ECi M1

Overview

ECi M1 is a powerful, Windows-based, client/server application designed for growing job shops, custom manufacturers and mixed-mode manufacturers. It is based on the latest Microsoft® .NET technology, a powerful graphical development environment, and the industry standard Microsoft SQL ServerTM.

ECi M1 is a modular system which makes it truly scalable software suitable to meet the needs of small enterprises. The only mandatory module is Production. All other modules are optional and can be purchased at any time as your business grows.

M1 version 9.2 includes enhanced features with cost of goods sold (COGS) for precise job costing and first in first out/last in first out (FIFO/LIFO) inventory control. This functionality will give manufacturers visibility into their business, enabling them to track job costs in real time.

The latest version of M1 features enhanced functionality for scheduling for better constraint planning of labor, and equipment management.

An ancillary improvement is the ability to create custom calendar views for any given month to see Late Deliveries, Scheduled Deliveries, and Shipments, all on the same calendar view.

In July, 2017 The Apax Funds purchased a majority interest in ECiM1. The Carlyle Group continues to have a minority interest. Concurrent with this transaction, the Macola, JobBOSS and MAX business of Exact Software (a current Apax Funds portfolio company) combined with ECi. These businesses are based in the U.S. and provide ERP software applications to a wide range of manufacturers.

User Experience

Ease of use: System usability has one of the biggest impacts on a company's productivity after implementing a new system of any kind. ECi understands this simple concept and has built in a level of system usability and context-sensitive help so that users can learn and maintain the system themselves.

When logging into their system for the day, users are welcomed by their "Start Page" which provides executive information that can be tailored to the company as well as the user's needs.

Value

ECi Software Solutions is a provider of vertically oriented business management and e-commerce systems software for growing and mid-size companies. The company's software fuels the expansion and efficiency of manufacturing operations throughout the world as well as dealers and distributors in industries such as office equipment, office supplies, contract office furniture, business equipment, lumber and building materials, hardware, and jan/san supplies.

Pros

- Lots of power for the money
- Lower annual maintenance cost than most vendors
- Integrated CRM
- Strong e-commerce
- Product configurator

Cons

- Not an MRP system
- No true forecasting
- Limited for product life cycle management (e.g., revision changes)
- Not suitable for process batch manufacturing
- Very inconsistent on support, limited number of competent support personnel

Ease of Deployment & Training

M1 is designed to minimize implementation time and maximize your return on investment. The Implementation Checklist provides a precise roadmap for the setup of M1. Knowledgeable industry experts are on site providing the consulting and direction necessary to meet your go live date. The average M1 implementation takes 3-4 months.

Training is a major contributor to the successful implementation and optimization of your software.

System Tools & Features

Graphical user interface: A sophisticated Microsoft Outlook standard has been used which gives a familiar look and feel.

Object-oriented: Object-orientated design for ease of maintenance and enhancement.

Easily maintain master files: Maintain master files easily from within the programs that use the files.

Customizable forms: Accommodates both plain paper and preprinted customizable forms.

Ease of use: System usability has one of the biggest impacts on a company's productivity after implementing a new system of any kind. ECi has built in a level of system usability and context-sensitive help so that users can learn and maintain the system themselves.
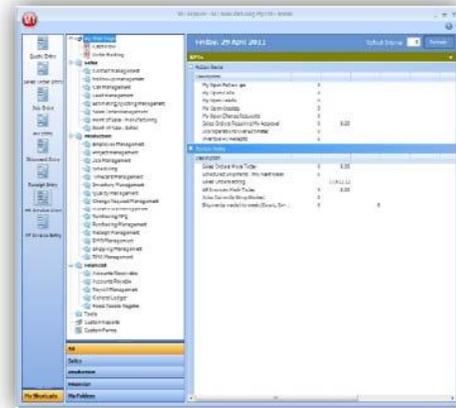
Your system administrator can set up each user with access to only those databases, tables, fields, reports and functions of M1 that they use. When logging into their system for the day, users are welcomed by their "Start Page" which provides executive information that can be tailored to the company as well as the user's needs.

Productivity Tools

M1's productivity tools increase efficiency by providing access points to information contained within the system. There are tools such as graphs, calendars, explorers, wizards and other shortcuts to help locate answers to questions quickly and accurately.

Business Analysis Tools

These are available in every module.

Data Visualizers. Transaction activity over a specified time period can be viewed as a bar graph, pie chart, calendar or map.

Explorers display key information on the screen so it's all at your fingertips. *Advisors* answer common questions.

The Start Page can display a series of pre- or user-defined searches that provide a snap shot of the most critical business activities. All these business analysis tools feature drill down capability; just click and all of the detailed information is displayed. You can drilldown from a report.

M1

Design Studio

M1 Design Studio helps to ensure your most unique business processes are handled in a way that works for you. Using Design Studio, you can add new tables and fields, change input forms, customize reports, modify search grids, and add new views to the grids if desired.

Customer Relationship Management (CRM)

M1 gives you the ability to provide superior customer service. Call Management provides an effective means of recording all communications with prospects, customers and suppliers. You can record presales activity, track call times, assign a call to the right person, prioritize the calls and manage service contracts, including warranties and maintenance. You can also analyze marketing programs to determine the most effective strategies. Lead management allows you to create leads for all inquiries, create marketing programs and view revenue generated. Milestones show the status of each lead and assigns a confidence factor to help forecast accurate revenue. You can create quotes and orders directly from calls and leads. M1 also allows you to store emails as call records.

Integration with familiar everyday tools

M1 has a Microsoft Outlook feel which makes its use intuitive. When a quote is generated, M1 automatically creates a follow up in Outlook. Use Microsoft MapPoint or Google Maps to view customer's locations, export any data to Microsoft Word or Excel. PDF files of invoices or quotes can be emailed directly from within M1. You can also perform mail merges.

Smart Screen Technology

There's no more need to have multiple windows open at once. M1's state-of-the-art navigation methods allow you to find everything you need quickly. Select the task to carry out and the screen modifies to suit. Any information you need is easily accessible.

The power of search

M1 allows as many search filters as you need. This can reduce the time spent looking for data and eliminates having to consolidate information from a number of reports.

Enter data only once

Wizards allow you to create a quote and then pull the quote through sales order, job, shipment and invoice without entering the data again. Use the purchase order wizard to order all materials at the same time.

Approvals and Warnings

M1 makes sure that you can maintain control of the important activities within the business. When you receive an order from a customer, M1 will check the current status of the customer's account and will advise you of any aging accounts issues. Sales order and purchase order approvals are built into the system so specific activities cannot be started without approval.

Easily maintain master files

There is no need to stop entering a quote, job, P.O., etc. when you discover something is missing. You can update master files as you go.

Advanced inventory features

M1 Advanced Inventory Management provides the means of effectively managing complex inventory requirements. Multiple warehouses, multiple bins, dimensional inventory and parts cross references improve your inventory control. Advanced Bill of Material gives you revision control, serial number tracking, lot control and find and replace tools.

Feature-packed financials

AR invoicing wizard creates invoices directly from shipments, eliminating rekeying and reducing errors. With AP, you can update jobs with actual costs so you can analyze job costs and match your creditor's invoice with the purchase order and receipt. General Ledger lets you post transactions into prior or future periods without the need to close the current period. The General Ledger module includes a Fixed Assets Register. You can also manage your buying and selling in foreign currencies. M1's fully integrated Payroll module simplifies the process for paying your employees.

Implementation & Training Short implementation cycle

M1 is designed to minimize implementation time and maximize your return on investment. The Implementation Checklist provides a precise roadmap for the setup of M1. Knowledgeable industry experts are on site providing the consulting and direction necessary to meet your go live date.

The average M1 implementation takes 3-4 months.

Training

Training is a major contributor to the successful implementation and optimization of your software.

M1 is committed to providing you with the tools and support necessary to ensure success, which includes continuing education. Choose from a full range of classes for onsite training or online classes to learn the various aspects of your system. The training staff draws upon a wide range of experiences that help tie the classroom to the business world. The quality education you receive provides self-sufficiency in running your system.

The M1 Modules

ECi M1 is a modular system which makes it truly scalable software suitable to meet the needs of small enterprises and offers medium-to-large, complex businesses the key functionality needed at an affordable price. The only mandatory module is Production. All other modules are optional and can be purchased at any time as your business grows.

Production

Contact Management

Order Management

Job Management

Inventory Management

Purchasing Management

Shipping Management

Labor Management

Scheduling

Quality/Warranty Management

System Security

Unlimited View Only Users

M1 Design Studio

Optional Modules

Estimating & Quoting

Call Management

Lead Management

Point of Sale (POS) for Manufacturers

Product Configurator

WebGear Customer Web Interface for M1

Advanced Bill of Materials (ABOM)

Purchasing Request for Quote (RFQ)

Advanced Inventory Management (AIM)

Accounts Receivable

Accounts Payable

General Ledger (including Fixed Assets Register)

Multi-Currency Management

Payroll

Unlimited Shop Floor Entry (Data Collection)

Document Management

Project Management

Overview of Module Features

Production:

Contact Management

Contact Management organizes your customer and supplier details, including locations, contacts, tasks, appointments and memos. Every organization can have multiple related locations and contacts, be added to multiple organization groups, create follow-ups and assign tasks, and use the mail merge facility to send letters, faxes and emails. Use the organization explorer to access all records and transactions relating to an organization.
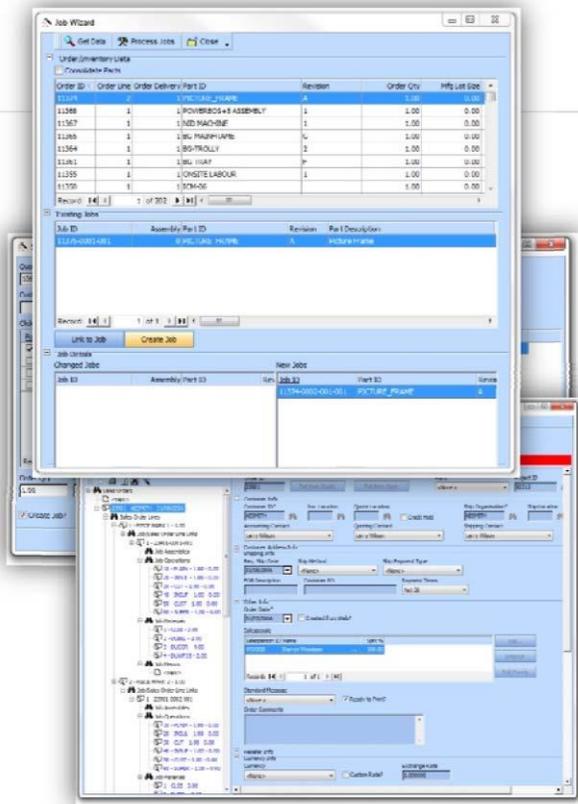
Order Management

Order Management provides a fast, efficient method of booking sales orders as soon as you receive them. Every order can include a combination of make-to-order, pull-from-stock quantities, purchase-to-order and kit parts. Integration with the Job Management module allows you to immediately create jobs for your make-to-order items.

Create master files as needed, work on multiple sales orders at once, create a job from a sales order and

manage customers' blanket orders.

Job Management

Job Management allows better management of production jobs. Raw material demands are automatically updated with the job. Job costs are automatically updated with every job transaction. The multi-level bills of material allow for management of complex production jobs. Quality assurance reporting allows tracking and reporting on scrap and rework, and job analysis allows comparison of actual versus estimated costs. The Job Wizard automates the process so you can create and update multiple jobs according to your selected criteria on one screen.

Inventory Management

Inventory Management provides the mechanism to control your raw materials, finished goods and sub assemblies. Integration with Order Management, Job Management and Purchasing Management modules ensures accurate stock records through automatic allocations, stock receipts and issues.

Materials can be purchased directly to the job, back-

flushed, and issued individually or on a mass scale. You can maintain different inventory and purchasing units of measure by using the conversion factor. A step-by-step checklist for physical counts is included.
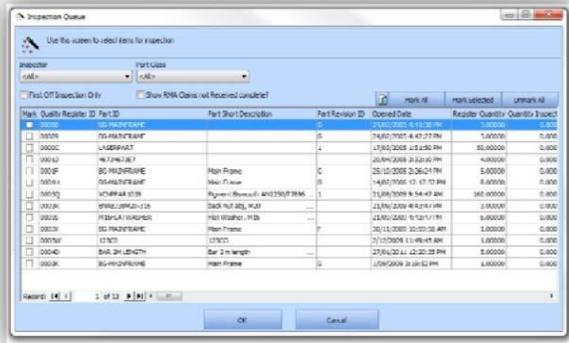
Purchasing Management

Purchasing Management provides the tools to create purchase orders and track supplier performance with the ability to purchase materials directly to a job, stock or sales order. The Planned Material Requirements report provides the information you need to ensure the right purchasing decisions. You can use the purchase order wizard after creating a job to ensure materials will not be missing.

Shipping Management

Shipping Management is a pivotal tool for managing all outgoing deliveries. You can ship goods to a customer from either a job or an order. You can also ship goods directly from a work in progress with no need to transfer manufactured items to inventory before delivery. You may print packing slips as you process a customer's shipment to avoid delays. Sales orders are automatically updated to reflect partial or complete shipments. You can review your on-time delivery performance.

Labor Management

Labor Management is a fundamental module used to collect and track your employees' labor hours. All employee work hours can be captured through timecard entry or shop floor entry, which integrate with the Payroll module. You may define shifts, record critical employee information, audit collected labor information, see who is clocked in and view which job each employee is working at any given time.

Scheduling

Scheduling is designed to provide manufacturers with pertinent information to enable improved delivery performance. You can identify shop floor capacity problems at a glance and, if a work center is overloaded, M1 can automatically level the load. You can also schedule multiple jobs at one time. There are an unlimited number of "what if" scenarios allowing you to test a variety of production schedules. Both Finite and Infinite scheduling are supported.

View Only

View Only allows you to have users who can view, print and export data for free. You only pay for users that actually transact in the system and not for those who just review pertinent information.

Quality & Warranty

The Quality & Warranty module ties together all quality and warranty functions so you can provide superior products and services. The Quality and Warranty module is packed with features that will improve efficiency and productivity and allow you to meet, or continue to maintain, ISO quality standards. You can enter non-conformances to manage, control and analyze your scrap, and log any procedural or process problems or errors. This allows you to manage the inspection process to ensure that rework or discrepant material is processed appropriately and to make discrepant material claims on your suppliers to ensure recovery of your costs.

The Corrective Action process allows you to track, follow-up, verify and sign-off all corrective and preventative measures. Warranty provides you with the ability to activate warranty contracts associated with a part and allows you to quickly determine whether a claim is covered under warranty or not.

The Quality & Warranty module includes many more features that will ensure you meet the strict quality standards that your customers demand.
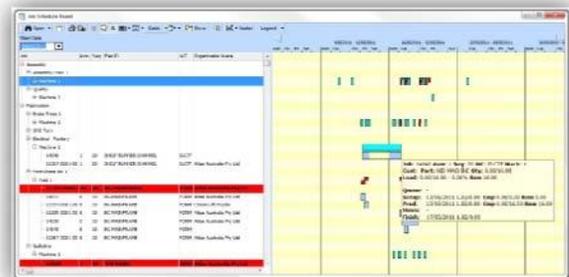
Optional Modules

Sales & Marketing Modules:

Estimating & Quoting

Estimating & Quoting allows for quick and accurate quotations. Multiple items with quantity price breaks are supported. M1 has the ability to base quotations on cost-plus-percentage markup, quoting rate, margin or price list. You can copy the bill of materials (BOM) from inventory, previous jobs, and quotes, which saves time. Email, fax or print a professional-looking quotation directly from your computer. When an order is received, pull the quote through to create the job without having to rekey the data.

Lead Management

Lead Management enables companies to document all activities in the presales process with the added ability to analyze marketing programs to determine the most effective strategies. Create leads for all inquiries, create marketing programs and view forecasted revenue. Milestones show the status of each lead and assigns a confidence factor to forecast accurate revenue. Create quotes and orders directly from calls and leads. M1 also allows you to store emails as call records.

Point of Sale

Point of Sale allows you to sell stocked items in a retail environment. It combines order entry, shipping, AR invoicing and AP payment, totally integrating the process within M1. Create cash, check, and credit card or charge account transactions with absolute ease. Point of Sale provides a simple interface that accommodates information input via a mouse,

keyboard or bar code scanner.

Product Configurator

The Product Configurator is very simple and flexible. There is no need to have thousands of items in the master file to manage all the different options. Simply input the design rules with an unlimited number of dimensions and options and anyone within the organization will be able to configure a BOM, quote or job.

WebGear Customer Web Interface

Now your customers can have access to information 24/7, and faster and easier than ever before! WebGear comes in two modules: Explorer and E-commerce.
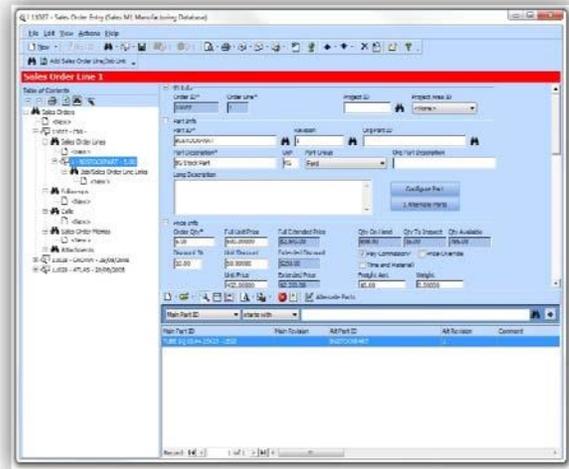
Explorer allows customers online access to view data they are given access. This allows them to track the progress of open orders, as well as view information about their current and past orders, all using your website.

The *E-commerce* module allows your products and services to be purchased online. Popular items and related items for cross sales will display while a customer is building their shopping cart. Products and services can be rated by online users. All payments can also be transacted online.

Materials Management Modules:

Advanced Bill of Material

Advanced Bill of Material gives you the tools to control revisions and assign serial and lot numbers to ensure traceability. Serial and lot numbers can be allocated to all inventory items. All lot and serial number transactions are easily traceable back to the original transaction. When you need to make a change to a part or process within multiple bills of material, you can use find and replace, and roll-up standard costs.

Purchasing Request for Quotation

Purchasing Request For Quotation (RFQ) provides an effective tool to request and manage quotations from multiple suppliers. M1 will automate this process so you can request pricing on raw materials and services from multiple vendors. Pull all or selected parts or services from a quote into a job straight into an RFQ. Automatically create purchase orders from the contents of an RFQ and generate RFQs for parts that are not set up in your part master.

Advanced Inventory Management

Advanced Inventory Management provides a better way of managing complex inventory requirements. Multiple warehouses, multiple bins, dimensional inventory and part cross-references improve your inventory control. Move inventory between locations using warehouse transfers. View the quantity on hand by warehouse and bin, and control your dimensional inventory through the use of bins and their associated conversion factors. Record your customers or suppliers cross-reference part numbers so their reference will appear on your purchase orders and invoices.

Financial Modules:

Accounts Receivable

Accounts Receivable provides a quick and accurate method of invoicing customers and recording their payments. Invoices can be generated from packing slips, eliminating data entry errors. You can print invoices directly from your computer, or email or fax directly to your customers. Multiple tax codes
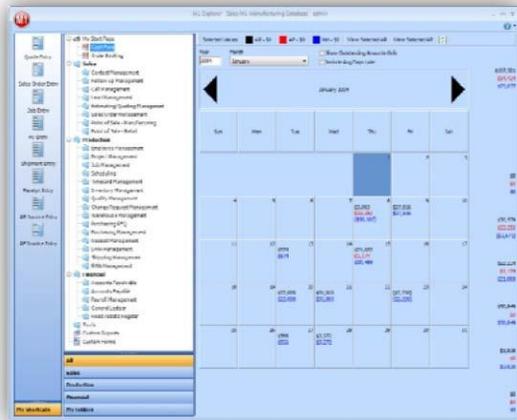
simplify your tax reporting, pay commissions at the time of invoicing or receipt of payment. The system supports processing cash, checks, direct deposit and credit card receipts. You can report on sales history specific parts or by customer.

Accounts Payable

Accounts Payable allows you to process creditors' invoices and payments. Create payments such as EFT, manual checks or M1-generated checks. There is three-way matching of a creditor's invoice with the purchase order and its receipt. You can automatically update job costs with actual material and subcontract costs. Analyze the aging report and use the supplier explorer to view all transaction histories.

General Ledger (including Fixed Assets Register)

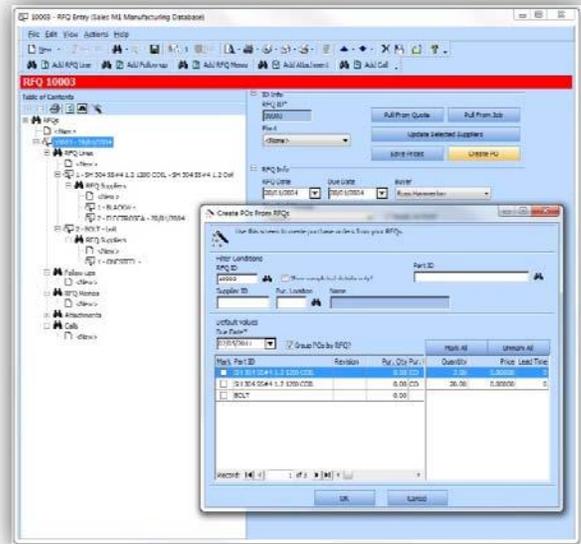General Ledger captures and posts transactions

created in accounts receivable, accounts payable, payroll and general journals created manually. Includes 13 user-defined fiscal periods, maintains budgets for any account and can manage multiple companies.

Transactions can be posted to prior and future periods without the need to close out the current period. Improve accuracy and save time by creating recurring entries for regular, fixed-amount journals. The General Ledger module also includes a Fixed Assets Register. Track all assets, calculate book and tax depreciation schedules, sell, dispose and revalue assets.

Multi-Currency Management

Multi-currency Management simplifies buying and selling functions in foreign currencies. Exchange rates are accurately managed through effective dates. Define any number of currencies and exchange rates. Simply and quickly toggle between home and foreign currency. Produce quotes, invoices and purchase orders in your customer's or supplier's home currency.

Payroll

The Payroll module will transfer data from the timecards of shop employees, using Shop Floor Entry (SFE) or Time Card Entry, and also processes salaried employees. Leave accruals can be automatically calculated based on a number of options, and leave applications can be entered and viewed in a scheduling board format for easy review. This module includes the standard analysis graphs and calendars to allow you to easily review your data.

By using a start date and revision you are able to enter future tax tables well in advance. Your payroll can be exported to a direct deposit file, plus M1 supports an unlimited number of bank accounts per employee. M1 will update your General Ledger and Bank Reconciliation automatically when you post the payroll session.

Other Modules:

Shop Floor Data Collection

The Shop Floor Data Collection module is designed to deliver a high return for any company. It will provide accurate job costs, real-time prioritizing, real-time job status and collection of payroll hours. There are several hardware options that can be utilized: mouse/keyboard, bar code scanner, touch screen or mobile terminals.

Document Management

Document Management provides a cost-effective method of controlling external documents related to quotes, parts, jobs and purchase orders. An unlimited number of documents can be linked to these records. Maintain your quality records, safety records, work instructions, testing procedures and shop floor production.

Project Management

The Project Management module ties together all quotes, jobs, orders, purchases and invoices to a specific project. Assign a project manager, track progress and create follow-ups that integrate with Microsoft Outlook. You can manage variations to the project at any time and review your project status report to ensure everything is always on track.