THE PLEX SMART MANUFACTURING PLATFORM
Plex Professional Services

You have chosen the Plex Smart Manufacturing Platform and you want to get the most value out of your investment. Let Plex Professional Services be your guide.

Our team is made up of manufacturing experts and our sole mission is to ensure you have a successful implementation while turning your team into self-sufficient Plex experts. Our consultants will help you plan your implementation based on your unique objectives and business goals then guide you through the journey to realize value. We have four key offerings to help you get the most out of Plex:

Implementation Services: Where do you start and what steps should you take? Our consultants will guide you through the process with the experience drawn from decades of successful implementations.

Technical Services: Have a need to extend or expand Plex capabilities? Our tech services engineers can assist with system integrations, database scripts, custom labels, documents, reports, and screen development.

Optimization Services: Already implemented and in need of a tune-up? Our experts will help optimize Plex to your business needs and uncover additional value in capabilities you are not leveraging.

EDI Services: Are you ready to leverage Plex's fully integrated EDI capabilities to transact with your customers and suppliers? The Plex EDI team is ready to assist with a smooth transition.

PL=X MAKE IT SMART™

Implementation Services

Our sole purpose is to guide Plex customers through the implementation journey successfully. Our consultants will partner with you to create a tailored plan that is aligned to your business goals, speeds time-to-value and maximizes the use of best practices, while enabling your team to become self-sufficient using Plex.

PLEX DEPLOYMENT METHODOLOGY

Our deployment methodology follows a stage gate approach with a purpose, outcome, and budget established for each stage-gate:

1. **Plan** First we start with a collaborative discovery activity that defines your project charter. The project charter will include a detailed work plan, resource plan, governance, and potential project risks that require mitigating actions. Once the project charter is signed off, we move on to the next stage.

2. **Design** is an iterative approach with Functional Design workshops and activities that are organized by Business Process (i.e., Plan-to-Produce, Order-to-Cash, Quality, Maintenance, etc.). These workshops are hands-on activities that include configuration, knowledge transfer to your team and follow up.

3. **Validate** consists of an end-to-end simulation of the configured Plex solution, a series of pilots that serve as user acceptance testing, and a readiness assessment. This ensures you are prepared for a successful deployment.

4. **Prepare** This short phase is the final step prior to go-live. This includes completion of readiness activities, end-user enablement, development of a go-live support plan and execution of a detailed cut-over plan.

5. **Deploy** Our goal is for your deployment to be a non-event. In this stage your implementation team is ready for the transition to steady-state operation. While you may not need us, we will be there to support.

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Optimization Services

If you chose to keep your first Plex deployment simple and focused, you may be ready to explore additional capabilities. We are here to assist you as an advisor, full service guide or somewhere in between to help you get more out of the platform.

Our optimization methodology is similar to a new deployment in that our first step is to establish a baseline through a discovery and planning activity.

- Review your current environment / usage of Plex
- Capture and align on your goals, challenges and opportunities
- Define a project scope
- Plan an implementation (resources, timing, outcome)

The implementation plan will be the guide for delivering on the desired outcome. Optimization project examples:

- Mastering what we have implemented
- Implementing a specific module of capability
- Leveraging new product capabilities
- Managing organizational change and adoption challenges
- Integrating Plex with existing or newly acquired business systems
- Integrating with plant floor equipment
- Meeting requirements for reporting and analytics

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Technical Services

Plex solutions operate in a highly configurable, multi-tenant SaaS environment which eliminates the need to customize.

However, you may have a need to extend the capability to meet requirements outside the scope of Plex. The Plex Tech Services team offers a wide range of options to assist with and enable capability extensions as a fee-based service.

Integration: We can help you connect Plex to 3rd party systems and custom applications. Leveraging the library of Plex APIs, we can make your integration needs a reality.

Custom Reporting: Drawing from deep expertise and best practice experience, Plex Technical Services can assist you with unlocking data-driven insights by creating custom reports and business intelligence dashboards.

Custom Content: In line with your specifications, we create and deploy NACHA, SEPA, ACH formats for local and international financial institutions, build custom printed documents, design labels and more.

Data Management: We will work with you to access and manipulate data quickly and easily.

Common services that we provide include:

- Custom Screens
- Custom, Real-Time Reporting
- BI Dashboards & Portals
- Custom API/Data Source for Programmatically Accessing Data
- Integrations: 3rd Party Systems, Custom Applications
- Scripts/Mass Data Management
- Data Extractions
- Document Migrations
- Custom Printed Documents
- Bank File Formats: NACHA, SEPA, ACH, Positive Pay
- Custom Labels & Custom Workflow/Email Tokens

Plex Tech Services operates within Plex Professional Services. Inquiries and requests are made by creating a Tech Services case through the Plex Community.

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EDI Services

EDI setup and testing can cause significant disruption to your business if it is not executed right the first time. The EDI Professional Services team ensures that when you're ready to transact with your customers and suppliers, Plex EDI delivers as promised.

Our guided service follows a best practice approach with seven key stages:

Discovery: This step is key to a successful EDI implementation. We work with your project team to understand and document not just your EDI Trading Partner requirements, but all of the critical details for a successful launch.

Convert Master Data: We guide you in preparing your Plex instance for EDI Trading Partner setup and validation.

Set Up and Validation: We show you how to set up and validate your EDI Trading Partner transactions. This helps identify any functional gaps that need to be addressed and ensures the project team is confident that all critical business scenarios have been validated.

Gap Resolution: We identify any functional gaps we encounter with the product team on your behalf, from initial request through enhancement validation and rollout.

Certification & Sign Off: Not only do we take ownership of completing any required Trading Partner certifications, we also guide your team through sign-off of testing results. This step also ensures technical readiness for go-live.

Cutover Preparation: We coordinate final go-live preparations. This includes comprehensive training for your team and execution of the detailed EDI cutover plan.

Deployment: Our goal in Professional Services is for all deployments to be non-events – this includes EDI. While our team will be there to support, in this stage your team will be prepared to effectively support the transition.

To get started on your EDI journey, create a Professional Services case through the Plex Community.