

# IDEA, Epicor, & Leviton: How a strong partnership helped transform complicated EDI data into actionable information, exceeding customer expectations and driving results.

## Challenges

- Legacy software and hardware would no longer meet the archive/documentation/customer service needs of the business.
- Leviton needed to broaden its EDI capabilities, enabling a better use of resources and improving efficiency in claims resolution and customer service responsiveness.

## Benefits

- IDEA helps facilitate the exchange of high-quality, commercial grade transactional and e-commerce content; Epicor serves as the backbone of IDEA's EDI efforts.
- Epicor IntelligentXchange (IX) provides an archive of all EDI documents for claims and audits, which saves a lot of IT staff time and speeds up Leviton's response time.
- People from other departments can review the documents in human-readable format and be self-sufficient, without needing EDI staff to look up invoices and other EDI



### Company Facts

Established in 1998 by NEMA and NAED, IDEA is a leading provider of eCommerce-ready electrical industry data through IDEA Connector and IDEA Exchange. Supported by a growing partner network, IDEA plays a crucial role in setting and upholding industry data standards, including the Harmonized Data Model (HDM).

**Location:** Arlington, VA

**Website:** [idea4industry.com](http://idea4industry.com)



### Company Facts

Leviton residential products are the brand most preferred by builders and electrical contractors. Leviton's award-winning lighting controls, load centers, and wiring devices help electrical industry professionals and homeowners create smart and safe living environments that deliver energy savings, convenience, and reliability.

**Location:** Melville, NY

**Website:** [leviton.com](http://leviton.com)



### Company Facts

For 50 years, Epicor has worked hand-in-hand with our customers, creating industry-specific software solutions and services that enable a world of better business. Our standalone, ERP-agnostic suite of EDI solutions helps thousands of customers do business more effectively.

**Location:** Austin, TX

**Website:** [epicor.com](http://epicor.com)

## The Challenge

Leviton is a global leader in electrical wiring devices, lighting energy management solutions, networking solutions, security and home automation and commercial data infrastructure products. They offer a product line that includes more than 25,000 devices for virtually every conceivable residential, commercial, and industrial wiring device need.

With so many products and such a wide range of customers, an efficient EDI solution is key for Leviton—but they weren't getting what they needed. They faced an issue with their legacy system where some EDI documents weren't being automatically generated. They needed a solution to automatically generate an alert when this occurred, and Epicor IX was originally considered for that solution. As part of the decision-making process, Leviton tried the IX solution by Epicor—IX is an ERP and EDI service-agnostic visibility tool, that can work on virtually any system.

## The Value of Partnerships

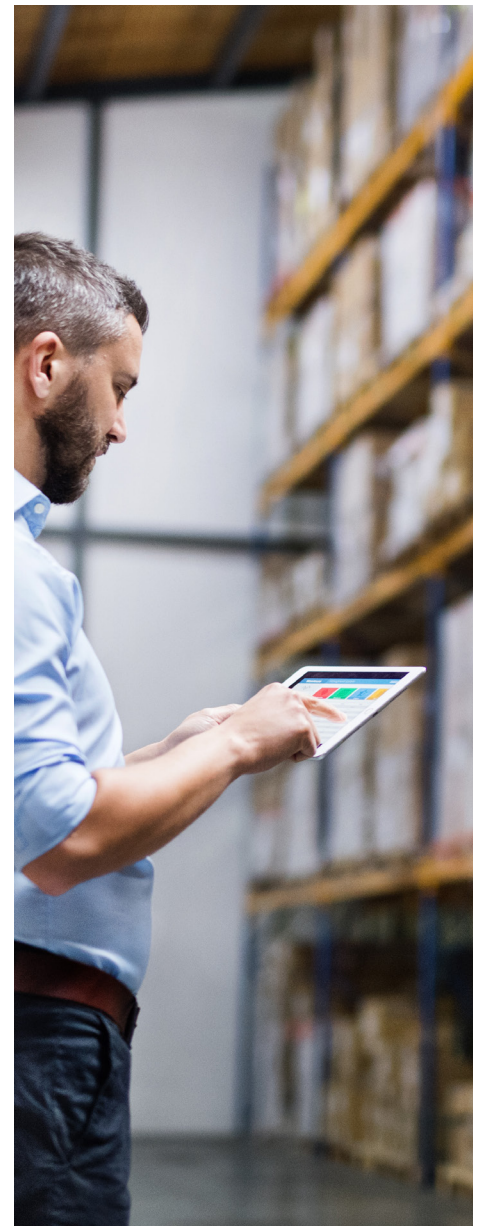
Epicor is IDEA Exchange's premier EDI platform provider, enabling the transfer of electronic data between trading partners using any ERP solutions. IDEA's applications help connect the supply chain, making business processes more efficient, easy, and successful for thousands of manufacturers and distributors.

Although the original problem was resolved with a custom-programmed solution, Leviton discovered while trying Epicor IX that it provided an archive and human-readable EDI documents for non-technical staff. These capabilities solved some key pain points for Leviton, resulting in greater productivity internally, efficient use of resources, and improved customer service.

According to Chris Pego, Senior Manager, eCommerce at Leviton, "There's so many transactions that are coming through here you cannot afford to not have reliability. The supply chain dies at EDI if it's not working."

Epicor and EDI worked together to meet Leviton's specific needs for data transfer, and for human-readable archive documents.

"Epicor is a very agile partner to us, and they're able to react and respond to changes in the channel's needs or requirements," says Pego. "When it came to Leviton's requirement for custom logic development, they managed to accomplish it within a week of coding. This rapid response would not have been possible with other EDI VAN providers, who might have simply dismissed the request." Epicor and IDEA Exchange distinguished themselves by working swiftly and effectively to deliver specific results.



# Employee Autonomy Drives Efficiency

It took about six months to migrate the data and train the staff on EDI IX, and the difference was apparent immediately.

Leviton's employees were able to research and resolve claim issues by themselves using the archive, rather than having to wait or ask for assistance to view the purchase history of each client. Employees found the search tool easy to use, as they were even able to search based on a resource number. By empowering employees to take on these tasks immediately, rather than constantly having to call IT for assistance, the company not only streamlined processes, but made the most of its existing people resources while simultaneously helping customers faster.

"There are three things that we always discuss when it comes to getting things done: time, money and resources," Pego explains. "And they all kind of go together in some way. And so for me, being able to have different areas within the company be self-sufficient and able to pull information that

they need to be able to do their jobs, to satisfy the customer faster, that's a big deal--to have a tool that allows us to grab that information on our own. For me, it's huge because it helps with productivity. In some ways it helps with costs, just from a time standpoint."

EDI IX has been so successful for Leviton that the company is hoping to expand its use going forward, implementing it on the sourcing side along with its current place in sales. Pego acknowledges that although some elements will be new (the information will display differently than an actual invoice), "it will still be readable, still have the customer's name, the part numbers, the prices, everything they need to approve it and not have a bottleneck where they need to say, 'where is this, somebody needs to show me.'"

Pego advises other companies on the fence about upgrading their EDI system to look at the big picture, rather than just focusing on the initial investment. "You might look like a hero saving \$10,000. But

you're not going to look like a hero when you're not delivering purchase orders into your system and through your supply chain." He adds that Leviton has also really appreciated the reliability of the new system. For his employees and for Leviton as whole, the ability to empower people to do more, do better, and do it efficiently has positioned them well for the future. One of IX's strengths is its flexibility, making it adaptable to any ERP solutions that a business has in place.

"I have to think that I'm not the only one from a manufacturer standpoint, even from a distributor standpoint that has finite IT resources, and this isn't the type of thing you want them looking for. If you have the tools to be able to do it on your own, which we now do, you use it and you run with it," he adds.

The way that Epicor, IDEA Exchange, and Leviton worked together to solve problems, improve results, and boost profits underscores the importance of collaborative, experienced support at every stage of the supply chain.

**"The greatest asset of our partnership with Epicor is their ability to turn things around very quickly."**

—Chris Pego, Senior Manager, eCommerce | Leviton

