B&L NEWS

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CEO'S CORNER

The Big 5, from Phil Laney, CEO

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Why do metalcasters need an ERP system? Each foundry and die caster must ask this question, and it will certainly vary depending on the specific conditions at the business. However, over the past 40 years and over 400 ERP implementations, at B&L we have identified some common elements of what each metalcasting company is striving to achieve. We call them *The Big 5*. The Big 5 are the areas of the business that tend to yield the biggest potential payback from an ERP system. Here they are:

Costing – The ability to quote jobs accurately and then easily compare quoted jobs to actual performance from the production reporting system. Also, the ability to use a standard cost approach for month-end valuation of WIP & FG inventory and book those values to the general ledger.

Data Integration – The ability to maintain one, single database of corporate information as the only "system of record". Multiple databases, side-spreadsheets or the paper file of key product, customer, material and supplier information (a.k.a., silos or islands of information) are a high cost, error-prone and dysfunctional method for keeping business systems.

Inventory – The ability to keep accurate WIP, FG and outside inventory counts for each product, thereby avoiding the dreaded inventory write-off at month/year end.

Quality – The ability to look at problem jobs and drill down into the reasons for the problems (scrap reason code) and then input scrap avoidance instructions into the system so that the next time it is run, the shop floor employees have the most current work instructions. Other areas of integrated quality system include: Corrective Action Reporting, Rework Analysis, Tool shot/impression tracking, Cost of Poor Quality reporting and Heat Analysis (Chemical & Physical properties).

Scheduling – The ability to pull together all the customer orders for castings (both firm and planned) and create a daily or weekly production schedule for each department. The system should allow for such conditions as known scrap allowance, inventory on hand, processing times, outside supplier lead times, current load on the shop floor and many other variables.

WINDOWS to WEB

You've been hearing about all the features and enhancements in the Odyssey Web UI – Shop Planner, Shop Floor Manager, the CRM, Quick Quote, etc. – for a while now. Have you started thinking about trying out the Web UI? Here's how you get started with Odyssey Web UI:

- Contact the Support Desk for access info and tips for getting started
- Start using the Web UI to explore new features and enhancements
- Schedule a time with your project consultant to review challenges and create a team training plan for a smooth transition

PARTNER UPDATES

824 Consulting was established to assist metalcasters with their technology needs. Our primary experiences with B&L Information Systems' products are configuring and supporting Odyssey including creating or re-engineering Crystal Reports, project management, and technology operations. This kind of experience creates business data efficiencies and effectiveness leading to critical decision making in production, quality, and profitability. We are cost conscience while providing quality work giving our customers the best options or solutions. With over 20 years of experiences, we can also provide understanding on your technical infrastructure, from hardware to software to data communication. 824Consulting.com

Visi-Trak®
ADVANCING PROCESS · INCREASING PROFITS

Constant Innovation since 1981: Visi-Trak has been assisting die casters to Advance their Process and Increase their Profits for over 35 years. From real time closed loop shot control systems for High Integrity die casting, to high-speed, high-resolution sensors, to HMI software programs for PLC interface for complete machine cell monitoring and control, to Traceability Part Identification & Tracking Systems, to Plantwide Production Reporting Systems to Plantwide Process Monitoring Systems – Visi-Trak develops complete process automation solutions. Visi-Trak.com

ODYSSEY FEEDBACK FORUM

Are you making your voice heard on the Feedback Forum? It's an easy way to let our R&D team know about what's important to you and to see if other metalcasters have similar needs. You can both suggest enhancements and vote on enhancements suggested by other Odyssey users.

How does the Feedback Forum work?

❶ B&L staff will review each and every enhancement for possible inclusion in the software. **UNDER REVIEW**

❷ Those that are good ideas, but need more community support will be given a **REVIEWED** status.

❸ Those that are chosen to be included in Odyssey will be given a **PLANNED** status.

❹ Some enhancements require extra research and design to determine the feasibility of their inclusion in the application. Those enhancements are given a **DESIGN REVIEW** status.

❺ When an enhancement has been selected to be included in the next full version or maintenance release, it will be given a **SCHEDULED** status.

❻ After the enhancement has been coded and placed into a specific version or release, it will be given a **CONFIRMED** status.

❼ An enhancement is marked as **COMPLETED** when the version or maintenance release it is included in has been released.

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
Carteret Die Casting, OSCO Industries	Diversified Metals; Urick Ductile Solutions	Specialty Castings; Quality Castings; Federal Bronze; Mid-City	Diversified Metal Products; Pace (Maple Lake, NM); Alumco	ADC LLC; Diamond Castings & Machine Company, Inc; Serv-All	Pace (St. Paul Metalcraft); Dyersville; Auto-Cast, Inc

Kristine Craft promoted to VP-Professional Services;

Matt Gacek has article in Foundry Management & Technology on Managing a Shop Floor

B&L receives Silver Stake Award

2016 **BRONZE STEVIE WINNER** FOR SALES & CUSTOMER SERVICE

2016 **GOLD STEVIE WINNER** FOR SALES & CUSTOMER SERVICE

B&L receives a Gold and a Bronze Stevie

B&L's celebrates 40th anniversary

B&L hosts 40th anniversary open house; *Philip Laney* has article in Foundry Management & Technology on the Cloud + SMBs

Odyssey CRM, by Doug Hinman, Senior VP R&D

Something we didn't predict a year ago was that Odyssey would have a Customer Relationship Management (CRM) module, even though the idea had been on the radar for a while. As more and more customers noted how important an integrated CRM was to Odyssey, both on the Feedback Forum and in person, we got the message and delivered the new CRM Module in our Web UI interface at last September's Spectrum with release 5.0MR2. The CRM includes many of the base features needed by our metalcasting customers to manage their sales and quoting activities. While Cost Estimating (Quotes) and Requests for Quotes have been in Odyssey for many years, the new CRM expanded that functionality - and more importantly - expanded the interface with new and existing customer-centric information.
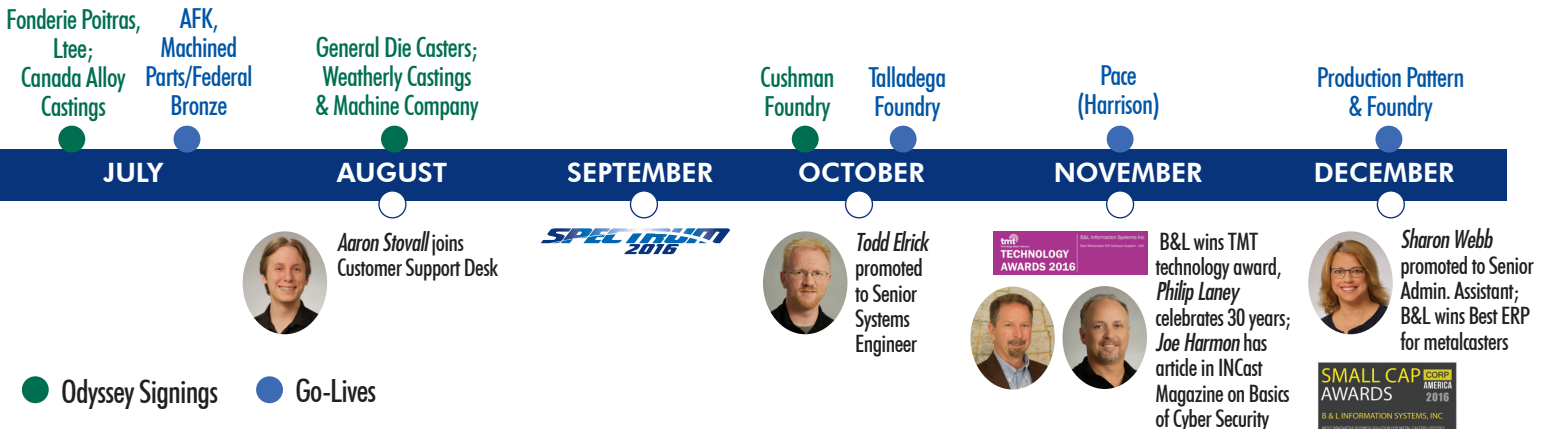
During Spectrum, where we unveiled the new CRM, we held an input session and got great input from several of you. We knew something new and as important as CRM needed critique and ideas directly from our customers. Since then, we have incorporated many of those ideas and approved several enhancement requests from our customer Feedback Forum. Several customers dove right in and are currently using Odyssey CRM. The upcoming Odyssey release 5.0MR3 includes many improvements in the CRM, and you can expect future releases to also advance the CRM module.

Enough of that preamble stuff. Here's what Odyssey CRM is all about. Odyssey's CRM centers around: the customer and prospect master tables; dated notes and follow-up activities; sales and pipeline tracking from Requests for Quote (RFQ); and cost estimating using the Quote Master. The Customer Master has new classifications, like a Customer Rating code, and it allows access to a wealth of information about each customer, including: on-time delivery performance, open orders, sales history, open A/R and collections, payment history, corrective actions, RMAs, etc.

- A new **Prospect Master** means your sales staff can track information and activities for potential customers. RFQs and Quotes can be created for prospects. Once you win a job for a prospect, you can turn them into a customer with a click of a button. CRM includes a handy search that spans both customers and prospects.

- **RFQ information** has been expanded for better sales pipeline tracking. It includes codes for Sales Stage, Lead Source, and Win Probability. Estimated quantity and projected sales amount, along with projected close and expiration dates give you clear visibility into the pipeline.

- **Activity Follow-ups** have been available for RFQs for a long time. Follow-ups can now be defined for either customers and/or prospects. Follow-up examples include: credit checks for new customers, verifying addresses, certifying shipping labels, etc. Odyssey gives you both manual and automatic ways to email reminders to your users who are responsible for those upcoming or past due activities.

- **Contacts** have been enhanced to include more information like the person's interests, birthday, social media handles, and mailing address (if different than the main customer or prospect). A new Contact Search lets you find a contact for a customer or prospect from a single screen. You can search by company, contact name, email address, phone number, etc.

- There is a new **Notes** feature which is a way to track any correspondence (emails, verbal communication, etc.), events, complaints, observations, etc. related to customers and prospects. Each Note is stamped with the user, date, and time of creation and change to give you a chronological record. Notes are also available for individual RFQs and you can also define Note Types in General Codes to classify them for areas such as General Correspondence, Quality Complaints, Customer Personnel Changes, etc.

Because of the volume of email correspondence between your sales and quoting staff and customers and prospects, the CRM module was designed to make emailing and tracking emails easy. You will see the Send Email button when viewing customers, prospects, contacts, RFQs, and follow-ups. The **Odyssey Email form** includes the option to automatically create a Note record for the email. In addition, you can install an Outlook Plug-in which gives you the ability to feed emails into Odyssey Notes. So, you can email from Microsoft Outlook or from within Odyssey (or both) and store the information in the Odyssey Notes table directly attached to customers or prospects.

A built-in dashboard keeps all this new CRM information from being overwhelming. It includes a pyramid graph showing your sales pipeline at a glance, a pie chart of lead sources, and a bar graph with projected sales from open RFQs versus your company

JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Fonderie Poitras, Ltee; Canada Alloy Castings	AFK, Machined Parts/Federal Bronze	General Die Casters; Weatherly Castings & Machine Company	Cushman Foundry	Talladega Foundry	Pace (Harrison)	Production Pattern & Foundry

Aaron Stovall joins Customer Support Desk

SPECTRUM 2016

Todd Elrick promoted to Senior Systems Engineer

B&L wins TMT technology award, *Philip Laney* celebrates 30 years; *Joe Harmon* has article in INCast Magazine on Basics of Cyber Security

Sharon Webb promoted to Senior Admin. Assistant; B&L wins Best ERP for metalcasters

● Odyssey Signings   ● Go-Lives

2017 Classes

In-person, small group classes hosted at B&L's Bridgman, Michigan office. On-site access to a team of trainers and in-house expertise. All classes are hands-on. Bring your questions!

BootCamp – Classes in February, May, August and November

New to Odyssey? Staff change? Odyssey Boot Camp may be the answer! This class overviews the entire Odyssey software system and includes hands-on demonstrations of various methods used to enter data. The small class size lends itself to a "bring your questions" format where company-specific questions are answered.

Crystal Reports – Classes in February, May, August and November

There's a report for that! A Crystal Report, that is. The modern basis of business reporting, Crystal Reports can be a little intimidating and time consuming. Whether you've built zero or dozens of Crystal Reports, in this class we'll dive into how to make Crystal Reports plumb the depths of Odyssey's data to give you access to better information, faster.

Spectrum – Hosted off-site in September

B&L's premier customer education event, Spectrum, is held every fall at a new location in North America. During this 2-day conference B&L's expert staff leads classes on a variety of Odyssey and related software topics. Attendees meet and learn with other Odyssey users on how they use ERP software and their processes. Past attendees note this industry-specific "networking" for metalcasters who use Odyssey is one of the best features of the conference!

Specific Topics – Classes in March, April, June and October

Each year, the Professional Services department creates classes based on recent training demand. For 2017, the topic specific classes will be:

1) Web UI Accounting **2)** Data Views, Intelligent Views & Dashboards **3)** Scheduling Tools **4)** Administrator's Toolbox

Check BLInfo.com for more details

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Odyssey CRM con't

goal. Odyssey dashboards can also be customized so you can make Odyssey's CRM graphs to fit your business's goals.

CRM Graph Types

Sales Stages

- Pending, $500,000
- Quoted, $376,500
- Quote Req, $425,000
- Initial, $998,500

Lead Source

- Referral, 3
- Existing customer, 6
- Cold Call, 3
- (Unknown), 14

RFQs vs Goal

$3,000,000
$2,400,000
$1,800,000
$1,200,000
$600,000
$0

Open RFQs