weighting Moving Average module (*yeah, we don't know who came up with that one either!)* works, they all want it.)

It takes all your data, the seasonality of products etc. and works out the history of sales and any trends and data patterns. It's very smart and a fantastic tool to have in these times.

**Find out what forecasting tools your system offers and start using them.**

# 7.

## Getting in line with Making Tax Digital

**(UK specific)**

Ok, so this is not something our customers have been enquiring about but rather potential customers. **There's a big push to be MTD compliant and for businesses to get in-line with the new regulations.**

This has resulted in an increase in calls from businesses looking for seamless integration with the HMRC within their software packages; many of whom claim providers are charging them extra to do so.

We've also come across business who can submit their accounts via their software but it involves exporting data to excel and then uploading it to the HMRC, which is a rudimentary approach to handling Making Tax Digital.

**Intact is a HMRC approved supplier of Making Tax Digital (MTD) compatible software.** This applies to all of our software products - Intact Vline, Intact Xline and Intact iQ.

The functionality we have added to our software to facilitate MTD compliance was rolled out to all of our existing customers free of charge; forming part of a standard upgrade process. Everything you need has been facilitated within the software with zero requirement to export to excel.

If your ERP provider doesn't already offer the above, then we'd worry about their future ability to ensure any new regulations are responded to and incorporated into their product road-map. Also, charging for regulatory change is a poor reflection of the provider.



# In conclusion

**While the above represents the most popular moves by our customers, we've also seen many take significant actions on costs and cash management to give them a strong financial footing through the crisis and beyond. Things like...**

- Introducing more effective stock management
- Improving credit control processes reducing exposure from the risk of bad debt
- Implementing customer account portals so b2b customers can manage their account online rather than having to call back/email your credit control team
- Better end-to-end sales management

During this period of uncertainty, some businesses will thrive in this change and reach accelerated success, others will struggle to find their footing in all of the chaos.

Emerging stronger is about driving your baseline technology, your ERP solution, to adapt to the new norm. We've put new customers live on our software. We've got customers trading online. And we've got customers driving their business software to do more for them.

You can do the same – with the right software. So when choosing ERP software, it's important to select a system scalable enough to grow along with your business for the next 10/15 years. And more importantly, you need to ensure it is based on a flexible architecture that will accommodate changes in both the technology landscape and market conditions in the years to come.



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Intact iQ will flex and grow to fit the current and future needs of your business providing you with a future-ready, integrated central business hub that will enable your business to operate at its best.

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For more information, please contact us at  
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