



15

Reasons you need ERP on the Salesforce Platform

The Time is Right for Cloud ERP on the Salesforce Platform

Legacy ERP is the weakest link in your digital transformation, especially when it's disconnected from CRM. But when everything from supply to sales is built on the same platform, you get more value, flexibility, and visibility to better serve your customers.

Moving away from your legacy ERP system and on to something more modern may seem daunting, but the alternative of doing nothing or waiting for the next new technology is holding your business back in more ways than you might imagine. Hundreds of Rootstock customers have gone through the same process, looking at the limitations of their legacy ERP but assuming the migration to a modern cloud-based ERP could wait another year. But, without fail, every single customer comes out the other side wondering why they waited so long to make the switch.



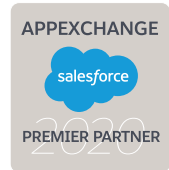
**YOUR PEOPLE » YOUR IT TEAM » YOUR OPERATIONS »
YOUR AGILITY » YOUR CUSTOMERS » YOUR BUSINESS**

A set of common benefits has become reality for these customers soon after moving to Rootstock Cloud ERP. The benefits extend across your organization, from the production line to the C-suite and even on to your customers. Best of all, they combine to make your business more productive, more efficient, and more agile.

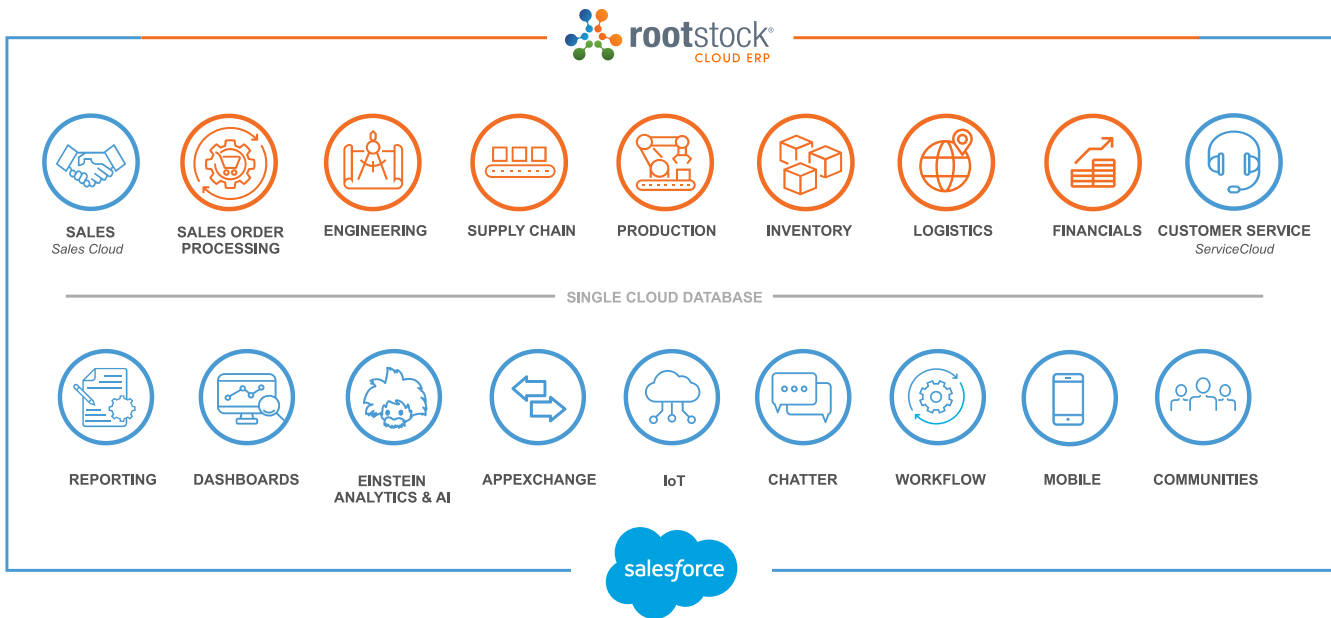


CRM and ERP Together: One record. One view. One customer experience. One cloud.

The basic element of success is choosing a modern ERP solution built on a platform that supports your end-to-end business. Not just one system for operations or sales or finance or services, but one platform for everyone. For Rootstock, that begins with using Salesforce as the underlying cloud platform for your entire company, which your Sales team is already using.



Unfortunately, most companies have cobbled together systems which rely on integrations that, while workable, inevitably prevent data from being fully utilized in serving your customers. Maybe your call center manages support cases in one system but can't determine if the product required to fix the issue has or hasn't been shipped. Maybe Sales can't see what's in the operations pipeline when making promises to customers, so they rely on outdated spreadsheets or ad hoc email requests. The lack of visibility slows down your entire business.



With systems built on multiple platforms, you're wasting time bridging those data gaps while you try to keep those gaps hidden from customers. It places a drag on your business and inflates costs, but it also keeps you from getting the visibility you need to constantly improve your performance.

We've identified the top 15 reasons why companies choose to move to Rootstock Cloud ERP built on the Salesforce platform and the benefits they realize after doing so. These points show how using the Salesforce platform provides benefits across your entire organization while Rootstock Cloud ERP uses business data to drive more efficient operations and unleashes operations data to improve and accelerate other parts of your business.



Improving Business Effectiveness

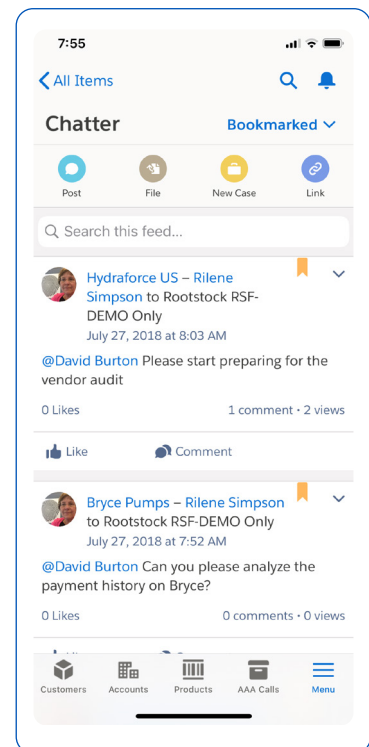
More information and more visibility, shared across the right workers at the right times, makes everyone more effective. It gives them complete information to do their jobs correctly. It gives them insight into the challenges others are having and in areas where they may be able to help. It lets them work faster and smarter, and make better decisions. And, it helps encourage collaboration by eliminating the data silos that keep teams apart.

Rootstock Cloud ERP built on the Salesforce platform extends the frontline tools usually reserved for Sales and opens access to information for every worker. The result is a more effective business that's more responsive to customer needs.

1 | BETTER COLLABORATION

At many companies, departments are not just separated by their organizational and reporting structures, they are also separated by their systems. Workers, especially those on the floor, tend to have access or are trained only on the systems in the narrow definition of their role or department. But workers frequently need upstream or downstream information to do their jobs. Without that visibility, they're left to email, physically track people down, or simply guess. It's understandably frustrating and tends to widen departmental divides. Worse yet, those types of decisions and conversations are hidden from those not on the email or never recorded at all, and difficult or impossible to trace after the fact.

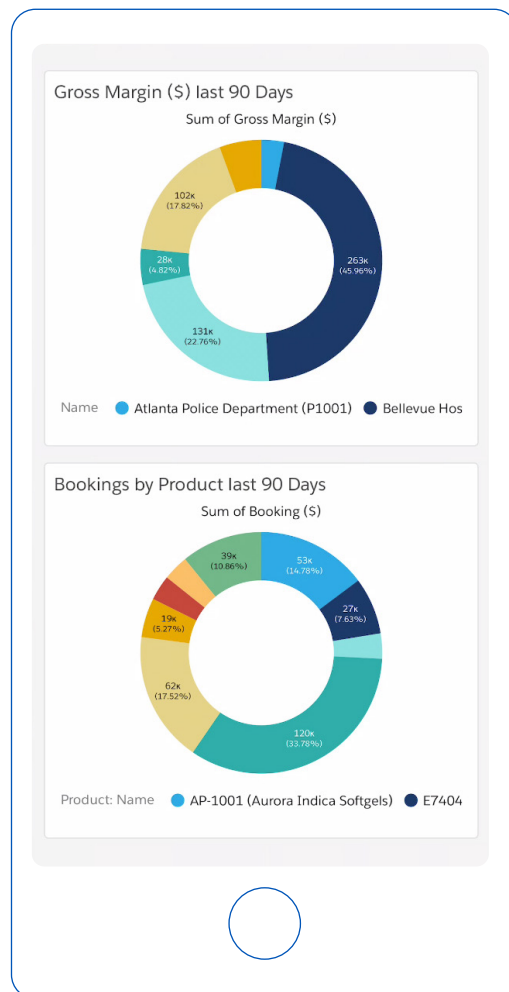
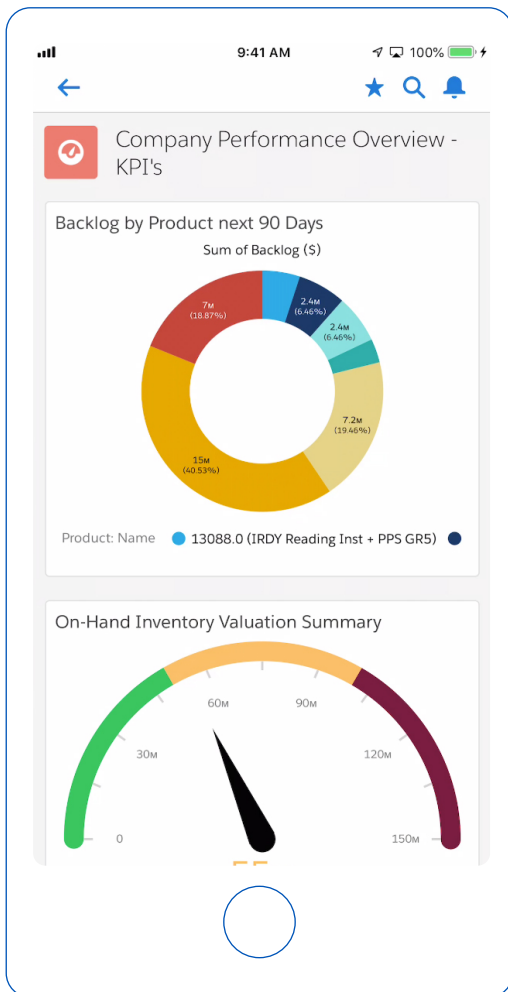
A common platform and data structure for CRM and ERP (and even beyond to support, service, and channels) enables data ubiquity to promote information sharing across departments. No matter what tools a worker has access to, the needed data is always available, seamlessly and instantly. When combined with a common collaboration tool such as Salesforce Chatter, the artificial departmental divides can disappear as workers quickly engage in conversations, get the data they need, and get back to work. Better yet, Chatter conversations across departments are attached to the data object, such as an invoice, so the conversations are always visible and in context.



2 | MOBILE APPS

Everyone wants instant access to the information they need, from anywhere and at any time. Mobile apps keep workers on the job while putting data in their hands. It extends the value of business data to workers who don't have access to a workstation, are away from an office, or need simple access to limited data that requires little to no training.

Rootstock Cloud ERP has long included mobile capabilities, but many companies look to build bespoke apps for their specific needs. It's a minimal investment that can shave time and frustration off a worker's daily routine. With Salesforce as the common platform, creating custom mobile apps has become incredibly easy with Salesforce mobile and Salesforce Lightning Flow. A Salesforce administrator, or even a business user, can build custom mobile applications including wizard-like tasks, for specific granular use cases. Rootstock Cloud ERP customers have developed task-specific mobile capabilities for cycle counting, shop floor processes, and field sales that are unique to their business and physical environment. These tailored mobile apps help companies extend ERP information and processes to anyone in the business, without them having to learn ERP.

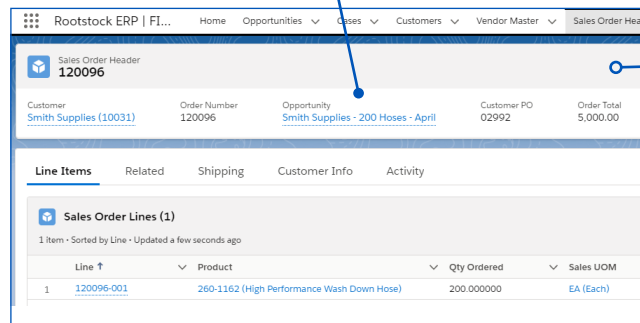
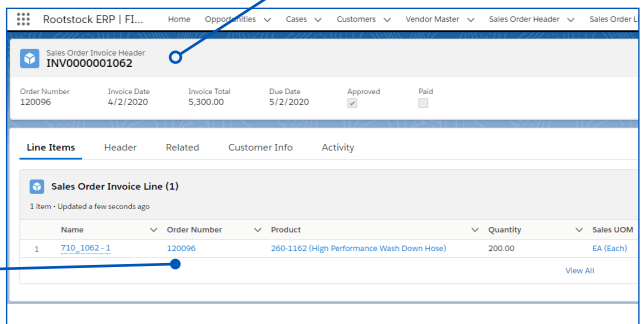
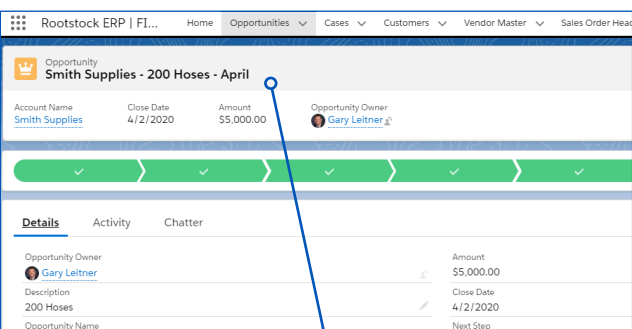
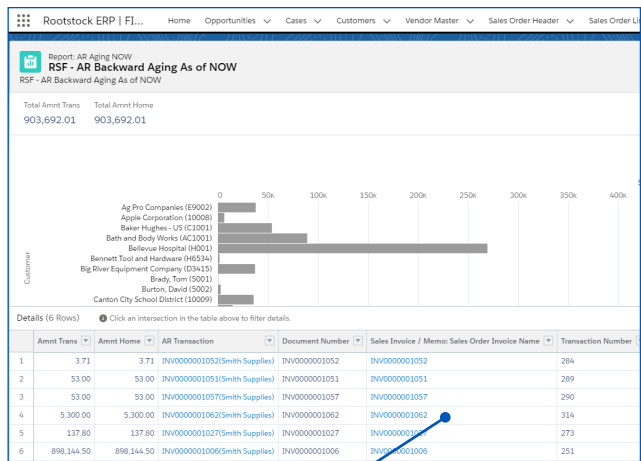
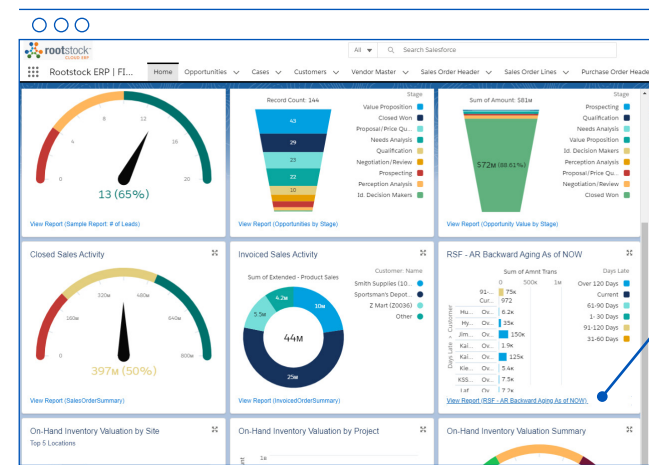


3 | AUTOMATIC DRILLDOWN AUDIT TRAILS

Audit trails are obviously important to certain regulatory, financial reporting, and compliance needs, but they're also critical to troubleshooting processes, locating the source of errors, and finding opportunities to improve. Once your data and decision-making moves into spreadsheets, text messages, and emails, it makes the process impossible to audit. Piecing together the trail after the fact takes time and people away from more important tasks. Creating automatic audit trails removes this tedious process and keeps auditors focused, happy, and efficient.

Putting CRM, ERP, and other solutions on the same platform, and giving workers the communication and collaboration tools to stay on that platform, makes auditing a breeze. As data and transactions flow across those systems, they are automatically tracked. Sales opportunities are connected to their quote in CRM, which is then connected to the sales order, fulfillment, inventory, and work order transactions in ERP. A related shipment is then not only tracked for auditing, it triggers an invoice and adds entries

into accounts receivable and the general ledger. Payments are also tracked, finally giving you a trail that connects the initial sales opportunity to the eventual cash received, and it's all linked together in a continuous audit trail.





4 | BETTER SALES AND OPERATIONS PLANNING (S&OP)

Agility is a challenge for manufacturing organizations. As the economy moves faster, so do customer and competitors. That makes collaborative Sales and Operations planning (S&OP) more critical than ever before, since that relationship is where customer demand turns into an operational plan. Shaving time and eliminating guesswork can increase productivity and efficiency while speeding response times and improving the customer experience.

Sales is the early warning system for the rest of the business. Having visibility into the upward or downward spikes in customer demand helps Operations better respond to what's happening in the market. Keeping both teams on the same platform gives Operations a faster, more accurate insight into what Sales is seeing.

This has been enhanced by the recent addition of Salesforce Manufacturing Cloud. When combined with Rootstock Cloud ERP, Sales is better positioned to manage run rate or long-term pricing agreements and produce more accurate account-based forecasts. This is because Sales is given a 360-degree view of the customer, allowing them to see actuals from ERP and accurately track a customer's progress against agreements and predict future behavior.

Operations then benefits from these more continuous, real-time, and accurate forecasts with a faster response to coming demand spikes or downturns. Keeping everyone on the same platform is the best way to ensure this data is shared and puts Sales and Operations on a more collaborative path to developing better production and supply chain plans. More timely and accurate plans mean less waste, better utilization, lower inventories, and more, combining for a huge bottom-line impact.



Increased Flexibility

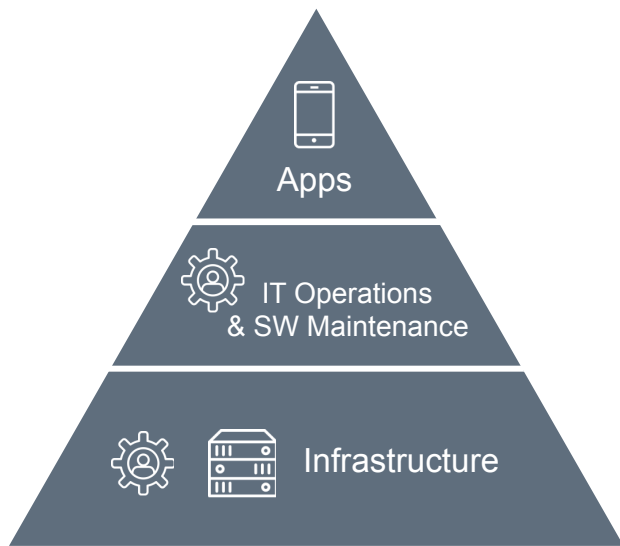
Manufacturing organizations must be more flexible than ever as buyers demand advanced customization, shorter response times, expanded delivery options, and more. Flexibility in your operations is obvious, but flexibility behind the scenes is important as well. How your business responds and adapts to changing customer requests reflects back through your organization and to those customers. An inflexible organization is in constant stress, where frustrations and delays can turn into mistakes and unhappy customers. But organizations with the flexibility to adapt can better service customers.

5 | MANUFACTURING FLEXIBILITY

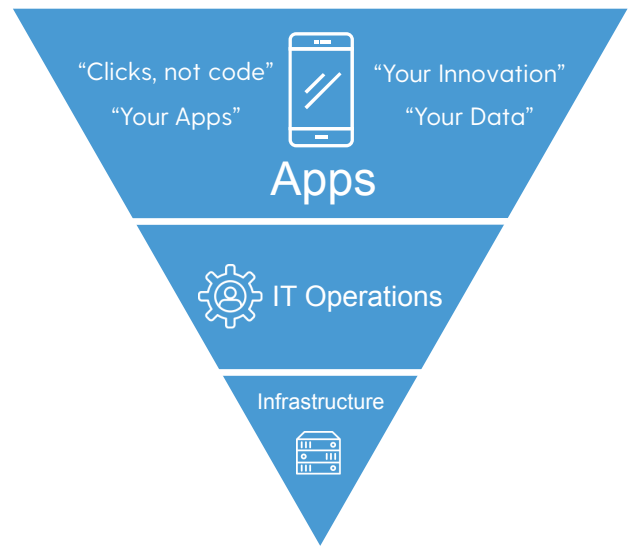
Having the ability to quickly adjust to changing demand and markets is an inherent component of business success. But the day-to-day changes are where your business can outshine the competition and delight customers. Scaling up or down production, accommodating product personalization, and supporting non-standard orders are just a few ways customers challenge your manufacturing agility. Internally, you may also need to adjust as your business changes direction. Inflexibility can strain every department from engineering to scheduling to quality control to shipping.

Rootstock Cloud ERP supports a deep set of manufacturing functionality that can handle multiple manufacturing modes simultaneously, from make-to-stock to personalized and hybrid manufacturing. Some manufacturers run just a single mode, so ERP brings deeper visibility and control to optimize productivity and increase efficiency. But many companies also combine manufacturing modes for greater flexibility. This requires agility in how you configure, estimate, price, and quote those orders, but also in how your shop floor scheduling is created and how the supply chain is managed. Again, Rootstock Cloud ERP brings visibility and control into all those processes, particularly because it maintains continuity between CRM and ERP during all these changes. Flexibility is a much easier trait to instill when ERP and CRM are on one platform.





Legacy Platforms



Rootstock & Salesforce

6 | APPLICATION FLEXIBILITY

Every business is different, and you want your business applications to fit your business. Rigid, expensive-to-configure applications are relics of the past. Everyone expects customized, personalized approaches to software where the interface is suited to the role and the underlying workflow is suited to the task at hand. But creating those configurations shouldn't require a team of consultants and months of time to implement.

Rootstock Cloud ERP uses the clicks-not-code configuration approach of the Salesforce platform. Even business users can change the configuration and processes themselves instead of relying on IT or outside experts. It also allows seemingly complex changes and configurations to be performed easily by your Salesforce administrator, with only occasional requests to consultants for more technical adjustments.

It should be noted that most ERP systems are not known for this type of flexibility, which is a capability taken for granted by the Salesforce CRM community. With Rootstock Cloud ERP, companies can leverage the same clicks-not-code approach in a powerful ERP solution, while leveraging all the Salesforce system administration and platform skills they have in place today.



Better Customer Experience

Every industry is taking a more customer-centric approach, and manufacturing is no different. Buyers are looking to vendors who can meet their demands, deliver beyond expectations, and respond to changing requirements. Price is still important, of course, but putting the customer first is, well, first. That means customer-facing workers need to understand customer needs and be able to quickly answer their questions. But to do so requires a holistic platform on which every process can connect back to the customer.

7 | UNIFIED CRM AND ERP

Building your business on a common technology platform eases the sharing of data and seamless processes across the company. Since Sales is already using Salesforce CRM, and Rootstock Cloud ERP uses that same foundation for production and operations, it's a no-brainer to extend that first customer touch of sales quotes, orders, contracts, and more back to production. Customers get what they want, when they want it, and requests don't fall through the cracks of your processes.

Of all your processes, the Opportunity to Cash path might see the biggest improvement with CRM and ERP on one platform. The data flows effortlessly across departments and can drive large productivity gains and customer experience improvements. Sales has access to inventory availability to set accurate promise dates, Operations can fit orders into production schedules to meet those dates, and Fulfillment knows well ahead of time what the customer expects. Invoices are created accurately and go out the door quickly. Everyone can work smarter, more efficiently, and with fewer errors, and cash can be collected faster. Disjointed processes, islands of information, and peripheral spreadsheets are gone.

8 | A SINGLE DATA MODEL ACROSS CRM AND ERP

Like the preceding item, moving to Rootstock Cloud ERP on the Salesforce platform brings a single data model. There are no integrations; the data is fundamentally in the same application. Workers can instantly access the information they need about sales, profitability, inventory levels, and more.

But beyond the day-to-day use of that data to deliver a better customer experience, it also helps to provide a better basis for advanced analytics across the entire enterprise. A single data model eliminates time delays or the waterfall effect caused by information crossing from CRM to ERP, and becomes a real-time river of information. It also eliminates the painful master data management and data warehouse ETL processes most companies must endure to get consolidated data for eventual analysis. Companies with ERP and CRM on one platform can enjoy a real time view of all their key performance indicators through one simple dashboard view.





9 | 360° VIEW OF THE CUSTOMER

We've found the number one reason companies implement Rootstock Cloud ERP built on the Salesforce platform is to finally gain that elusive 360-degree view of their customers. As more manufactures compete on service, not just price, they need better, complete, and real-time access to customer information.

Having a full view of the customer helps anyone in any department service the customer across all aspects of marketing, sales, service, operations, and finance. There is no need to bounce the customer around from one department to another, less chance of giving them the wrong information, and more ability for everyone to serve the customer well because the information is all in one place. Of course, this also produces better analytics about the customer by combining data on sales, returns, profitability, and service history to anticipate future buying patterns or determine the profile of your ideal customer.

This capability is sometimes referred to as combined systems of engagement (CRM) and system of record (ERP) with the main beneficiary being your customer.

10 | ELEVATE YOUR SALES GAME

OK, we've used this reason above, but here it's applied to the customer experience delivered by Sales. Customers increasingly don't want to deal with the stereotypical back slapping salesperson, they want to deal with a knowledgeable partner. A combined view of ERP and CRM data enables the salesperson to proactively manage each account and elevate the customer's perception of your salespeople.

With ERP and CRM on one platform, Sales not only has a better view into what they can promise, they have a constant view into how it's then tracking as it moves from order through production and to the customer's warehouse. They can walk into every customer meeting armed with information about outstanding orders, delivery status, returns, credits, support cases, and outstanding invoices. They'll know who your customer has been talking with at your company and they won't be surprised by any issues. Ultimately, it turns your salespeople into a one-stop resource for customers.



Easier for IT

Don't worry, we didn't forget about IT. ERP can transform your entire business, so as the solution's value increases, its footprint will expand. That's great for your business for all of the reasons listed above, and for the single data model that gives more teams more access to more accurate data. IT has the purview to ensure more teams get on board, but also to ensure your data remains secure, your systems remain compliant, and maintenance is easy. In all these areas and more, Rootstock Cloud ERP delivers for IT, too.

11 | ENTERPRISE-WIDE UX, TOOLS, AND SERVICES

A single, enterprise-wide platform helps IT ease training and adoption, which improves business speed, productivity, and intelligence. Having a single solution means IT and workers will be trained on one user interface. For IT, they can then be more responsive when teams ask for changes, request new dashboards or reports, or need to add fields or screens to capture new data or manage new tasks.

As a native Salesforce Platform application, Rootstock Cloud ERP also inherits all the platform tools such as Chatter, Flow, Communities, Dashboards, Reports, and Einstein Analytics and AI. In deploying Salesforce, IT is really deploying dozens of useful applications at once, so IT and workers only learn and work in one application environment. Skills learned in creating sales reports can be used in generating operations reports. Data, dashboards, messages, reports, and more can be shared across departments. The data divide and user experience divide are eliminated, replaced with more productive workers, better collaboration, and higher adoption rates.

12 | SINGLE SYSTEM TO ADMINISTER

The promise of “the cloud” brings IT more efficiency, lower costs, and a streamlined administration, among other benefits. But even a reduced effort is still effort if it's multiplied across several cloud platforms. Obviously, consolidating on a single platform makes the job of IT much easier.

Furthermore, most mid-sized companies have very limited IT staff. Since Sales is already using Salesforce CRM, IT already has the skills needed to administer Rootstock Cloud ERP users, security profiles, and permissions. IT can also leverage their skills across Flow, Data Loader, API's, and Einstein to easily scale existing resources. There is no need to learn another stack of technology when using Rootstock Cloud ERP.



13 | ONE MAINTENANCE WINDOW

Maintenance can impact an entire organization if mismanaged. Multiple platforms compound the challenge with increased downtimes and the potential for data disruptions that can bring your business to a screeching halt.

Companies using multiple application clouds, or a mix of cloud and on-premises systems, can experience conflicting or uncoordinated system maintenance windows. This means one system might go offline and result in broken integration links. IT must then troubleshoot to uncover and fix such issues. When CRM and ERP are on one cloud platform, they share the same maintenance window, making the business impact, downtime, and user access expectations easier to manage.

14 | SOC & SECURITY CONTROLS

Compliance and control are increasingly important to IT organizations, and auditing is a critical part of that effort. Creating reports and managing audits can take IT away from more strategic projects. A common platform with built-in audit trails and controls makes compliance easier on everyone.

The screenshot displays the Salesforce Trust & Compliance dashboard. At the top, it says "Trust | Compliance" with a "Login" button. Below this is a banner with the text "Compliance engineered for the Cloud" and a sub-headline "Salesforce maintains a comprehensive catalog of compliance certifications and attestations to validate our commitment to trust." The main content area is titled "Certifications, Standards and Regulations" and features a grid of 16 certification cards. Each card includes a logo, a title, and a brief description of the certification. The certifications shown are: ASIP Santé HDS, ASIP/SaaS, CS (ISAE 3000), CS Gold Mark, Disaster Recovery & BCP, DoD IL2, DoD IL4, External Security Assessments, FedRAMP, Financial Services Compliance, GDPR, HIPAA, HITRUST CSF Certified, IRAP, ISO 27001, and ISO 27017.

Systems and Organization Controls (SOC) are far easier to manage and assess when a single cloud platform is underlying all your critical master data, processes, and client information. Using a common workflow engine that self-documents processes and changes across ERP and CRM makes it easier to enforce enterprise-wide controls and adequately document change management procedures. With a single system to administer user access and data permissions, IT departments can more easily stay in compliance with their internal policies, security controls, and industry regulations.



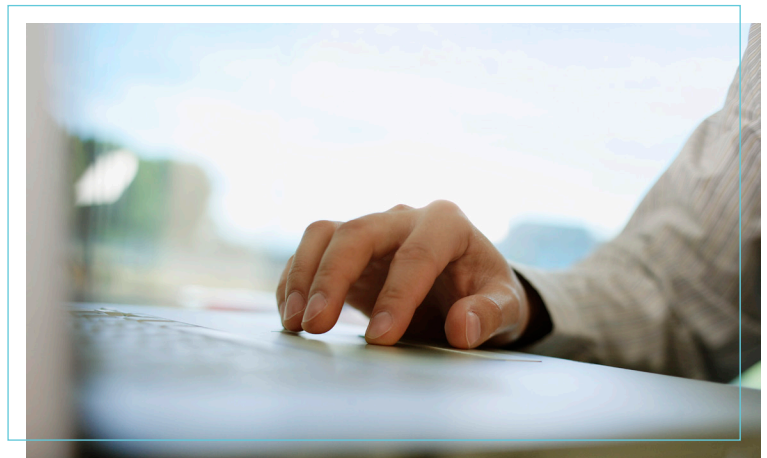
A Better Overall Value

Business is about making money. Every dollar that's invested should return many more back to the business. It's not different when evaluating ERP. The 14 preceding reasons, even if you only realize a few, amount to an incredible return on investment that stretches across your entire business. Need a number? [Matouk, a high-end textile manufacturer](#), achieved an annual ROI of 223% by implementing Salesforce CRM and Rootstock Cloud ERP. Which brings us to Reason #15.

15 | RETURN ON INVESTMENT

Rootstock Cloud ERP delivers a better ROI. All the reasons above add up to a system that costs less to run and manage while adding more value to support the constantly changing needs of your business. It's better for your workers, who can focus on working instead of searching for answers or fighting with cumbersome applications. It's better for Sales and Operations, as well as Service, Support, Supply Chain, Finance, and more. It's better for IT because there's less effort required.

Most of all, Rootstock Cloud ERP is better for your customers because they'll get more of what they want, faster and with more accuracy.






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Rootstock Software® is a worldwide provider of cloud ERP on the Salesforce Cloud Platform. When combined with Salesforce CRM, Rootstock Cloud ERP offers manufacturing, distribution, and supply chain organizations a single platform to grow and manage their businesses.

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