

FIELD NOTES

BY KOBLE SYSTEMS



NO. 5
OCT 2026

IN THIS ISSUE:

Common Year End Pitfalls & How to Avoid Them

EBMS Product Update

Year End Checklist for EBMS



A NOTE FROM MIKE

Hello customers and friends!

I've talked in the past about Koble being the kind of software partner that helps customers harvest the value of their ERP investment. Features alone won't deliver this ROI. The software needs to be put to work in the processes that matter to users and feel intuitive to those users.

Getting to this outcome is not easy. Gartner reports that 55–75% of ERP implementations miss their original business goals, exceed their budgets by 3–4x, or are abandoned altogether. This statistic is astonishing (and maybe depressing!). Why the high failure rate?

ERP implementation represents a lot of change. It's technical, and the project often comes with complexities, so there are plenty of opportunities for things to go wrong.

Let's focus on four common reasons these projects fail:

- **Poor change management.** Employees are not prepared for the disruption to their daily workflows.
- **Over-customization.** The software is forced to mimic broken legacy processes rather than taking advantage of standard, built-in best practices.
- **Vague business goals.** The implementation begins without clearly defined measures of success.
- **Data quality issues.** The time and effort required to clean and migrate old data into the new software are underestimated.

Each of these issues can be addressed proactively when business leadership and the ERP implementer collaborate. Everyone needs a common understanding of the business, the team needs to be prepared to switch software, and

the goals for the initial implementation need to be clear.

It also helps to keep the initial implementation scope small and add ideas to a wish list along the way rather than trying to tackle everything at once. That wish list can then be addressed in the future, once the team is settled into the software and no longer drinking from the fire hydrant.

Many of our long-time customers at Koble have added employees, locations, and lines of business and experienced a lot of growth since they first implemented EBMS. Some wonder whether a reimplementation is necessary to get their processes, data, and reporting clean and aligned with what they need today.

Having a strong ERP partner is not only important on the front end. It's also important as the business changes over time. The software needs to adapt along with those changes so it continues to work well for the people using it. With the right partnership, a business can make sure its software isn't falling behind over time but instead continues to grow in its usefulness.

For us at Koble to succeed for our customers, we need to be this kind of partner. I'm thankful for the team here who have embraced this partnership approach for years. We are eager to serve and to see every customer thriving with EBMS.

It is only through this kind of partnership that we can achieve our mission of making business growth easier by putting ERP software to work.

Please reach out if we can help.



MIKE STOLTZFUS
KOBLE CEO



Contents

04.

PRODUCT UPDATE

by Deke Bowman

05.

COMMON YEAR-END PITFALLS & HOW TO AVOID THEM

by Mike Stoltzfus

06.

YEAR-END DOS & DON'TS FOR EBMS USERS

+ Download the Year-End Checklist

08.

HOW THE RIGHT SUPPORT MAKES ERP IMPLEMENTATION LESS DAUNTING

As told by Keener Electric Motors



**RATHER HAVE THIS
CONTENT IN AN
EMAIL?**

Subscribe to get the pdf at
koblesystems.com/newsletter

PRODUCT UPDATE

FROM DEKE BOWMAN
HEAD OF PRODUCT

EBMS 9.0 Update

EBMS 9.0 continues to gain momentum, **with more than 120 customers now running** on the new platform, including some of our largest and most customized environments.

As adoption grows, we're encouraged by both the performance and stability we're seeing. We've also continued refining the upgrade experience, simplifying

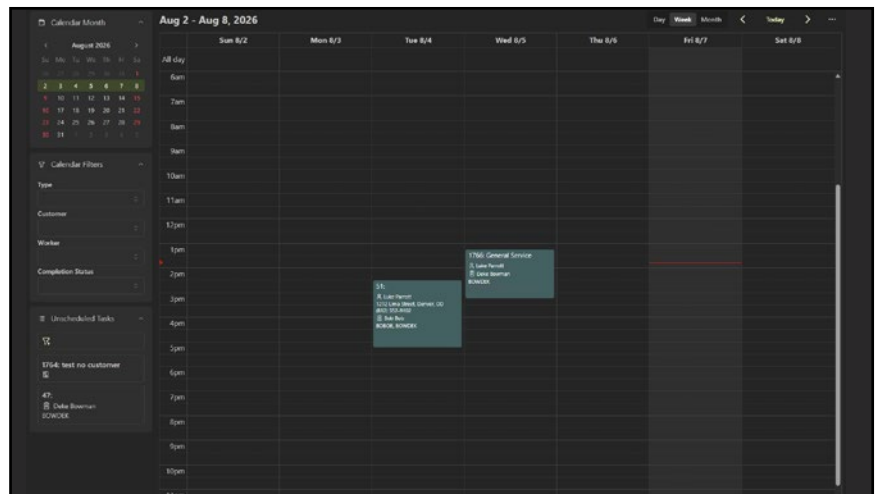
steps and adding automation with the goal of making future upgrades even easier for customers.

One of the most exciting parts of EBMS 9.0 is what the new database makes possible. Modern Lists, for example, can now refresh directly from live database information, creating a faster and more responsive experience.

Schedule View (Beta)

One long-requested improvement is a better way to schedule tasks and see upcoming work in a familiar calendar format.

The new Schedule View brings that experience to EBMS 9, giving task users a modern calendar where they can view, organize, and interact with scheduled tasks more easily. The feature is currently in beta as we continue refining the experience and gathering feedback.



Have feedback or questions?
You can email Deke directly at deke@koblesystems.com

Quarterly Pro Tip

Don't overlook the Purchasing screen in EBMS.

It's a quick way to see what needs replenished and take action from one place.

Use it to

- Create purchase orders
- Review inventory demand
- Check MIN and MAX levels
- Create manufacturing batches
- Create warehouse transfers

COMMON YEAR-END PITFALLS & HOW TO AVOID THEM

BY MIKE STOLTZFUS

As the year winds down, financial loose ends tend to surface. Incomplete books, inaccurate inventory, misclassified transactions, or a missing budget may not seem urgent during the year, but by Q4 they can turn into tax surprises, cash flow problems, and difficult decisions.

Here are four common year-end pitfalls and how to avoid them.

1. You Haven't Closed Your Books

Waiting until year-end to reconcile your books creates an unnecessary uphill battle.

Bank accounts, credit cards, and loan accounts should be reconciled regularly, ideally monthly. If they are not, you cannot be confident that your financial reports reflect what is actually happening in the business.

Avoid it: Keep a clean, reconciled set of books throughout the year. Make sure invoices, deposits, payments, and account balances are recorded accurately. If you cannot keep up internally, work with a CPA or bookkeeper who understands your accounting system.

2. You Haven't Been Counting Inventory

For inventory-driven businesses, inventory accuracy affects much more than what is sitting on the shelf.

Incorrect quantities or values can distort your balance sheet, margins, purchasing decisions, cash flow, and tax planning. A single year-end physical count can help, but regular cycle counting makes it easier to catch problems before they pile up.

Avoid it: Build cycle counting into your normal operations. Even rotating counts of smaller sections are better than waiting until December. Know what you have, where it is, and what it is worth.

3. Transactions Aren't Classified Correctly

Your books can be reconciled and still give you the wrong picture if transactions are recorded in the wrong accounts.

Loan payments are a common example. The principal portion should reduce the loan balance rather than appear entirely as an expense. Owner draws, payroll, sales tax, and other transactions can create similar problems when classified incorrectly.

Those mistakes can distort profitability and leave your accountant spending time cleaning up records instead of helping you plan.

Avoid it: Make sure your accounting setup is correct and your team knows how less-common transactions should be handled.

4. You Don't Have a Budget

Many small businesses operate without a formal budget, relying instead on last year's numbers or intuition.

A budget does not have to be complicated. It gives your team a framework for making decisions and creates intentional conversations around revenue, costs, spending, and priorities.

The goal is not to predict every number perfectly. It is to decide what you expect to happen, plan accordingly, and adjust as the year unfolds.

Avoid it: Start with a simple projection of revenue, cost of goods sold, and major expenses. A basic plan is far more useful than no plan at all.

Start With the Basics

If several of these issues sound familiar, you do not need to fix everything at once. Start with clean books, accurate inventory, and a basic plan for the year ahead.

Good accounting is not just about cleaner records. It gives you a clearer picture of your business so you can make better decisions, plan ahead, and head into the new year with fewer surprises.

As both CEO of Koble and a CPA, Mike has spent his career helping businesses thrive by building out strong operations and financials.

Related Reading:



USING CYCLE COUNTING TO
MANAGE YOUR INVENTORY

By Brian Esh



WHY YOU NEED TO MAKE RECONCILING
YOUR BOOKS A PRIORITY

By Mike Stoltzfus

YEAR-END DO'S & DON'TS FOR EBMS USERS

BY KRISTINA CARTER

DO

- ✓ Open the new fiscal year before entering new-year transactions.
- ✓ Run maintenance utilities and verify your balances.
- ✓ Leave the final adjustment period open for year-end entries.
- ✓ Perform a backup before completing year-end processes.

DON'T

- ✗ Don't permanently close the prior fiscal year too soon.
- ✗ Don't close the payroll year until all payroll activity is complete.
- ✗ Don't enter prior-year transactions in the new fiscal year.



DOWNLOAD THE
EBMS YEAR END CHECKLIST FOR 2026/27



Scan the QR code to download or head to koblesystems.com/knowledge/financials/fiscal-years-controls.htm

MEET KRISTINA CARTER, SUPPORT SPECIALIST



If you've reached out to Support with a financial or accounting question, there's a good chance you've talked with Kristina Carter. She came to Koble with more than 20 years of experience in bookkeeping, taxes, and finance, and over the past year she's been adding EBMS knowledge to that background every day.

For Kristina, the best part of Support is getting to know the people she's helping. She's built relationships with customers who reach out to her regularly, and she enjoys the conversations that happen in between solving the actual problem, whether that means learning more about their business, hearing about their family, or finally getting to meet someone in person after helping them remotely. As Kristina put it, "It's been really nice to get to know clients."

CES UPDATE
This QTR: 6.7 of 7
YTD: 6.56 OF 7

Our Customer Effort Score (CES) measures how easy it is for customers to get the help they need. Thank you to everyone who responds to our surveys and shares feedback. Your input helps us recognize what's working and identify where we can make the experience even better.

GET MORE FROM EBMS

Purpose-built services to help your business go further with EBMS.



ONLINE KNOWLEDGE BASE koblesystems.com/knowledge

Step-by-step articles, how-to guidance, and answers to common questions. Whether you're learning a feature, troubleshooting a process, or just trying to get more out of EBMS, it's a good place to start.

ANALYTICS

Turn your EBMS data into actionable insights with live dashboards, KPI tracking, and reporting that goes beyond the standard reports.

- Inventory & sales trend analysis
- Customer KPI scorecards
- Data exports & BI connectors



Download the one-sheet

FINANCIAL SUPPORT SERVICES

Financial accuracy depends on consistent processes, clean transactions, and regular account maintenance. We offer 2 services to help with specific needs you may have.



EBMS Year-End Close & Audit Prep Package
koblesystems.com/ebms-year-end-and-audit-prep



EBMS Catch-Up Bookkeeping Package
koblesystems.com/ebms-cleanup-and-bookkeeping-package

CUSTOMIZATIONS

Tailor EBMS to fit the exact way your team works, from custom workflows to purpose-built apps like Denver Wholesale's order picking app.

- Custom mobile apps
- Workflow automations
- Third-party integrations

EBMS is flexible. You can create custom processes as needed, so I'd recommend it to anyone who needs that.

Mel Lapp
Dutch County Cheese

Reach out to your Account Manager for next steps on any of these services.

THE RIGHT SUPPORT MAKES ERP IMPLEMENTATION LESS DAUNTING

KEENER ELECTRIC MOTORS SHARES HOW RESPONSIVE IMPLEMENTATION SUPPORT MADE THE MOVE TO ERP EASIER.

There comes a point when *the way we've always done it* starts costing more than it saves.

For Keener Electric Motors, that point looked like long days, stacks of paperwork, handwritten notes, and too much time spent searching for information that should have been easy to find. Owner Bill Weidman was regularly working 13- and 14-hour days, six days a week, and much of that time was being consumed by manual administrative work.

The need for a different system was becoming clear. They needed something that would cut down Bill's administrative load and also build scalable processes with. Something like ERP.

But replacing decades-old manual systems with ERP is not a small change, especially for a small business where there is little extra capacity to absorb disruption. Much of the business still ran on paper and fax, and many of the processes that would eventually live in EBMS had never

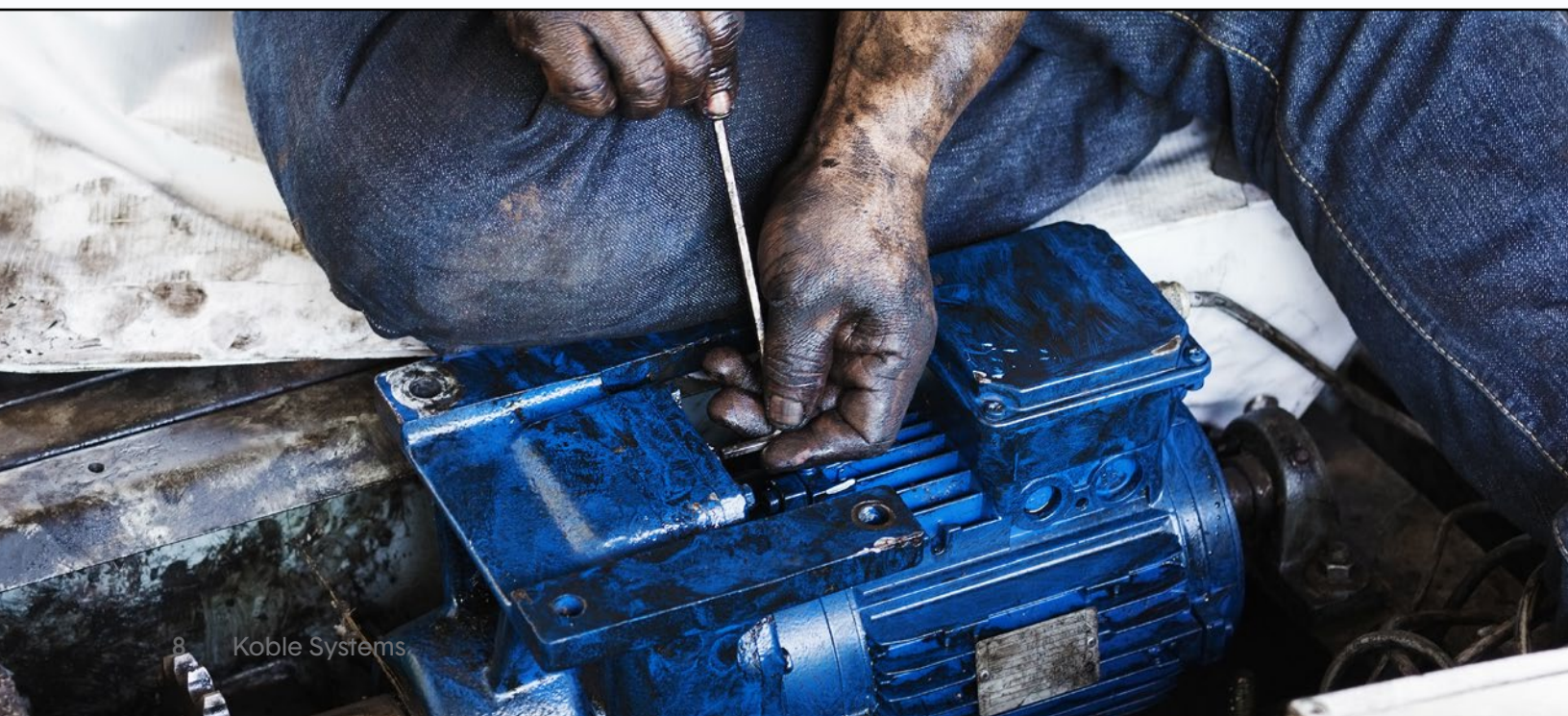
been formally documented in the first place. That meant implementation carried a real risk: while the team was trying to build a better way to operate, the business still had to keep running.

When his wife, Gretchen Weidman, retired from her corporate career and became more involved at Keener, she took on the challenge of spear-heading the company's ERP implementation. She reached out to Koble.

Starting With the Business, Not the Software

"Everything needed to be developed," Gretchen explained. "A new process for everything needed to be created." That meant implementation could not simply be a matter of configuring software and teaching employees where to click.

Luke, one of Koble's Consultants, worked closely with Gretchen to understand how Keener actually operated and help turn those practices into repeatable workflows in



Koble's EBMS. Some of those needs were highly specific. Keener stores inventory belonging to one of its motor distributors, which required the team to develop a way to track that inventory without treating it as Keener-owned stock. Its repair work also required work orders that could accommodate the different information technicians need when servicing pumps, motors, and other equipment. Koble worked through those requirements with Keener, testing different approaches until the workflows fit the business.

For Gretchen, that willingness to work through the details stood out.

"We really bent the software to accommodate what we actually needed," she said. "That was huge with our implementation team. I cannot even explain how much they helped to do this."

Learning a New Business and a New ERP at the Same Time

Gretchen was uniquely prepared for an ERP implementation.

Before retiring, she had spent years working in learning and development at a large corporation and had managed software implementation projects herself. She understood implementation timelines, training, software rollouts, and what a good vendor relationship should look like.

So she came into the EBMS project with experience and high expectations.

The problem was, Gretchen was new to Keener. She needed to simultaneously learn the electric motor business from her husband Bill while learning EBMS from Koble. She would sit down with Bill to understand how Keener handled a particular process, then take that information to Luke and the rest of her Koble team to work through how it should function in EBMS.

"I really relied heavily on my implementation team," she said, "and they were above and beyond."

The training became a collaborative process. Luke set up a sandbox where the Keener team could practice before going live. Gretchen worked through the system with him in what she described as a "train the trainer" approach, then helped Bill and Keener's office staff learn the new workflows. Recorded sessions and shorter training

resources gave employees additional opportunities to practice what they were learning.

That support continued after go-live.

Koble team members Dorothy and Mary Lou worked with Keener through the accounting processes all the way through reconciliation, while Isaac, another Koble consultant, was physically at Keener's office on the day the company went live. For Gretchen, implementation never felt like being handed a finished system and left to figure out the rest.

Then the Unexpected Happened



Read the rest of this story
on our blog
koblesystems.com/blog



EVENTS RECAP

This year, we introduced two new event formats designed to bring business leaders together for practical conversations, peer connection, and shared learning.



LUNCH & LEARNS

Regional events that bring business owners together to talk about the challenges that come with growing and scaling a company.

TOPICS DISCUSSED

- Inventory & Purchasing
- Job Costing
- Work in Process & Billing
- Field Service
- Moving Beyond Disconnected Processes

3 HOSTED IN 2026

July 15 | Indiana August 12 | Ohio August 25 | New Jersey

The goal: To bring useful ERP education closer to businesses in the regions we serve and give attendees a chance to ask questions in a smaller, more conversational setting.

EXECUTIVE ROUND-TABLES

Small, invite-only gatherings for leaders of current EBMS client companies.

AGENDA

- Breakfast & time to connect
- A tour of the Koble Office
- EBMS product and roadmap updates
- Peer discussions around inventory, reporting, people, integrations, & other operational challenges
- Time with Koble leadership

2 HOSTED IN 2026

May 19 | Manufacturing July 22 | Distribution

The goal: To create space for customers to learn from one another, share feedback, and build strong connections with other business leaders using EBMS.



WHERE SHOULD WE GO NEXT?

Want us to host an Executive Round-table for your industry, or a Lunch & Learn in your area? Let us know at marketing@koblesystems.com



350 NEW HOLLAND AVE
LANCASTER PA 17602

Are you prepared for year end?

Learn how to avoid common year end pitfalls inside.

Also inside: an EBMS product update, how the right support makes ERP implementation less daunting, and a note from our CEO.