



CARILLON® ERP
Complete Manufacturing Solution



Manufacturing can be complex or simple, depending on what you make. You can have subcomponents used to make many other subcomponents. You may create by-products in the manufacturing process. You might disassemble rather than assemble. Every item you make may be a unique item or you may always make the same items over and over again. Some organizations make things in batches, some don't. You might want to track detailed labor and machine time. Or, that may be impractical or unnecessary in your environment.

No matter how you manufacture, Carillon ERP meets the needs for both discrete and process manufacturers.

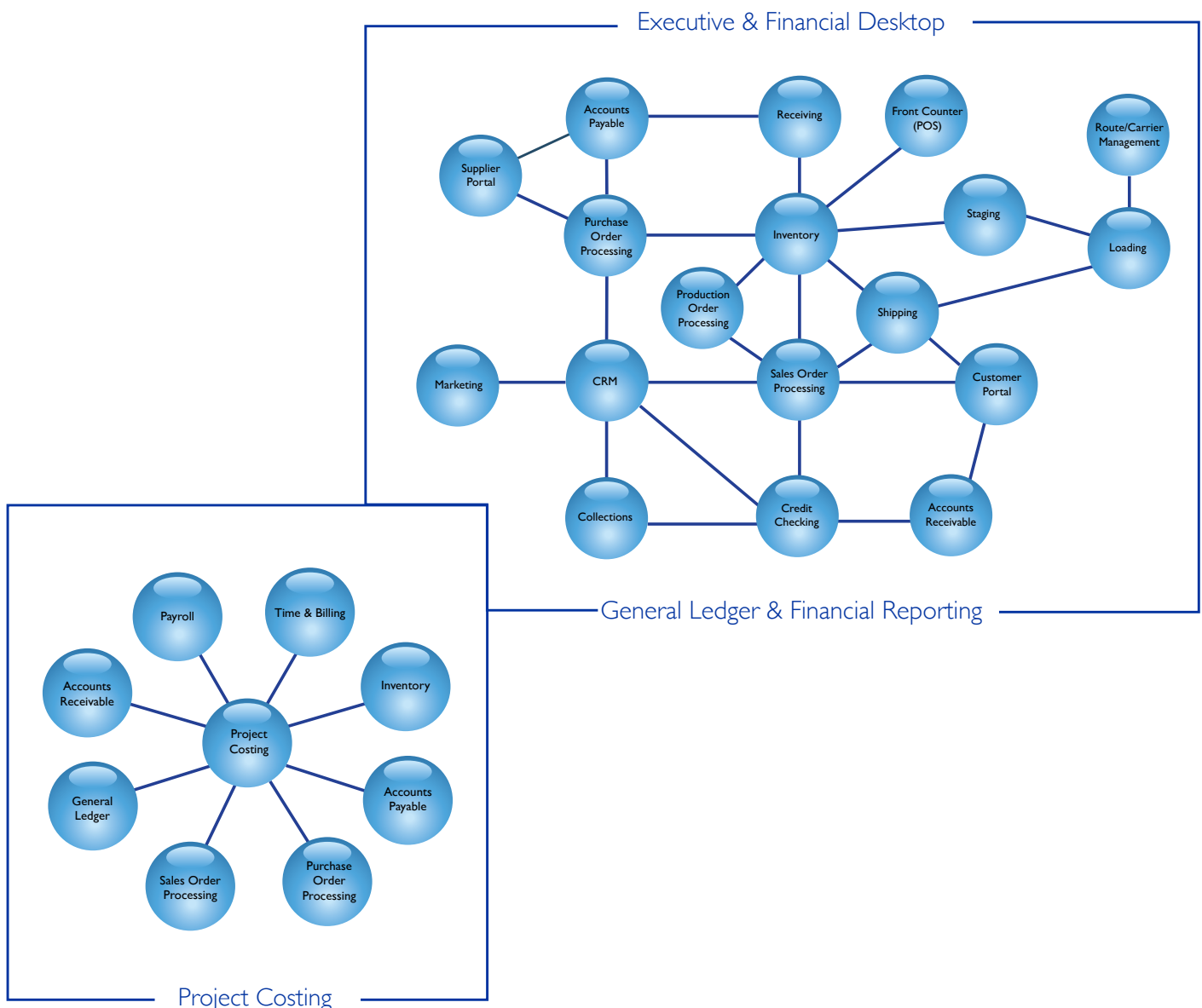
End-to-End Contact Relationship Management

Carillon ERP is a true enterprise system, designed to be used by everyone in your organization.

Carillon's Contact Relationship Management (CRM) capabilities are not as limited as other Customer Relationship Management systems. In an enterprise system, your activities with suppliers and other third parties need to be tracked in CRM in addition to your activities with customers. Carillon ERP's CRM is an integral part of the ERP system, not a third-party afterthought.

Fully Integrated For a 360° View of Your Business

A fully integrated enterprise system can be especially important in the manufacturing industry, which can have long lead times and constantly changing attributes for your inventory. If purchasing, marketing and sales are not working closely together in a single integrated system, inventory shortages and overages can almost be assured.



Robust Sales Order Entry

Ease of Entry

Carillon ERP's Sales Order Entry window is extremely easy and efficient. It's designed to be so fast you can enter orders while talking to customers on the phone and email them a quote or order acknowledgement before you hang up.

Fully Integrated CRM

Carillon ERP's Contact Relationship Management (CRM) functionality is fully integrated into the sales order process. You can have three contacts associated with an order:

- The person placing the order
- The person the items should be sent to
- The person the invoice should be mailed or emailed to

Create Purchase Orders

If you want to drop ship an order straight to a customer, you can create a purchase at the same time you save the sales order. It can even be emailed to the supplier at the same time the order is saved. Artwork, specifications, unlimited notes and documents can automatically be attached.

Commissions

Carillon ERP has a very robust commissions calculation feature that even lets you split commissions among multiple salespeople.

Available to Sell (ATS)

Know how many items you have available to sell as you're taking the order. See the next page for more on our ATS Dashboard.

Approval Process

Quotes and sales orders can go through an approval process based on the security rights of the user.

Quoting

In Carillon ERP, you can use the same window for quoting as you use for entering sales orders, giving you all of the features of the Sales Order Entry window even when providing quotes. Click send to email a quote for a customer to see while you are on the phone. You can then convert a quote into a sales order by simply clicking a radio button. Whether you're selling stock inventory, drop-ship inventory or a custom built manufactured item, you have all the capability you need in this one window.

Historical Orders

With a single click, you can see everything a customer has ever bought from you. You can view it order by order or summarized by year.

Copy Previous Orders

If a customer merely wants to copy their last order, you can do this by retrieving and copying their previous order. You can even change whatever is necessary prior to saving.

Email and Fax Integration

Carillon ERP's mail functionality allows you to email order acknowledgements and purchase orders straight from the Sales Order Entry window. Invoices and statements may also be emailed directly to a contact.

Pricing

Carillon ERP supports unlimited cascading price files and should be able to handle almost any pricing algorithm you can imagine.

Notes

Unlimited notes can be created both at the header level and at the line item level. The user can specify where these notes appear. Each note can be over 32,000 characters long.



“We had pretty specific needs and were worried that a standard ERP system might not work for us. Carillon was the only package we found that could be customized to our business, including upgrades.”

- Beth Thibodeaux, Red River Specialties

Custom Build An Item

Not only does Carillon ERP allow you to create items on the fly, it also allows you to customize the first level bill of material right in the sales order entry screen. You can even roll up the price of the components and add it up to the new price of the item you're selling. Finally, saving the sales order can automatically create a production order.

Pictures

Need to see item pictures? They're available in the Sales Order Entry window. Need to custom draw a picture? You can do that, too.

Create Ship Tos, Customers and Items

Subject to security rights, users of the Sales Order Entry window can create customers, ship tos and items on the fly.

Credit Checking

In addition to traditional credit limits, Carillon ERP has user-defined rules that you can create and then assign to customers as appropriate. For example, you can specify what should happen if a particular type of customer has a past due invoice or has gone over their credit limit. Of course, credit managers can always override any rules on an order-by-order basis.

Support for Unlimited Warehouses

You can source the product required to fill an order from unlimited warehouses without creating separate sales orders.

Process Downpayments

Downpayments can be entered and posted to deferred revenue. Once the order is shipped, the downpayment is automatically moved from deferred revenue to “real” revenue.

Take Complete Control of Your Inventory

ATS Dashboard

Available to Sell

Carillon ERP calculates a time-phased available to sell amount for today or any date in the future. It considers all the known demands and supplies for an item out through the lead time to determine what is currently available. This is a far more sophisticated and accurate method of managing your inventory than the manual allocation process older systems use.

Items are color-coded:

- **Green** – You have adequate known supplies to meet known demands.
- **Yellow** – You have adequate known supplies to meet known demands, but you will fall below the parameter defined in Item Maintenance, which functions similar to the safety stock level.
- **Red** – You do not have adequate known supplies to meet known demands. You need to either increase or accelerate the availability of supply transactions or decrease or delay demand transactions.

The screenshot displays the 'WINO320 - ATS Dashboard' interface. At the top, there are search filters for Company (Ongreco Company), Location ID, Item ID, and Supplier ID. Below these are options for Method Acquired (Purchase, Transfer, Make) and checkboxes for 'Show Green ATS Items' and 'Show Zero ATS, Quantity On Hand and Yellow Quantity'. A 'Retrieve' button is visible. The main table lists various items with their respective ATS values (color-coded Green, Yellow, or Red), quantities, and other inventory metrics. The table columns include Location ID, Item ID, Item Description, ATS, Quantity On Hand, Yellow Quantity, Stocking UOM, Suggested Order Quantity, Purchasing UOM, Order Quantity, Cost, Supplier ID, Supplier Name, Vendor ID, Vendor Name, Lead Time, Date, Do Buy, Special, Freight, Terms, and FOB.



Bills of Material (also known as recipes)

Carillon ERP supports an unlimited level bill of material. In addition, Carillon's bill of material doesn't just include materials, but also includes operations, which are defined as tasks done in workcenters. So in each level of the bill of material you can not only indicate the materials that will be required, you can also indicate the operations that will be performed. The use of operations then allows some organizations to perform rough-cut capacity planning.

Assemblies

Assemblies are definitions for the bills of material. They are time-phased to allow you to start to manufacture something differently as of some date in the future. They also let you define both the required materials as well as the operations required to manufacture an item.

The image shows two overlapping windows from the Carillon ERP system. The top window, titled 'WIN04570 - Assembly Treeview', displays a hierarchical tree structure for an assembly named 'BIKE'. The tree includes components such as 'FRAME26 Frame 26 inch (1.0000)', 'GOLD BIKE CHAIN Gold Bike Chain (1.0000)', 'HB26 Handlebars 26 inch (1.0000)', 'TUBING Tubing (3.0000)', 'GRIPS Handlebar Grips (2.0000)', 'HBCLAMP Handlebar Clamp (1.0000)', 'BENDTUBE Bend Tubing (Handlebar Shop)', 'ASSHB Assemble (Handlebar Shop)', 'WHEEL26 Wheel 26 inch (2.0000)', 'HUB Hub for 26 inch wheel (1.0000)', 'GEAR-LARGE Large Gear (3.0000)', 'GEAR-SMALL Small Gear (8.0000)', 'GEAR-MEDIUM Medium Gear (4.0000)', 'SPOKE26 Spokes 26" (40.0000)', 'RIM26 Rim 26 inch (1.0000)', 'BELL Bell (1.0000)', and 'ASS Assemble (Assembly)'. The 'As Of Date' is set to 05/19/14.

The bottom window, titled 'WIN01600 - Assembly Maintenance', shows the configuration for the 'BIKE' assembly. It includes fields for 'Assembly ID: 1', 'Item ID: BIKE', 'Revision Number', 'Revision Description', 'Drawing Reference Number', 'Drawing File Name', 'Effective Date: 02/28/01', 'Expiration Date: 12/31/49', 'Ship Components', and 'Delete'. Below these fields is a table listing the components and their quantities:

Sequence Number	Component ID	Item Description	Quantity	Unit Of Measure	Bubble Number	Multiply Quantity	Operation Sequence	Delete
10	FRAME26	Frame 26 inch	1.0000	EA		<input checked="" type="checkbox"/>		<input type="checkbox"/>
15	GOLD BIKE CHAIN	Gold Bike Chain	1.0000	EA		<input checked="" type="checkbox"/>		<input type="checkbox"/>
20	HB26	Handlebars 26 inch	1.0000	EA		<input checked="" type="checkbox"/>		<input type="checkbox"/>
30	WHEEL26	Wheel 26 inch	2.0000	EA		<input checked="" type="checkbox"/>		<input type="checkbox"/>
40	BELL	Bell	1.0000	EA		<input checked="" type="checkbox"/>		<input type="checkbox"/>



Job Costing vs. Production Order

If the item you're making is always 100 percent unique, you'll probably want to use Carillon ERP's job costing functionality. If the item you make is repetitive, chances are Carillon's production order capabilities are the best for you. With Carillon, you can use either, or both, methods of manufacturing depending on what makes sense in your environment.

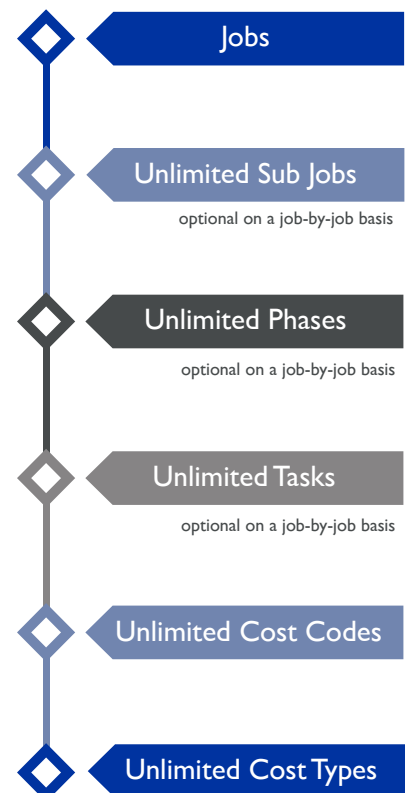
Production Orders

Production orders allow you to take one or more inventory items and turn them into another inventory item with one or more by-products. Or, a production order can allow you to disassemble an item into other items. Yields are considered when determining the demand for subcomponents. Production orders can also be “closed” multiple times if items are completed over a longer period of time, and you need inventory to be updated with what has already been completed.

Item ID	Producer	Item Description	Standard Yield %	Usually Aquired	Quantity	Delete
BELL		Bell	100.00	P	12.0000	<input type="checkbox"/>
FRAME26		Frame 26 inch	100.00	P	12.0000	<input type="checkbox"/>
GOLD BIKE CHAI		Gold Bike Chain	100.00	P	12.0000	<input type="checkbox"/>
HB26		Handlebars 26 inch	100.00	P	12.0000	<input type="checkbox"/>
WHEEL26		Wheel 26 inch	100.00	P	24.0000	<input type="checkbox"/>

Jobs

Jobs are commonly used for custom items. Each job can have unlimited sub jobs, phases, tasks, cost codes and cost types. Revenues and costs can be recognized using the completed contract or percentage of completion methods. Employees, equipment or machines can have unlimited cost-of-service and billing rates, if applicable.





“Carillon’s assistance in implementing barcoding throughout our warehouse has dramatically increased our warehouse efficiency. Taking physical inventory is now immensely easier.”

- A large importer and distributor of wine, beer and spirits

Make-To-Order Sales Orders

With the appropriate permissions in the Sales Order Entry window, you can change the top-level bill of material for an item, including both the components and operations for that item. If you make-to-order, you also have the capability to automatically create jobs and/or production orders for each line in the sales order when it's saved as approved. This is applicable whether you are just making a simple custom kit or manufacturing an item with a very complicated bill of material. You also have the ability to roll-up the prices of the components and operations to help you calculate the price of the custom item.

Barcoding Capabilities for More Accurate Item Tracking

Carillon ERP has full support for barcoding built throughout the system and also works with **kwiktag**[®] for barcoding documents.

Some examples of Carillon ERP's capabilities:

- Print custom designed barcode labels to be affixed to items during the processing of inventory receipts that can vary by item. Bigger labels for big items, and smaller labels for small items.
- Print custom barcoded shipping labels that can vary by customer.
- Scan barcodes during picking, staging, and loading.
- Generate and print barcode labels for repacked boxes that track its contents, so scanning during shipping or delivery can still be possible.
- Print barcodes on any document such as the remittance advice on a customer statement.
- Allow an item to have multiple UPC and/or EAN codes associated with it.
- And many more.

Stay Organized with Document Imaging

Eliminate file cabinets and easily search, store and send documents electronically with fully integrated document imaging through an interface to **kwiktag**[®]

Balance the Workload with WebPack

WebPack is Carillon ERP's online portal for employees, customers, vendors and suppliers. It allows these individuals to perform simple, secure and safe information inquiries, thereby minimizing the workload strain on your Accounting, Human Resources, Purchasing and Customer Service departments. Employees can update their personal information and print paystubs, customers can check their order status and print invoices and suppliers can see purchasing and payment information. WebPack frees up your staff's time for more important tasks.

Additional Functionality for Manufacturers

Warehouse Management

- Physical inventory scanning
- Bin, lot and serial number tracking
- Unlimited inventory stocking locations
- Track on-hand quantities per location
- Reason tracking for inventory adjustments
- Source sales order from multiple stocking locations
- Fully integrated document imaging

Inventory

- Link producer to an item
- Master item - groups items for historical analysis
- Multiple units of measure per item
- Assign industry-specific characteristics to an item
- Each item can have multiple barcodes and UPCs
- Item specific unit-of-measure conversions

Purchasing

- Change order capabilities
- Non-inventory purchase orders
- Unit of measure conversions
- Unlimited suppliers per item
- Ability to store suppliers' IDs and descriptions
- Variance tracking
- Open purchase order visibility
- Previous cost visibility

Logistics

- Route scheduling and delivery
- Supports staging areas and loading zones
- Pick orders to staging area/loading zone for holding before loading onto truck
- Scan items from staging area to delivery truck to ensure shipment is correct
- Print pick tickets, labels, packing slips and bills of lading
- Supports case unpacking and repacking, including tracking cases of assorted repacked items
- Processes transfers within warehouses, between warehouses, between bins and between companies
- Coordinates shipments, direct shipments, returns and point of sale

Customer Management

- Fully integrated customer portal
- Fully integrated Contact Relationship Management (CRM)
- Rule-based credit checking
- Compliance tracking
- Customer-level pricing, discounting, payment and terms
- Credit approval options
- Powerful sales order entry capabilities

Costing & Pricing

- FIFO, average and standard inventory costing
- Robust pricing tools allow you to calculate new prices based on cost, bonded cost or other methods
- Price by customer and by item
- Unlimited cascading, multitier, date-sensitive price files

Barcode Scanning

- Improves inventory accuracy
- Tracks transfer of inventory to other locations
- Tracks movement of inventory within warehouses from shelf to staging area/loading zone and onto delivery truck
- Tracks shipment and delivery of orders
- Streamlines order entry and point-of-sale processes
- Simplifies case unpacking and repacking

Project Costing

- Full job costing
- Full promotional/marketing material costing

Production

- Fully integrated production capabilities
- Full kitting capability
- Unlimited levels on bills of material

Importing & Receiving

- Currency tax calculation (if applicable)
- True multicurrency system
- Ability to add up to 10 additional costing factors
- Allocate a cost to a single PO or an entire shipping container
- Able to have multiple consolidators per container
- Duty calculations



“A major benefit we didn’t anticipate is the positive changes to our business practices that came in conjunction with implementing Carillon.”

- John Hall, Utah Department of Alcoholic Beverage Control



Visit:
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or call us at 800.739.9933
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