

THE BACKGROUND

When small-midsize companies enter large markets, they frequently are required to behave like large companies. Today, that increasingly involves exchanging business documents electronically with trading partners — B2B e-commerce. Often, ACOM's EZConnect EDI/XML solutions is the mechanism of choice because its flexibility, moderate cost, modular architecture and ease of implementation make it a manageable purchase technologically and financially for firms of virtually any size — firms like Creative Teaching Press, which was founded by Luella Connelly in Orange County, California in 1965.

As a classroom teacher, Connelly was in a constant and usually unrewarding search for attractive and relevant curriculum support materials. She was a committed and imaginative educator and somewhere in her 17-year career she began to create her own. The materials she developed were good. Other teachers wanted them and Connelly soon discovered that she had a product line and a business.

Now approaching its 40th year in business, Creative Teaching Press, Inc. is a multimillion-dollar privately owned corporation headed by Connelly's son Jim, who has confirmed it as a significant factor in the school supply industry, quadrupling sales since assuming leadership. The company's product line continues to broaden, consisting of educational and inspirational books, charts, posters, music, bulletin board items, puzzles, teaching aids and more.

THE PROBLEM

Growth brings its challenges, not least of which is the implementation of systems and controls. Currently, Creative Teaching Press sales derive from a variety of sources, among them retail chains, dealer networks, education supply catalogs, individual schools and since February 2004, the web, which is now producing orders both domestically and internationally.

Connelly recognized that to support the company's growth and diverse client base, it needed a comprehensive enterprise resource planning system that could accommodate the flood of paperwork being generated between the acceptance of orders and the issue of invoices. He engaged Orange County-based Management Consulting firm Kipnis Technology Group to locate such a system and direct its installation. Group President Gary Kipnis helped his client select the Epicor eBackOffice Suite, which went into service in 1999.

eBackOffice is a Microsoft Windows-resident solution that resides on an ODBC-compliant SQL Server database and

which provides modules both for financial controls and operations. The financial management suite includes general ledger, accounts payable, accounts receivable, cash management, asset management, currency manager and advance allocations and financial reporting capabilities. Operations modules include order entry, distribution, warehousing, manufacturing and advanced planning and scheduling.

eBackOffice enabled the company to organize and coordinate all of the company's activities within a single, powerful software platform, typically generating both internal and external documents such as invoices and purchase orders on preprinted forms. For example, orders arrived by mail, fax or telephone and were keyed into the system by customer service team members. Once in the system, data was updated automatically and outbound invoices were printed and sent by mail.

“We had the system, but we did not have an electronic link to customers,” Kipnis notes.

When a very large potential customer made B2B e-commerce capability a condition of its patronage, Connelly again called in Kipnis. Overtures from other customers had already suggested that implementation of the technology was just a matter of time.

“The company recognized that it needed to use B2B e-commerce, but being on the small end of the mid-size business category, it had several concerns,” Kipnis says. “Cost was a consideration and there had to be a demonstrable ROI. It had to be easy to implement and use, because the company did not want to incur the expense of organizing and supporting an EDI department. It had to integrate easily with the Epicor eBackOffice suite and it had to be flexible enough to accommodate the individual characteristics and requirements of the various companies with which Creative Teaching Press does business.”

THE SOLUTION

Kipnis researched several solutions, among them ACOM's EZConnect EDI/XML, which he found had already established a partnering relationship with Epicor. *EZConnect is a PC-based universal EDI and XML data translation, data management and complete partner communications platform.*

It supports direct access to multiple databases as well as flat file and XML interfaces to applications systems. *It is compliant with all EDI standards, including ANSI X12 and EDIFACT; it also supports a number of XML repositories such as BIZTALK and RosettaNet, xCML and eb/xML; and it*

is compatible with all data transports, including value-added networks (VANs), proprietary networks and the Internet. It has its own SQL Server database, which it uses to catch and store any documents in which it detects anomalies, automatically alerting the system administrator.

“What we learned when we contacted ACOM made EZConnect the obvious choice,” Kipnis says. “The company has *proven technological expertise* and it already had a working relationship with Epicor. The *product was mature, its modular architecture* enabled us to get in at a price Creative Teaching Press could afford and it was already implemented for Epicor eBackOffice. And finally, its being headquartered in Long Beach, just a few minutes away on the freeway, told us that service and support would be at hand if we needed it.” Kipnis recommended the purchase and Connelly agreed.

IMPLEMENTATION

Shortly after a disk containing the software arrived, Kipnis scheduled three days of installation and training with an ACOM EDI professional services expert. Along with the installation, the installer/trainer, Alex Chang implemented the first trading partner, in the process instructing Kipnis and Creative Teaching Press staffers on how to do it. Subsequently, all trading partners have been implemented internally, primarily with the X.12 850 and 810 documents, the purchase order and invoice forms, respectively. ACOM continues to provide consulting help whenever it is needed.

EZConnect is not only universally compatible with all electronic and database file formats but also with all data transports. Currently, Creative Teaching Press exchanges trading partner documents using VANs as well as direct FTP connections. Web activity, for example, is hosted by a third party. Rather than enter the orders directly into the Creative Teaching Press database, they are submitted via EDI using a private connection, eliminating manual activity and assuring both accuracy and security.

“One of the advantages of this system is its transparency,” Kipnis says. “EZConnect is tightly integrated with eBackOffice and the system can be managed by a single person. When orders arrive they are acknowledged via EZConnect and placed in the database. Sales is notified automatically by email. Sales reviews the orders and releases them for fulfillment. When an order is shipped, an electronic invoice is generated and transmitted automatically.

While the volume of electronic transactions was small at first, it has already expanded substantially, Kipnis says. Orders

come in at varying rates: as many as 100 per month from large customers, 15-20 from others and as few as 5 or 10 from some quarters. Often they arrive in large batches, which could create bottlenecks using manual methods, but which are easily handled using EZConnect and eBackOffice. The company expects continued growth in both order volume and in the number of B2B trading partners.

SUCCESS!

ROI calculations are not available, Kipnis says, but the company is already benefiting substantially through *reduction of manual activities such as telephone sales, order entry and invoice processing, as well as through elimination of the error potential associated with manual input-output.* Any errors will originate on the customer side, he says.

“Even the customers who expected the company to accommodate their needs for B2B e-commerce were impressed with the way Creative Teaching Press was able to respond so quickly, and we give ACOM a great deal of credit for that,” Kipnis says. “*The tool is so easy to use that we can quickly adapt the EDI maps to other customers.*”

EZConnect’s flexibility has also proven itself in other ways, he says, sometimes dramatically. “Recently we went through an eBackOffice 7.0 to 7.3 upgrade and there were significant database changes,” he says. “We were a little worried, because we had to change the mapping. We were able to make the changes and test them very quickly because EZConnect made it simple. We didn’t even have to interrupt our EDI operations.”

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