



**CARILLON® ERP**  
Your Complete ERP Solution

## Who We Are

Carillon was founded in 1990 in Dallas, Texas. Development of the Carillon ERP product began in 1992, with its first installation at a food processor and distributor in 1994. The last time the Journal of Accountancy, which is published by the American Institute of Certified Public Accountants (AICPA), independently reviewed ERP systems, Carillon ERP was chosen as one of the top 10 ERP systems. Carillon has been a Microsoft Partner since 1992.

Carillon ERP wasn't "built" by purchasing multiple systems and trying to integrate them. Instead, Carillon was developed 100 percent by us. Its interface is consistent throughout the entire system, making it much easier to learn. It is so tightly integrated with Microsoft Office that Excel can read our tables directly, with no imports or exports necessary.

Carillon ERP has installations throughout the USA, Canada, South Pacific, Hong Kong, Bermuda, Cayman Islands and Malta. The Carillon product is also licensed to OEMs in various industries who sell it under their own name.

## For Your Business

Carillon ERP is installed in clients of all sizes, from Fortune 100 companies to single-user systems. Most of our licenses are for unlimited users, since Carillon ERP is truly designed to be used by everybody in the organization.

Either through employee web portals or through our fully integrated Contact Relationship Management (CRM) system, almost everybody in your organization will likely become a Carillon user.

A close-up photograph of a man with short brown hair, a light beard, and black-rimmed glasses. He is wearing a light blue button-down shirt and is looking towards the right side of the frame, presumably at a computer monitor. The background is a blurred office setting with another person's shoulder visible on the right.

## User Interface

Carillon ERP's user interface is the same throughout the whole system. Once a user learns how to navigate in one window, they will know how to navigate through all of the windows in the system.

Carillon ERP, when run on a Windows platform, is an MDI (Multiple Document Interface) application. This means you can have as many windows open at one time as your workstation will support. It's not unusual for a salesperson to have a couple Sales Order Entry windows, some CRM windows and maybe a Customer Drill Down window open at the same time. Carillon wants your users to be empowered without having to open multiple copies of the application.



“Analyzing data is so much easier, so much more timely. We’re looking at things in real time as far as understanding where the business is and where it’s headed.”

Chuck Warren, CFO, G.H.C. Reid

## Unmatched Functionality

You won't find an ERP system with more functionality than Carillon ERP. We can say that because every non-proprietary enhancement made for every client over the past 20 years has been built into the core Carillon ERP system. So the only functionality we don't have is functionality that no one has asked for in the past 20 years! We love building new functionality into the system for our clients. It's part of our culture. It's what makes Carillon the best ERP solution available, and it just keeps getting better.

We also severely limit the need for third-party add-ons. For the few third-party add-ons we do support, like fully integrated document imaging, the interfaces are maintained by Carillon. That means you'll never need to worry about problems upgrading to those third-party add-ons.

If you hire a reputable independent consultant, they will tell you to expect to only find 80 to 90 percent of the functionality you need. Carillon ERP's goal is to give you 100 percent of the functionality you need, along with plenty of functionality left over for you to grow into as you use the system. If we don't have all the functionality you need, we'll gladly build it into the core system for you. This way, you won't have any trouble upgrading as new versions of Carillon ERP are released.

- **Multilingual Functionality**

Carillon ERP allows you to define as many languages as you want. You can have users working side by side with each using a different language. However, the most common use for multilingual functionality is for an organization to create their own language to use in the system. You may have "clients" instead of "customers", or "parts" instead of "items". Any word or phrase you see in the Carillon system can be translated into another word or phrase.

- **Multicompany Functionality**

Carillon ERP allows you to have unlimited companies and unlimited branches within a company. You will never have to log out just to switch the company you want to process or see. In fact, with Carillon's Multiple Document Interface, you can have multiple companies' information on the screen at the same time. Organizations with multiple companies save time with Carillon because they are able to manage all of their companies at once, rather than having separate logins and databases for each company.

- **Multicurrency Functionality**

Carillon ERP has complete multicurrency capability on a company-by-company basis. Each company may have a different home currency with full support for consolidations.

- **Intercompany Functionality**

With Carillon ERP, when you get an invoice that needs to be applied to multiple stores, you won't have to go in and enter vouchers multiple times. Any company may process other companies' payables or receivables and Carillon will automatically create the appropriate intercompany payables and receivables. This means that you can split one vendor invoice amongst multiple companies. You can also have one company write checks to pay other companies' vendors.

## Approval Process

Almost every transaction in the Carillon ERP system has an optional, security controlled approval process attached to it. If you want someone to only be able to enter unapproved transactions and then have someone else approve them, Carillon ERP provides that functionality.

## Increase Productivity with Cost Effective Operations

### WebPack Online Portal

WebPack is Carillon ERP's online portal for employees, customers, vendors and suppliers. It allows you to perform simple, secure and safe information inquiries, thereby minimizing the workload strain on your Accounting, Human Resources and Purchasing departments. Employees can update their personal information, print paystubs, get their W-2 forms, see their year-to-date payroll summaries, get employment verifications and more. Additionally, employees can make changes to their W-4 forms easily with WebPack. If an employee does not have Internet access, their supervisor can do any of these things for them.

WebPack isn't just for internal use. Vendors can see whether their payment has been processed and suppliers can see purchasing and payment information. WebPack frees up everyone's time for more important tasks.

### Mail Functionality

Imagine not having to stand at the fax machine while you send quotes, order acknowledgements, invoices, and statements to your customers. In the Sales Order Entry window, you can choose File, Send and a pop-up box will allow you to send the quote or order acknowledgement to the ordering contact, ship to contact, bill to contact or the sales rep. You can fax it to some and email it to others. Many other documents, including purchase orders, invoices and customer statements can also be sent using this functionality.

### Document Imaging

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

## Instant Visibility Into Your Business' Past, Present and Future

### Unlimited Years of History

Existing Carillon ERP clients have never had to purge any of their history. In fact, we've never had to write any purge routines for any of our clients.

Carillon was designed to support huge amounts of data spanning an unlimited number of years. Although some databases might occasionally require "tuning" to maintain performance, you should expect to be able to keep your historical data forever with Carillon ERP.

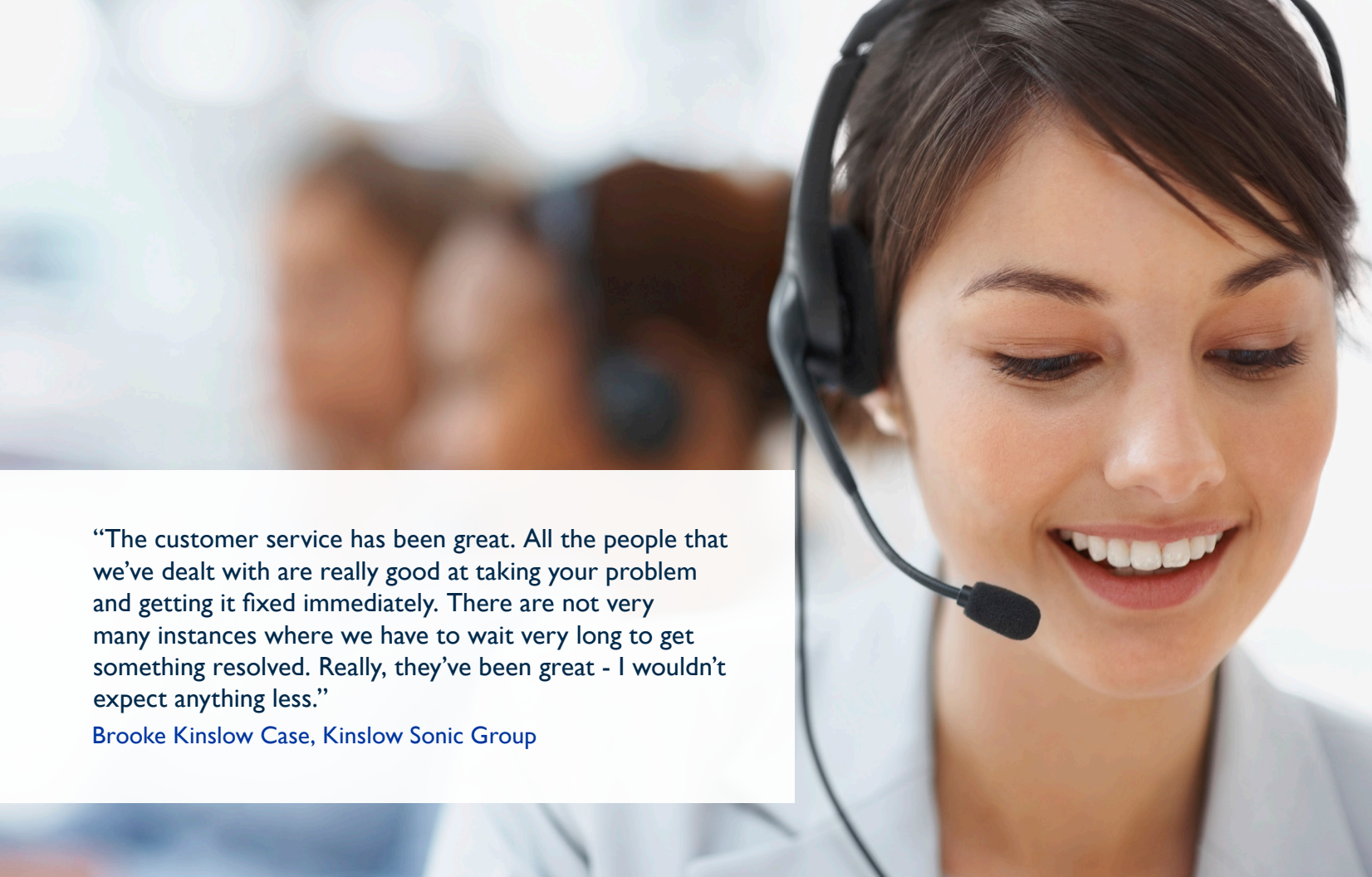
### Audit Trail Availability

You can certainly print all of your ledgers and journals as of the end of every period or year and stuff them into a file cabinet if you choose to support the paper industry, but there's no need to. With Carillon, you can print any part of your audit trail (ledgers and journals) as of any period or year in the past at any time.

Since you can also keep unlimited years of history online without purging, your audit trail will always be immediately available to you.

## Sales Process

Carillon ERP personnel will be involved in your sales process even if an authorized reseller is involved. We want to make sure the Carillon ERP system is a good fit prior to you licensing the system. This usually involves an on-site visit by Carillon ERP senior management.



“The customer service has been great. All the people that we’ve dealt with are really good at taking your problem and getting it fixed immediately. There are not very many instances where we have to wait very long to get something resolved. Really, they’ve been great - I wouldn’t expect anything less.”

Brooke Kinslow Case, Kinslow Sonic Group

## U.S.A. Based Support

Carillon ERP was developed in the U.S.A. and is committed to providing the best U.S. based support. Every client is assigned and given direct telephone and email access to a developer, quality assurance tester and senior manager. You get to decide whom to contact on an issue-by-issue basis. That means the same people who are developing and testing Carillon ERP are providing end-user support.

This team is the same team that works with you on site during your implementation and follows up with you on site periodically, even after your initial implementation is complete. This makes your support team not only experts in how Carillon works, but also in how you are using it. This level of support is rare in this industry and is a major advantage of Carillon ERP.

*Carillon ERP also has one of the most robust ERP online support forums available.  
Please feel free to visit it at [www.carillon.info](http://www.carillon.info)*

## CARILLON ERP IS THE ONLY KNOW IT NOW® CERTIFIED ERP SYSTEM

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In today's challenging environment, management needs all the operational information they can get in order to make informed decisions. The more timely the information, the more useful it is.

As information ages, it becomes more and more useless. Information that is months old is totally useless to management in most industries. Information that is weeks old might not be useless, but it is pretty close.

Finding out today that you didn't ship something yesterday is probably better than finding out next week, but it's certainly not as good as finding out yesterday morning that something was going to prevent you from shipping something today!

Learn more at [www.CarillonERP.com/know-it-now-management](http://www.CarillonERP.com/know-it-now-management)

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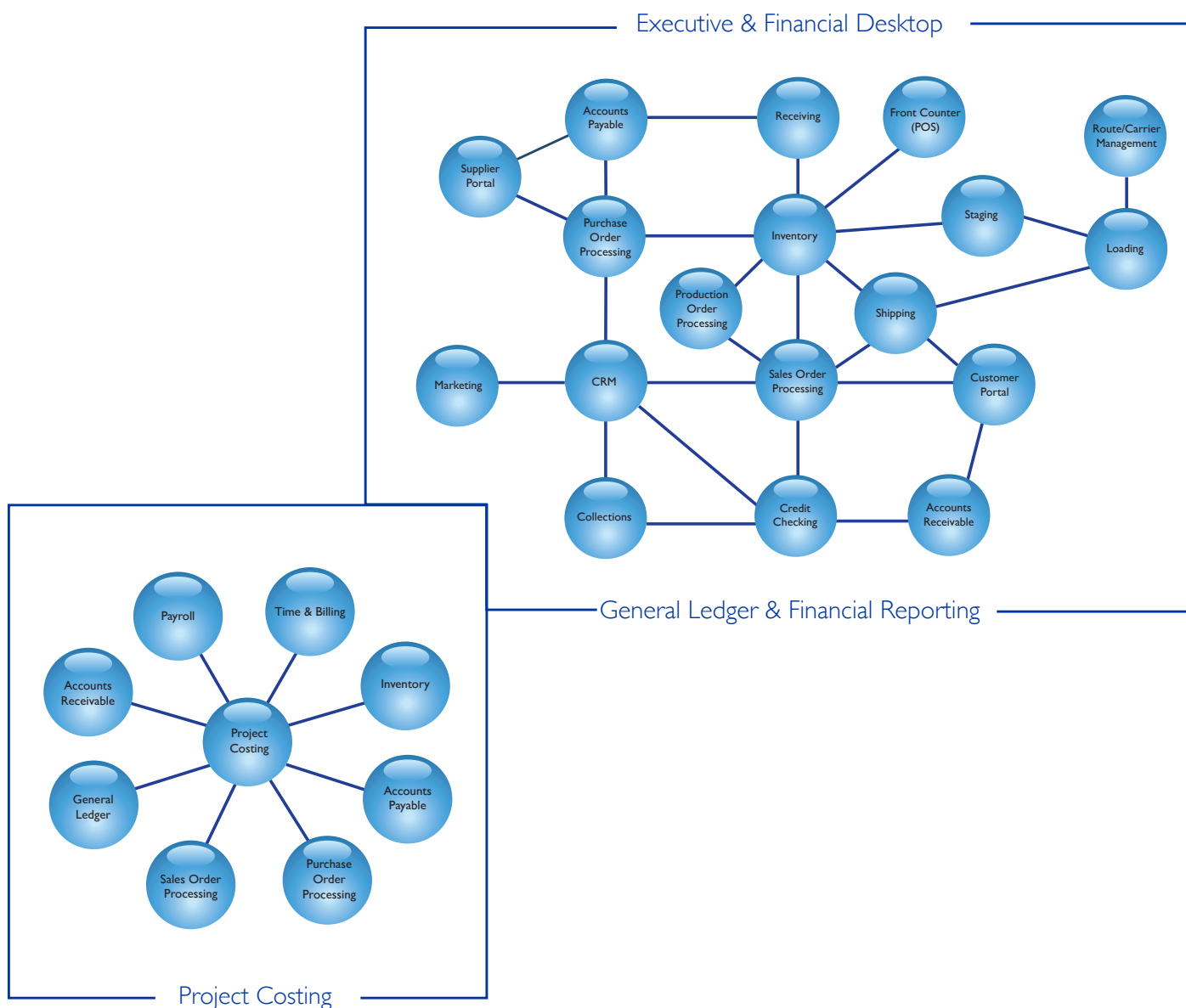
## Cloud Strategy

Carillon ERP had clients with servers in the cloud before it was called the cloud. We allow your server(s) to be on premise, in the cloud or a mixture. We're happy to assist with your implementation in any environment. Remote access from any location with an Internet connection is not problematic.

### What we don't do is:

- Commingle your data with other clients' data on the same physical server or physical network.
- Take ownership of your data, your data belongs to you.
- Make it difficult to access your data outside of the Carillon ERP system.
- Force you to run your system in a slow, insecure browser environment (except for portals designed for vendors, customers and employees).
- Force you to use a particular cloud vendor.

## A Single Integrated System



“I like being able to call Carillon developers when I have a question. With the Carillon system, you are able to speak to the developers and they are always there to help.”

Laurie Williams-Bishop, Gainesville Foundry



## Fully Integrated CRM (Contact Relationship Management)

To some, the acronym CRM means Customer Relationship Management. Carillon ERP goes further with our Contact Relationship Management. 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 functionality is also fully integrated with the system, and has the exact same look and feel as the rest of the system because it was built using the same set of ancestor objects. Anywhere in the system where you are referring to a person, the person will be set up in CRM. Even employees are a special kind of contact.

Your whole company will benefit by tracking your contact's activities with all contacts and management will easily be able to see all the activities associated with any organization in one easy-to-use window.

## Some of the Industries for Which Carillon Has Been Customized

Construction	Natural Gas
Distribution	Non-Profit Philanthropic
Manufacturing	Automotive Part Manufacturer and Supplier
Beverage Manufacturing and Distribution	Full Service Promotional Products Distributor
Quick Service Restaurants	Oil and Gas
Professional Services	Mining
Industrial and Commercial	Earth Moving
Imaging	Industrial Machinery
Semiconductor and Industrial	Power Transmission
Electrical	Industrial and Commercial Lubricants
Distributors of Crop Protection	Construction and Operation of Hotels
Chemical Distribution	Logistics

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