

No. 1

# FIELD NOTES

## BY KOBLE SYSTEMS

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**THE FIRST EDITION**

Bringing the latest in product updates, business insights, and customer success stories

# A NOTE FROM MIKE

Hello customers and friends,

Happy hunting season (or *fall*, as some refer to it)!

This year has been a great one so far, filled with growth and change as we continually strive to make it easier for you to manage and grow your business by putting ERP software to work.

We are all in an environment that is tough for many small businesses right now. Regardless of whether real or proposed tariffs directly impact our business, the uncertainty has made decision making more difficult and has led to many taking a more cautious approach and has slowed many businesses down. In addition, the challenge of finding and keeping enough good talent on the team continues to face many of us. More business owners and seasoned employees are nearing retirement age, prompting succession planning discussions and transitions, all of which introduce another layer of complexity in how we manage today while preparing for tomorrow.

One of the best things about my job is talking to customers and hearing about the good work they've been doing this year and their plans for the next. I am encouraged to see so many entrepreneurs and business leaders approach the challenges of today with genuine care for the customer and a desire to bless their employees. As you navigate tariff questions, employee retention, process efficiency, financial visibility, inventory overstock problems, etc., you continually remind me that while these

challenges may seem tough, business is still at its core the opportunity to bless others through our work and to meet their needs with the products and services we offer. And what a joy that is!

To support you as you navigate these challenges, we've been hard at work doubling down on EBMS improvements and innovations (check out more on the Product page of this newsletter!), streamlining our service department workflows to better serve you, and building out a customizations team to more effectively build the core software to further support your specific needs. We've implemented EBMS landed costs to help you manage the cost of tariffs, created better inventory dashboards to manage overstock, and automated purchasing levels to help you free up cash. And we're excited for the work ahead to continue strengthening EBMS to help you achieve your goals!

I also wanted to take the time here to highlight the work of Jake Esh and Glenn Esh. This year they both moved to new ventures, completing the succession planning begun many years ago. As Koble's founders, they are the reason that we are all here doing business together and their contribution to our businesses and lives cannot be measured. So thank you Jake and Glenn!

We're here to see you all thriving in your business (and beyond!). Please reach out if we can help.

**MIKE STOLTZFUS**  
KOBLE CEO



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# GAINING A NEW PERSPECTIVE

## HOW EBIKES OF HOLMES COUNTY FREED UP TIME AND CASH WITH KOBLE ANALYTICS

For the team at e-Bikes of Holmes County, EBMS - Koble's ERP platform – has long been the backbone of their operations. It holds everything they need to know about inventory, sales, customers, and more. But pulling all that data together in a way that made sense—especially when it came time to make buying or marketing decisions—could be time-consuming.

That's where Koble Analytics came in.

"In the past, we'd try exporting different spreadsheets, breaking down those spreadsheets to compare them, but nothing worked like Koble Analytics does," one team member explained. "We've been looking for something like this for I don't know how long, to be honest."

### Reevaluating Inventory

Koble Analytics gave the e-Bikes team an easier, faster way to see what was happening across the business. Instead of pulling one-off reports, waiting until the end of the month, or skipping reports altogether, their team now checks their dashboards every day. Koble Analytics works hand-in-hand with EBMS to pull up-to-date business data.

One of the dashboards they rely on most is the inventory forecasting dashboard. With it, they can break down inventory across categories—bikes, accessories, components—and quickly see what's selling and what's slowing down. That clarity has helped them adjust their purchasing more confidently and more often, freeing up cash flow that would've

otherwise been tied up in overstock.

"One of the biggest shocks was what I learned about our overstock value. For example, I'm way overstocked right now on our most popular brake pad. We've got 209 days of inventory for that item. Our goal is 60. That alone is a significant amount in overstock tying up cash in this one component," said Allen, e-Bikes' Inventory Manager.

"It was eye-opening to learn the size increments that we needed to order things in—it's less than I would have thought. And the dashboard breaks it down to where I don't need to be looking at a calculator trying to figure out orders for each and every part and component."

The inventory forecasting dashboard has made such a difference for Allen in the 6 weeks he's had access to it that his day-to-day now looks entirely different than before they had Koble Analytics. He's been able to save 20 hours of work a week by referencing the dashboard instead of building spreadsheets. It's helped him clarify purchasing decisions with the goal of refining and lowering their stock levels.

### Reevaluating Sales and Marketing

Allen has been eBikes' Analytics power user, but while he's fine-tuning their stock levels, David, Owner of eBikes, also started using the sales dashboards to guide their marketing efforts. The customer location dashboard, for example, showed where their customer base was strongest—information

they already had in EBMS, but couldn't easily visualize. Now, that data helps them decide where to focus regional marketing spend and where to grow.

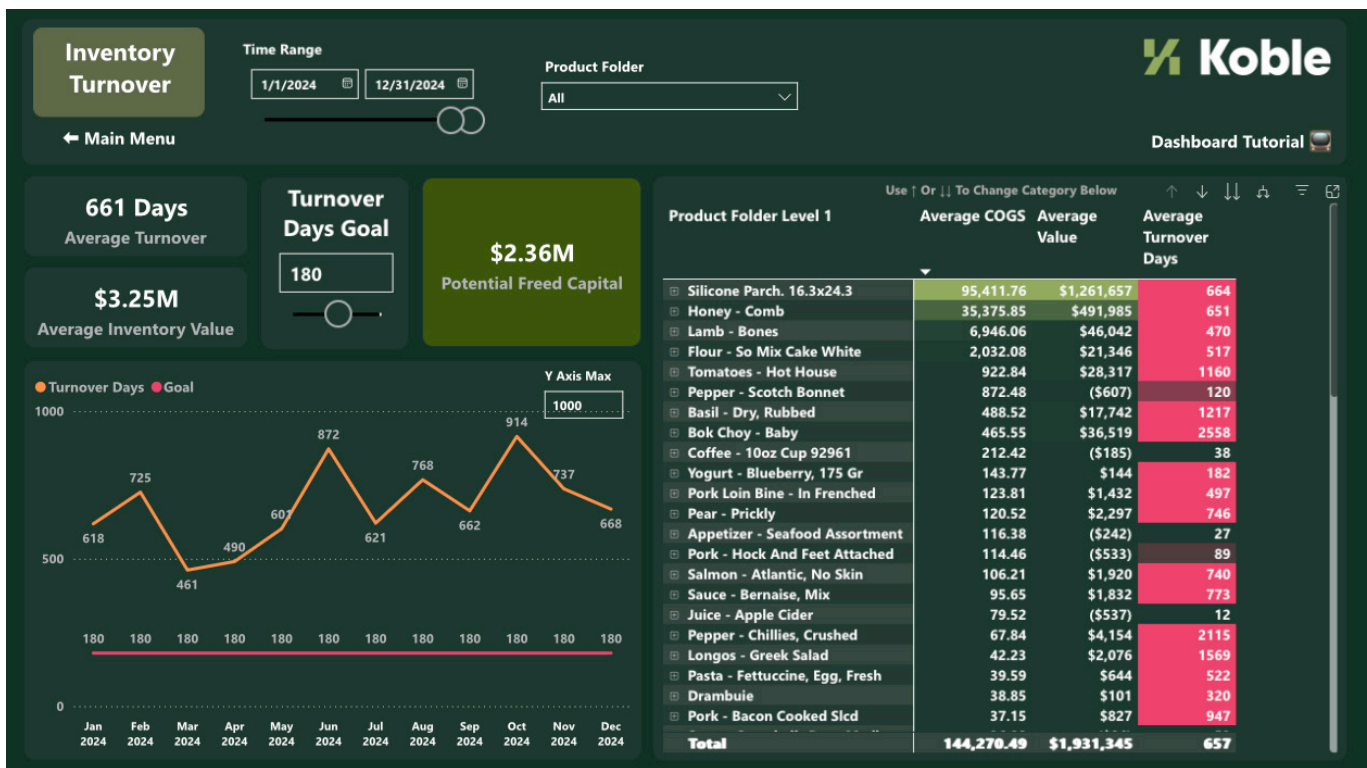
"I like the customer map that shows where our customers are coming from. It helps me better understand where to target, which areas our marketing is working and which areas are not. It's been a good validation on some of our current marketing efforts."

David also uses the sales dashboards to closely monitor daily sales. Instead of running reports and manually going through different

G/L codes, he's got up-to-date visual dashboards showing him what's happening.

"It's going to help us recognize any potential declines more quickly so we can take action. Before, it was kind of easy for a decline to happen without us really realizing it."

As the business continues to grow, they're adding more dashboards and uncovering new ways to use the data they already have. EBMS gives the team the structure and accuracy they need, while Koble Analytics makes the data easier to interpret, share, and act on.



You can view interactive demos of these Koble Analytics dashboards where this article is posted on our blog: [koblesystems.com/blog](https://koblesystems.com/blog)

Contact your account manager to set up a Koble analytics demo to see how our dashboards could help you discover new perspectives into your inventory, customer base, financials, and more.

## INVENTORY BEST PRACTICES

# CYCLE COUNTING: WHY IT MATTERS

**MICHAEL BURKHOLDER IS A SMALL BUSINESS OWNER WHO MANUFACTURES CROP-ROLLERS AND OTHER AG EQUIPMENT. HE HAS RECENTLY IMPLEMENTED EBMS.**

*The numbers didn't add up. Again.*

Michael stared at his clipboard and re-checked the system. He'd counted his axle inventory twice in hopes he'd been the one who was wrong, and not his new system that he'd just spent thousands of dollars on.

His ERP implementation had been going well, and he was getting excited by all the possibilities this implementation could unlock. But he needed to be able to trust the numbers, and here seemed proof that he couldn't.

He pulled out his phone and called Brian, the implementation consultant for his ERP.

"Hi Michael," came the voice over the phone, "Good to hear from you! How are things going?"

"Hey Brian – I'm pretty frustrated, honestly."

"What's the issue?"

"I just finished a count of my high-volume inventory items to check against the system, as you'd recommended, and, well, they're all incorrect. I even counted them again to make sure I wasn't the one making the mistake here."

"Hm," said Brian. "How far off is it? Do you have extra or are you short?"

"Depends on the item. Some of them are right, but I've got more axles and bearings than the system says I should, and too few tires, for example."

"Alright – well, first off, this is not uncommon for some counts to be incorrect at this stage of the implementation process. In fact, it is more uncommon for this not to be the case."

Michael frowned.

"That seems problematic – I bought this system for accurate inventory tracking. And you're telling me now it can't do that?"

"A system like ERP is virtual, right? The system tracks your inventory based on the data inputs, but it doesn't itself pull inventory off the shelf or type in part numbers or quantities – your team members do. Even if you've laid out great steps in your system but those steps aren't followed by your team, then the numbers will be off."

"You're talking about when someone doesn't put a part back where it's supposed to go, that type of thing. Is that what you're getting at?" Michael asked.

"Exactly," said Brian. "Once you've gotten into the system it is helpful to do manual counts on your inventory to make sure the system reflects what is actually happening on the floor. It also helps your team understand why specific steps in your process matter and helps your team to develop the right habits."

"I don't think my employees are going to be excited about doing manual counts after all the time we spent implementing ERP," said Michael. "They thought it would mean less of that!"

"I know," Brian said. "And it will. To start, don't try to count everything at once, but record in the system the ones that you have counted. I'd focus in on a core group of your high volume parts – pick 12 say. If you implement barcoding it becomes even simpler to get through that. Do these consistent and frequent cycle counts so you and your team catch small mistakes before they become big ones and affect your customers."

"Will we still have to do the full count annually?" Michael asked.

"If you do this well, you shouldn't have to. With cycle counting, you accomplish two things: first you can quickly spot process issues that are not aligned with best practices, and second, by fixing those issues and verifying that they are fixed, you establish throughout the year that your system can be trusted. If you want to ensure that your inventory gets billed and not lost, this is a great way to do it. It also allows you to make inventory adjustments regularly, instead of having larger inventory swings at the end of the year."

"Well, that part sounds pretty good," Michael admitted. "I'll let the team know our plan and we can get this under control."

Cycle counting is a way to ensure that what's happening on your shop floor is consistent with what's happening in your system. We recommend cycle counting as an important check on your inventory counts. Let your Koble account manager know if you need additional resources on cycle counting.

*\*This article is an edited version of a piece that was originally published in the February 2025 edition of PCBE.*



# PRODUCT UPDATES

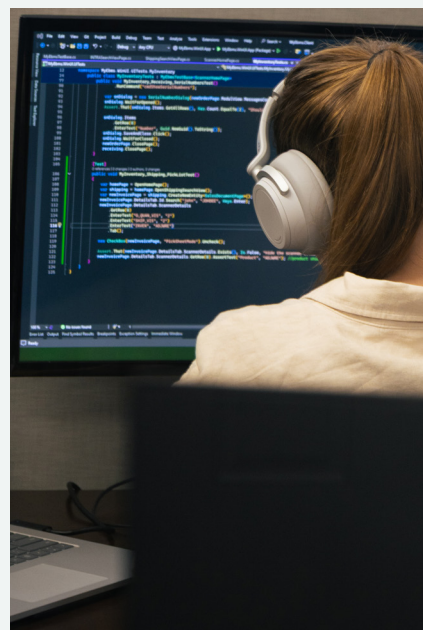
We are always working to make and improve our software products to make business growth easier for you as you put ERP to work in your business. This year, to better support that goal, we have shifted our technical strategy and our product focus to invest even more into EBMS.

## What does this change mean?

Different from the past, we will be building in small chunks of functionality and shipping that work to you, the customer. This allows us to progressively bring new value and a fresh look to the software over time, while increasing functionality and incorporating new technologies along the way.

## When you will get access to new and improved functionality?

Our goal and commitment is to continue release updates to EBMS regularly. This could come in the form of General Release builds that includes patches, bug fixes, and smaller updates, to version releases that include new features and changes to the database schema. We are working to increase our ability to release version updates to multiple instances per year.



## NEW FEATURES & UPDATES: EBMS 8.6

### AUTOSEND ENHANCEMENTS

**OAuth2:** Simplify logging into and connecting with Microsoft Office 365 & Google Workplace

**Statement Queries:** No longer limited to predefined queries, with 8.6 and advanced queries, you can build the precise query of customers you want to send statements to.

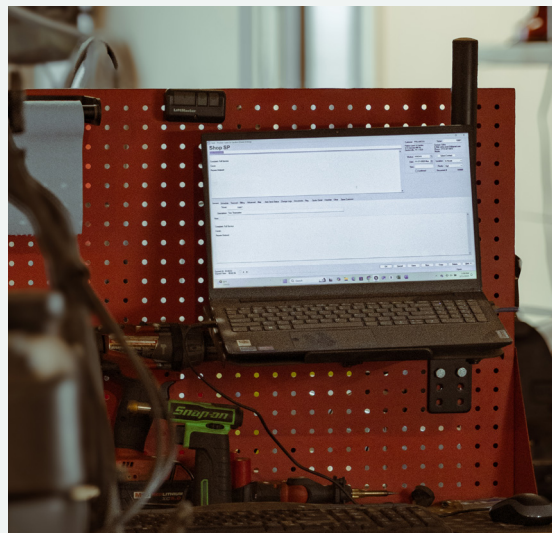
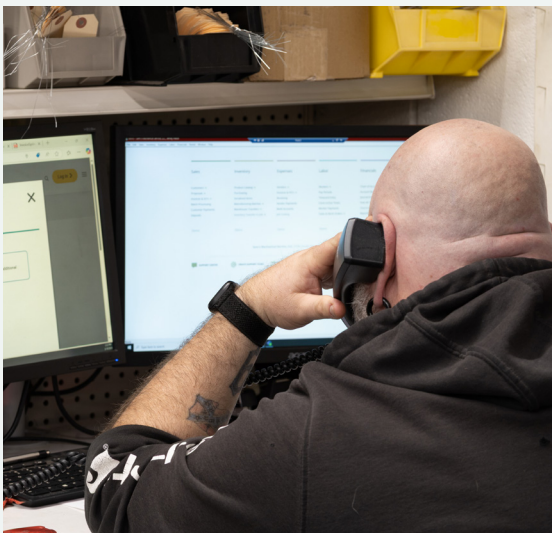
**W-2s available in Autosend:** Let EBMS handle sending out W2 reports to your workers by email (with encryption methods to keep everything secure).

**Multi-select invoices for Send Now:** Right from the customer document screen, you can now open the customer, navigate to the invoice screen, and multi-select the invoices you would like to print.

## OTHER ENHANCEMENTS

**Timed Events:** This allows you to create, manage, and edit recurring events currently available for Autosend from within EBMS. Formerly all automation had to be done from the system server.

**Search Preview:** As you type in any search box, EBMS will now preview the top five matches rather than selecting the first record. This change was made to help you avoid selecting the wrong product ID since SKUs are often similar and the first record may not be the product you are looking for.



## HOW DO I GET ACCESS TO THESE UPDATES?

Regularly update your system to install the newest features, fixes and enhancements we have available for EBMS at Koble. Keep an eye out for emails and events where we will spend time announcing new features, and how to get them. And, of course, reach out to your Account Manager about any questions you may have, and they will be your guide to help you leverage the new features and updates to achieve your business goals.



You can see features and updates under consideration, planned, and in progress through our online product portal. Submit your ideas and upvote others by going to [koblesystems.com/resources](https://koblesystems.com/resources) and clicking on 'Product Portal'

# LOOKING FORWARD

## Modern EBMS List Views:

This spring we began modernizing EBMS lists of Customers, Vendors, Products and Invoices, since these are screens you interact with everyday. Our goal is to develop these key enhancements in those screens.

- Smart Search on the top of the screen
- Modern Filters
- The ability to re-order columns
- The ability to show any or all of the columns including those made with Customization Designer on that table
- The ability to increase and decrease the size of font dynamically
- The ability to save queries (which we are calling 'views')
- Light mode and dark mode

**Invoice Scanning:** This tool will help users quickly and efficiently update EBMS with data from invoice documents that have been received digitally or scanned from a printed document. The system will work to match vendors, PO numbers and products with the data in EBMS to help you avoid duplicate document creation. *\*The release of this feature is expected for this fall.*

**Excel Add-in:** We have built an add-in that does not require an internet connection but has the ability to pull live data and allow you the user to make calculations, review, and one of the pieces we are most excited about update data in EBMS straight from Excel! *\*We expect to put this feature into beta this fall with limited release availability.*

**BigCommerce Bridge Integration:** We are working to build an integration with BigCommerce, an industry leading ecommerce platform that serves both B2C and B2B businesses with a robust toolset. We are nearing the point in which we are planning to implement our first MVP beta customer this fall.

## New Infrastructure Project!

**EBMS on PostgreSQL:** We are working through and building the ability to swap out the EBMS database. EBMS on PostgreSQL opens the door for smart search, faster performance, increased stability, and higher levels of data integrity.

*\*The timeline for this project is highly variable and dependent on successful completion of testing.*



# UPCOMING EVENTS

<b>KOBLE USER FORUM</b>	OCT. 14	LANCASTER, PA
<b>METALCON</b> BOOTH #3123	OCT. 21-23	LAS VEGAS, NV
<b>MCMS</b> BOOTH #2104	OCT. 22-23	SHIPSHEWANA, IN



To sign up for one of these events, visit our website at [koblesystems.com/conferences-and-events](http://koblesystems.com/conferences-and-events) or send us a message at [marketing@koblesystems.com](mailto:marketing@koblesystems.com)

## EVENT RECAP: PROVIA LEADERSHIP SUMMIT

This past August, we had the privilege of attending the ProVia Leadership Symposium in Holmes County, Ohio. The day was filled with powerful sessions from speakers like David Salyers, a former Chick-fil-A executive, who challenged us to shift our perspective from “normal” to “remarkable,” and Horst Schulze, co-founder of The Ritz-Carlton, who inspired us with his passion for pursuing excellence and creating vision-driven workplaces (and check out Horst’s book, *Excellence Wins*. We’ve been enjoying it!). We especially enjoyed hearing from Sam Yoder of Berlin Gardens who shared practical ways his company fosters a positive culture. Beyond the sessions, we were encouraged by the atmosphere of worship, the professionalism of the event, and the chance to connect with like-minded leaders. We left inspired to lead well and keep people at the heart of business.



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## INTRODUCING KOBLE FIELD NOTES,

A QUARTERLY NEWSLETTER FROM THE  
KOBLE TEAM BRINGING THE LATEST IN  
EBMS UPDATES, BUSINESS INSIGHTS, AND  
CUSTOMER SUCCESS STORIES.

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