

INTUITIVE ERP

MANUFACTURING SOFTWARE REVIEW BY SHELDON NEEDLE



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Company Background

Aptean Corporation owns Intuitive Software ERP (Aptean, formerly known as M2M Holdings Inc.). In the 1990's and early 2,000's Intuitive was a formidable competitor in the market but it has far less visibility nowadays.

ERP Market Positioning --Intuitive ERP is designed for discrete, make to stock, make to order, configure to order, assemble to order, engineer to order and contract manufacturers. The package is multi-language, multi-country, multi-currency, multi-site, multi-warehouse, and multi-division. Intuitive ERP serves the small to mid-size manufacturing segment. Customers range from 5 to 150 users, with annual revenues from \$5 to \$500 million. Intuitive, originally called MRP9000, was founded in 1994. They currently have about 900 customers in North America.

Customers who select Intuitive, with a moderate to large selection of modules to implement, are likely to spend \$125K to \$200K, by the time they are completed with everything. This is competitive to somewhat favorable with the "all-in" costs of comparably functioned packages, for similar user license counts.

Value Proposition - Intuitive Functionality

The Intuitive ERP enterprise solution includes feature-rich and integrated enterprise resource planning (ERP), customer relationship management (CRM), business intelligence and e-commerce modules—all the tools users need to enhance the productivity and profitability of the company's operations.



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Innovative Technology

Intuitive ERP's early adopter work use of Microsoft's .NET technology provides a new level of advanced features, capabilities and system manageability.

Rapid Implementation

Intuitive provides the people, processes and tools necessary for a well-executed implementation. Intuitive claims their ERP customers can achieve a successful implementation in 90 days or less. This is a pretty aggressive goal few companies can achieve.

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Globalization

Intuitive ERP supports extensive multi-language and multi-currency capabilities. Intuitive ERP is designed to support businesses that operate locally or globally. With multi-language and multi-currency capabilities, Intuitive ERP can be implemented around the world.

Multi-Currency and VAT

Intuitive ERP is fully multi-currency enabled, allowing for an unlimited number of currencies including the Euro. The multiple currency capability includes currency gains/losses (realized and unrealized), currency transfers, reports written in the vendor/customer's language, default currency by customer and vendor, and more. In addition to single or multi-currency capabilities, Intuitive ERP includes support for the use of the Goods and Services Tax (GST) and Value Added Tax (VAT) throughout the system, including an easy-to-use interface for managing tax rates.



establish VAT Percentage Matrix by item or product family.

User Interface, Workflow, and User Interface Personalization -- Intuitive ERP was designed with a focus on usability. By providing an outstanding user interface, customizable fields, menus and grids, ad hoc reporting, However many users find its ad hoc reporting to be difficult to use so other report writers may be the better alternative.

The unique and intuitive Work Flow tool helps employees visualize their business processes by guiding users through the software. These process flows include step-by-step work instructions that contain links to the actual system forms and reports where live data can be entered. Written in HTML and accessed through a web browser, Work Flow can be customized for the company's unique business processes and work instructions. In addition, Work Flow meets the documentation requirements for ISO certification.

Return on investment

Intuitive ERP claims it provides solid, measurable financial benefit within the first year after implementation. Customer satisfaction increases based on improved on-time delivery, increased quality, shortened delivery times, etc. Inventory carrying costs decrease due to better planning, tracking and forecasting of requirements. Visibility into how to best schedule the shop floor minimizes downtime. Vendor pricing decreases by taking better advantage of quantity breaks and tracking vendor performance. Collections are turned faster due to better visibility into accounts and fewer billing and delivery errors. And, while the average cost in the industry for ERP implementation is usually at least twice the cost of the software, Intuitive ERP claims their implementation costs are most often much less than the cost of the system.

All of these results factor favorably to a rapid return on users investment. . Technology Standards --

Microsoft® technology contributes to the extremely flexible nature of Intuitive ERP, ensuring that the implementation and on-going management of users' system can be accomplished simply and effectively.

System architecture

Microsoft is the recognized worldwide leader in business technology and has continued to advance the world of business computing with its .NET framework. Microsoft .NET is a completely new approach to how software operates and Intuitive has pioneered the development of a pure .NET ERP solution in order to lead the manufacturing market into these new capabilities. Intuitive ERP was originally built with, and continues to use, exclusively Microsoft technologies and platforms, ensuring a seamless interaction between all elements of the Intuitive ERP architecture. Intuitive ERP has a pure .NET framework and over 80 percent of the product functionality is written in pure .NET managed code. Intuitive ERP uses Microsoft SQL Server® as the database technology.

System administration

A set of intuitive system tools keep administration chores to a minimum:

- Install and upgrade all clients simultaneously
- Import data quickly and easily with Import Wizards
- Personalize the software by entering selections in pre-formatted master controls—without making modifications in the code
- Proactively avoid problems with self-diagnostic tools Schedule and automatically deploy alert messages

The benefits of a .NET enterprise solution

Today, the Intuitive ERP solution is an ERP product with a .NET managed code framework and standard functionality released in pure .NET.

Intuitive's customers benefit from advanced product features, capabilities and manageability that Intuitive can provide.

*For the Users' IT department --*Less wasted time troubleshooting, Smaller footprint, Quick customizations, Leverages the Internet, Ease of modification, Easier to install and remove, More secure, Inherently compatible, Easier to administer, Inherent support of XML, and BizTalk.

For users' everyday system user -- Less bugs, Faster, More features in less time, Rich user experience, More innovative features, Web services, More robust and easier to use, Easy connectivity, Less costly to own, and Strategic technology investment.

The Intuitive Enterprise Solution addresses the following business needs

Planning

Generate MRP, CTP (Capable to Promise) and ATP (Available to Promise) plans on demand, analyze material requirements, control production costs and scheduling, and manage resource efficiency.

With its planning capabilities and user interfaces, Intuitive ERP provides the information required to react to scheduling, inventory and capacity problems as they occur. This advanced planning functionality reduces consumer costs and increases

productivity by eliminating stock shortages, improving delivery performance, and increasing flexibility in building users' demand schedule. The tools are designed to determine material requirements with graphical pegging information and make accurate delivery commitments on the fly with dynamic available-to-promise (ATP) and capable-to-promise (CTP) tools.

These tools are not easy to use to identify problems. Although the details are there and usually accurate, the outputs are very poor. The pegging formats are confusing and any macro views required for material or capacity analysis are inadequate. Analyzing MRP results is very difficult and time consuming Intuitive is good at the detail level, but anything higher than the specific part information is difficult to view. Many users need crystal reports to extract data, and excel to present information in a usable format.

Inventory

Intuitive is cumbersome from a transaction point of view – not a simplification You can automate frequently performed tasks, ship and receive goods, track material location/lot information, track serial numbers, utilize bar coding, and perform cycle counting. Although the capturing and posting of inventory counts works well, the reports and Tags used in the physical counting is weak requiring use of Crystal to create the tools used during the actual count and to bypass the intuitive tools.

Effective management of finished goods, work in-process and raw material is critical to users. Instant access to real-time data allows users to track inventory levels by item, location, product family and historical usage with the click of a button. Intuitive ERP provides a robust and structured materials management system— everything users need to accurately control inventory transactions, product costs and material usage at the warehouse, location, and/or lot level, including advanced serial number tracking. However Finished Goods

inventory is NOT tracked by serial number. The system tracks FG inventory and separately tracks serial numbers used but does not link the two sets of information.

The system has lot control and lot tracking. Lot tracking history is easily maintained but not easily accessed. Many users find using it necessary to use Crystal Reports to access the information

Inventory transaction tracking is good with sufficient information available to understand inventory movement.

Engineering

You can create and maintain multi-level visual bills of material, manage product data, design routings and standard processes and track engineering changes. ECN is weak. It provides superficial document and comments tracking only.

Bills of material management is very limited. With the ECO/ECR module, users can introduce engineering changes but are not able to assess the impact of engineering changes throughout the span of operations. SolidWorks® and Microsoft Project are integrated.

Purchasing

This application supports procurement, maintains detailed vendor information, a bid matrix, create purchase orders or generate POs from planned orders, manages requisitions and RFQs, and receives and inspects vendor shipments.

Purchasing activities offer an electronic RFQ system to preferred vendor selection to entering bids, and from purchase order entry to receiving and inspection.

Manufacturing

Entering and tracking work orders is strong but Planning and scheduling tools are very poor and ineffective You can control the shop floor, monitor production status, manage material and equipment capacity but the system does not support equipment capacity constraints.

Work orders, material tracking to work order operation, labor time tracking (once entered) and in-process status is effective and accurate.

Serialized tracking by work order during production works well.

The process of Planned to Firm to Released work orders is a strong function.

On the minus side, shop floor reporting is very cumbersome and difficult to use. Production reporting can be very time consuming. Intuitive ERP users can quickly generate work orders from planned orders. It supports automated back-flushing, infinite and finite loading, however forward and backward scheduling is very poor – and are very limited from a scheduling point of view

Finance

Finance users can create budgets, monitor and project cash flow, process accounts payable and accounts receivable, reconcile financial accounts, perform drill-down analysis, and track material, labor and production costs.

Intuitive ERP tracks the flow of money in the company in a secure and accurate environment. Sophisticated functionality streamlines transactions and provides instant access to all users' financial data, from summary views to transaction-level drill-down detail. It offers strong functions to

manage and process accounts payable and accounts receivable.

Quoting / Estimating

Intuitive provides quotes and estimates to customers and automatically convert quotes to sales orders.

It easily creates new items (and associated bills of material and routings), copy and modify existing items.

Intuitive ERP's quoting solution shortens the sales cycle and automates order processing. With the ability to configure and quote an order quickly and accurately, users can increase customer responsiveness and realize revenue faster. Create and manage quotes for prospects and existing customers, from initial preparation to automatic conversion into regular sales orders. New items can be created easily during the quoting process; existing items can be copied and modified, or configured an item on-the-fly through the configurator. If users quote a new item, the item, bill of material, and routing will be created automatically when the quote is converted to a sales order. The quoting module is fully integrated with Intuitive CRM to help users find, track and close business.

Other features

- Provide quotes and estimates quickly
- Create and quote new items, bills of material and routings on-the-fly
- Provide customer-specific or volume discounts Generate a Request for Quote (RFQ) from a vendor for any of the lines on the quote
- Check item availability and promise deliveries

Order Processing

You can enter and maintain complex sales orders or create a sales order directly from a quote, create new items, bills of material and routings on-the fly, maintain price matrices, and ship finished product.

Intuitive ERP's complete order processing functionality, including direct quote-to-sales order conversion, revision tracking, full-featured order entry forms, multiple commission options, sales analysis reporting, provides the tools necessary to maximize the efficiency of users' sales force. After sales orders are entered, Intuitive ERP takes the newly created demand and reserves inventory or generates planned purchase orders and work orders to procure raw materials and build manufactured parts. Once the finished goods are complete and available to be shipped, sales orders are fulfilled and invoiced.

Advanced Configurator

This application is used to quote, sell and deliver complex, custom-configured products with a powerful rules and constraint-based guidance engine. It allows for design and pricing changes automatically.. While this tool can be very powerful many users have found it a real challenge to use.

This tool can generate accurate pricing, product **configuration and specifications, as well as bills of material and process routings.** This is a true "bottom-up," rules-based configurator that provides simple point and click product definition under a powerful rule and constraint-based guidance engine. However the configurator creates a different part number for each variation

Intuitive's Dynamic MRP enables planners and schedulers to generate and modify material plans on demand, frequently exhibiting an increase of 30 to

80 times faster than traditional MRP engines. While this application works well and is fairly fast, it is difficult to digest the results – many different screens are needed to really understand the results (pegging, etc). Pegging screens can be confusing at first, however once learned, the results are good.

Quality

You can inspect incoming (purchased) and outgoing (manufactured) materials, inspect returned materials, trace defective parts to their original location/lot, and maintain data on instruments and equipment

By implementing an ERP system, users are already taking the first step in improving quality control across the entire operation. Intuitive ERP takes that level of quality a step further with specific quality-focused tools to assist users' companies in achieving optimal quality control over products, performance and procedures. The system enables a high-level of product quality with complete inspection procedures—from raw materials, to work-in-process, to customer returns. You can track defective materials and assign them for return to vendor, scrap, or rework.

Intuitive SPC

This application effectively tracks users' production performance and procedures with Intuitive ERP's Intuitive SPC statistical process control module. This tool provides real-time Statistical Process Control at all inspection points throughout the Intuitive ERP system, including work-in process, purchasing, and material review and return. This module completes the Intuitive ERP quality cycle with a dynamic tool that can capture and analyze high-level data using statistical techniques to help users maintain and improve users' company's process capabilities.

Return Material Authorization (RMA)

The return material authorization (RMA) module provides users with the ability to ensure a thoroughly professional approach in this sensitive area of customer service. Returned material is tracked, inspected, accepted into inventory, sent to rework or scrapped to an expense account, and the customer is automatically credited or provided with a replacement order.

Intuitive Forecasting

Intuitive Forecasting provides users with the ability to generate forecasts based on usage data and many different forecasting models. This data is used by the Intuitive planning modules to generate user demand requirements based on the forecast and complete analysis of forecast to actual is available. Intuitive Forecasting is easy to learn and use, and does not require a background in statistics or forecasting. Users simply provide the historic data, and the built-in expert system analyzes the data, selects the appropriate forecasting technique, and calculates the forecast. Alternatively, if users want to dictate the forecasting approach, Intuitive Forecasting provides a complete range of forecasting models and all of the diagnostic aids necessary

Human Resources and Payroll

HR supports every aspect of employee information, including salary, job histories, and employee benefits. Process payroll quickly and efficiently and print payroll checks. Ensure full tax compliance and manage government reporting.

Intuitive HR is a complete employee tracking and benefits management system that can help users eliminate tedious administrative tasks so that users can focus on managing the most important and

valuable resources: the employees. Manage and report on every aspect of employee information, including benefits, hiring, salaries, job histories, etc. Intuitive HR ensures government reporting is simple and complete. Intuitive Payroll will help users enter, maintain, process and report on crucial payroll information, and print payroll checks as needed, on demand. Intuitive Payroll includes a powerful tax compliance calculation engine that assures accurate results every single payroll.

On the minus side, users have experienced inadequate updates to tax and deduction information, poor support and inability to produce W2s at the end of the year.

AlertMessenger

This application supports real-time workflow communication by automating customized messages to vendors and customers as well as employees for specific system events, via e-mail, on-screen messaging, or pager.

The following are supported: Customize messages for specific system events Automate messages to vendors, customers and employees Send messages via e-mail, on-screen messaging or pagers The Intuitive ERP system authenticates with Microsoft Windows security, eliminating the need to remember yet another password each time users use the system.

Project Management

For companies that use project management techniques, Intuitive ERP provides the tools necessary to establish projects and track all transactions related to that project. Progress billing reporting assists in billing of work completed for a given project. Also available are drill-down reports on revenues, expenses, and profit/loss for any project or master project for complete project profitability reporting.

System Tools

The Intuitive ERP menu, installation and security systems have been enhanced to take advantage of .NET functionality,

Authentication with Windows security eliminates the need for a separate system user logon. The Intuitive ERP menu allows users to create and save a “My Menu” with their most frequently used menu items. A search tool allows users to quickly find any function, and the system also tracks the last 20 menu items users’ used, so that they can easily get back to anywhere in the system they have been recently. Intuitive ERP is equipped with system-wide tools designed to enhance the convenience and the usefulness of the software:

Enhanced security system Interactive menus Advanced search functions Grid control and personalized data templates Please note Personalization may be lost anytime the client is reinstalled due to changes - Grid changes are saved, but non grid changes are lost

Integration

These standard integrations allow Intuitive ERP users to work seamlessly with other systems the business may utilize:

- Electronic Data Interchange (EDI)
- Solidworks Interface
- Payroll Service Interface
- Product Data Management (PDM) Interface

Intuitive Mobile

You can use smart phone or tablets for shop floor and inventory transactions.

Utilizing Microsoft's Windows Mobile and the Compact .NET Framework, Intuitive provides a full suite of shop floor and inventory transactions for use on hand-held devices. These transactions are generally performed using provided barcode capabilities, but the Intuitive compact user interface also allows for standard data entry on the device. No proprietary software, networking or, additional server is required,

Intuitive CRM

The Intuitive CRM Relationship Management module provides the tools necessary to manage important business information about not only users' prospects and customers, but also vendors, business partners, and other third parties the company deals with. Contact and account information, schedules, a complete history of interactions and transactions, current orders and financial status, and other data are immediately available to assist users' sales and support teams in effectively maintaining valuable business relationships. The learning curve on this application is steep, but, once learned, it works well.

The Intuitive CRM Marketing Management features provides a single location to create and track the details—and results—of the company's targeted marketing campaigns. Customers can create targeted mailing lists of potential and/or current customers and select the lists to be associated with a marketing campaign. Deploy a campaign by automatically creating a mass-email or mass mail-merge document to all campaign participants. After launching a campaign, users can manage responses and associate opportunities to campaigns. Users can then compare actual responses with forecasted response rates to determine campaign ROI.

Intuitive Service

The Intuitive Service and Repair module helps provide superior support to users' new and existing customers. These support tools allow the user to manage, record and resolve customer support incidents, quickly identify and address urgent customer issues, and analyze the effectiveness of users' entire support department. With the click of a button, sales and customer service reps can access a complete picture of each customer, from contact information to order status to account history—and then schedule calls and follow-ups directly into their Microsoft Outlook calendar.

Reporting and Analysis Functionality Business Intelligence (BISpecifics)

Intuitive's suite of Business Intelligence tools provides high level business information needed for faster and more informed decision-making. From a global view of managing the business, the user can review summary information, drill down into transaction-level detail and easily prepare presentation-quality reports. These tools are also integrated with Microsoft Office to provide maximum flexibility.

Decision Management Tool

Intuitive's unique Decision Management Tool (DMT) provides management the visibility of those key elements that provide vital information on the health of the users' company. DMT tracks and analyzes over 50 key performance indicators (KPIs) using data from Intuitive ERP. These indicators (which include Return on Assets, Return on Net Worth, Inventory Turns, Days Sales in A/R, Current Ratios, Quick Ratios, and many more), are

calculated automatically for you and displayed instantly.

OLAP Analytics

The OLAP Analytics module provides the sophisticated functionality needed to analyze and report on transactional data using advanced On Line Analytical Processing (OLAP) and data warehousing technology. OLAP Analytics enables the user to gain critical insights into financial activity, sales analysis, production and inventory management, and other key analytical information throughout users' organizations. While other systems offer OLAP technology, Intuitive's OLAP Analytics module offers pre-filled cubes that will save weeks or months of development time—it is ready to start analyzing data right out of the box, with no modifications or development required.

Advanced Financial Analyst

Intuitive ERPs' Advanced Financial Analyst option provides advanced financial reporting and analysis capabilities to help monitor the financial status of users' company, manage financial information and generate and track budgets. Financial Analyst provides executives and financial analysts with real-time access to data, presentation quality reporting and the flexibility to meet the unique needs of any manufacturer.

Intuitive's e-commerce solutions leverage Internet technology to provide users' company with the tools needed in today's market to compete successfully.

Customer Portal

Intuitive ERP's Customer Portal harnesses the power of .NET web services to provide e-commerce capabilities to the business. End customers can check their activity status, enter orders, and peruse products through the ease of an

on-line Web catalog. This functionality dramatically increases customer satisfaction while decreasing sales and service administrative costs.

With Intuitive ERP's Customer Portal, customers can log on to the company's secured Web site and browse a catalog of the products offered. The catalog can be automatically customized for each customer to only include specified items, with the prices approved for that particular customer. Customers can easily enter purchase orders from the Web, which are sent directly into users Intuitive ERP system and treated as a normal sales order. Automatic e-mail confirmations are sent to the customer when the order is received and when the order has shipped. Users' customers can also look up the status of their orders, shipment activity for all orders or a specific order, their current aging, and other reports—all over the Internet.

Sales Portal

Web-based access to users' Intuitive ERP systems provides remote sales representatives with a powerful tool: the ability to enter orders at the point of sale and to look up information on order value and status, shipments, billings and invoice detail and history over the Internet.

Electronic Data Interchange (EDI) EDI (Electronic Data Interchange) allows communication with users' trading partners electronically. Intuitive provides the templates necessary for the entry and transmission of EDI transactions to and from users' customers and vendors. Intuitive ERP's EDI interface provides support for the transactions commonly processed via EDI and can be used with any EDI translator service.

Solution Start Implementation Program

Intuitive provides the processes, tools and people necessary for implementation. Consisting of six main phases, and supplemented by the Intuitive ERP Implementation Guide, the Solution Start program is a service package designed to guide new user implementation efforts. This process provides a step-by-step implementation solution that focuses on measurable objectives as a method of assuring a successful project. The program includes the services of an Intuitive ERP application consultant, who will come to the user facility and provide the expert guidance and resources necessary to execute the Intuitive ERP proven implementation plan.

Virtual Classroom & Hands-on Training

The Intuitive Virtual Classroom is a live, on-line training program designed to help customers get the most out of their Intuitive ERP system. Virtual Classroom sessions provide an easy and cost-effective way for customers to get new employees educated, learn about a new release, train end users in specific functional areas, and to receive expert answers to questions regarding ERP. Several in-depth educational courses are offered at the Intuitive corporate training facility or on-site at users' locations. These courses, which include hands-on training and workshops, provide an in-depth understanding of Intuitive ERP and the manufacturing environment.

Customization Services Group

Customers find that Intuitive ERP meets the majority of their needs without customization.. Intuitive offers complete customization services to

provide the technical expertise and development resources for the customization of users' system. All customizations are fully documented and conform to Intuitive's strict programming standards to assure product compatibility and seamless integration.

Technical Support & Consulting --Certified technicians who have in-depth knowledge of the product, as well as manufacturing and accounting environments, staff Intuitive's technical support organization. All technical support calls and e-mails are always answered by a live technician. Intuitive's consultants are available to provide direct, on-site support of users' needs in the application of Intuitive products and process re-engineering.

Customer Support Web Site

Access to the Intuitive Customer Support web site, an immediate online service and support resource, provides customers with 24-hour access to a support knowledgebase, software updates, technical documentation, and much more.

Documentation

An Implementation Guide, Tutorial Workbook, and User's Manual are available in hard copy as well as electronically, in Adobe Acrobat PDF format. Context-sensitive on-line F1 key help—with an integrated APICS glossary—provides in-depth product information and multiple cross-references throughout the system.

User Groups

User Groups provide a forum for Intuitive ERP users to share their experience and knowledge about the product. Intuitive supports User Groups by providing organizational guidance, guest speakers, product updates and an opportunity to

provide direct feedback on product features and functionality.

Additional Comments

- The multi-national, multi-currency, foreign language support, and local ability to support foreign locations have all been improved.
- Intuitive works with customers on product customization and takes into account whether the customization should become a standard feature of the Intuitive product in a future release.
- The product's ability to support lean manufacturing concepts like kan-bans, kaizen events, has also improved.

Intuitive Pros and Cons

Pros

- Has good basic functionality.
- A good system for the money
- Intuitive user interface
- Flexible and Scaleable technology platform
- Easy Customization
- Intuitive Process Flow

Cons

- Multiplant usage is a workaround using multiwarehouse functions for support and transfers of materials or sales orders or scheduling for separate plants within one database This would eliminate one level of location control for example, warehouse/aisle/bin
- Not targeted for process, and workarounds to support process manufacturing are not effective
- Items are not "committed/reserved" to a customer order until the picking document is printed
- System treats a blanket order over a 12 month period as a single demand quantity vs. by period
- Batch entry of person, time and workcenter labor is cumbersome and time consuming.
- One database will run only one company
- Weak on resource scheduling with labor and or/machine constraints
- In general, accessing information within Intuitive is poor
- Payroll application is very weak
- Configurator very cumbersome to work with.
- This product does not lend itself to any significant customization, little support for it

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.