



## Value

A cloud-based software and full-service ERP platform for small and medium sized manufacturers and distributors.

## Strengths

**A True ERP Platform**

**Full-service  
Manufacturing**

**Affordable Solution for  
Small Business**

**Simplified Onboarding  
with Support**

**Accounting Software  
Included**

**Analytics for Automation  
& Insights**

# xTuple ERP Fully Functional Software for Growing Businesses

xTuple is a cloud-based software and full-service ERP platform for small and medium sized manufacturers and distributors.

The key functionality, user-friendly interface, and high-level configurability distinguishes xTuple as a top-tier ERP solution across industries.

As part of the CAI Software group of products, xTuple offers a solution for manufacturers and distributors across industry sectors and provides full-service ERP functionality for growing businesses. With major focus in accounting, manufacturing, inventory and warehouse management, shipping, and CRM – the xTuple ERP provides small businesses with scalable resources and the ability to grow while maintaining productivity across all aspects of a business.



## Versatility Unleashed – Driving Success Across Key Industries

xTuple ERP works as a full-service solution for manufacturers and distributors, and its versatility and configurability give it the range to succeed across various sub-industries without having to sacrifice on key functionality.

At CAI Software, we understand that not every business needs the same solution. Our robust offerings of ERP, EDI, and MRP give businesses the resources they need to find the right solution, and our xTuple Software offers full-service functionality and integrations for manufacturers and distributors across the board.

**Distribution** – xTuple ERP works for Wholesale Distributors and other Distribution companies to give you the necessary processes to manage, streamline, and optimize business operations. With high level visibility on the platform, distributors can utilize xTuple ERP for warehouse management, inventory, lot tracking, vendor management, shipping, and requirements planning.

**Manufacturing** – xTuple ERP offers a full-service solution for manufacturers across industries that will allow your business to operate efficiently using traditional system features that are required for most manufacturers, including: manufacturing operations, warranty and RMA process, material resource planning, master production scheduling, inventory management, and eCommerce integrations.

xTuple's configurable structure allows for industry specific functionality and requirements for manufacturers.

### Machinery & Equipment Manufacturing

With xTuple ERP, manufacturers of machinery and equipment can utilize traditional manufacturing operations procedures while remaining compliant with safety requirements and established quality standards.

### Pharmaceutical & Nutraceutical Manufacturing

xTuple bridges the gap for Biomedical and Pharmaceutical companies when it comes to manufacturing processes and includes capabilities for ingredient sourcing and tracking to ensure quality production standards. Maintaining industry standards and requirements for production and quality assurance allows pharmaceutical manufacturers to stay compliant and ensure best practices.

### Medical Device Manufacturing

xTuple ERP offers extensive manufacturing capabilities for the medical device industry by including functionality that allows for high level visibility from shop floor to C-suite. With traceability and lean manufacturing capabilities, manufacturers can maintain compliant with industry regulations and eliminate unnecessary costs.

### Electronics Manufacturing

xTuple ERP provides electronics manufacturers with robust operating systems that allow for visibility and flexibility in the production process, including made-to-order or made-to-stock capabilities and warranty management systems.

### Metal Fabrication

By utilizing xTuple ERP, metal fabrication companies can help to manage and streamline operations by utilizing functionality that allows for managing quotes and specialized pricing as well as multi-level bills of materials for a smooth operating system.

### Food & Beverage Distributors

xTuple ERP provides compliant solutions for food and beverage distribution by providing food safety compliance, unit-of-measurement conversion options, and bar code scanning features.

**xTuple ERP is a highly configurable solution that allows for integrations across many manufacturing and distribution verticals.**

# Functionality Meets Flexibility: ERP Solutions Built for Success

xTuple gives businesses the necessary capabilities to run efficient and streamlined operations while simultaneously providing unique industry specific features and integrations to standardize operations and allow for sustainable growth.

xTuple offers a long list of functionalities that can be uniquely tailored to your business goals and production standards. By giving users and employees access to only the functions necessary to perform their duties, you can manage and streamline operations and set operating standards that align with company goals.

## 1. Manufacturing Workorder and Operations

xTuple ERP works as a fully functional solution for manufacturers. The xTuple Manufacturing module incorporates functionality for all necessary components of a manufacturing enterprise, including:

- ♦ Work Orders
- ♦ Shop Floor Workbench
- ♦ Transactions
- ♦ Clocking in and out for the work orders

## 2. Inventory Management

One of the key growth factors that can often lead to the implementation of an ERP system for manufacturers is the need for more productive functionality when managing products and inventory. xTuple ERP comprises of robust management in the products module:

- ♦ Bills of Material
- ♦ Routing
- ♦ Lot/Serial Tracking
- ♦ Costing – supporting both standard and average costing
- ♦ Multi-site/Multi-warehouse capabilities
- ♦ Receiving
- ♦ Shipping
- ♦ Transactions
- ♦ Utilities

## 3. Scheduling

Being able to manage and forecast your manufacturing and distribution process is a major element to choosing an ERP that has the necessary capabilities for a smooth operating schedule. xTuple ERP offers a full-service scheduling module that incorporates:

- ♦ Capacity Planning
- ♦ Lean/Constraint Management
- ♦ Forecasting
- ♦ Material Requirements Planning
- ♦ Scheduling

## 4. Purchasing

As another major functional area required for manufacturers, the inclusion of the purchasing module for xTuple ERP is a necessary component for meeting all demands for all aspects of a purchasing plan, including:

- ♦ Contract Management
- ♦ Forms
- ♦ Purchase Orders
- ♦ Purchase Requests
- ♦ Vendors
- ♦ Vouchers
- ♦ 3rd Party Integrations



## 5. CRM

Customer management allows your ERP to maintain cross-functional operations that enable businesses to manage everything in one database. By utilizing xTuple ERP, you can take advantage of this by easily maintaining customer management across key functional areas:

- ◆ Incident and Project tracking
- ◆ Opportunities
- ◆ Leads and Prospecting
- ◆ Vendor tracking
- ◆ Employee/User Management

## 6. Sales

Sales functionality is implemented into the system to allow for a more streamlined and organized approach that allows businesses to track and monitor across all parts of business operations, including sales processes, by utilizing:

- ◆ Sales orders
- ◆ Quote functionality
- ◆ Billing
- ◆ RMA Management/Return Authorization



## 7. Accounting

When your business requires deeper functionality, xTuple ERP allows you to transition away from QuickBooks and provides businesses with an integrated solution that will allow you to operate accounting processes through the same software as all other aspects of the business by including:

- ◆ Accounts payable
- ◆ Accounts receivable
- ◆ General Ledger
- ◆ Invoices
- ◆ Pay and Cash Receipts
- ◆ Budget

## 8. Reporting & Analytics

Being able to easily track and report on key business decisions and financials allows businesses to review and make decisions based on data and important operational functions. By utilizing xTuple ERP, you can gain insights into the most important aspects of your business due to highly customizable reporting capabilities across major areas:

- ◆ Custom Reports
- ◆ CRM Order reports
- ◆ Quantities
- ◆ Inventory
- ◆ Dashboard views
- ◆ Work Orders
- ◆ Historical data
- ◆ Backlog

xTuple provides manufacturers and distributors with the key functionality needed to operate their processes and systems while also offering additional features and functionality that can appeal to specialized industries. Some of the key differentiators for xTuple are the inclusion of lot and serial tracking, multi-site capabilities, internal accounting functionality, the Shop Floor Work Bench, basic reporting and modules to fit your specific business needs, and an advanced analytics dashboard for actionable insights.

xTuple offers both the necessary functionality for manufacturers and the options for add-ons, integrations, and configurability to be a solution that allows for operational success across industries.



## Integrate & Innovate: Configurable Solutions for Custom Success

The key to a highly configurable solution is the ability to integrate with 3rd party solutions and drive success through simplified connections. With xTuple, you can utilize a number of integrations to link your ERP software to outside functionality in order to streamline manufacturing and distribution processes.

### E-Commerce Solutions

Integrations with major e-commerce solutions such as Shopify and Woo-commerce make it easy to link online stores with xTuple ERP, allowing for streamlined processes and simple implementation for e-commerce needs.

### Shipping Functionality

Take advantage of the benefits of a full-service ERP by linking all processes together, including shipping functionality. Integrations with major fulfillment and shipping software such as ShipStation make it easier than ever to manage real-time orders and shipping details from a single platform.

### EDI System

Take full advantage of our Electronic Data Interchange solutions to help your manufacturing business with compliance, profitability, and profitability. Our in-house CAI Software solutions include Radley EDI products for easy integrations.

### API Capabilities

The API capabilities and webhook configurations allow for extensive connection capabilities. With the API, xTuple allows businesses to connect their ERP software to just about any 3rd party system through the use of API calls.

Some of the other major integrations offered with the xTuple ERP





## Unlock Key Benefits of an ERP Built for Small Businesses

**A True ERP Platform** – xTuple is built for small businesses that recognize the need for one system that can service their business. As a true ERP, xTuple includes the key functionality and integrations needed to run all aspects of a business, from accounting to manufacturing, to distribution, and all other components of a manufacturer's business operations.

**Full-service Manufacturing** – xTuple's configurability makes it the perfect solution no matter how simple or complex a company's needs are. xTuple offers the necessary components for manufacturers across industry to remain compliant, meet standardization requirements, and operate across all areas of their business. With solutions and features offered for MES, EDI, MRP, and warehouse management, xTuple provides all necessary components for manufacturers to continue to run and grow their business.

**Affordable Solution for Small Business** – xTuple is where functionality meets affordability. As a full-service ERP solution, it includes all the necessary components for manufacturers and distributors with configurable solutions tailored to your business needs.

**Simplified Onboarding with Support** – xTuple offers a fast and in-depth onboarding process to work businesses through setup, training, testing, and implementation. xTuple implementation experts will work with you to onboard on an established timeline that fits your business goals.

**Accounting Software Included** – xTuple ERP is ideal for manufacturers that have outgrown QuickBooks and spreadsheets due to its fully operational accounting software that exists on the platform. Businesses can run all aspects of their accounting, including invoicing, general ledger, accounts payable and receivable, and tax management.

**Analytics for Automation & Insights** – xTuple's latest technology updates include an analytics and reporting dashboard that allows for simplified reports, easy access to data, visual charts and graphs, and automated processes that can help businesses monitor their data and gain valuable insights without having to rely on spreadsheets and manual processes.

## The Latest Software – Where Key Innovations Grow with Your Business

The xTuple ERP is a cloud-based system that allows for easy-adaptability and efficiencies in resolving issues and integrating with modern technology from a functional perspective.

With the latest software updates and focus on key industry trends - xTuple ERP builds upon customer needs as they arise by strategizing in key development areas and maintaining a proactive approach to customer feedback.

**Cloud-Based Software** – As a cloud-based technology, xTuple is easily accessible on the cloud which allows for continuous software and security updates, integrations across the web, and better support which helps maximize the user experience.

**Key Security Updates** – In the digital age, technological trends continue to evolve and change, which lends to updates on software accessibility, security, and data storage. xTuple ERP develops security updates, both small and large, to continue to stay with the times and ensure a smooth transition to each new version of the software so that end users are able to reap the benefits without interruptions to business operations.

**Focus on Customer Feedback** – In conjunction with changes to security and technological advancements, the xTuple team continues to build and develop features and functionality to improve business operations for our customer base. With user feedback and a strong focus on customer support, xTuple developers take a proactive approach to development by gaining customer insights to continue to evolve the functionality of the software.

**Compatibility Across Operating Systems** – No matter which operating system you utilize across your business, xTuple ERP offers a compatible option when it comes to Windows, Mac, and Linux Operating Systems. This allows for ease of use within a business across key departments that may operate on different systems.

## Streamlined Onboarding – Starting on the Path to Ultimate Success

Effectively Onboard in as Little as 90 Days – The timeline for onboarding new xTuple customers can vary depending on a number of factors, including the complexity of the set up involved, the number of employees and users that need to be trained, and the processes that need to be implemented and tested. xTuple's team of experts works with you to efficiently onboard and train with minimal interruption so that small businesses can get quickly acclimated with all aspects of xTuple ERP.

Support and Training Factored In – When utilizing xTuple ERP, our team of experts is available to work with you throughout the entire implementation process, allowing customers to lean on the support team with set up, testing, and final implementation. You can alleviate headaches and errors by utilizing support functionality to answer any questions that may arise.

Customize User Permissions and Access Levels – You can utilize your onboarding process to determine which employees need access to specific parts of the ERP. As a configurable solution, xTuple allows permission levels to be customized so that you can ensure that employees on the shop floor, office managers, and executives have the necessary information to successfully run operations, without sharing proprietary information across the company.

View More Case Studies, Additional Resources,  
or Request a Demo today by visiting [caisoft.com](http://caisoft.com)