

Kara L. Bates

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Targeting Opportunities to Assist Businesses Achieve their Growth Goals and Increase their Operational Efficiency using ERP Technology

- 20+ years combined experience with ERP manufacturing systems, Kinetic, Epicor 10, Epicor 9 and ProAlpha. 4 years of experience as Power BI Architect and Admin.
- Consistently recognized for rapidly and cost-effectively resolving challenging issues through the efficient use of ERP technology.
- Effectively manage complex multi-segment Projects using Teamworks technology
- Life-long learner with ability to implement and master new technology quickly; equally successful in both team and self-directed settings; and proficient in a range of manufacturing technology solutions.
- 30 years of experience working in a manufacturing environment in all capacities. Production, Shipping / Receiving, Purchasing, Accounting, Sales, Executive Assistant, IT Management.

Technology Summary

ERP Systems: Kinetic 2021-2023, Epicor 10, Epicor 9, Pro-Alpha

Databases: SQL, Azure, Progress, Prism

Languages: C#, JSON, LogiK, M, Dax (intermediate level), .NET (intermediate level)

Software: Power BI, MS Office, MS Visio, MS Project, MS Access, Crystal Reports, Doc-Link, MES, DMT, Open Office, MapPoint, Adobe Product Suite, UPS Roadnet, Appian Logistics Suite, TopSolid, CadLink, Manifest, Avalara, SalesForce, SourceDay, KBMax Configurator Solution, SSRS, Application Studio, Teamworks, PartTrap, EBiz, QuickShip

Organizations: Epicor Service Partner, Epicor User Group Member, PowerBIPro User Group Member, Junior Achievement Classroom Presenter, EpiUsers Member, Epicor Influencer Program

Affiliations: PartTrap, Century Business Solutions (EBiz Charge)

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Website: www.kbixsolutionsllc.com

Experience

KBix Solutions LLC Bryan, OH (Mar 2021 to Present)

Owner / Sr Consultant, (2021 to Present) Provide businesses with innovative solutions to growth and process improvement challenges utilizing ERP and Data Analytics. Project Management and Change Management services offered as part of standard implementation packages.

- Specializing in optimization of supply chain, manufacturing and purchasing procedures utilizing Epicor 9, 10 and Kinetic.
- Quote to Cash process evaluations and strategy planning.

- Design and implementation of Customizations, Personalizations, BPM's, Custom SSRS Reports, Advanced Print Routings, Updatable BAQ's and Dashboards providing automation and efficiency to the end user.
- PowerBI integration
- Project completed April 2021 for Client on time and on budget. Project involved quote to cash process design for large international drop shipment with lot tracking and audit preparation.
- Project completed May 2021 for Client on time and on budget. Project involved automation of order entry do not ship before date fields and modification of fulfillment workbench.
- Project completed April 2022 for Client on time and on budget. Improved Quote Entry Efficiency 175% by transforming existing customizations to BPM's. Implemented custom functionality related to sales order entry and quote entry.
- Successful upgrade February 2023 from Epicor 9 to Kinetic Government Cloud for Aerospace Client.
- Successful launch in February 2023 of ACH with automation of Remittance Statements, Invoices, Purchase Orders, Pack Slips and Customer Statements for Manufacturer eliminating manual processing that took up to 1 week per month manually.
- Successful launch of QuickShip for 2 clients in 2023.

Wurtec Toledo, OH (June 2016 to Sept 30, 2022)

ERP Systems Analyst, (2016 to Present) Implement, optimize, and increase effective use of Epicor 10.0 ERP system in a multi-company, multi-plant, multi-currency environment.

- Specializing in optimization of supply chain, manufacturing and purchasing procedures.
- Support CFO with Quote to Cash process and reduction of DSO.
- Reduction of annual Epicor maintenance costs through contract negotiation and reduction in need for outside support specialists.
- Design and implementation of Customizations, Personalizations, BPM's, Custom SSRS Reports, Advanced Print Routings, Updatable BAQ's and Dashboards providing automation and efficiency to the end user.
- Virtual and on-site end user training using established procedures, flow charts, demonstrations, and Epicor Embedded Education. • Design and author written Epicor Business Procedures. Train Consumers on procedures.
- Create and Map business process flows to achieve future state vision.
- System Architect responsibilities related to automation, efficiencies, accessibility, and growth.
- Power BI Architect, Admin, Analyst and Trainer. Integration with Epicor using RestAPI's and SQL calls.
- Website / Epicor Project Manager responsible for coordinating with our Website developer and Headless CMS provider.
- Epicor Lead for CPQ implementation project. Coordinate Engineering requirements with website development team, sales, and production departments.

Recent Contributions:

- Upgrade of Epicor 10 Database to Epicor Kinetic 2022.1
- Design and implementation of custom module to track Supplier Performance. Built using UD tables, UD fields, Custom C# code, BPM's, Dashboards and Advanced Print Module. Reduced Late Supplier PO's, Improved Supplier Quality Rating.

- Lead Implementation Specialist for Avalara Tax Connect Software integration. Eliminating manual processing of multi-state mandated sales and use tax collection.
- Implementation of cycle counting program in both Manufacturing and Distribution locations using Epicor 10.
- Implementation of Epicor CRM module as a replacement for Salesforce with reduced cost and increased utilization of the CRM process by our sales team.
- Implementation of Inspection, DMR / RMA process. Reduction of quality issues and ability to quickly identify areas that need attention.
- Implementation of Advanced Unit of Measure Module.
- Automated sending Purchase Orders, Invoices and Shipping Documents to our Clients and Vendors using Advanced Print Routing, UD Fields and Customizations to allow for opt-out designations. Eliminated the need for manual printing, scanning, mailing and emailing documents reducing cost of supplies and labor related to the above tasks and improvements in communication.
- Implementation of ACH solution reducing manual processing and DSO.
- Implementation of Cad-Link and Sourceday.
- Implementation and support of QuickShip
- Implementation and architect PowerBI solution allowing for data analysis of Wurtec KPI's. Train workforce of 54 PowerBI Pro data consumers. Solution has reduced manual data tracking by 100 hours per week in the first 3 months of use.

Haulotte Group / Bil-Jax Archbold, OH / Virginia Beach, VA / Frederick, MD (July 2012 to May 2016)

ERP Operations Specialist. (2012 to 2016) Use Epicor 9.0 to optimize and increase company operational efficiency in an international, multi-company, multi-plant environment.

- Specializing in optimization of supply chain, manufacturing and purchasing procedures.
- Coordinate with corporate partners to ensure global data integrity.
- Reduction of annual Epicor maintenance costs through contract negotiation and reduction in need for outside support specialists.
- Design and implementation of Customizations, Personalization, basic BPM's, Crystal Reports and Dashboards providing automation and efficiency to the end user. • Virtual and on-site end user training using established procedures, flow charts, demonstrations and Epicor Embedded Education. • Design and author written Epicor Business Procedures.

Significant Contributions:

- Design and implementation of custom module to track Demo agreements. Built using UD tables, UD fields, Custom C# code, BPM's, Dashboards and Crystal reports.
- Coordinated relocation of distribution location from Frederick, MD to Virginia Beach, VA. Implemented new plant and warehouses, transferred inventory, trained all new associates, ensured that all business processes were seamlessly transferred to new location.
- Implementation of cycle counting program in both Manufacturing and Distribution locations using Epicor 9.05.605. Led annual physical inventory and oversaw Cycle Count program.
- Implementation of Epicor Case Management and Call Log modules in distribution location in order to increase knowledge and tracking for our technical service specialists.
- Implementation of DMR / RMA process in distribution location.

- Implementation of revised Distribution pricing structure allowing for greater accuracy and use of on-line ordering system, Easy Spare Parts (ESP).
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L E Smith Company, Bryan, OH (1999 to July 2012)

ERP Technology Manager (2009 - 2012) Responsible for carrying out company vision of being the best in our industry by seeking out and implementing ERP software and technology solutions allowing for growth and flexibility.

Significant Contributions:

- Project Manager for implementation of Epicor ERP System (2011), Epicor CRM system (2011), Appian / DR Track Logistics solutions (2011), UPS Roadnet (2009), ProAlpha CRM system (2008) and ProAlpha ERP system (2005). 100% adherence to implementation budget. Extensive list of Epicor contacts.
- Advanced training on reporting and configurations with Epicor functional experts.
- Implementation of configurator logic and creation of system reports reduced overall budgeted ERP system development cost by 90% annually.
- 80% of user issues and expanded functionality requests are resolved in-house without the need for ERP consultants.
- Implementation of lean solutions in drawing management, CNC integration, material planning (including Kanban and MRP), and order entry / quote management.

Prior Positions at LE Smith Company:

- **ERP Technology Assistant Manager** (2004 to 2009)
- **Sales / Cost Analyst** (1999 to 2012)
- **Client Services Specialist** (2012)
- **Assistant to Executive Director of Sales & Marketing** (1999 to 2004)

Travel Negotiable – On-Site’s Scheduled as Needed and To Be Planned 2 Weeks before Scheduled On-Site Date