



The effort needed to acquire Data Analytics for your ERP

In this age of multiple sources of data, it is essential to have tools that allow us to visualize and analyze big quantities of data, but more importantly, to transform it into valuable information to spot opportunities and issues and take not only corrective action but also proactive actions effectively.

Power BI has become one of the leading solutions for data analysis; it is easy to use and its cost is much lower than that of similar tools that were only affordable for large enterprises. But even choosing the right tool doesn't mean that your data will be transformed into valuable information in just one click. It takes uncountable hours of technical and operational executives to decide which indicators are critical for controlling your business operations, find where the data resides, design and program the processes to build up the different layers in which the data will be added and displayed, and then test and enhance your prototypes until they are ready to be used.

Small, Midsize and even Large companies might not be able to dedicate the resources needed to collect the information, design the graphical user interface (GUI), develop the Extract, Transform and Load programs, present the solution, support it once it goes Live, and then not only support it throughout the years it will be used but also enhance it with the upgrades and new technologies that are constantly evolving on the Business Intelligence's tools market.

Maximize your ERP investment through real-time analytics from Smarti

Smarti is the Smartest, Fastest, Simplest, and Most Cost-Effective Solution to Unlock the Power of ERP Data along with Other Enterprise Data.

Smarti is a fully integrated end-to-end analytics solution that provides instant insights from your ERP data with zero programming. Built on **Power Bi** automated extract-transform-load and data warehousing technology, Smarti integrates your ERP data and other enterprise data into one platform, providing a single unified view of business information. And with 40+ pre-built dashboards and key performance indicators across almost all modules, everyone in your organization can access the information they need at their fingertips, spot opportunities, and issues, and take corrective and proactive actions to drive business performance — at any time, from anywhere.

2022 SA8100



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Smarti is Revolutionizing ERP Data Analytics

Smarti is the smartest, fastest, simplest, and most cost-effective way to enable analytics on your online data. We have automated the entire data management and analytics process so you can rapidly explore data, uncover insights, and make smart, data-driven decisions.

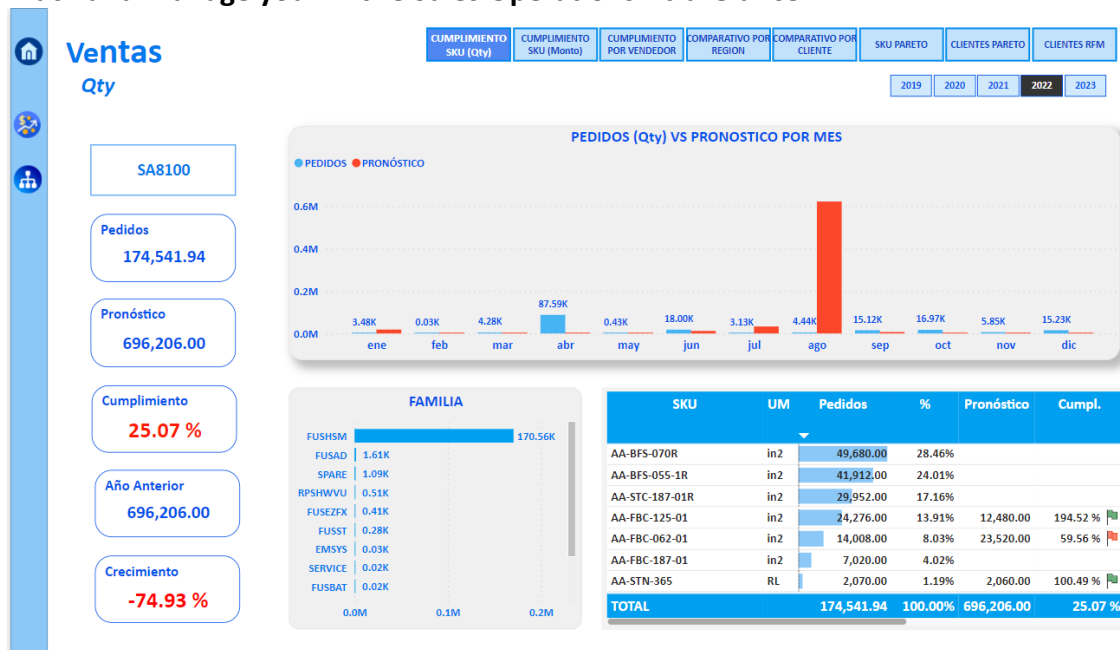
- Epicor ERP Integration** - Smarti comes with pre-built mappings and business logic for almost all ERP modules, enabling you to get started right away. Simply connect to your data and start analyzing performance using a powerful Dashboard, interactive Panels, and lots of prebuild Business Objects and Cards.

- **Ready to Use** - Say goodbye to tedious and time-consuming manual data preparation processes. Power BI's automated ETL engine quickly prepares data for analysis, reducing lag from days and hours to minutes and even seconds. Monitor performance, uncover trends, anticipate problems and take timely action to keep results on track.
- **Built-In Automated Data Warehouse** – Power BI built-in automated data warehouse integrates your ERP and non-ERP data into a single unified view. Now you can analyze your Epicor data in combination with data from other business systems to gain unprecedented insights into the business.
- **True Self-Service Panels** - Why wait for hours or days to get access to the insights you need to run your business. With Smarti, you can build personalized Panels in as little as 3 clicks and get immediate answers to your day-to-day business questions.
- **40+ Pre-Built Panels** - Gain instant visibility into your entire operations - from anywhere, at any time. Monitor sales performance, stay on top of customer problems, keep up with inventory levels, get alerts to production issues and more – all in one place.
- **Fastest Time to Implement and Lowest TCO** – Smarti can be deployed in a matter of weeks or days at the lowest upfront cost and pay on a monthly basis with the lowest on-going cost of ownership. This ensures quick value and a faster Return on Investment (ROI) than other solutions in the market.

40+ Pre-Built Panels

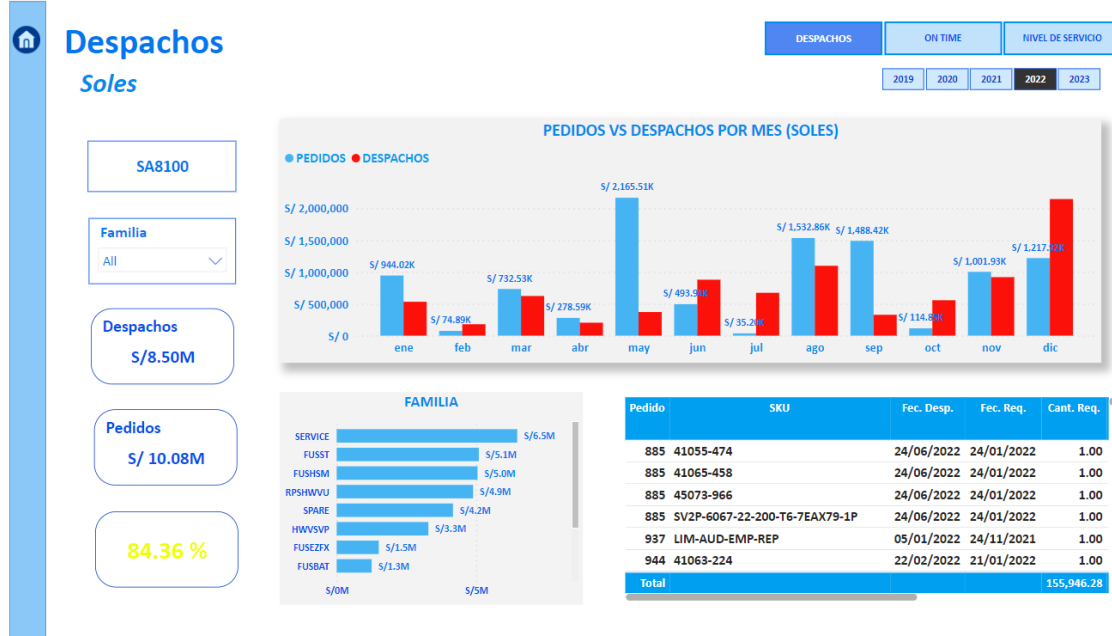
Take control of your manufacturing business like never before! Track and analyze your entire operations in real-time using 40+ pre-built Panels. Monitor sales performance, stay on top of customer problems, keep up with inventory levels, get alerts to production issues and more – all in one place.

Track and Manage your Entire Sales Operations At-a-Glance



- Visualize your sales status from quote to order to shipment
- Spot your top/high and bottom/low performing products, regions and sales reps
- Set warning flags to identify numbers below your expectation and quickly take action to improve your numbers.
- Use built in scenarios to Predict future results in just few clicks

Improve Responsiveness to Customers

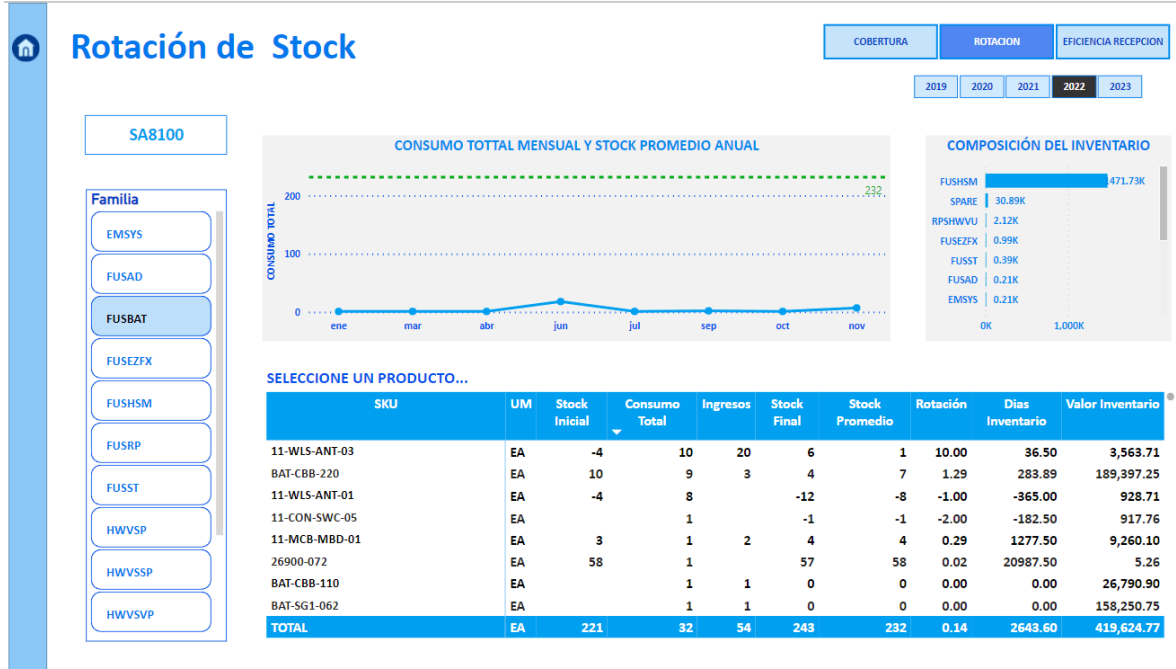


Optimize Procurement Spend and Minimize Supplier Risk



- Keep track of spending trends across products and business units
- Analyze and compare supplier's costs
- Identify and act on savings potential across products and suppliers

Maintain Profitable Inventory Levels Across the Value Chain



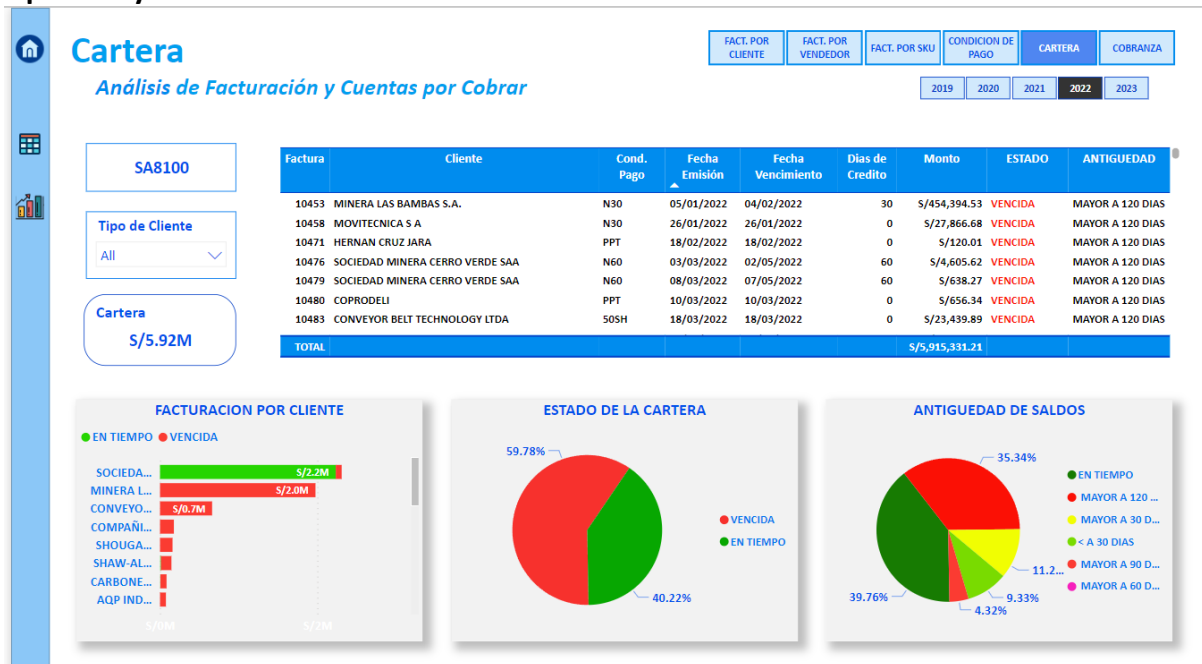
- Keep track of what materials you have on hand, where they are, and how they are being used
- Analyze usage patterns to identify what is fast-moving, slow-moving and obsolete
- Set alerts and avoid excess and shortage conditions.

Maximize Shop Floor Efficiency



- Get up-to-the-minute visibility into every detail of your production operations - From schedule attainment to Overall Equipment Efficiency (OEE)
- Proactively identify and address issues related to material, labor, capacity etc.

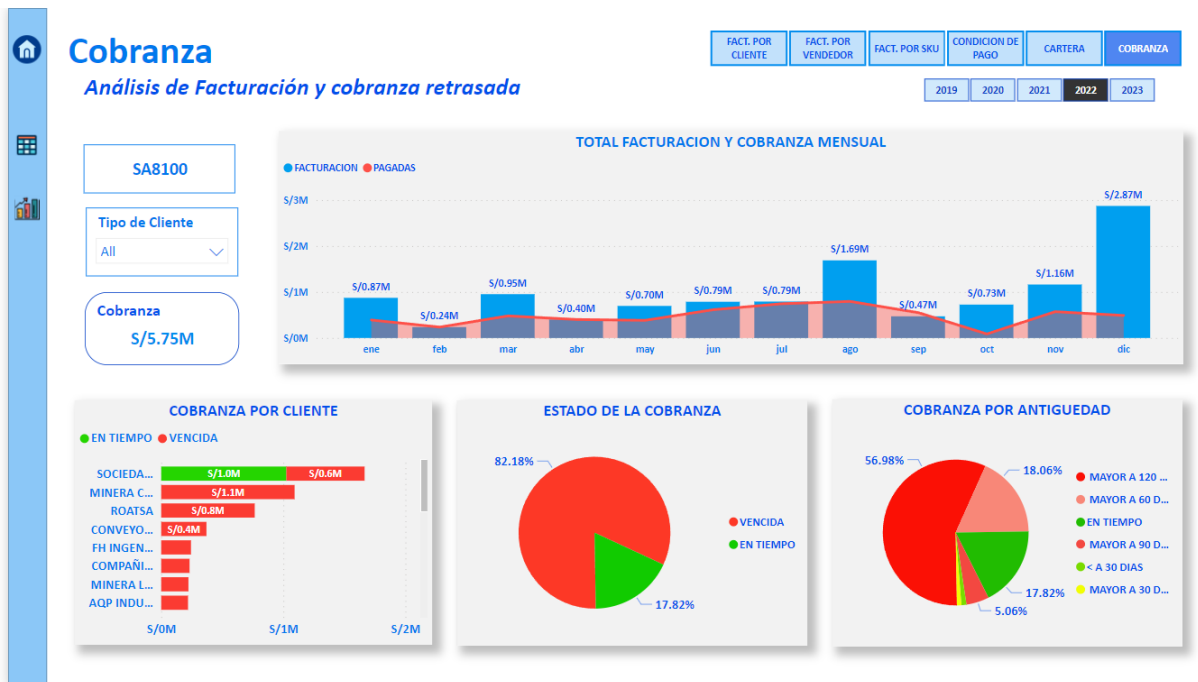
Optimize your Accounts Receivable



- Maximizing Cash Flow is essential for keeping business afloat and ensuring they have the resources to meet their obligations. One common metric is Days Sales Outstanding (DSO) which measures the average number of days customers pay their invoices. Another essential metric is accounts receivable turnover rate (ART), which measures how often your accounts receivable balance turns over in a given period. This can be a good indicator of the efficiency of your [accounts receivable collections](#) process.

- Minimizing Bad Debt, on the other hand, help businesses to avoid write-offs and keep their bottom line healthy. Bad Debt Expense is the amount of money you have written off as uncollectible debt.
- Finally, maintaining customer satisfaction ensures repeat business and positive word-of-mouth. In other words, happy customers are more likely to pay on time and less likely to default on their payments. Tracking your on time payments will highlight which customers are more satisfied with your products and services and may be open to enhance business with your company.

Optimize your Accounts Payable



Here are several accounts payable KPIs that can help you drive success for your business (more detail on <https://www.invoiced.com>):

- (APR) Also known as the creditor’s turnover ratio or payables turnover, the accounts payable ratio metric tracks the average number of times a company pays its creditors over a given accounting period.
- Average Accounts Payable: It’s often useful to know how much debt your business is carrying at any given moment and on average. By mapping out this total by month, quarter, and year, you can better detect financial patterns and gauge the relative health of your operations.
- Cost per Invoice: The average amount of money spent to process a given invoice is a useful metric to track the overall efficiency of your accounts payable.
- Days Payable Outstanding (DPO): This statistic tracks the days your accounts payable processes require you to pay back a supplier or vendor after receiving a good or service.
- Exception Rate: Unlike an error rate, an exception rate instead focuses on identifying problematic invoices requiring additional review. These issues might be flagged during a purchase order (PO) to invoice matching efforts.
- Invoices Processed by Employee: Keeping track of this KPI offers valuable insight into employee and process efficiency. For example, by examining this metric at a more granular

level (e.g., the total number of invoices processed per employee per day), you can more readily identify which specific vendor invoices cause the most work for your personnel.

- **Per Vendor Spending:** By actively monitoring how much you spend with any given company, you'll be equipped to easily identify which suppliers are most critical to your day-to-day operations.
- **Late Payment Rate:** You should not only track your successes but your failures as well. Admittedly, sometimes it makes more sense to hold onto your cash reserves than to meet a payment deadline. But even in those cases, there is a clear indication that something went wrong, and you need to take measures to prevent it from happening again in the future.

What's Next on Smarti?

We are currently working on providing the most used Financial kpis:

- **Return over Equity (ROE classic):** $\text{Return after taxes} / \text{Capital}$
- **Return over Equity (ROE non classic):** $\text{Return before taxes and interests} / \text{Capital} + \text{Financial debt}$
- **Return over Assets (ROA):** $\text{Return} / \text{Assets}$
- **Ratio of Income Tax over Return:** $\text{Income Tax} / \text{Return}$
- **And many more...**
