

Navigating Your AI Journey: From Adoption to Transformation

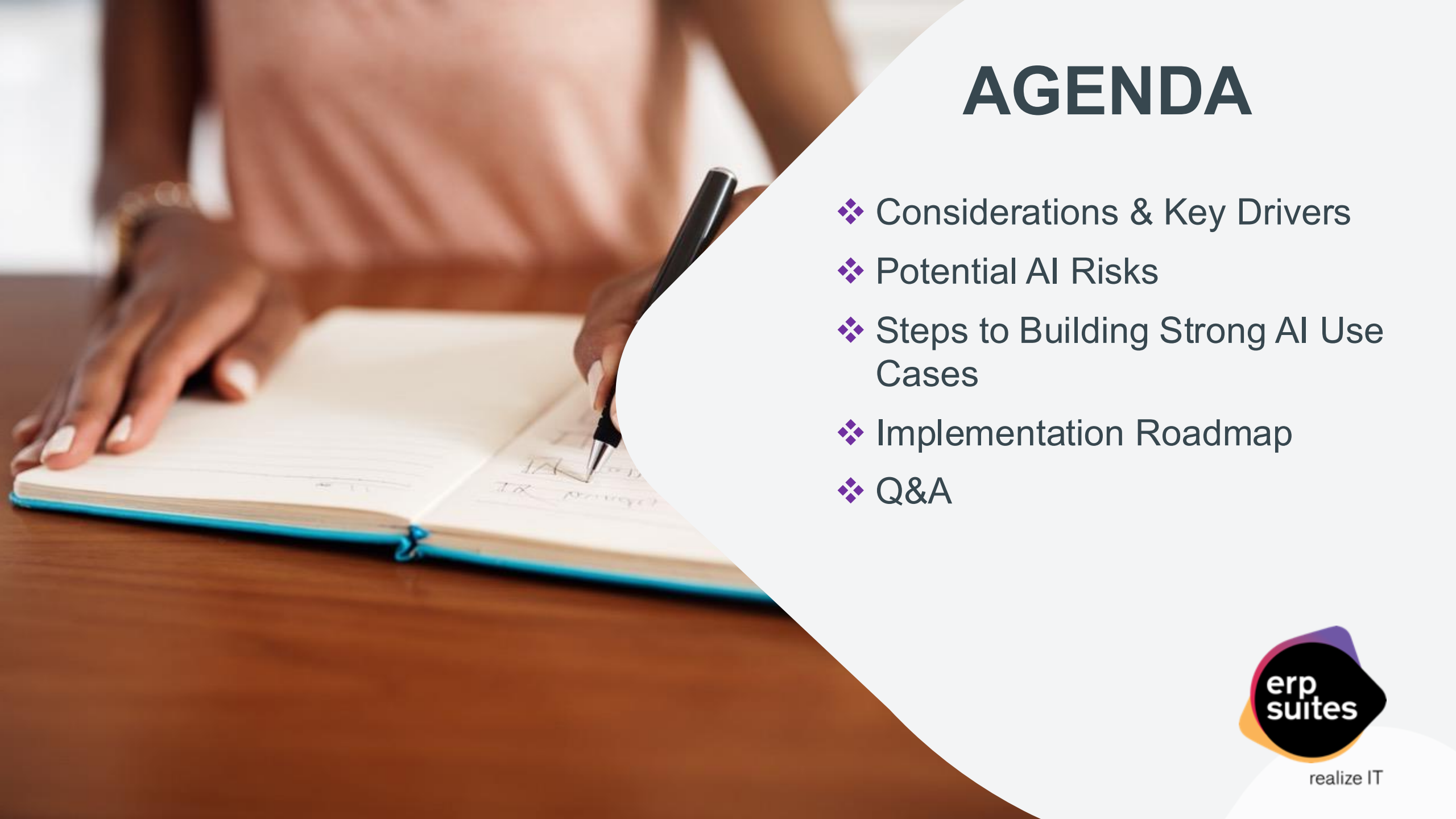
Session P-051240– Thursday Sept. 11, 2025

Drew Robb ERP Suites

Introduction



- Drew Robb AI Advisor
- Helps customer realize the value of AI and how to get started
- ERP Suites – 6 years
- Works with ERP Suites products space, data analytics consulting, and now AI advising
- OCI & AWS AI services experience
- Presented at 15+ user groups and conferences

A background image showing a person's hands writing in a notebook. The person is wearing a light-colored top and a gold bracelet. The notebook is open on a wooden desk, and the person is using a black pen to write. The right page of the notebook has some handwritten notes, including "1/11/2020" and "ITK Project".

AGENDA

- ❖ Considerations & Key Drivers
- ❖ Potential AI Risks
- ❖ Steps to Building Strong AI Use Cases
- ❖ Implementation Roadmap
- ❖ Q&A

AI Journey Considerations

Organic Growth

Divestiture & Acquisitions

Digital Transformation

Strategic Partnerships Forming

Focus on Company Sustainability

Navigating Economic Uncertainty

Understanding Key Drivers of AI

Operational Efficiency & Cost Reduction

Turning Data into a Strategic Investment

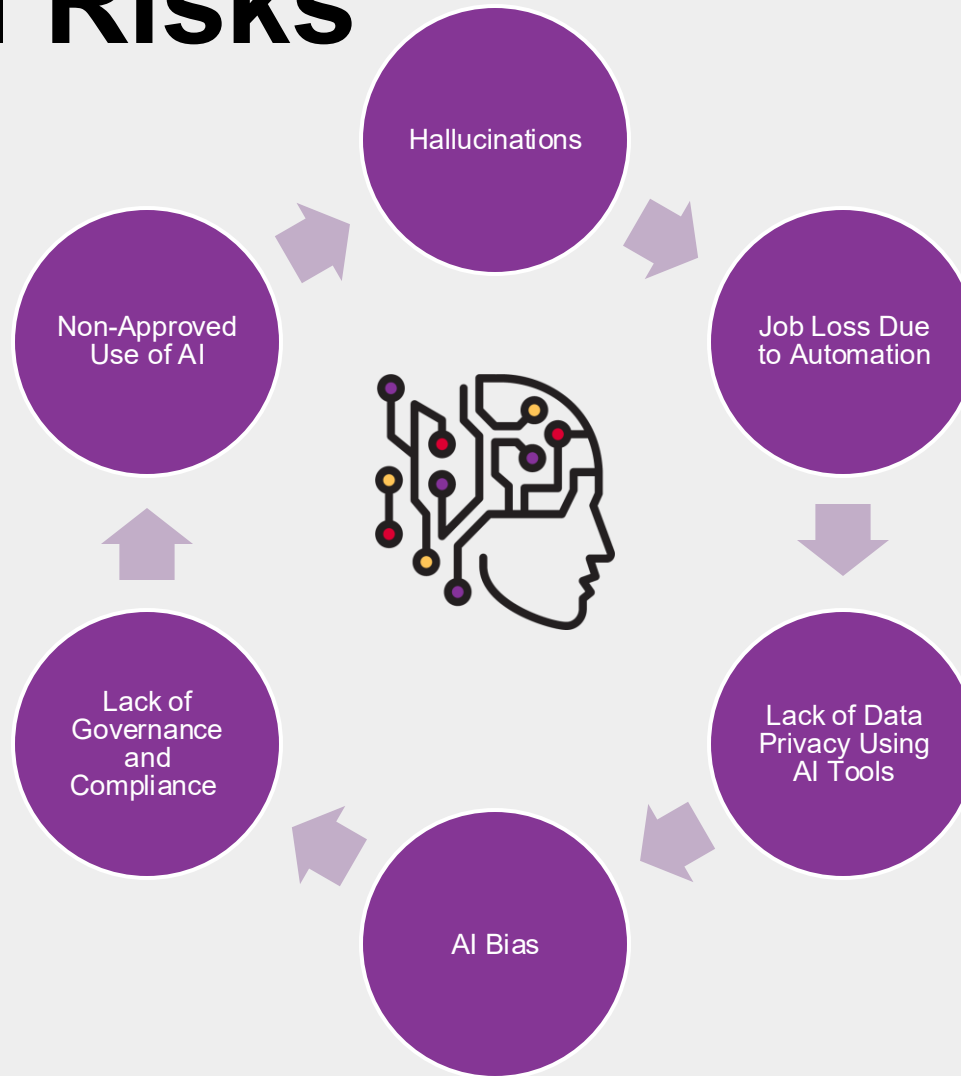
Improve Current Business Processes

Competitive Advantage & Innovation

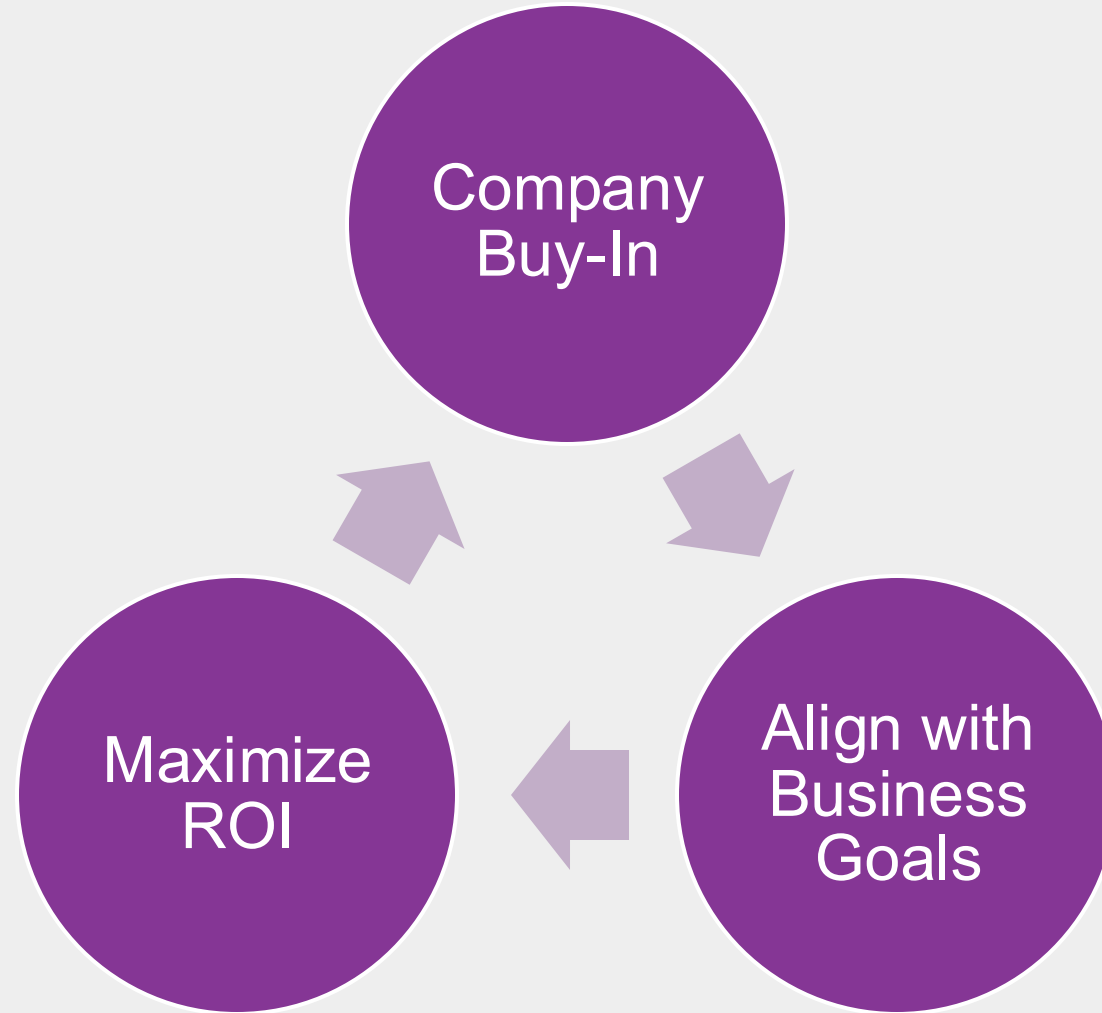
CEO wants to start looking into AI



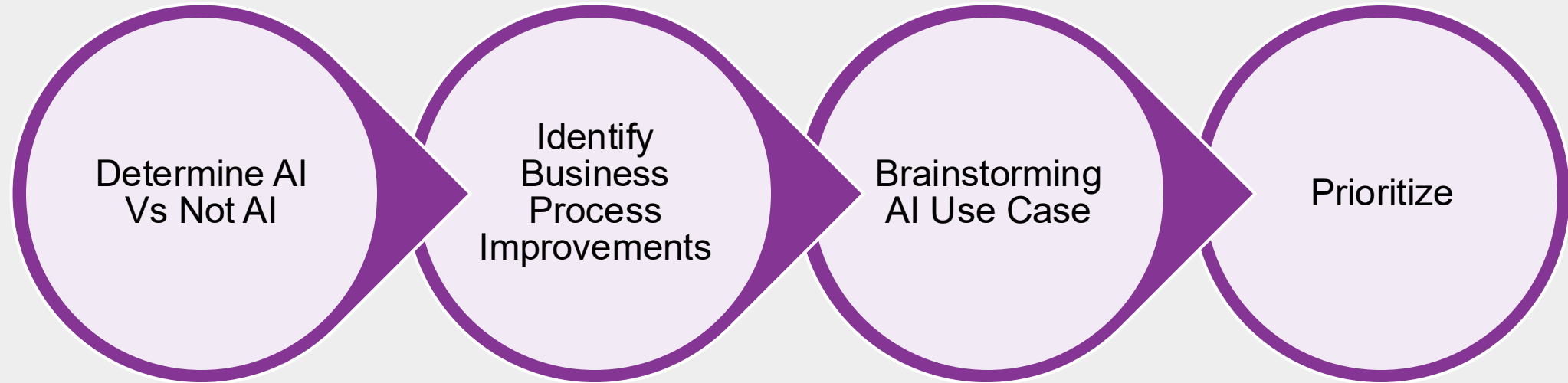
Potential AI Risks



Importance of Building Strong AI Use Cases



Steps of Use Case Development



Outcome: Understand solutions that are AI vs not AI solutions

Outcome: Map out the current process including the different phases, steps and opportunities

Outcome: Brainstorm use cases that will help solve current problems

Outcome: Prioritize 3-5 AI Use Cases



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AI vs Not AI

Digital Assistants providing customer support	AI
Excel formulas calculating totals	Not AI
Netflix recommending movies	AI
Barcode Scanning	Not AI
Basic Fraud Detection	Not AI
A GPS navigation system adjusting routes based on traffic	AI
Image Recognition	AI

User: Customer Service Rep

Scenario: Automating the creation of purchase order to a sales order in JDE P4210

Goals: To minimize the duration, it takes to convert a purchase order to a sales order

Phases

TSM sends purchase order in

Enter Sales Order

Reach back TSM to confirm sales order

Steps

Validate purchase order

Reach back out if any information is missing

Gather missing information from sales rep

Enter order information in P4210

Add any discounts needed

Send email confirmation with sales order information

Sales rep confirms order is entered correctly

Goals

Gather correct information from TSM

Convert purchase order into a sales order in JDE

Validate correct sales order in JDE

Pain Points

Too many steps

Data Inconsistent

Too many steps

Too much manual work involved

Too many steps

Takes too long to validate an order

Opportunities : Automate the entry of sales orders, allow for correction of missing data via CSR

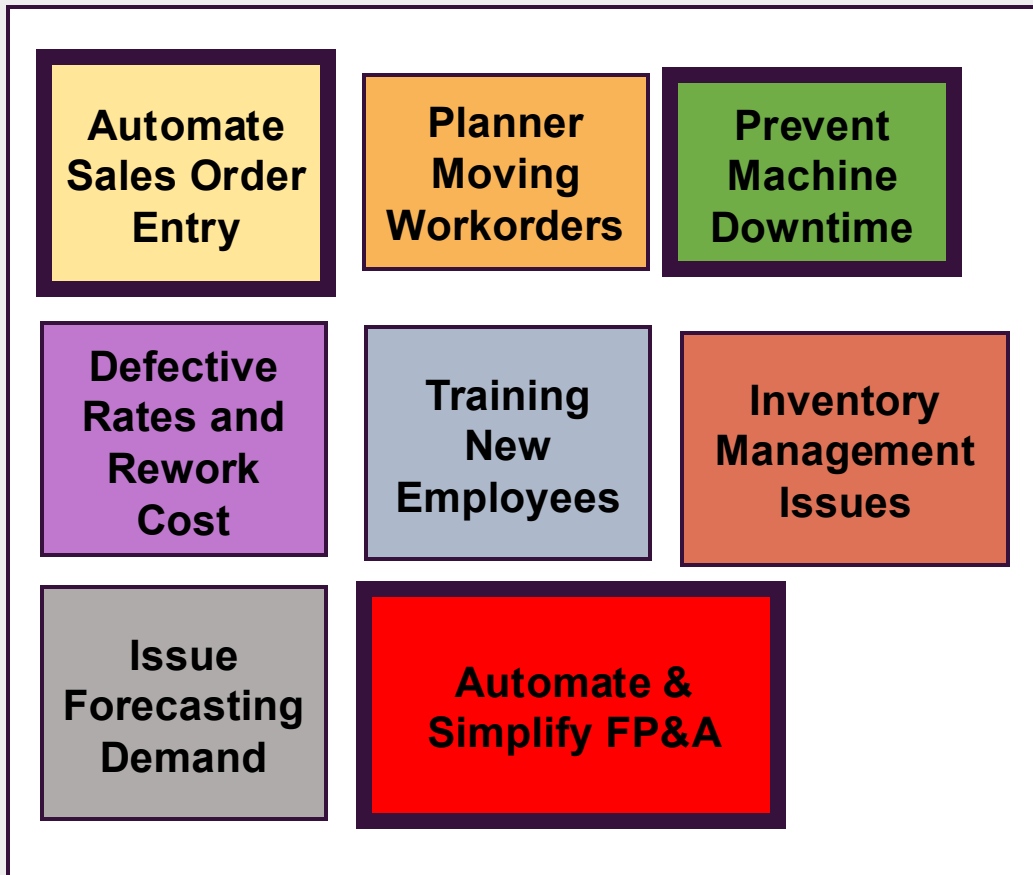
Ownership: Customer Business Analyst & ERP Suites Team

erp suites

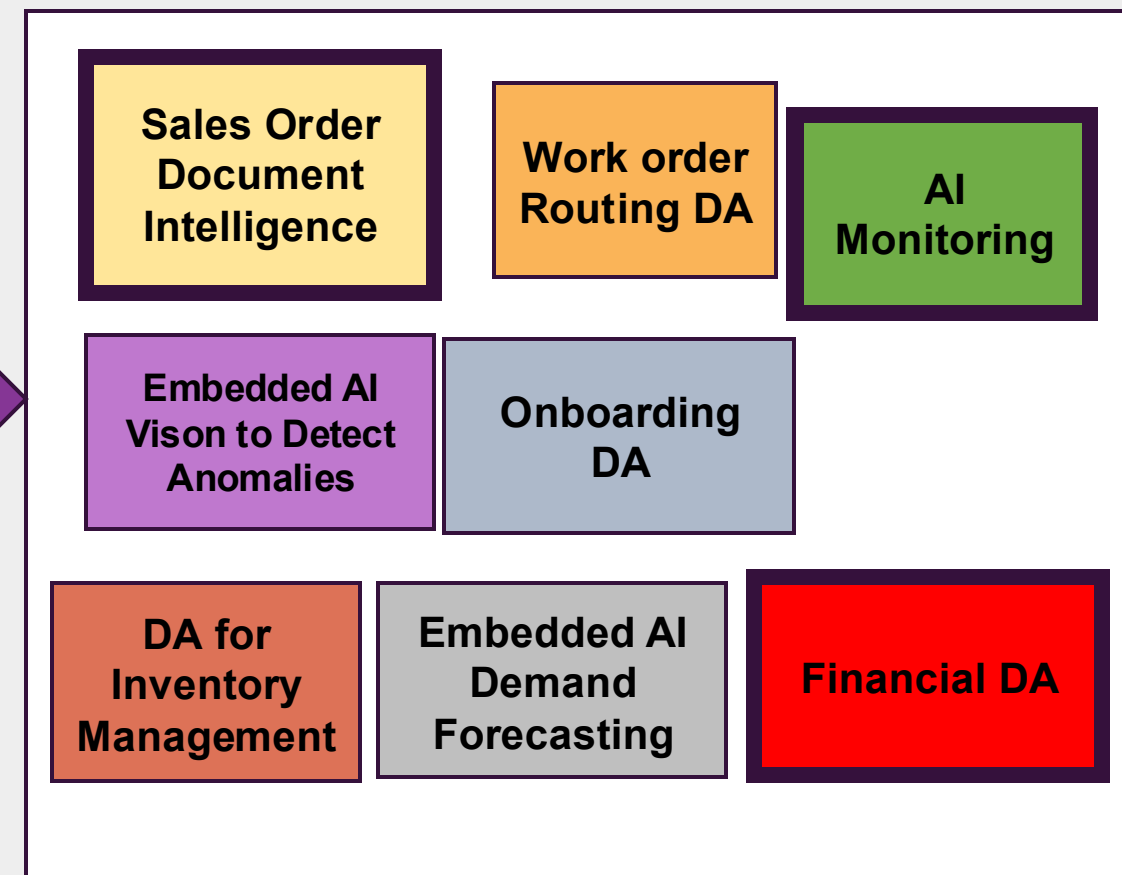
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Brainstorming Use Cases

Business Process Improvements



AI Use Cases



Prioritize Use Cases

Name	Description	Goal	Category	Value	Effort
Sales Order Entry	Read through customer sales orders and automate the upload of information into the P4210	This will minimize the amount of time it takes for CSR to manually input sales order details into the P4210	Quick Win	Low ——— ——— ——— High	Low ——— ——— ——— High
AI Monitoring	Place sensors on all manufacturing machines	99% uptime because of the ability when a machine will go down and fix it. Allow employees to focus on getting shipment orders out the door.	Quick Win	Low ——— ——— ——— High	Low ——— ——— ——— High
Financial Digital Assistant	Use natural language to run calculations and predictions against your JDE financial data	Assistant finance users in the querying of Edwards data needed for planning and budgeting	Strategic Investment	Low ——— ——— ——— High	Low ——— ——— ——— High

Top 5 Customer Use Cases of AI

Automate Sales Order Processing

- Document Intelligence

Automate Warehouse Receiving & Quality Control

- Document Intelligence using Vision

Automate Financial Close & Reconciliation

- Smarter Analytics

Forecasting Material Demand

- Smarter Analytics

Cross functional Digital Assistant

- Digital Assistant + RAG



Factors to Consider Implementing AI Solution

Scope

Phases/Milestones

Technical Requirements

Data Readiness

Security Readiness

Roles & Skills

Risk management

Change Management & Adoption



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Technical Requirements – SOE

OCI Services

- OCI Buckets
- Document Understanding
- Autonomous Datawarehouse

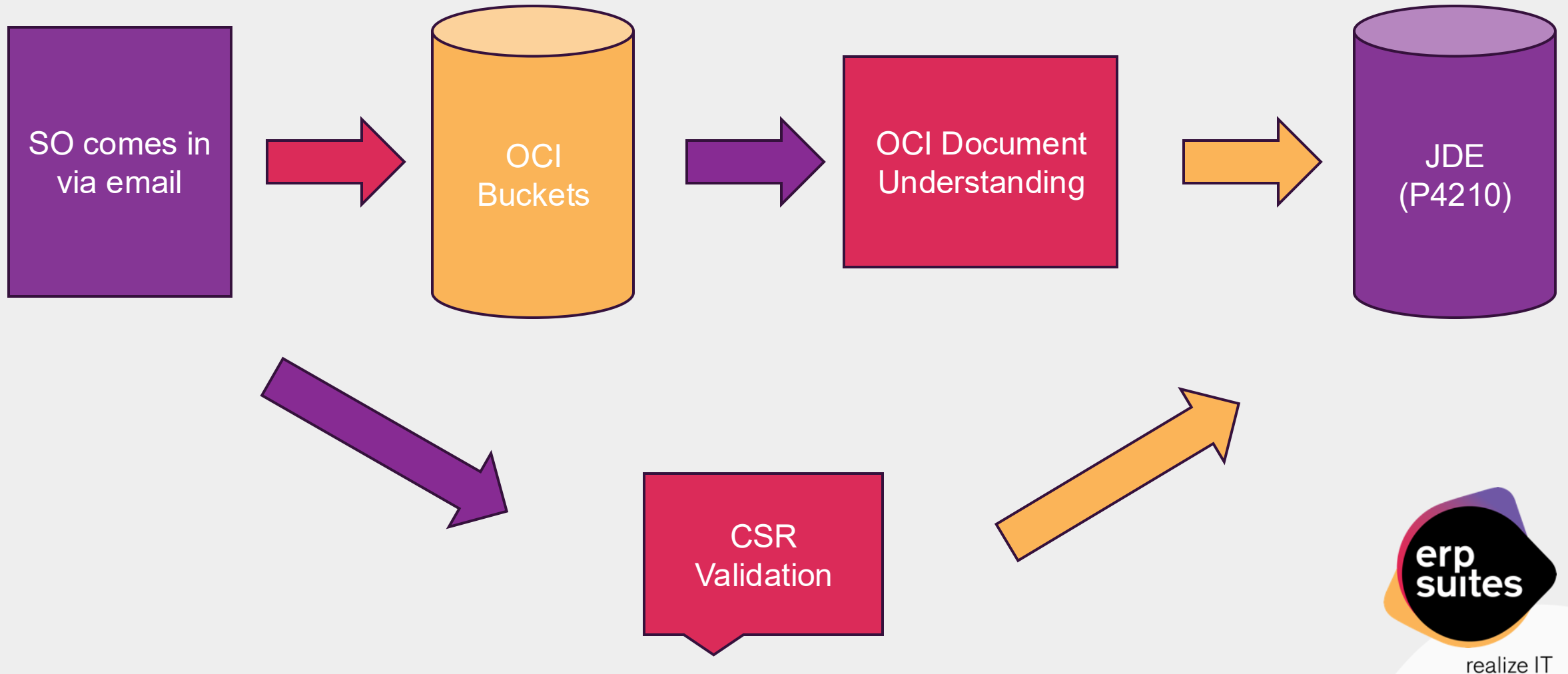
JDE Tools

- JDE Orchestration
- Form Extensions
- UDO



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Technical Requirements Flow – SOE



Data Readiness – SOE

Current Sales Order Entry come in as:

- 80% standard PDF forms
- 15% handwritten
- 5% come in just as email detailed

Current Sales Order Attributes

- Item Number
- Description
- Item
- Quantity
- Ship to
- Sold to

Historical Sales Orders in the P4210

- Believe data cleansing and validation may need to be done to enhance future sales order predictability from customers



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Security Readiness – SOE

JDE role-based security

- Already setup
- Most users are trained on current manual sales order entry

OCI security

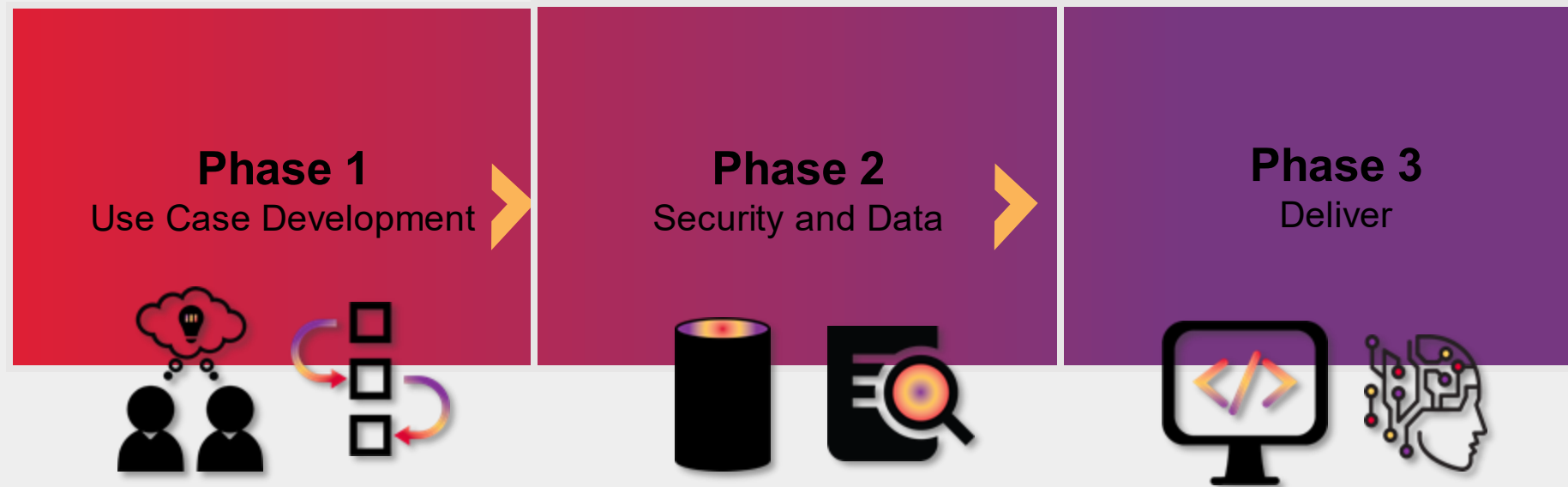
- Need to setup secure data transfer from CSR email folder to OCI storage buckets
- Create end to end encryption for transfer of SOE information from OCI document understanding to JDE



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Quick Win – AI Engagement

The Phases of the AI Journey



How Can We Help?

Talk with us!



User Groups

- Orlando: Sept 25th
- PLUG: Oct 16th
- ...and more



Video Podcast

Not Your Grandpa's JDE
presented by ERP Suites

Now available on YouTube
and Spotify @ERPSuites

Contact The ERP Suites Team



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Account Executive



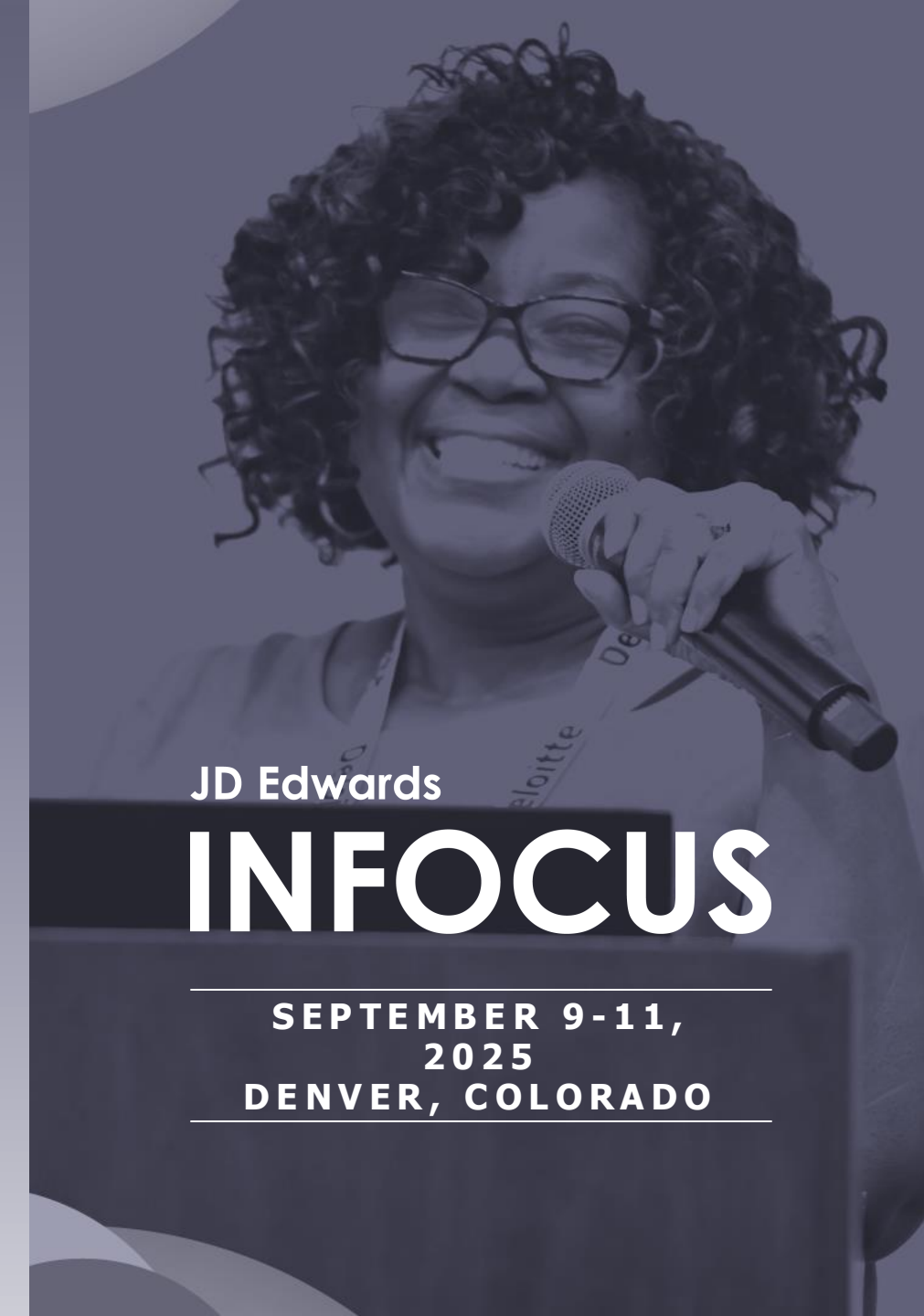
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Account Executive



Sharie Mims

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JD Edwards

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SEPTEMBER 9-11,
2025
DENVER, COLORADO

Q&A

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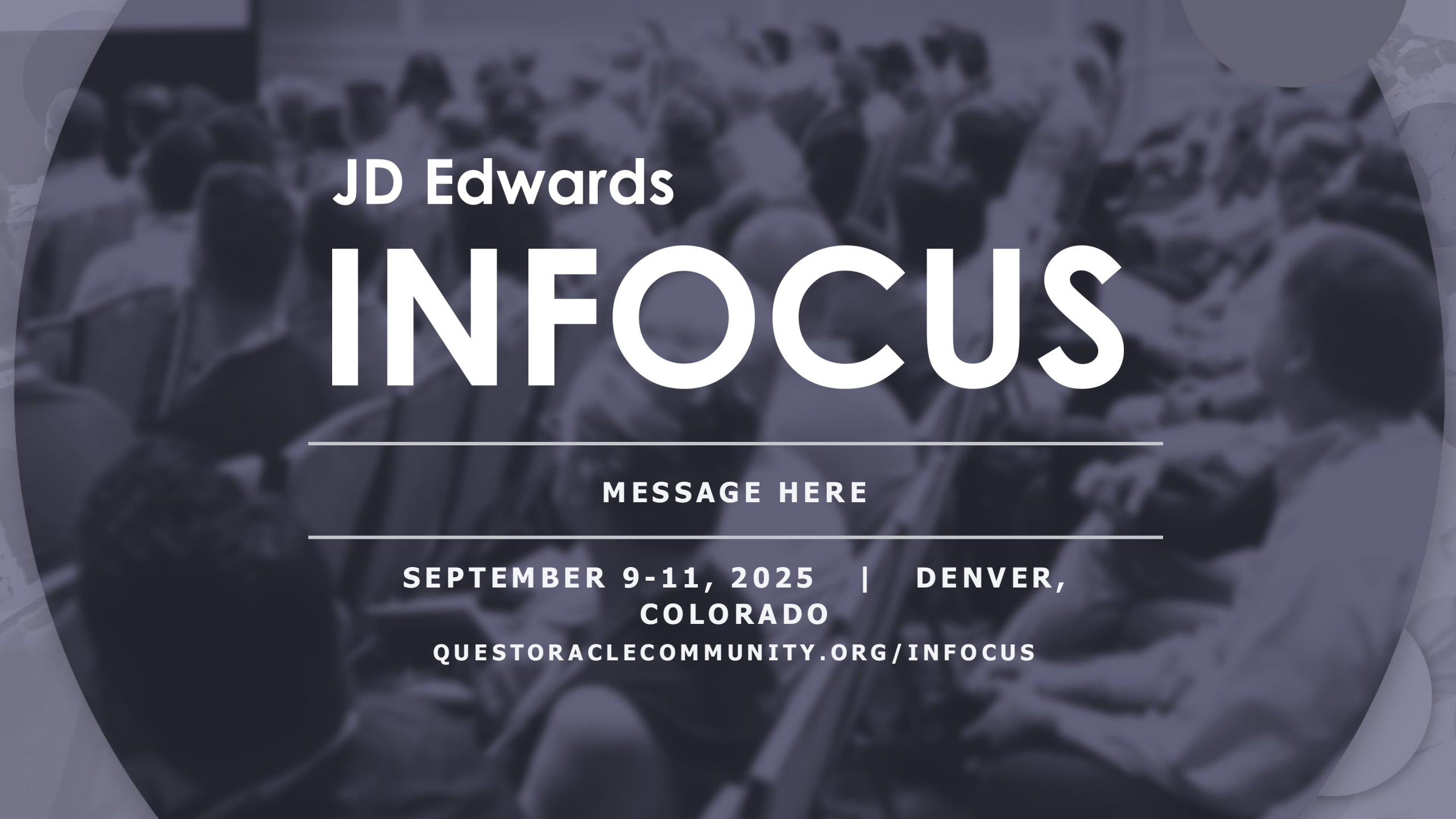
Quest
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Community



LOVE THIS SESSION?

COMPLETE AT LEAST
3 SESSION SURVEYS PER
DAY AND GET ENTERED
INTO THE DAILY DRAWINGS
TO WIN A **\$500** GIFT CARD!





JD Edwards

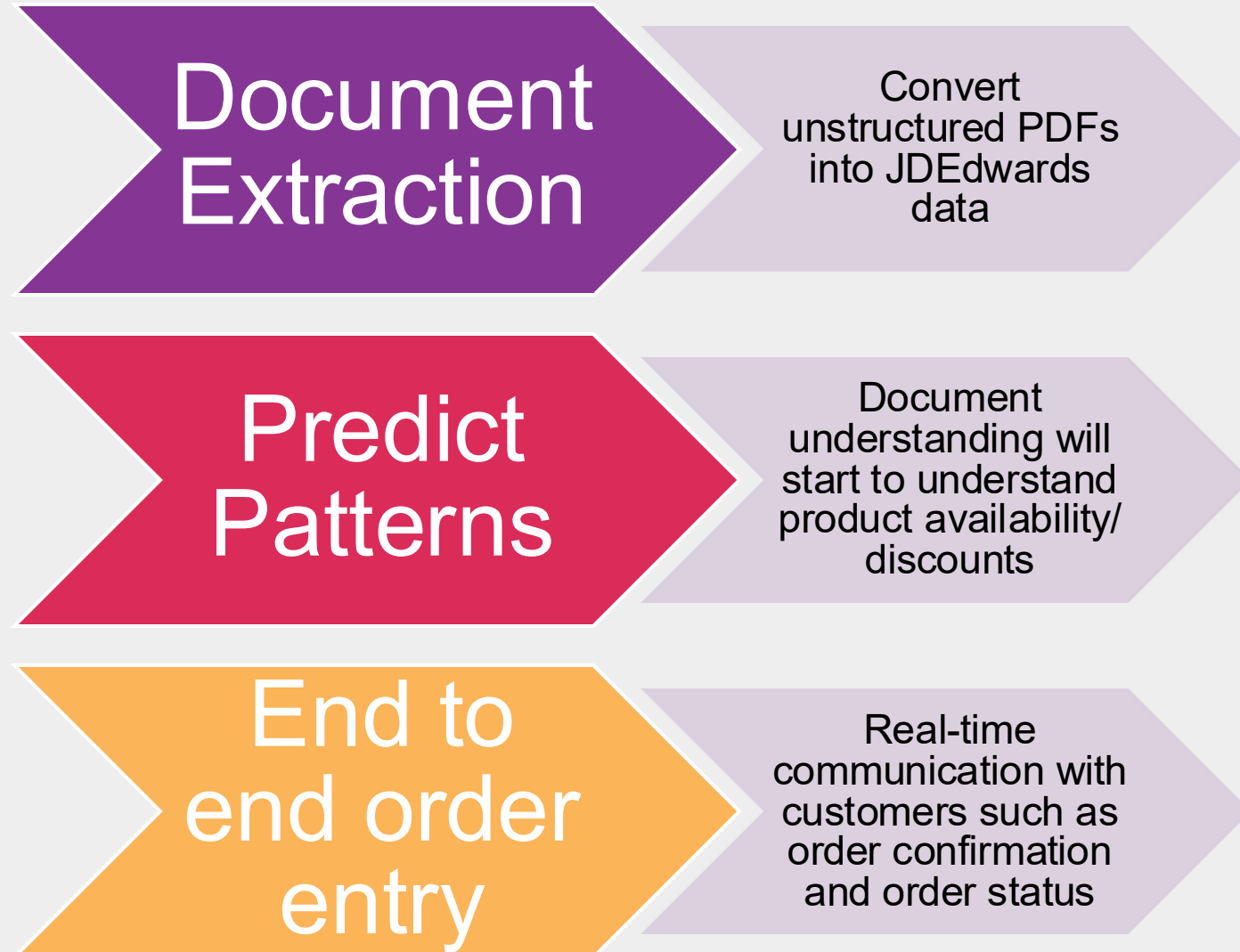
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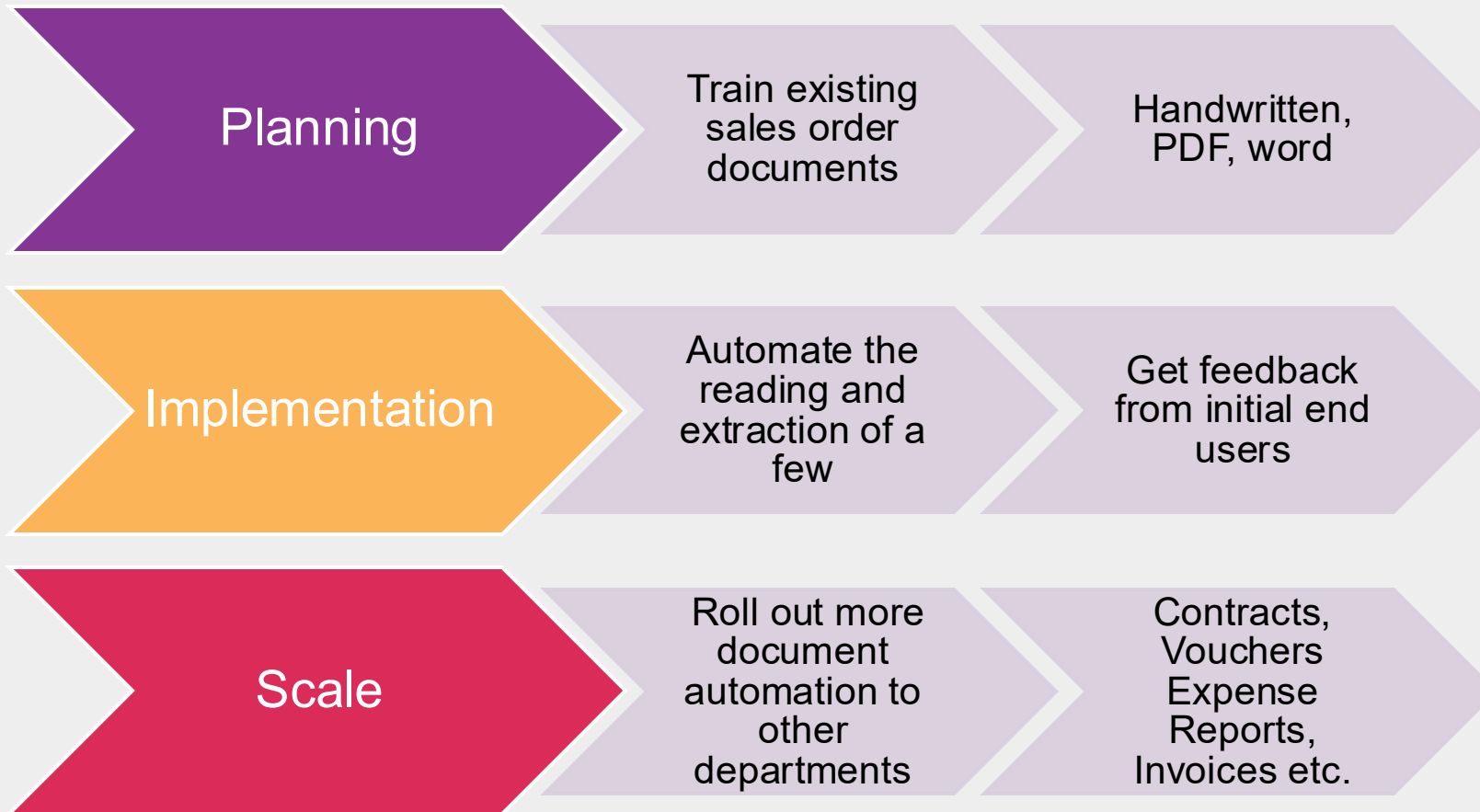
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Phased Approach - SOE



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Milestones – SOE



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Data Readiness – SOE

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Roles and Responsibilities – SOE

Project Manager	Customer Service Rep	Business Analyst	JDE Developer	OCI Developer	AI Advisor
• Make deliverables are being hit for the project	• Helps with the organization of customer sales orders to be trained	• Understands the sales orders process fully aids in implementation of solution	• Develops needed orchestrations and embedded tools	• Trains various models on Customer Sales Orders	• Makes sure everything runs smoothly. That's me!!!

Risk Management – SOE

Data Quality

- Robust preprocessing and human in the loop checks throughout the training of different sales order formats or structures

Compliance and Regulatory

- Continuously monitor sales order entry
- Role based access ensured

Security Risks

- Encrypt data at rest and in transit

Continuous model training

- Update models as sales order inputs may change

