

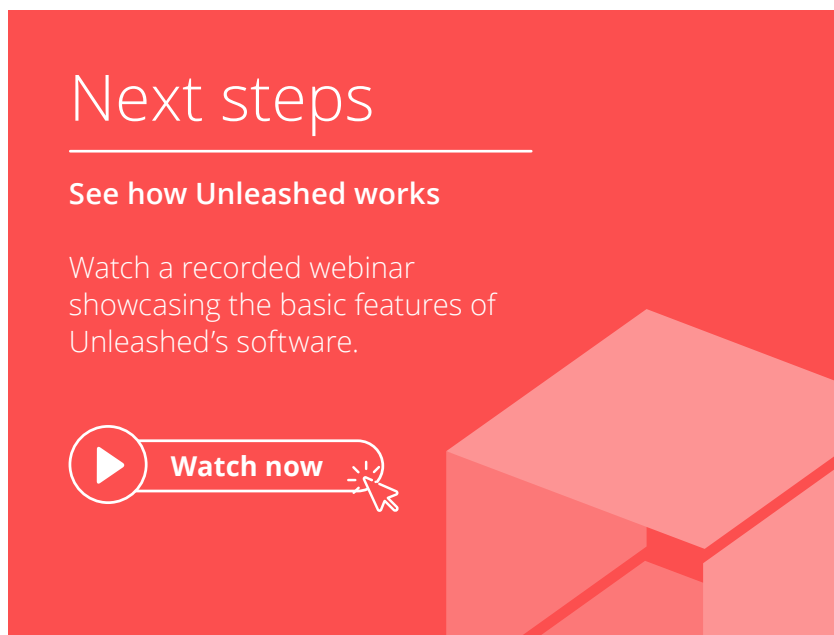
The Manufacturers Guide to Cloud Software

Solutions advice for manufacturers of
every type and size



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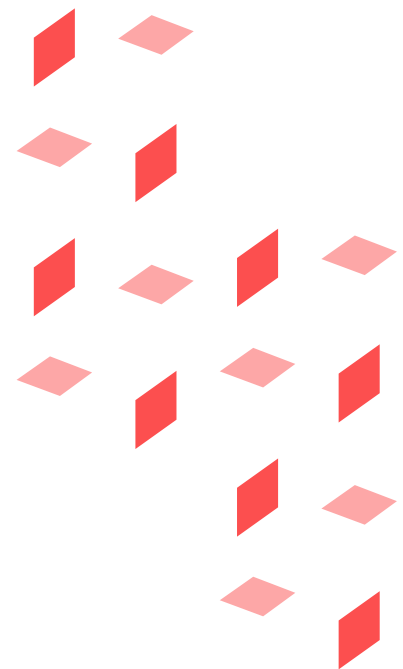


Next steps

See how Unleashed works

Watch a recorded webinar showcasing the basic features of Unleashed's software.

 **Watch now** 





The **benefits** of cloud apps

Cloud apps versus ERPs

Cloud apps and ERPs offer two different methods of managing your manufacturing.

Manufacturers using cloud apps will typically pick a handful of 'best of breed' solutions that cover the functions they want to digitise. For example you might choose three of four top apps for your accounting, production, inventory management and sales needs. These are then integrated so that where needed the various functions 'speak' to each other, with data flowing from app to app.

A big sale through Shopify, for example, might see stock adjusted in Unleashed – an extra production run initiated, with more parts ordered where needed – and the whole processes reflected in the company's accounts in, say, Xero.

ERP systems, on the other hand, are more comprehensive systems that cover lots of different aspects of a business. So instead of picking multiple focused solutions, you'll buy a single package to manage everything.

This can be a powerful proposition, but ERP systems do come with downsides:

- Many aren't cloud-based, which means they're difficult to install and keep updated. The cloud-based systems that do exist are new and relatively untested
- They tend to be inflexible. You'll have to redesign your business processes to fit the new software, instead of picking a tool that fits your specific requirements
- You have to invest a lot of time into set up and training. Getting started with an ERP often takes months
- You have to pay sizable upfront costs – often for functionality you won't use
- You also have to pay steep maintenance costs. Any updates or enhancements require an upgrade, or you might have to pay a consultant to make changes

Which option should you choose?

Cloud apps aren't necessarily suitable for every manufacturer. If you operate in a rural area with connectivity issues or poor internet speeds, for example, you'll likely have a problematic experience with cloud-based applications.

In most situations, though, manufacturers will get maximum benefit from a best-of-breed cloud app combination.

Advantages of cloud apps include:

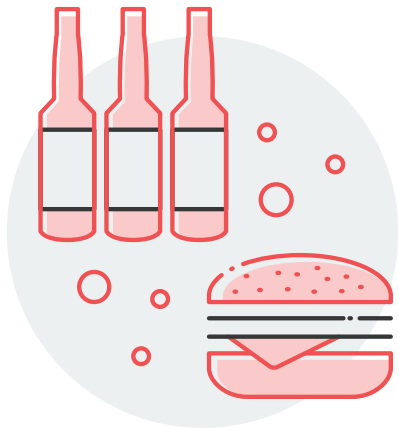
- Lower upfront costs – cloud apps are typically provided on a subscription basis
- Continuous improvement – most are updated and improved on a weekly basis, with no involvement needed by the user, and new features rolled out periodically
- Remote access – your key business functions are available from any location with internet access; a critical feature since the Covid shocks of 2020
- Flexibility – the wider cloud app ecosystem means you can add features and scale as your business evolves

Let's start by looking at the types of manufacturers that are likely to benefit most from a cloud app solution, along with their specific needs.



Manufacturer app needs by **sector**

A look at manufacturer requirements by sector

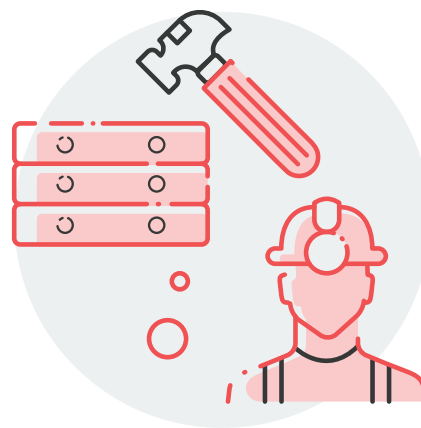


Food and beverage

With high volumes of limited shelf-life inventory, these manufacturers have special requirements

- Batch tracking of raw material inventory to avoid the costs of ingredients expiring
- Accurate audit trails in the case of a product recall
- Attribution of production costs (e.g. labour, or third-party charges) for accurate costing of finished goods
- View of margins by product and channel to drive profit growth and strategy
- Multichannel sales to grow revenue, spread risk and build resilience

Example companies



Building and construction

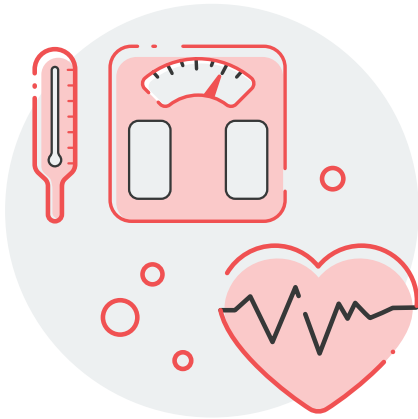
Supplying building and construction materials involves close management of both customers and products

- CRM to manage key contacts, accounts and projects
- Make to order functions to reduce finished goods inventory
- Batch and serial number tracking for traceability
- Online client ordering portal to reduce admin
- View of margins by product and channel to drive profit growth and strategy

Example companies



STONE UK
NATURAL BRITISH STONE



Health and medical equipment

Successful companies in this space connect sales systems with inventory, closely manage customer relationships, and accurately track their labour costs by product

- CRM to manage key contacts, accounts and projects
- Accurate audit trails in the case of a product recall
- Serial number tracking improves management of high-value componentry, and aids warranty process after sales
- Mobile sales and inventory management for more effective sales and fulfillment in the field

Example companies

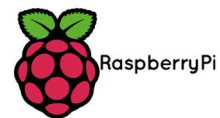


Electronics and telecoms

Multi-level BOMs need close tracking and management. Early adopters of tech may also be hindered by legacy systems, and need an update

- Serial number tracking improves management of high-value componentry
- Warehouse management and inventory control efficiencies
- Lead time tracking to reduce production downtime
- Mobile sales and inventory management for more effective sales and fulfillment

Example companies





Medical supplies

These manufacturers have similar needs to food and beverage companies, but with added regulatory oversight

- Batch and serial number tracking for compliance with product recall legislation
- Improved purchase order and sales order management
- Accurate view of margins by product and channel to drive profit growth and strategy

Example companies



Furniture and fixtures

Managing margins and production efficiency is critical as these companies seek to stay in touch with changing trends

- Efficient Bill of Materials management that captures all costs
- Accurate view of margins by product and channel to drive profit growth and strategy
- B2B sales portal to reduce admin
- Warehouse management and inventory control efficiencies

Example companies



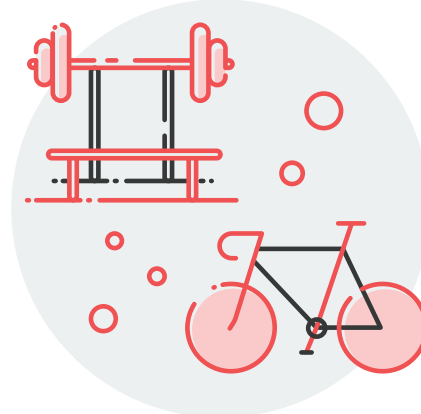


Metals and fabrication

Productive efficiency is a key focus area for capital intensive industries

- Efficient Bills of Materials management that captures all costs
- Supplier management to reduce production downtime
- Improved purchase order and sales order management

Example companies



Sport and entertainment

A close relationship between production and sales drives growth in these companies

- Mobile sales and inventory management for more effective sales and fulfillment
- Multichannel sales to grow revenue, spread risk and build resilience
- Accurate view of margins by product and channel to drive profit growth and strategy

Example companies



LAZER

ANCE LIGHTING

FASTER GO SAFER



Lazer Lamps

Identifying your **needs**

Creating a business profile

Moving to cloud-based apps can be a transformative moment for your company. To get the most out of the process it's often worth migrating multiple areas of your business at once. By creating a profile of your company you'll build an accurate picture of its different needs and pain points, which in turn will show you where the greatest potential gains can be made.

Winning over other key decision-makers within your business will also require a detailed view of the specific benefits and costs of moving to cloud apps – and the opportunity costs of the status quo.

Here are the areas we suggest you cover.



Goals

What are your ambitions for the next 1-2 years? What are your goals over the next few months?



Pain points

What are the main issues holding you back?



Technology

What software are you currently working with? Is your accounting/bookkeeping already run through the cloud? If only a handful of the key financial personnel currently use the accounting software, while operations staff manually provide their own inputs, then a cloud solution will provide huge value here



Proficiency

Do you have enough technological expertise within your team? Which staff are ready to use cloud tools?



Manufacturing style

There are two main types of manufacturers: those who make to order, and those who make to stock. Where does your company fit?



Now build the details

Use these questions to build as accurate a profile of the company and its current state of play as you can.

How do you operate?

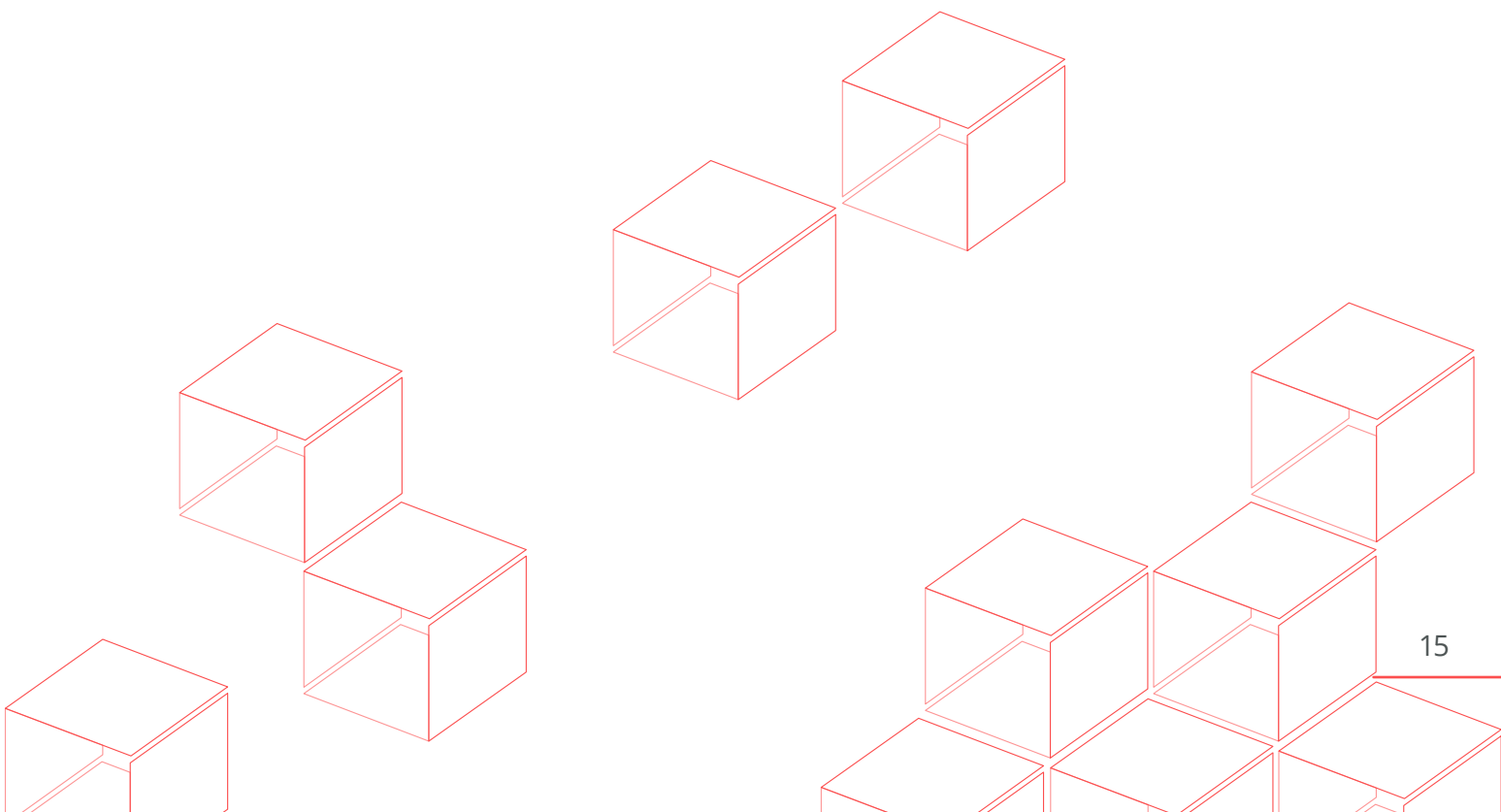
- How many product codes do you use?
- What products do you have to bundle / kitset / assemble?
- Are you assembling / manufacturing a finished product for sale?
- Do you have serialised products that need tracking?
- What are your needs around batch tracking / expiry of products?
- How many warehouses do you have?
- What sales channels do you currently have? What's working and what's not?
- How do you track and manage your customers?
- What performance metrics do you track? What internal data can you access?

What are your timeframes?

- What upcoming events/deadlines drive having a solution in place?
- What plans are there for major projects?
- What are your financial goals for the next two quarters?
- Can those goals be met without some sort of change?

Financial factors

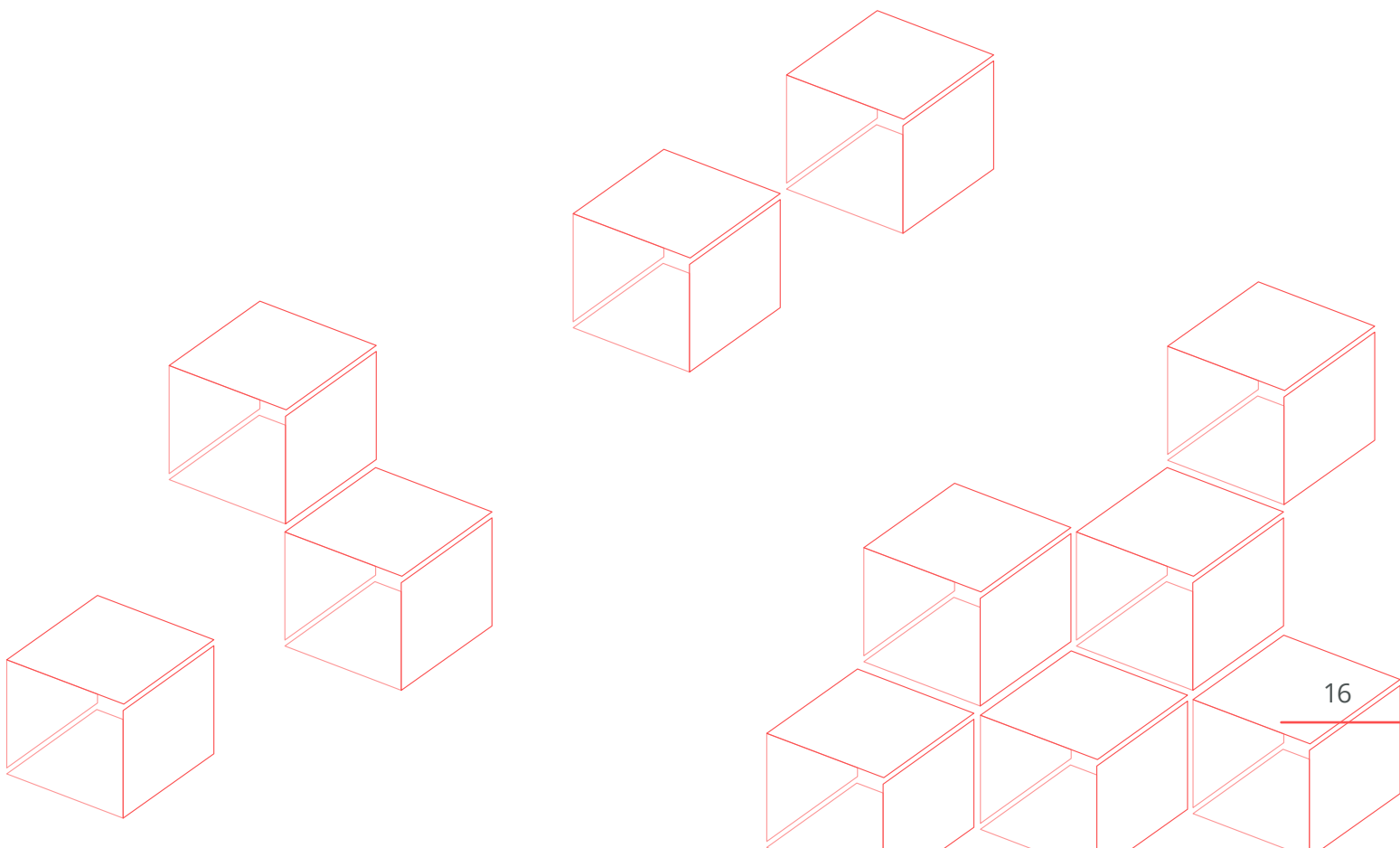
- What do you currently spend on your pain points? What are the opportunity costs of not addressing them?
- What potential gains can addressing these bring?
- What budget do you have set aside for addressing these goals / issues?
- What ROI are you hoping for?



What are your real problems?

Look beyond the finance / exec team to investigate wider organisational processes. Here you'll likely uncover some of the real problems holding the business back

- How accurate is your stock valuation at year-end?
 - How many operational processes are duplicated across teams?
 - How accessible is your operational data if you're required to work from home?
 - How do your customers order from the business currently?
 - How often do you take returned stock from customers?
 - How up to date are your BOM costs?
- How do you factor staff labour into the cost of goods?
 - What problems does the business have and when did you identify them?
 - What steps have you already taken to address them?
 - How important is addressing these problems to your goals – both company-wide and departmental?
 - What happens if you don't address these pain points?
 - What are your top priorities at the moment? Where do these issues fit on that list?



Make to order versus make to stock manufacturers

Manufacturers who make to order and those who make to stock have different requirements in terms of app features and functionality. Here's how to identify where your company sits.

Make to order (MTO)	Make to stock (MTS)
<ul style="list-style-type: none">• Work on a 'pull production' model, creating assemblies as and when a customer creates an order• May take prepayments from customers• Often sell customised final products• Use lead times when estimating delivery dates	<ul style="list-style-type: none">• Fulfil orders with finished goods already manufactured in the warehouse• Rarely take prepayments• Most products not customised• Only use delivery information for estimating delivery dates• Often sell wholesale or multi channel
Common MTO companies	Common MTS companies
Electronics and telecoms, building and construction manufacturers, furniture and fixtures, metals and fabrication	Food and beverage manufacturers, health and medical supplies companies, sports and entertainment industry, FMCG

Setting out goals: growth versus productivity

Most businesses either want to scale their operations or find new efficiencies – or even achieve both at the same time. What does your company want to achieve?

Going digital for growth

Taking on more staff, selling at new levels or getting picked up by a major chain are all common goals for manufacturers. Cloud apps can help you achieve all of them

Going digital for productivity

Some companies are happy at their current size – but want to manufacture their products much more efficiently. You might be aiming to reduce your admin burden, or to improve your financial position by growing margins



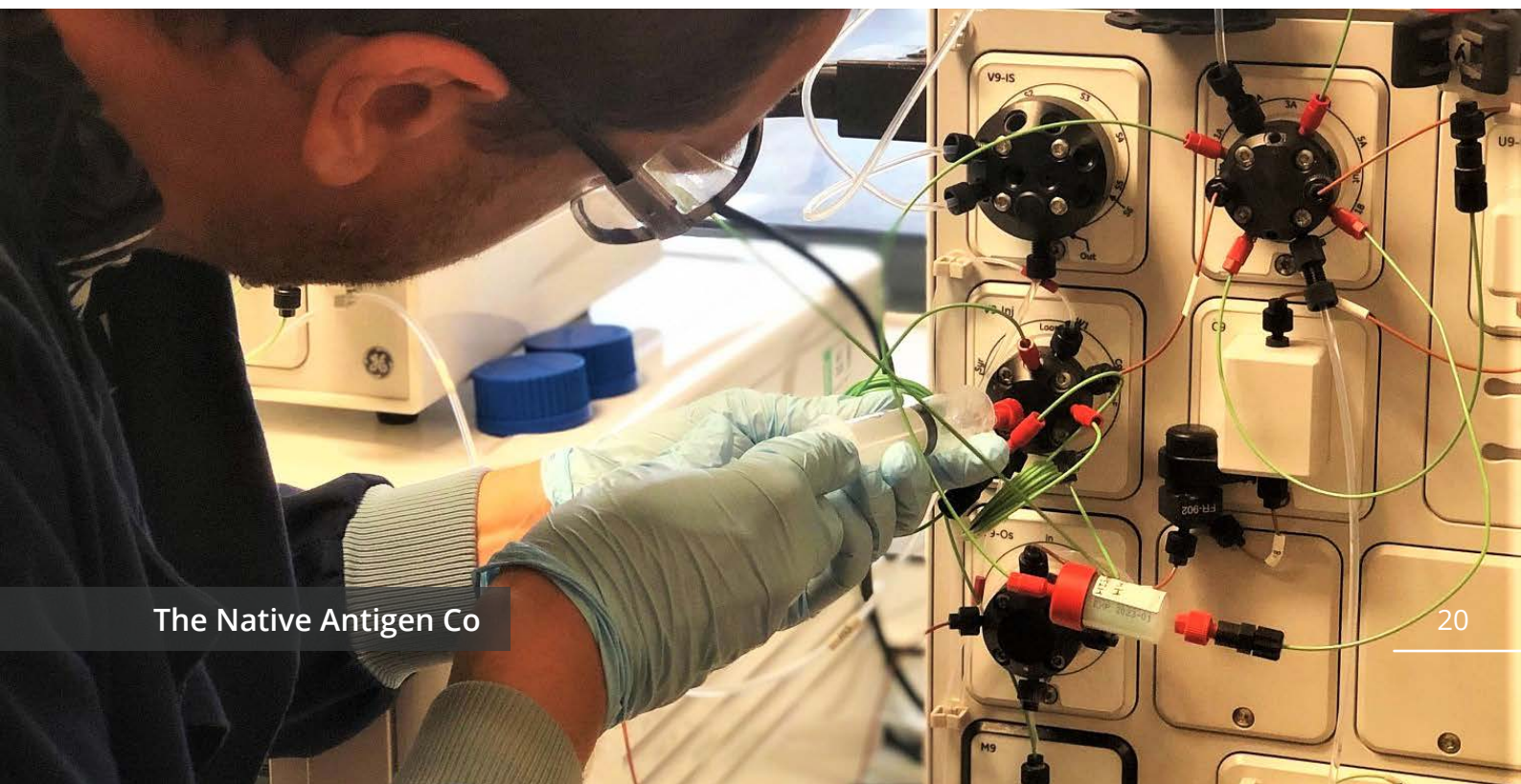
Watson Gym Equipment

What make-to-order manufacturers need

Primary business strategy	Features you'll need	Apps you'll need
Digital for growth (new customers, new markets, new products)	<ul style="list-style-type: none">• Split invoicing• Customisable ordering• Capture labour costs and COGS• Lead time tracking• Place multiple POs at once• Quoting• Mobile sales app• Cloud accounting• Track leads and manage customers• Data insights	<ul style="list-style-type: none">• Unleashed• Xero• Prospect CRM• Chaser• Unleashed Business Intelligence Vision
Digital for productivity (less admin, less downtime, more strategic decision-making)	<ul style="list-style-type: none">• Split invoicing• Customisable ordering• Capture labour costs and COGS• Lead time tracking• Place multiple POs at once• Quoting• B2B self-service sales portals• Cloud accounting• Data insights	<ul style="list-style-type: none">• Unleashed• Xero• Chaser• Unleashed Business Intelligence Vision

What make-to-stock manufacturers need

Primary business strategy	Features you'll need	Apps you'll need
Digital for growth (new customers, new markets, new products)	<ul style="list-style-type: none"> • Batch/serial tracking • Production scheduling • Capture labour costs and COGS • Demand forecasting • Streamlined fulfillment • Data insights • Multichannel sales 	<ul style="list-style-type: none"> • Unleashed • Xero • Shopify • Inventory Planner • Unleashed Advanced Shipping • Unleashed Business Intelligence Vision
Digital for productivity (less admin, less downtime, more strategic decision-making)	<ul style="list-style-type: none"> • Batch/serial tracking • Production scheduling • Capture labour costs and COGS • Demand forecasting • Streamlined fulfillment 	<ul style="list-style-type: none"> • Unleashed • Xero • Inventory Planner • Unleashed Advanced Shipping





Choosing your apps

The fundamentals: Production, Inventory Management and Accounting

For manufacturers the most important apps are those handling the production, supply chain, and financial processes – including supplier management, Bill of Materials and assemblies, stock management and accounting. Managing these core business functions with cloud technology can have a transformative effect for a manufacturer by freeing up time, lifting efficiency and dramatically improving visibility and control.

Accounting solutions

There are several highly regarded accounting apps on the market, including the cloud apps from Xero and QuickBooks Online, with the final choice often decided by the CFO's personal preference, or previous experience.

Production and inventory management solutions

Unleashed is widely used by manufacturers as their primary production and inventory management solution. Its comprehensive feature set allows for total management of the manufacturing process. Core functions include:

- Order management of components and materials from suppliers
- Production, including assemblies and Bills of Materials management
- Managing finished inventory
- Sales, including a native B2B eCommerce store and mobile sales app

It also benefits from plug-and-play compatibility with financial systems thanks to a managed integration with each of the accounting packages mentioned above.



Find out more

For more on migrating important business functions to the cloud, read **The no-fuss guide to leaving legacy software for FY21.**

For more on choosing inventory management software, see **Choosing the best inventory software for a business.**



Top 20 Manufacturing Software Report

Unleashed is rated one of the world's Top 20 Manufacturing Software solutions by Capterra.



Top 20 Inventory Management Software Report

Unleashed is rated one of the world's Top 20 Inventory Management Software solutions by Capterra.

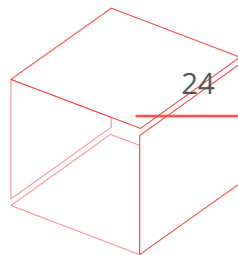
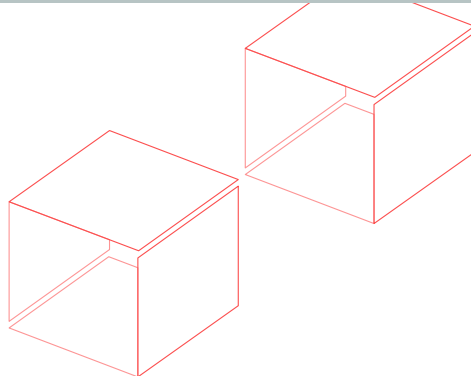
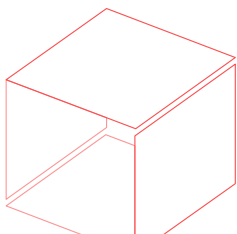
To find out more about using Unleashed as your manufacturing and inventory management solution, book a free call with one of our consultants.



Want to know more?








Book a 20-minute discovery call

BOOK A CHAT



Additional apps

With accounting, manufacturing and inventory management solutions in place, a business should look to fill out its stack with apps that add the most value according to its particular needs. The following apps all streamline and build efficiency in important parts of a business.

	Chaser	Prospect CRM	Inventory Planner	Shopify	Unleashed Advanced Shipping	Unleashed BI Vision	Unleashed B2B Premium
Type	Debtor tracking	Customer relationship management	Sales forecasting	eCommerce	Fulfillment <small>* not available in all regions</small>	Business intelligence	Electronic Data Interchange
Onboarding and support	<ul style="list-style-type: none"> • Online help and resource centre • Email support 	<ul style="list-style-type: none"> • Online help and resource centre • Support portal • Video and webinar training 	<ul style="list-style-type: none"> • Online help and resource centre 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Support centre • Community forums 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Phone and live chat support (paid extra) • Community forums • Community forums 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Phone and live chat support (paid extra) • Community forums 	<ul style="list-style-type: none"> • Online help and resource centre • Training videos, blogs, webinars and podcasts • Phone and live chat support (paid extra) • Community forums
Overview	<p>Cloud Credit Control software for Xero - designed for small-medium businesses, or Accountants and Bookkeepers with SMB clients</p> <p>"Automate your invoice chasing without losing the human touch"</p>	<p>Software for tracking leads and closing deals designed specifically for wholesalers, distributors and manufacturers</p> <p>"Stock-Aware CRM"</p>	<p>A planning tool for both e-commerce and brick and mortar sales with a number of useful metrics and reports to analyse your business</p> <p>"Puts you in charge of your inventory"</p>	<p>A leading multichannel eCommerce platform designed for small and medium-sized businesses</p> <p>"Build an online business—no matter what business you're in"</p>	<p>Fulfillment app for high-volume shippers. Processes shipments in 20 seconds</p> <p>"Increase efficiency and accuracy by automating your shipment processes directly from Unleashed"</p>	<p>Powerful data insights for Unleashed users</p> <p>"Drive successful decision making with actionable KPIs"</p>	<p>Customer self-service for quotes and ordering, based on your live inventory status. Customisable interface plus guest access/cash sales.</p> <p>"Give customers a seamless buying experience with a dedicated online ordering platform"</p>
More information	 Learn more about Chaser	 Learn more about Prospect CRM	 Learn more about Inventory Planner	 Learn more about Shopify	 Learn more about Unleashed Advanced Shipping	 Learn more about Unleashed BI Vision	 Learn more about Unleashed B2B Premium



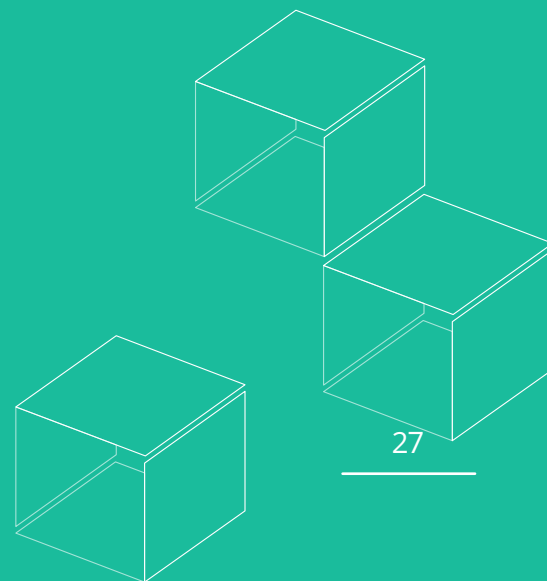
Cheat sheets

How to use the cheat sheets

These case studies will give you a rough guide on the apps different business types need – whether large or small, make-to-order or make-to-stock.

We'll give you a brief overview of each business, outline the features they need and include the apps that we suggest.

If your business doesn't fit any of these case studies and you're not sure what options are best, **reach out to an Unleashed consultant for advice.**



Small make-to-stock business looking to scale

Maryam is the managing director at Galactic Pets, a firm that makes specialist pet food. Business is going well. Her turnover was £500k last year and she's expecting to hit £600k the next. Until now, she's been running her entire inventory and production on spreadsheets. She also does her books on Sage 50 Professional.

Maryam's main problem is that her inventory system doesn't link up to her accounts, making it difficult to prevent stock outs, schedule production or get an accurate current picture of the business at any given time. She also wants to add new apps to make her growing business more efficient – for eCommerce and shipping, for example – but she's concerned it's going to be difficult to integrate any new app with her existing systems and processes.



How Maryam can achieve her goals:

By moving to the cloud Maryam can:

- Link key systems like accounts and inventory easily
- Add other new apps at any time with managed integrations
- Build the confidence that she can grow her business without technology holding her back

Why Xero for Maryam?

She'll get a flexible, always-up-to-date cloud based accounting system that will link easily with hundreds of other modern cloud based apps. She'll also improve her productivity by being able to access Xero from anywhere. And she can provide easy remote access to her accountant.

Why Unleashed for Maryam?

She can break free from spreadsheet-based working and enjoy a host of efficiency and productivity boosting features that will also enhance profitability – including warehouse management, automated stock alerts, and serial and batch tracking.

Why Unleashed Advanced Shipping for Maryam?

She can reduce the time and cost of managing shipments, integrating directly with couriers like DPD. Efficient logistics will be particularly important for Maryam as she scales.

Why Shopify for Maryam?

Shopify is packed with features that will enable her to connect to her website, design a great looking store and also link the store to her accounts.

Getting the ball rolling

See how similar real-life businesses did it:

Try this case study:



ShinDigger Craft Beer

Recommended apps for Maryam

- **Xero** for accounts
- **Unleashed** for inventory
- **Unleashed Advanced Shipping** for efficient shipping
- **Unleashed BI Vision** for data insights
- **Shopify** for eCommerce

Large make-to-stock business seeking productivity gains

Ash has spent the last 15 years turning his passion for radio-controlled cars into a successful business. Now, with an enviable reputation for both quality and performance, and a global network of stockists, he's eyeing his next step.

Specifically, he has an opportunity via a trusted supplier to begin selling a range of RC drones – something he hasn't sold before – under his own brand. He knows this could launch him into a whole new level of business, but he's not prepared to make the required investment in marketing and sales without shoring up the performance of his core business beforehand.

After all, Ash will be funding this move entirely off the back of his current RC car-making efforts, which means he'll need to grow his margins and improve efficiency if he wants a better cash position without growing his sales.

To top it off, Ash seems to spend most of his time micro-managing his increasingly complex operation. With six warehouses and dozens of suppliers, he spends hours each day simply keeping his operation running – something he knows he'll need to step away from if he's to focus on his new venture.



How Ash can achieve his goals:

Moving to the cloud will be critical if Ash is to lift productivity and grow margins without adding significant new capital. He will:

- Reduce the time he spends on production planning and stock management
- Reduce the amount of capital he has tied up in safety stock
- Use serial number tracking to manage his small but expensive componentry across his warehouses, reducing losses and avoiding production delays
- Zero in on the product lines, sales people and regions that add most to his margins

Why Xero for Ash?

Ash's CFO has been clamouring for a fully cloud-based cloud accounting system, and has already been researching the integrations he wants. By saving his CFO time he'll free him up to help with the new project.

Why Unleashed for Ash?

Inventory management and production planning have been major pain points for Ash. Unleashed will free up time, reduce waste, and give an accurate picture of the real costs of each product.

Why Inventory Planner for Ash?

While his core inventory needs will be met by Unleashed, an integration with Inventory Planner will give him the accurate sales forecasts he needs to get his products to the right place at the right time, and at the lowest cost.

Why Unleashed Advanced Shipping for Ash?

Ash takes pride in his efficient logistics staff, but he likes the idea of future proofing his systems for growth. With the Unleashed Advanced Shipping Module his warehouse staff will be able to process a shipment – including lodging the request with DPD and printing labels – in 20 seconds.

Why Unleashed BI Vision for Ash?

In order to continually seek out efficiencies and improved margins, Ash and his team need access to their data in an intuitive interface. Vision will be both cost-effective and game-changing.

Getting the ball rolling

See how similar real-life businesses did it:

Try this case study:



Aston Microphones

Recommended apps for Ash

- **Xero** for accounts
- **Unleashed** for inventory
- **Inventory Planner** for sales forecasting
- **Unleashed Advanced Shipping** for efficient shipping
- **Unleashed BI Vision** for data insights

Small make-to-order business looking to scale

Fleur runs Fleur's Cakes, a small sweet-treats business in a bohemian part of town. She rents space in a commercial kitchen, has very low overheads in her tiny-but-trendy brick and mortar store, runs all her own marketing over Instagram, and takes orders over the phone.

Late last year, however, Fleur was featured in a popular magazine and her profile has taken off. She's now struggling to keep up with orders, and her friend has offered to open a second shop in a nearby city.

Fleur wants to pursue this sudden opportunity for growth, but she now needs to worry about how she'll manage her short-shelf-life ingredients, about launching a proper eCommerce store, how to get smarter about ordering from suppliers, and what price to offer cafes who want her slices in bulk.



How Fleur can achieve her goals:

Fleur has very suddenly found herself in need of online tools that will allow her to manage her fledgling business on the go. Thankfully with just a handful of cloud apps Fleur can:

- Automatically generate Purchase Orders for ingredients in response to sales
- Integrate her accounting system with her new eCommerce store so that sales are automatically processed and recorded
- Batch track her fresh ingredients, and get smart about when to offer discounts that will move expiring stock
- Offer unique pricing to different cafe businesses and let them place orders through a B2B portal

Why Xero for Fleur?

Writing invoices on her laptop and manually filing tax returns become a thing of the past for Fleur (and her accountant) when she moves to Xero.

Why Unleashed for Fleur?

Running a business from spreadsheets is too time-consuming and error-prone to allow the growth that Fleur wants. Unleashed will integrate neatly with her first choice of accounting app (Xero), and let her manage her ingredients, suppliers, and customer orders all in one place. It also works elegantly with Shopify, which her web designer recommends.

Why Shopify for Fleur?

With an online eCommerce store connected to her inventory management and accounting apps, Fleur's potential for growth is now limited only by her (formidable) social media marketing skills.

Getting the ball rolling

See how similar real-life businesses did it:

Try this case study:



Food manufacturer La Tortilleria puts inventory management at their core

Recommended apps for Fleur

- **Xero** for accounts
- **Unleashed** for inventory
- **Shopify** for eCommerce

Large make-to-order business seeking productivity gains

Steve is the managing director of LidarTech, which makes specialist geospatial engineering equipment for the surveying industry. His equipment ranges from aircraft-mounted laser scanners for terrain mapping within the mining sector, to GPS tracking buoys used by marine scientists.

Steve's business strategy is based on constant product innovation and refinement, and he has a dedicated team of engineers and product specialists. His manufacturing operation, however, is hindered by a legacy ERP – while his engineering team struggles to productise the constant stream of ideas coming from senior management, marketing, and customer feedback.

Altogether, he feels that too much time and energy goes into day-to-day operations and projects that go nowhere.



How Steve can achieve his goals:

A best-of-breed cloud app coalition will help LidarTech by:

- Providing core business software that adapts and evolves as they do
- Supporting their innovation cycles with accurately costed assemblies
- Managing their high-value stock efficiently, with oversight of supplier leads times and accurate margins
- Delivering data insights that fuel strategic innovation

Why Xero for Steve?

Moving to a cloud accounting system gives Steve and his team a much needed refresh of their core accounting software, with minimal capital outlay.

Why Unleashed for Steve?

Linking LidarTech's innovation cycles with their inventory management and production software

becomes simple with Unleashed: as products are spec'd-up and prototyped they can be broken down into Bills of Materials and accurately costed, making life much easier for Steve's purchasing and production staff.

Why Unleashed BI Vision for Steve?

With live data insights fed directly from the manufacturing, sales and sourcing functions in Unleashed Steve is able to focus the company on the products that deliver the greatest margins. His reputation for quality and competitive pricing grows as he continually cuts costs and inefficiencies from his operation.

Getting the ball rolling

See how similar real-life businesses did it:

Try this case study:



Recommended apps for Steve

- **Xero** for accounts
- **Unleashed** for inventory
- **Unleashed BI Vision** for data insights

NEXT STEPS



Ready to try Unleashed?

Sign up for a free 14-day trial to see firsthand how Unleashed can benefit your business.

[START YOUR FREE TRIAL NOW](#)



Want to see how Unleashed works?

Watch a recorded webinar showcasing the basic features of Unleashed's software.



[W www.unleashedsoftware.com/partners](http://www.unleashedsoftware.com/partners)







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