



GUIDE TO ACTIVANT PROPHET 21 Implementation Services

IMPLEMENTATION METHODOLOGY

Activant recognizes the importance of undertaking a software implementation project and works with you to create an organized, systematic, and cost-effective means of implementation. Although this document describes a defined set of steps, Activant's implementation process is designed to allow you and your Implementation Consultant the flexibility to modify the process to meet your individual needs.

Activant implementation services create the highest levels of customer satisfaction, while maintaining a cost-effective project management approach. We accomplish this by:

- Utilizing a partnership philosophy
- Analyzing your processes
- Developing a customized project plan
- Maintaining consistent and constant communication
- Executing the plan

KEY ROLES

To ensure the successful implementation of your Activant solution, you will work with several different Activant experts throughout the implementation process, including:

- Implementation Consultant
- Activant Educators
- Application Consultant
- Support Professionals
- Data Conversion Experts
- Additional Consultants

In addition, you will need to appoint an implementation team from your own company, including a project manager, who has the support of top company executives.

One of the most important tools you will use during your implementation is Activant's Implementation Guide. Given to you at the start of your implementation cycle, this book will serve as your road map throughout the implementation process.

ACTIVANT ROLES

IMPLEMENTATION CONSULTANT

Your business consultant and Activant project manager, the Implementation Consultant coordinates all necessary resources within Activant to make your implementation go as smoothly as possible. Serving as your primary contact at Activant until after you are successfully operating on Prophet 21, you should contact your Implementation Consultant if you have a question during the implementation process and do not know whom to contact. Once you are live, Activant Support will become your primary contact along with your Customer Account Executive, Inside Sales Representative, and Professional Services Sales Representative.

In order to be successful, it is necessary for the Implementation Consultant to know as much about your company as possible, including learning all aspects of your business processes and the issues you face. To accomplish this, the Implementation Consultant creates a Business Analysis that analyzes how Prophet 21 can meet your specific business needs.

The Implementation Consultant and your project manager will work together to set schedules and timetables that measure the progress of the implementation. You should alert your Implementation Consultant of any issues that could alter this timetable, such as unplanned vacation for someone on the team. Clear communication allows the Implementation Consultant to keep all relevant departments at Activant informed about the progress of your implementation.

The Implementation Consultant coordinates the training schedule to meet your specific needs, such as key content areas and personnel availability. The Implementation Consultant informs the Application Consultant of any special circumstances or procedures that your business will follow.

ACTIVANT EDUCATION

Activant Education includes the Custom Education Program to help you determine your company's specific training needs; a blended suite of educational courseware; and Summit, an annual conference for customers. During your implementation, you will have the opportunity to take advantage of several of these educational offerings.

The Custom Education Program offers you a method to develop a customized training program for your employees. This free, online service helps you pinpoint your training needs by allowing you to create custom surveys based on the business function, role, and task of specific employees. These surveys identify knowledge deficits and can be used for benchmarking employee knowledge or designing your own certifications or training incentive programs.

Based on your employees' survey results, you will receive a report prioritizing the educational resources and services Activant offers that would benefit your business. Your project manager and Implementation Consultant can use this document to adjust your training plan, assuring a smooth go live. In addition, you can also use this report as a road map of educational resources for training new employees.

Among the training programs available, is a comprehensive educational curriculum. Activant experts, each with extensive industry experience, develop all courses and materials. During your implementation your Implementation Consultant will work with your project manager to build your training plan to incorporate some or all of these training tools into your implementation plan.

Web-Based Training enables participants to engage in one- to two-hour classes delivered over the Internet. Students interact online in real time with the instructor and other students without leaving their offices. Using an Internet browser, students log on to a specified Web site to view class handouts, gain hands-on experience, listen to the instructor, and ask questions. Since everything takes place from the participants' own computers, travel expenses are eliminated and students can immediately apply what they've learned.

Computer-Based Training courses, delivered via CD-ROM, incorporate audio, video, and animation to instruct users in the operation of Activant's enterprise software solutions. Students set the pace and multiple employees can reuse CDs. Each CD includes integrated, user-specific testing, which enables individuals and their managers to track performance. Many Activant distributors require new hires to complete entire suites of Computer-Based Training courses as a job requirement.

Classroom-Based Training courses provide intensive, classroom-style instruction. In addition to having an instructor present, these courses include the added advantage of removing students from the distractions of their work settings. These courses usually last one or two days and provide intensive, hands-on coaching on particular aspects of a solution.

Activant Summit offers you an opportunity to learn about your solution from technology experts. In addition to formal classroom sessions and a Technology Center, where you can try the latest versions of Activant solutions and schedule one-on-one meetings with technology and business application experts, Activant incorporates several networking opportunities for distributors attending Summit. These networking events provide excellent opportunities for you to keep in touch with fellow distributors and learn new ways to utilize the technology that helps you run your businesses. Depending on the time of year Summit takes place and your scheduled go-live, your Implementation Consultant will advise you on the value of this event.

APPLICATION CONSULTANT

Available either onsite or over the Internet, an Application Consultant will teach application functionality and relate that functionality to your business.

The Application Consultant will also assist you at your go-live, if you choose to have support during your go-live. At this time, the Application Consultant functions less as a trainer and more as on-site support.

SUPPORT PROFESSIONALS

From the start of the implementation process through the life of your solution the Activant Support team is there to assist you. Once you are live on Prophet 21, the Support team will become your primary resource for any questions you have about your solution. Offered via the Internet, Support is available 24 hours a day, seven days a week.

Activant Web-based support, available at www.activant.com, includes a comprehensive solutions database, which you can search 24 hours a day, seven days a week. Containing Frequently Asked Questions and documentation, the database continually grows as customers ask questions or request more information about particular features of their solution.

Online help is accessible from every module within Activant Prophet 21 by placing your cursor on any field and pressing [F1], clicking the Help icon, or selecting the Search option in the Help menu. You can also right-click on a field to select Help and annotate Help fields to apply directly to your processes.

If you cannot find an answer using online Help or Web-based support, Activant Support Representatives will answer your questions as quickly and thoroughly as possible.

DATA CONVERSION EXPERTS

One of the more challenging aspects of any implementation is converting the data from your current system into a solid database. While Prophet 21 offers all the necessary tools to import your data into the solution, Activant Data Conversion Specialists can help you format and import your data into Prophet 21.

ADDITIONAL CONSULTANTS

Activant also offers a host of other consulting experts to help you maximize your use of the solution.

Activant Technical Consultants help you address a broad range of information technology hardware issues, including network analysis and database-tuning services. Technical Consultants can help you review your company's current networking infrastructure, including servers, workstations, cabling, and application deployment, and make recommendations.

Once your infrastructure has been reviewed and upgraded (if necessary) to support Prophet 21, a Technical Consultant can also help you install and configure servers, workstations, database servers, and Prophet 21 prior to your on-site training. If you prefer to use a local provider to perform your hardware and software installations, Technical Consulting can work with them to implement the most effective network configuration for your business.

Furthermore, if you choose to streamline business processes through the Internet, eBusiness Consultants can help your company make the transition.

ROLES WITHIN YOUR COMPANY

PROJECT MANAGER

The Project Manager is your employee who is in charge of organizing your resources so that the implementation can be completed on time. The Project Manager will be your counterpart to the Implementation Consultant, and is the most important person of your implementation.

The Project Manager must have the ability to mobilize and assign resources as needed to complete the implementation. In addition, the Project Manager needs an adequate level of decision-making authority.

The Project Manager is responsible for monitoring the progress of the implementation through timetables and project plans that are developed in conjunction with the Implementation Consultant. The Project Manager is responsible for organizing your tasks, such as on-site training and go-live preparation.

The Project Manager should be involved with training in all areas of Activant Prophet 21. Since the Project Manager is your company's first line of support and information, he/she should be familiar with the workings of all major areas of the software. This person should have some technical knowledge and/or ability. He or she is responsible for maintaining your equipment and your database, as well as communicating all software issues to Activant.

The following is a list of traits to consider when selecting a Project Manager, if you haven't done so already:

Technical skills:

- Ability to plan a project and complete it on time
- Authority to make decisions and enlist employee resources
- Organized
- Problem solver – possesses good troubleshooting skills
- General knowledge of the entire company's functions
- Management skills
- Word processing, spreadsheet, and database knowledge
- Network administration knowledge
- Windows operating system knowledge

Intangible skills:

- Effective communicator
- A “people person”
- Motivated
- Dedicated
- Versatile/flexible
- Secure in their job future

EXECUTIVE SPONSOR

The Executive Sponsor is the key decision-maker in a company. The role of the Executive Sponsor is to empower the people who make the decisions necessary to get Activant Prophet 21 up and running. Also, his or her attitude and commitment to the implementation of Prophet 21 are invaluable resources during the development and execution of this challenging project.

OTHER TEAM MEMBERS

Ideally, your implementation team should have representatives from every major business area of your company. A wide cross section of your employees ensures that all your processes and procedures are taken into consideration during the implementation process. In addition, the implementation team members will act as the power-users of the new solution and their positive experience and expertise will encourage the rest of your employees to embrace the use of your new solution.

SUMMARY OF STEPS

The following is a very general outline of the implementation process. Any questions or concerns about the phases described here should be directed to your Implementation Consultant.

INTRODUCTORY CALL

An Activant Implementation Consultant will contact you shortly after you sign the contract. During this call, he or she will give you an overview of the implementation process and discuss the steps you need to follow in order to reach the next phase of the implementation.

BUSINESS ANALYSIS

Early in the process, you will receive a Pre-Business Analysis Questionnaire, which you need to complete and return to your Implementation Consultant. Your Implementation Consultant will review this document and depending on your company size may arrange for a site visit to your business. During this three-day visit – called a Business Analysis – the Implementation Consultant will observe and evaluate your operating procedures. When the Business Analysis visit is complete, your Implementation Consultant will write a formal report about your business processes and identify the individuals who will play key roles in the implementation process. The Business Analysis report will generally be delivered within approximately two weeks of the completed visit (for smaller organizations this may be done over the phone).

Because you should focus on your current business practices, your expectations for Activant Prophet 21, and the integration of your existing system, software demonstrations and training issues will not be covered during the Business Analysis site visit.

The purpose of the Business Analysis is three-fold:

- Provides an opportunity for Activant Implementation Consultant to learn your business, so you receive the most appropriate recommendations for your business
- Lays the groundwork for the entire implementation project
- Lays the groundwork for procedure development

PROJECT PLAN

When you have accepted the Business Analysis, your Implementation Consultant will develop a Project Plan based on the needs and expectations outlined in the Business Analysis. The Project Plan is a guideline for implementation and can serve a number of functions.

In some instances, the Project Plan is an organizational tool. It is a way of defining each step that needs to be accomplished before you can move on to the next phase. In other instances, the Project Plan simply formalizes what you've already been doing. If your Project Manager has had experience with implementing technical solutions, he/she is aware of the necessary preparations, and the order in which tasks should be accomplished. The Project Plan merely illustrates the implementation process.

To ensure that no critical steps of the implementation process are neglected prior to your go-live, the Prophet 21 Implementation Guide contains a pre-go-live checklist. Your Implementation Consultant will use this checklist to measure your company's progress along the road to implementation, and will advise you where special efforts have to be made. In addition, you should review this checklist throughout your implementation. Many companies incorporate this checklist into their formal project plan.

Below is a sample implementation project plan built using Microsoft Project. Activant believes that without a plan, you cannot control the implementation and marks progress verification points (PVPs) throughout the plan that allow you to sign off on during the implementation progress.

TASK NAME	DURATION
Prophet 21 Implementation	141 Days
Proper Planning	51 Days
Installation	6 Days
Database Building	55 Days
Training	98 Days
Read "Training" chapter in IG	1 Day
Process Development Consulting (Management Training)	44 Days
End-User Training	44 Days
Document all Procedures	16 Weeks
Going Live	17 Days
Practice, Practice, Practice!	10 Days
Test all forms	1 Day
Refine Operating Procedures and Procedure Manuals	5 Days
Refine System Setting and database	5 Days
Distribute procedure manuals to end-users	1 Day
Data Verification – System checks	5 Days
Create necessary reports	5 Days
Print and review all necessary business reports from Prophet 21	5 Days
Complete pre Go-Live Conversion	4 Days
PVP #5	0 Days
Go-Live	5 Days
Month End	3 Days
Graduate from Implementation	1 Day

NETWORK INFRASTRUCTURE/SOFTWARE INSTALLATION

It is advisable to confer with Activant's Technical Consulting Department prior to making any hardware, operating system (OS), and database purchasing decisions. This group of experts will ensure that you make the correct complementary hardware and software decisions.

You are responsible for the installation of all necessary hardware and software for Activant Prophet 21. The acquisition and integration of the server and workstation hardware, the network, and database server should be based on Activant recommendations and configuration specifications. If you choose, an Activant technical consultant can work with you during this stage.

Once your Project Manager receives the Activant Prophet 21 software, he or she will create a seed database by accessing the Activant FTP site (or downloading it from a CD-ROM). At this time, "Play" and "Production" databases, data device sizing considerations, and workstation access to Activant will be established. Activant recommends that you utilize our Technical Consulting Department to ensure proper set up of Activant Prophet 21.

DATABASE SETUP AND TRAINING

The data you collect in your company's computer system is one of your business' most valuable assets, and a solid plan to develop your database is a key task during the implementation cycle.

There are three methods that you can use to transfer data into your Activant solution:

- **Imports** – The Import feature is a cost-effective way of building your database. You can format your own data using a spreadsheet application, and use Prophet 21’s Import functionality to convert your files into data that Prophet 21 can use.
- **Data Conversion Service** – Activant’s Data Conversion Department can assist you in formatting your data. Once the data is in the proper format, they will assist you in the use of Activant’s Import functionality.
- **Manual Data Entry** – In some cases, manual data entry is the only method available to get data into Activant Prophet 21. Your legacy system may not have held all of the information that Prophet 21 enables you to store. For example, most customers key in open sales orders, purchase orders, and pricing.

Application Consulting, or training, is a phase of the implementation when you learn how to run your business on Activant Prophet 21. There is a direct correlation between the amount of quality training time your employees receive, and the success of your implementation. There are a number of options that you should consider when deciding how to use your training. Your Implementation Consultant and Project Manager will be able to help you develop a plan that meets your needs.

PRACTICE, PRACTICE, PRACTICE

Activant recommends you take some time to practice with your new solution prior to going live. This will ensure that you and your employees are comfortable using the solution and will make a near-seamless transition to Prophet 21.

TEST, TEST, TEST

Through the Custom Education Program you will be able to build and administer custom tests for your employees. This will ensure they have taken the proper education and have practiced, practiced, practiced.

GO-LIVE

The day you and everyone in your company start utilizing Prophet 21 for their daily business processes is known as the Go-Live. All of your employees have been trained and tested on how to use the software and business processes have been well established. Activant can provide onsite consulting assistance during your go-live.

POST GO-LIVE

After you have been successfully live on Activant Prophet 21 for a month or more, your company will be ready to develop plans to further explore and utilize Activant's technology.

Application Consultants as well as educational tools offered by Activant Educational Services can assist you in achieving your business objectives.

TRAINING AND CONSULTING

TRAINING METHODOLOGY

You want to maximize the return on your technology investment and the best way to do that is to thoroughly train your employees on how to use all of Prophet 21's features and functionality that will streamline your processes. To that end, Activant has developed a blended learning strategy to educate your employees.

Since no two people learn exactly the same way, Activant offers several training methods designed to maximize understanding and use of the solution. Employees can work individually, with consultants, or in instructor-led sessions.

- **Computer-Based Training** – Computer-Based Training courses, delivered via CD-ROM, incorporate audio, video, and animation to instruct users in the operation of Activant's enterprise software solutions. Students set the pace and can reuse CDs. Each CD includes integrated, user-specific testing, which enables individuals and their managers to track performance.
- **Web-Based Training** – Web-Based Training enables participants to engage in one- to two-hour classes delivered over the Internet. Students interact online in real time with the instructor and other students without leaving their offices. Using an Internet browser, students logon to a specified Web site to view class handouts, gain hands-on experience with their Activant solution, listen to the instructor, and verbally ask questions. Since everything takes place from the participants' own computers, travel expenses are eliminated.
- **Web-Based Consulting** – Like Web-Based Training, Web-Based Consulting eliminates travel expenses while providing live instruction. Web-Based Consulting, which can be customized to fit your specific business needs, covers more advanced topics in more detail.

- **Onsite Consulting** – Onsite Consulting can take place over several days at your company location. Procedure oriented, the focus is organized around your employee's needs.

Training & Consulting Milestones

As you progress through the implementation process, you will reach several training and consulting milestones.

Among the first will be System Setup Consulting, where you determine your database setup and define your system parameters. Next, Process Development Consulting will educate key employees. These super users will help develop a refined list of procedures, which will be used during End-User Consulting.

End-User Consulting trains your front-line employees on procedures specific to their job functions. This training can be performed in a classroom format, one-on-one sessions, or a combination of both – whichever best fits your needs.

When you are ready to go live on Prophet 21, go-live support will reinforce the concepts learned during previous training sessions.

Following go-live, you can start taking advantage of all the other Activant consulting and educational programs. These include phase two implementation projects, such as warehouse automation, System Audits, and eBusiness Consulting.

SUPPORT

Support for Prophet 21 is available starting the day you sign the contract.

While in the implementation cycle, you will have access to a special section of Activant's Customer Web Site that provides details about your account, including: status reports, milestone dates, countdown to go-live, contact information, account-specific documentation, and much more. In addition, you will have the ability to designate a satisfaction rating, so Activant's implementation team will always know how happy you are with your company's progress through the implementation cycle.

After you are live on Prophet 21, you can use the Customer Web Site to access a comprehensive Web-based solutions database, which you can search 24 hours a day, seven days a week. This is the same database used by Activant representatives. In addition to searching existing solutions, you can create and track cases specific to your company.

ONGOING EDUCATION

Activant Education features a Custom Education Program to help you meet your company's specific needs; a blended suite of educational courseware; and Summit, an annual conference for customers.

The Activant Custom Education Program offers you a method to develop a customized training program for your employees. This free, online service helps you pinpoint your training needs by allowing you to create custom surveys based on the business function, role, and task of specific

employees. These surveys identify knowledge deficits and can be used for benchmarking employee knowledge or designing your own certifications or training incentive programs.

Based on your employees' survey results, you will receive a report prioritizing the educational resources and services Activant offers that would benefit your business. In addition to using this document to help you determine your current employees' educational needs, you can also use it as a road map of educational resources for training new employees.

Among the training programs available is a comprehensive educational curriculum – includes Web-, Computer-, and Classroom-Based Training – that meets the various needs of distributors and their employees. Activant experts, each with extensive industry experience, develop all courses and materials.

In addition, The National Association of State Boards of Accountancy (NASBA) has approved Activant Educational Services courses for Continuing Professional Education (CPE) credits. You can learn how to maximize your Activant solution while earning points to keep your CPA license current. Activant is registered with the NASBA as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit.

Summit offers you an opportunity to learn about your solution from technology experts. In addition to formal classroom sessions and a Technology Center, where you can try the latest versions of Activant solutions and schedule one-on-one meetings with technology and business application experts, Activant incorporates several networking opportunities for distributors attending Summit. These networking events provide excellent opportunities for you to keep in touch with fellow distributors and learn new ways to utilize the technology that helps you run your businesses.

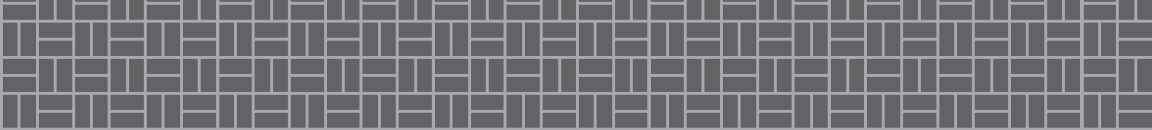
ABOUT ACTIVANT'S WHOLESALE DISTRIBUTION SOLUTIONS

Activant provides technology solutions and services to more than 3,800 wholesale distributors throughout North America. A leading technology provider for the distribution industry, Activant develops comprehensive enterprise software solutions to help distributors improve customer service and maximize the return on their technology investment. In addition, the company offers an Internet trading network that expedites sourcing, expands geographic reach, and streamlines transactions between distributors and manufacturers. Activant solutions are backed by a host of professional services, including support, consulting, and educational programs.

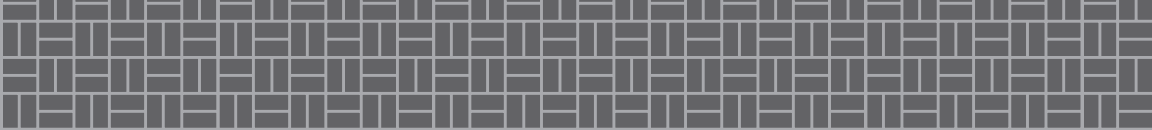
Activant Solutions Inc. (“Activant”) is a leading technology provider of business management solutions serving small and medium-sized retail and wholesale distribution businesses in three primary vertical markets: hardlines and lumber; wholesale distribution; and the automotive parts aftermarket. Founded in 1972, Activant provides customers with tailored proprietary software, professional services, content, supply chain connectivity, and analytics. More than 30,000 customer locations use an Activant solution to manage their day-to-day operations. Activant has operations in California, Colorado, Connecticut, Illinois, New Jersey, Pennsylvania, South Carolina, Texas, Utah, Canada, France, Ireland, and the United Kingdom.

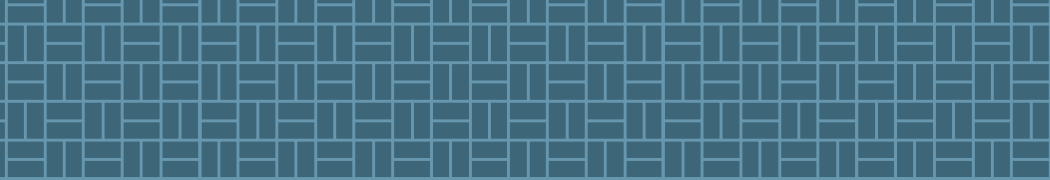
For more information, please visit www.activant.com.

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NOTES





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