

MADE2MANAGE SOFTWARE

MANUFACTURING SOFTWARE REVIEW BY SHELDON NEEDLE



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Executive Overview

Made2Manage Systems (now owned by Aptean) is a provider of comprehensive Enterprise Resource Planning Systems for mid-market manufacturers. Headquartered in Indianapolis, Indiana, the Company employs approximately 250 people at locations throughout the United States, Canada and the United Kingdom.

Founded in 1986, Made2Manage Systems delivers comprehensive enterprise software services to users worldwide. Our customers operate in a wide variety of industries; including farm machinery and equipment, packaging machinery, industrial commercial machinery, computer and office equipment, rubber and plastics.

Made2Manage Systems offers interlocking application services to manage your entire business environment from selling and design, finance and human resources, customer service and support, through manufacturing and distribution. These end-to-end solutions help establish and strengthen customer and supplier relationships, streamline operations, and develop and retain employees.

The company's principal software product, The Made2Manage Enterprise Resource Planning System, helps improve business performance by optimizing your supply chain, expanding your business opportunities, providing robust business analytics and leveraging the Web for reduced costs. The software tightly integrates sales, engineering, materials planning, production, quality management, finance and human resource functions. Made2Manage Systems also supports enterprise portals so you can extend the reach of your business beyond your four walls.

As a Microsoft development partner, Made2Manage Systems provides customers with easy-to-learn and easy-to-use business performance tools. Made2Manage Systems consistently delivers advanced technology solutions that are compatible with the Microsoft® Windows® operating systems and BackOffice® family of server products.

Made2Manage Enterprise Resource Planning System

The Made2Manage Enterprise Resource Planning System (M2M™ERP) represents the complete suite of Made2Manage manufacturing applications. M2M™ERP is comprised of tightly integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM), business intelligence (BI) and enterprise portal (M2MVIP) applications.

Made2Manage provides you with a robust business system that is easy to use, easy to implement and quickly pays for itself. The Microsoft-based suite of interlocking solutions provides a strong foundation for continued growth. Made2Manage delivers a strong return on your investment after the sale by providing a rapid implementation, flexible educational offerings, a dedicated call center and superior service and support via the www.m2mexpert.com site.

M2M ERP: Enterprise Resource Planning

Made2Manage ERP delivers a strong back-office package to enable you to focus on your core competencies. M2M™ERP integrates and coordinates the production of customer orders to enhance your productivity and reliability. The integrated back-office shares data throughout your entire production process to keep work centers operating at peak efficiency. From initial sales quotes and design drawings to shipping your



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product and collecting receivables, M2M™ERP offers seamless management of all the touch points in producing your product regardless of the type of discrete manufacturing you do

Sales Management

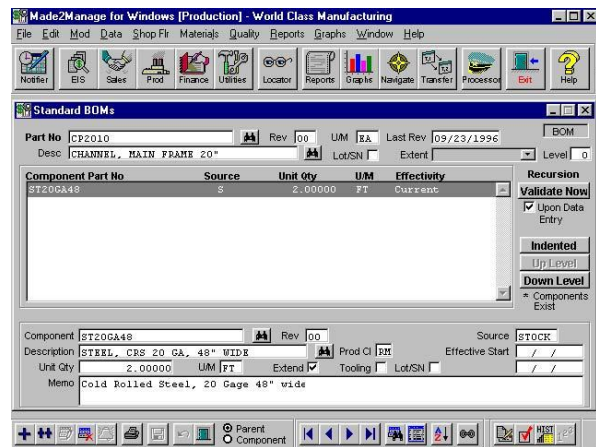
Sales Management begins with the quotation process which creates single as well as multiple item quotes, provides for *Bills of Material* and *Routings*, and standard or non-standard parts and multiple prices. *Quotes* can be created manually or automatically from existing quotes, sales orders or job orders.

Quotations are automatically printed in a standard format through a laser printer. Logo printing is fully supported. Quote formats can also be modified to meet unique requirements. The *Customer Service* feature enables users to track and easily follow-up on customer issues, and is accessible through the *Web Applications*. Users can enter problem details, corrective action required and assign an RMA number as needed.

In the sales data section, prospect, customer, distributor and salesperson files are created, along with the capability of automated mail merge for quick correspondence to any number of companies. Sales order entry creates sales orders with multiple buy, stock, or make items. Sales orders can be entered manually, or created from a quote, which copies *Bills of Materials*, *Routings*, and all pertinent information from the quote. Quotes and sales orders provide “features and options” order entry. Blanket orders can be created, released and order revisions tracked. Order acknowledgments and shipping lists can be automatically generated and printed for distribution.

The sales overview feature displays the status of key activities and conditions related to sales such as: orders past due, orders partially started, orders with cost overruns, quotes due this week, etc.

Standard reports ranging from *Status of Quotes* to *Order Status* to *Sales Follow-up* provide timely information on activities taking place within the sales department. Detailed reports on COGS, *Monthly Shipping Analysis* and others provide needed information for conducting in-depth analysis. All standard reports may be modified and custom reports may also be created. In addition to the many standard reports, the graph generator enables users to print a number of standard graphs. Once generated, graph formats can be easily modified.



Engineering Management

BOM Builder gives users a single screen for easy construction, viewing and maintenance of Standard Bills of Material. *AutoCAD Viewer* is a red line viewer allows users to annotate a copy of the drawing, rather than the original, and then send the proposed changes to engineering via e-mail. *AutoCAD Viewer* provides engineering and shop floor personnel with the ability to cost effectively view drawings without AutoCAD loaded on the workstation.

Engineering Change Management was designed to help manage and control product revisions, as well as to preview the impact of product changes. Changes to standard product information within

M2M™ERP such as the *Item Master*, *Bills of Material* and *Routings* have a widespread impact on an organization. Improper management of product data and the engineering change process can lead to customer dissatisfaction, production inefficiencies and higher production costs. M2M™ERP helps control the engineering change process by providing full auditing of critical documents and multiple revision levels for *Item Master*, *Standard Bills of Material* and *Routing* records.

Materials Management

This patented MRP has many of the features of a large MRP system while retaining enough simplicity to make it practical for mid-market companies. It provides bucketless net change and superfast regeneration features. The easy-to-use *MPS* allows the identification of firm orders with independent demand, firm orders with dependent demand, planned orders with independent demand and planned orders with dependent demand.

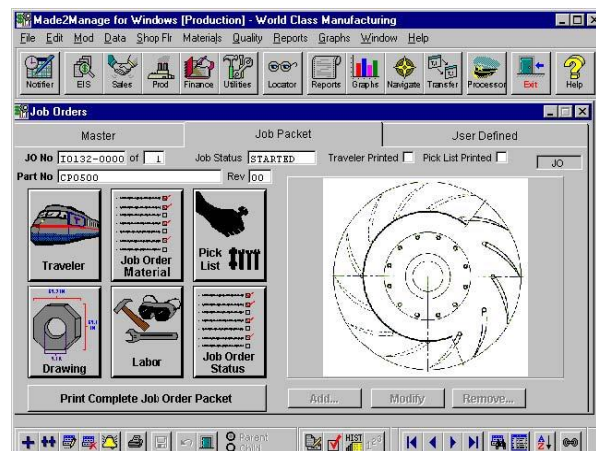
Bills of Material (Bills of Materials) are simple to create and maintain within M2M™ERP – making quotes, sales orders and job orders easy to complete. The system supports single or multiple level *Bills of Materials* and virtually unlimited levels and items on each. Inventory control in Made2Manage provides extensive functionality for managing all inventory-related transactions. It includes powerful cycle counting functionality and physical inventory capabilities. Providing the foundation for sound inventory control is the inventory *Item Master* with five screens of detailed information.

M2M™ERP provides an easy-to-use, yet sophisticated job order tracking feature. In addition to extensive functionality, the system's flexibility enables job orders to be tailored to fit each business.

The *Job Packet* is a unique, on-line feature within the job master file that enables viewing of items

such as the pick list and the routing on screen eliminating the traditional paper documents that accompany a job through production. The *Job Packet* screen also enables photos and CAD drawings of the item to be embedded.

Routings form the foundation for how an item is going to be produced and establishes the guidelines for scheduling all jobs. Much like *Bills of Material*, *Routings* are associated with an item in the item master file. A routing can be as simple as having only one operation and very little detail, to having unlimited operations with pages of notes attached. Each routing displays a screen that summarizes all costs for labor, overhead, subcontract, and other expenses for a quick, concise look at the total production cost.



Production Management

Production Management provides extensive functionality for managing manufacturing and related processes within the company. Driven by sales orders, production can plan, track and report every phase of production including scheduling, purchasing, manufacturing, inspection and shipment of standard and non-standard parts for each sales order. Job orders can be automatically created from sales orders or previous job orders.

Detailed or “casual” *Bills of Material* can be created as well as “detailed” routings.

Subjobs are automatically created when an indented *Bill of Material* is used, to allow each level to be separately scheduled and tracked. Backward pass scheduling creates release dates to establish purchasing queues and production releases. Printed floor travelers are created for job processing on the production floor, and detailed material pick lists are printed at job release date. Scheduling of all jobs, or one job at a time can be done quickly with M2M™ERP. The “What-If” scheduling of a quote or sales order is available

Financial Management

The financial section permits the posting of all financial information, some of which is generated automatically from sales orders and Production Management functions. It also displays all the financial reports to measure the total financial performance of the company, *P&L Statement*, *Balance Sheets*, *Budget Reports*, *Automated Cashflow Projections*, including unique events. Order costing records data by the job order or sales order in an order specific structure to arrive at "real costs."

M2M™ERP separates cost data for each product class into WIP and COGS. WIP holds actual costs reported for production that has not been shipped to the customer. COGS holds either the estimated costs before shipment, or the actual costs transferred from WIP when the order is closed. Made2Manage records four types of costs both during production (WIP) and after production (COGS) - material, direct labor, overhead and other costs.

Cash Flow Projection allows users to predict and manage the future cash flows of their company, drawing upon inputs from existing accounts to create cash flow forecasts. Incorporating user-

defined inputs and assumptions, users configure cash flow calculations to best reflect their company’s operating characteristics.

With M2M™ERP, it is possible to collect detailed information for each order. Information can be updated each day or only when the user chooses. The *General Ledger* allows posting to multiple periods. It has automatic account distribution and recurring posting features. All reports can be displayed on screen or printed for distribution, including a chart of accounts and trial balance sheets. All related modules report data transferred to the General Ledger. There is no ability to modify financial reports other than using Microsoft’s Management Reporter (MR).

Many standard reports and graphs are furnished, including the *Financial Management Overview*. *Accounts Receivable* creates computer-generated invoices, handwritten invoices, credit memos, returned merchandise and finance charges. Reports and statements are automatically laser printed on standard or custom forms.

Accounts Payable can post to multiple periods and uses automatic payables. Code features include hold for approval and payment urgency codes. Automatically printed or handwritten checks are supported. The employee master file automatically accumulates labor postings and links to the optional Payroll module. *Financial Overview* displays the status of all key activities related to Financial Management. A dozen reports can be displayed or printed to indicate the specific receivables, payables, jobs, items, etc., which require the attention of management.

Microsoft’s Management Reporter (MR) Reporting is an *essential* tool for financial personnel of small and midsize manufacturers, giving them an advanced financial software application for analysis and reporting. The Microsoft’s Management Reporter (MR) Interface provides users with rapid and flexible financial reporting,

consolidation and drill-down capabilities. Made2Manage's Microsoft's Management Reporter (MR) Interface can create new reporting relationships without changing chart of accounts or data entry procedures.

Made2Manage offers an *Electronic Data Interchange Infrastructure (EDI)* solution that provides a basis for integrating electronic documents such as invoices and purchase orders directly to and from M2M™ERP. Two *Reporting* systems are provided with Made2Manage. A large number of standard reports are an integral part of the system. Each of these reports may be printed or displayed in a variety of sort orders. Several different filter choices can be applied to expand or narrow the information retrieved. These reports can also be modified in content and format. A powerful report generator is also provided which permits reports to be customized in order to meet an organization's specific needs. These reports are added to the master report list and easily accessible by any user. A complete data dictionary is on-line to assist the user in creating or editing the contents of reports.

Payroll provides complete accounting functions for paying timecard, hourly and salaried employees, keeping payroll records and printing payroll checks. *Payroll* also supports the generation of additional payments, handwritten checks, payroll tax deposits and accrued vacation, sick and holiday information. Users can choose a payroll interface that best meets their needs, whether they send their payroll to a service bureau or they handle payroll in-house.

Whether *Payroll* is sent to a service bureau or handled in house, M2M™ERP takes integration a step further by interfacing with both *Automatic Data Processing (ADP)* software and *Abra Payroll for Windows*.

M2MVIP: Enterprise Portal

With M2M VIP, you have an enterprise portal to extend the reach of your business system to engage your customers, suppliers, partners and employees.

M2M VIP enables all of the elements involved in the development your product to collaborate on production resulting in a stronger supply chain.

M2M VIP is a customizable area on your company's Web site where your customers and suppliers can select their exclusive links to review real-time account and order status information, shipping details and enter orders or quotes 24 hours a day. In addition, M2M VIP is fully integrated into the Made2Manage back-office database so you can jump-start the fulfillment process.

By automating the delivery of key information to your supply chain, you can reduce the cost of conducting business. M2M VIP enables you to easily share information and offer a convenient, practical way for your partners to do business with you. Furthermore, the secured VIPsite allows you to select the level of access to information that you provide for each of your partners.

The M2M VIP product is unique from the competition in three ways: a) it offers 360 degree functionality – serving customers, suppliers, partners and employees b) it is a collaborative commerce site – document and discussion sharing between designated users is provided to promote collaboration, not just transaction-based e-commerce decisions and c) it provides the lowest total cost of ownership with a “hybrid hosted” model at a Data Center and the manufacturer only needs to install a small file on a Web server on their side; implementation can be done in less than one day.

Functionality includes:

- Document Repository
- Account Status
- Invoice Inquiry
- Order Status
- Product Catalog
- Order Entry
- Inventory Availability
- Request for Quotation
- Quote Status
- Channel Management
- Storefront (Public Product Catalog)
- Personalization Tools
- Administration Tools

Best of all, M2MVIP is the solution with the lowest total cost of ownership. The M2MVIP application is hosted by Made2Manage Systems and therefore requires no additional hardware, services or support fees, and is always compatible with the latest versions of Made2Manage.

With M2MVIP, you can be more responsive to the needs of your customers while decreasing operational costs.

M2MCRM: Customer Relationship Management

Made2Manage CRM allows you to manage all interactions with your current and future customers. The suite of Made2Manage CRM tools help you identify and capitalize on more business opportunities. The bottom line benefits to manufacturers include more sales, improved customer relationships and enhanced customer loyalty. In addition, detailed and complete information is available for each of your customers so you can give them individualized attention on all aspects of their respective accounts.

Sales force activities are automated throughout the selling cycle. From monitoring initial marketing

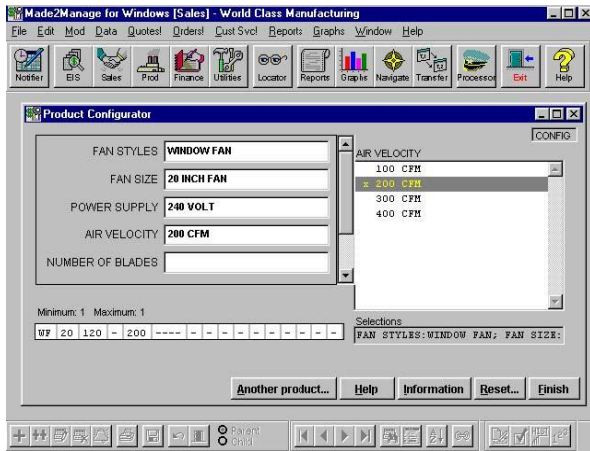
campaign metrics, to providing sales quotes, from accurately promising sales order delivery dates and configuring products, through notifying your customers of shipment dates and providing support after the sale, CRM applications from Made2Manage keep customers happy and drive repeat business.

Field service utilizes Made2Manage inventory, Lot control, BOMs and routings so you can get the complete customer's product configuration when you are on site providing services. It will also keep a full service history for each serviced product so you know how it's been maintained and upgraded over the years.

Product Configurator

With Made2Manage's *Product Configurator*, Order Entry and Sales personnel can configure a product easily using a question and answer format. On-line graphics, help files and other documents can be linked to provide all the information needed to configure a product. The *Rules-Based Product Configurator* extends beyond the functionality of the basic *Product Configurator*. The *Rules-Based Product Configurator* provides the latest technology and ease of use for the custom manufacturer who needs to create powerful validation rules, tailor the resulting manufacturing data or configure products from remote computers such as lap tops.

The Made2Manage *Product Configurator* provides the functionality needed in today's discrete manufacturing environment. Using a graphical drag and drop outline, Smart Part or "Wizard" interfaces, custom products may be defined, priced, quoted, ordered and catalogued. *Product Configurator* records configured product's features and options.



M2M SCM: Supply Chain Management

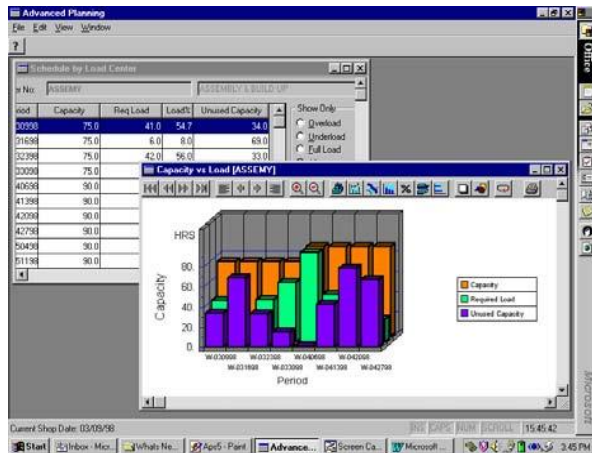
Growing your business requires developing an accurate vision of your future business needs. Made2Manage Supply Chain Management helps you plan and schedule all resources to maximize your throughput. Forecasting, planning and scheduling applications within Made2Manage provide enhanced predictability for your business. By accurately forecasting future demand, promising customer orders and optimizing production plans and schedules, you can get more product out of your existing resources and deliver more reliably. In addition, you can promise product delivery dates using information on actual capacity and material constraints (but not machine constraints).

Finite Scheduling, with an over-utilization feature, automatically determines a schedule for all jobs to achieve: most jobs on time, shortest time span within which to complete backlog, or the highest utilization of production capacity. Bottlenecks can be quickly spotted and schedules modified to reschedule work centers and assure on-time delivery. Infinite scheduling is also available for comparison.

Another tool provided is the *Work Center Loading Analysis* report. Taking just a few minutes to run, this is a displayed or printed report showing the scheduled number of hours and the number of idle hours for each work center. The report can present data for the next 12 shifts, days, weeks or months. This report can help pinpoint bottlenecks in the production schedule.

Once bottlenecks are identified, the work center schedule can be quickly obtained for a specific date range and work center to determine what jobs are going through that work center during the bottleneck periods. Jobs which may contribute to the bottleneck can then have their status modified, or they can be placed in a suspend mode through the use of "What-if" scheduling.

Advanced Planning and Scheduling is the set of functionality that enables manufacturers to determine how to effectively satisfy their customers' demands given the real-life constraints of limited production resources and material availability. *Advanced Planning and Scheduling* differs from traditional methods of planning and scheduling because it considers production capacity and material availability at the same time rather than in separate "passes" which require iteration. The "*Capable to Promise*" feature with a streamlined user interface allows manufacturers to accept orders with more confidence and better meet due date expectations. Manufacturers can quickly perform *Forecasting Analysis* using historical data stored in Made2Manage.



M2M™ Synchronizer uses a Drum-Buffer-Rope scheduling approach to help identify your shop's bottleneck resource, exploit that resource, buffer it to protect it and keep it running and subordinate other resource schedules to that bottleneck.

The M2M™ Synchronizer comes with a built in Infinite Planner that automatically creates jobs in support of demand. It features state of the art scheduling algorithms, previously available only to the largest and richest manufacturers.

The M2M SCM applications streamline and optimize your supply chains for maximum profit. By creating greater efficiencies, M2M SCM enables you to get more product produced, in less time.

M2M BI: Business Intelligence

Business Intelligence services from Made2Manage help your employees at all levels of the organization respond to potential challenges facing your business. With BI tools, you can make better, faster decisions. Access reports on all areas of your business quickly and easily with Made2Manage. What are the sales numbers for the quarter? By region and salesperson? How much is it costing us

to produce each job? Which of our products are most profitable? Questions can be answered in a thorough and rapid fashion with the comprehensive report system in Made2Manage.

Once you retrieve the information you need, Made2Manage enables you to organize and analyze key performance data. View data in greater detail by utilizing “drill-down” windows and easily navigate from summary information to the source transaction with just a few mouse clicks. M2MBI lets you stay on top of critical aspects of the business and address potential “hot spots” before they detract from the bottom line.

Our M2M Business Analysis Product is designed specifically for executives and senior managers that will allow them to dynamically “slice and dice” through sets of data collected to answer specific questions. This product is based on the latest Microsoft Analysis Services and on-line analytical processing (OLAP).

The Events and Action Tool is critical in helping management make better, faster business decisions. This business intelligence tool provides notification, via a popup, email or fax, when there is a status change of a key document, in some instances the action may even prompt another program to be executed. The Events and Action Tool can also handle criteria other than status changes. For instance % profitability that is unacceptable, multiple events and time based events.

M2M Link: Enterprise Integration

M2M Link enables you to automate electronic communications between your Made2Manage Enterprise Resource Planning System and other business systems, trading exchanges or XML Web services. Plus, we can get you up and running fast.

Electronic data exchange (EDI) is the most common form of automated communication and is usually a requirement of doing business with large customers. Made2Manage offers you traditional EDI functionality or our complete EDI/XML solution where we provide document exchange services for you.

With the Made2Manage EDI solution, you have the flexibility to create an interactive data exchange or make the process totally unattended. EDI also provides logs so you can track the processing and success of executing transactions. The EDI/XML solution enables you to better serve your customers by allowing you to accept documents in virtually any format. In addition, you benefit from a single point of contact. Made2Manage Systems hosts and manages the technology for you. We use the latest Microsoft.Net infrastructure to manage any type of data protocol you require.

System integration also presents the opportunity for you to streamline your own supply chain. By linking to your customers, you create barriers to entry for your competitors, you reduce your administrative costs and you make it easier to do business with you. Gain a competitive advantage by communicating rapidly and effectively with your customers.

Time2Value™ Services

Made2Manage Systems Service and Support provides you with the knowledge you need to maximize your business system investment. Made2Manage offers a range of tools and assistance to ensure manufacturers a rapid and successful implementation. After the sale, Made2Manage works to reduce your total cost of ownership while providing continuous, quality service in Customer Support, Education, Consulting and Customizations.

Made2Manage provides a competitive advantage for you through www.m2mexpert.com. M2M™EXPERT is available to you 24 hours a day, 7 days a week. M2MEXPERT serves as your principal source for information on Made2Manage software solutions. Within the web pages of M2MEXPERT, users may obtain information on a variety of topics. Whether you are searching for technical support, education courses, customized report writing, consulting, user2user contacts or related business contact information; M2MEXPERT is a powerful resource for your manufacturing business.

In addition, Made2Manage offers M2M University, a low cost, subscription-based education program designed to make the transition to a new business application service painless. M2M University helps by providing flexible, comprehensive educational opportunities. An M2M University education contract allows unlimited education to your entire corporation for the length of the subscription period.

Comprehensive Time2Value™ services help to enhance the performance of your business.

Time-to-ValueTools

When implementing a new information system, most organizations actually report a decline in productivity – a period of time called "disruption." The emphasis of the Made2Manage implementation process does not stop once the system is up. Made2Manage implementation goes past just getting the system up and running. It focuses on minimizing the disruption of a new system and getting the new user to the "value" period.

Made2Manage Systems' own success is determined by how successful – and how quickly – users are at finding the real value with a new information system. It's something called Time-to-

Value, and its their goal to keep that time brief. For instance, the exclusive Made2Manage Dataloader makes it simple to transfer all data from legacy systems to your new system, eliminating the need to re-key information.

Support

Users under a support agreement receive the following products and services:

- Toll-free customer support
- Customer-exclusive web page, M2M Expert, providing full access to the Made2Manage *Knowledgebase* and the *Change Request Management System*, and a web-based *Case Management* system.
- Downloadable service packs and free components
- Documentation updates
- E-Support Portal that is a desktop sharing and diagnostic tool.
- Customer Bulletin Boards

Users have access to exclusive areas of the Made2Manage Web Site to register for education courses, see what's new in the latest version, and download various utilities and files. This section includes the powerful *Change Request Management System* feature that enables users to check the status of their change requests by feature, change request number, company name or release number. Users can see what changes are included in a specified release and changes planned for future releases.

The Made2Manage *Knowledgebase* is an easy-to-use database of solutions and information driven by a powerful and sophisticated search engine. Plus, it's the same system the Made2Manage customer support team uses. The Made2Manage *Knowledgebase* contains a large number of actual case solutions and Frequently Asked Questions.

Case Management lets customers create, update, search and close support cases, 24 hours a day, seven days a week. A "case" is the historical record of any support issue a customer brings to Made2Manage's support team's attention. Customers can also update, close and search cases through the web site. This includes support issues currently being researched and those that have been resolved.

Consulting Services

Made2Manage Systems provides customers with the *Time2Value Methodology*[™] to provide them with a sound implementation plan and strategies that have been designed to assist the user at every phase of the implementation process. Made2Manage offers Installation and Configuration Services to evaluate customers' network set up and install and configure Made2Manage on the workstations and the server. After the implementation, there's *CheckPoint*[™], a consulting service that helps customers get the most out of the Made2Manage Enterprise Resource Planning System. From the beginning of the implementation process to evaluating system utilization years later, Made2Manage Systems delivers a variety of technical and application consulting services that meet the unique needs of each company. These proven consulting services are delivered by both an extensive business partner channel as well as by Made2Manage.

Documentation

Made2Manage Systems provides on-line and printed documentation to assist in the implementation and ongoing use of the system. The new documentation is user-role specific and task oriented. Steps are clearly outlined and minimally written. *The Implementation Workbook* guides users through initial set-up of Made2Manage. Additional documentation is provided for the use of optional modules.

Development Technology

Designed expressly for the Microsoft Windows environments, the Made2Manage Enterprise Resource Planning System is a technologically advanced Enterprise Resource Planning System for manufacturers. Developed using Visual Studio and various additional Microsoft technologies, Made2ManageSystems provides excellent performance and scalability across a range of mid-range manufacturing enterprises. Made2Manage utilizes SQL Server 2000 as its database server and integrates tightly with Microsoft Exchange, Microsoft Office, and Microsoft Project.

Made2Manage incorporates a variety of customization and extensibility options, including built-in Microsoft VBA support, OLE interfaces for external applications, OLE-DB and ODBC support for convenient and secure database access, and a variety of report development and customization capabilities.

Made2Manage can run in a thick client, thin client or mixed client setting. SQL Server transaction level support provides roll-forward and roll back capabilities for database recoverability.

A complete range of e-commerce and enterprise collaboration applications are built entirely using Microsoft.Net technology, including VB.Net, and ASP.Net and XML Web Services.

Pros

- Total integration of all modules
- Internet Applications to support enterprise-wide supply chain management
- Abra and ADP payroll interfaces
- Advanced Planning and Scheduling Features, including Advance Planning and Forecast Analysis and theory of Constraints

- After years of effort, M2M is now fully MS SQL
- Integrated Document Management and Quality Control
- Engineering Change Management
- Graphical Bills of Material
- Integrated Bills of Material and Routings
- Strong production module
- Sophisticated, super fast MRP module
- Total inventory control
- Excellent order costing system
- Rules-based and remote product configurators
- Screen customization
- Ecommerce capabilities

Cons

- Need to backflush before issuing materials by operation
- Cannot break out cost of sales, revenues by warehouse or locations
- No ability to customize financial reports without using Microsoft's Management Reporter (MR)
- No multicurrency or EU compliance
- Serial numbers for stocked, serialized inventory cannot be assigned to the order until the item is picked/shipped.
- No alternative routings in BOM
- Cannot edit sales orders after they have been completed
- Does not allow adjusting quotes by entering new line items and positioning them on the quote (always goes to bottom of quote)
- Cannot search for parts/orders/jobs/etc under item name/description
- Scheduling is weak
- Support is expensive and not always reliable
- Users report that Version 7.5 had many bugs

About Sheldon Needle



A former CFO, consultant and software designer, Sheldon Needle has authored or co-authored more than 20 books on software selection and has contributed articles to major publications, including the Journal of Accountancy and Nation's Business. CTSGuides.com has the distinction of being the very first company to do hands-on, independent evaluations of software for the middle market.

Sheldon speaks with business owners and managers every day about software selection and makes personalized recommendations based on their needs and budget. He is widely known and respected throughout the business software community for his independence, integrity and expertise.

As part of registering for our free software selection kit, you receive a 15-minute consult with Sheldon. Sheldon understands financial and business issues and speaks your language.

He knows the leading software companies—how they compare, their strengths and weaknesses, where they fit into the market and which ones would be suitable for your business.