
GoldFinch ERP

For Manufacturing

WHITE PAPER

From Quote to Production: Solving the Configure-to-Order Disconnect

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*10 Challenges Mid-Market Manufacturers Face When Sales, Engineering, Production,
Inventory, and Accounting Don't Share the Same System*

For Operations Leaders, VPs of Manufacturing, and CFOs Running or
Evaluating a Configure-to-Order Production Model

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Contents

The Promise — and the Complexity Behind It.....	3
What Configure-to-Order Actually Requires	4
Executive Summary: A Connected Configure-to-Order Process	4
10 Configure-to-Order Challenges.....	6
1. Quoting a Product Before Knowing Whether It Can Be Built	6
2. Pricing Does Not Keep Up with Configuration Complexity	6
3. The Approved Configuration Changes During Handoffs	6
4. Engineering Has to Rebuild What Sales Already Configured.....	7
5. Planning Begins Only After the Customer Places the Order	7
6. Planning One Order at a Time Creates Shortages and Excess.....	8
7. Special-Order Components Lose Their Connection to the Customer Order	8
8. Production Does Not Have a Complete Build Definition	9
9. Quoted Margin Does Not Match Actual Job Profitability	9
10. Service Does Not Know What the Customer Actually Bought	10
The Bigger Issue: One Configuration, Multiple Systems	10
Why the Salesforce Platform Matters	10
Evaluating Salesforce-Native Options.....	10
From Bottleneck to Competitive Advantage	12

The Promise — and the Complexity Behind It

Every configure-to-order manufacturer makes an important promise to its customers:

Build it the way I need it — and deliver it when you said you would.

That promise creates tremendous value. It allows manufacturers to serve specialized customer requirements, differentiate themselves from standardized-product competitors, and often command premium pricing.

But as the number of products, options, customers, and orders grows, keeping that promise becomes increasingly difficult.

The problem usually isn't one department.

It's the handoffs between departments.

Sales may configure and quote a product without knowing exactly what engineering can build. Engineering may need to create or modify a bill of materials after the order has already been accepted. Purchasing may not learn about a long-lead component until production needs it. Production may receive a work order that doesn't match what the customer originally requested.

Meanwhile, finance may not know whether the job was actually profitable until long after it shipped.

The result can be:

- Longer quote cycles
- Engineering rework
- Material shortages
- Excess inventory
- Production delays
- Expedited purchasing and freight
- Missed delivery dates
- Margin surprises

For many mid-market manufacturers, the underlying issue isn't a lack of effort or expertise. It's that sales, engineering, purchasing, inventory, production, and accounting are operating from different systems—or different versions of the truth.

The central challenge is preserving the customer's approved configuration as it moves from quote through engineering, planning, purchasing, production, inventory, and accounting.

GoldFinch ERP is designed to connect these processes on the Salesforce Platform, reducing the need to recreate, reconcile, or re-enter the same information as an order moves through the business.

This white paper examines ten common configure-to-order challenges and what a more connected process can look like.

What Configure-to-Order Actually Requires

Configure-to-order sounds simple:



In practice, every step depends on information created in the previous step.

A salesperson selects the customer's required options and creates a quote. Those selections must resolve into a valid configuration that production can actually build—including the appropriate bill of materials and routing. Materials must be available or purchased in time. Production must have the information required to execute the work order. Inventory must be consumed correctly. The finished product must be delivered according to the configuration and date promised to the customer.

And finance needs to understand what the order actually costs and whether it was profitable.

When those processes operate independently, employees become the integration layer—moving information through spreadsheets, emails, manual entry, and tribal knowledge.

A connected configure-to-order system should instead allow the configuration to become the thread connecting the entire process.

Executive Summary: A Connected Configure-to-Order Process

Configure-to-order manufacturing works best when the product configuration created during the sales process becomes the foundation for everything that follows.

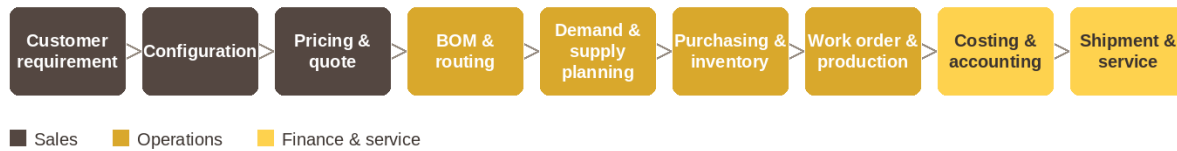
In GoldFinch, the configuration is more than information attached to a quote. The customer's selections can drive pricing, the Bill of Materials, routing, material requirements, and the Work Order, allowing the same product definition to move from Sales into Planning and Production without being recreated at each step.

That connection also allows the business to begin planning earlier. Demand from qualified Salesforce Opportunities can provide visibility into future material requirements, while confirmed orders and Work Orders drive actual supply and production needs. Purchasing, inventory, and manufacturing remain connected to those requirements as the order moves toward completion.

Once production begins, actual material usage and manufacturing costs remain tied to the order, providing Accounting and management with visibility into actual job profitability. After shipment, the customer, configuration, equipment, and service history can remain connected, giving Service visibility into what was actually sold and built.

The result is one connected process:

A Connected Configure-to-Order Process



The goal isn't to remove the complexity that comes with configure-to-order manufacturing. It's to stop requiring employees to manage that complexity manually as information moves from one department to the next.

Example: One Configured Order, End to End

A customer requests a product with nonstandard dimensions, selected options, and one long-lead component.

The approved configuration drives the quote, the required BOM and routing, and the related Work Order. Supply Planning identifies the long-lead material requirement early, while Purchasing and Production can trace the component and build activity back to the customer order.

Instead of asking, *"What did Sales promise, and can we still build it?"* the team can ask:

"What does this approved configuration require, and what must we do to deliver it on time and at the expected margin?"

10 Configure-to-Order Challenges

1. Quoting a Product Before Knowing Whether It Can Be Built

The challenge

Sales needs to respond quickly, but a quote can become a promise before anyone has confirmed that the selected options can be built within the proposed cost and delivery date.

A product may appear valid from a sales perspective while Engineering later finds that the combination requires different components, a different routing, or an exception to the normal production process.

What good looks like

Before a quote is approved, the selected configuration should be checked against the product rules, required components, routing, and relevant constraints.

The GoldFinch approach

GoldFinch connects configuration rules to the manufacturing requirements behind the quote. Teams can identify invalid combinations or nonstandard production paths before committing to price or delivery.

2. Pricing Does Not Keep Up with Configuration Complexity

The challenge

As products become more configurable, pricing becomes harder to manage consistently. Materials, dimensions, options, features, and customer-specific requirements may all affect the final selling price.

When pricing rules are maintained in spreadsheets or individual knowledge, Sales can miss charges, apply inconsistent pricing, and spend too much time rebuilding calculations.

What good looks like

Pricing should respond to the selected configuration, with clear rules for discounts, exceptions, and approvals.

The GoldFinch approach

GoldFinch connects product configuration, quoting, and pricing so the selections that define the product can also inform the price. This gives Sales a more consistent starting point for quoting and expected-margin review.

3. The Approved Configuration Changes During Handoffs

The challenge

The product the customer approved should be the product Manufacturing builds. But when quote, order, and production records are disconnected, options, quantities, and special requirements may be re-entered, omitted, or changed as the order moves through the business.

What good looks like

The approved configuration should carry from Sales Quote to Sales Order and Work Order, with changes controlled and visible.

The GoldFinch approach

GoldFinch keeps the configuration connected as the order progresses. Rather than routinely re-entering configuration details at each stage, teams can carry the approved product definition into execution and manage changes deliberately.

4. Engineering Has to Rebuild What Sales Already Configured**The challenge**

Even when Sales captures the customer's requirements correctly, Engineering may still need to translate those selections into the Bill of Materials and routing required to build the product.

This means the product is configured twice: once to define what the customer wants, and again to determine how it will be manufactured.

What good looks like

Standard configuration rules should resolve to the appropriate "Bills of Materials (BOM)" and routing, while Engineering focuses on true exceptions, custom requirements, and approvals.

The GoldFinch approach

GoldFinch links configuration selections to BOM and routing rules. This allows standard configurations to generate the appropriate manufacturing definition, while giving Engineering a controlled process for nonstandard requests.

5. Planning Begins Only After the Customer Places the Order**The challenge**

For manufacturers with long-lead components or multi-level BOMs, waiting for a confirmed Sales Order before planning material requirements may already be too late.

A configured product may take two weeks to build but require a component with an eight-week purchase lead time. If that requirement is not visible until the order is confirmed, the promised delivery date may already be at risk.

What good looks like

Planners should be able to consider credible future demand, while clearly distinguishing pipeline opportunities from confirmed orders.

The GoldFinch approach

GoldFinch Supply Planning can consider multi-level BOM requirements and demand signals from Salesforce Opportunities at defined sales stages, alongside confirmed Sales Orders and Work Orders.

This gives planners earlier visibility into potential material requirements without treating every opportunity as firm demand.

6. Planning One Order at a Time Creates Shortages and Excess

The challenge

A planner can solve each customer order individually and still have the wrong inventory overall. Components are often shared across configured products and multiple open orders.

Looking only at individual Work Orders can lead to over-purchasing one component while another quietly approaches a shortage.

What good looks like

Planning should evaluate demand, on-hand inventory, incoming supply, and manufacturing requirements across the relevant items and warehouses—not one order at a time.

The GoldFinch approach

GoldFinch Supply Planning evaluates requirements across the item catalog. It can consider demand alongside existing inventory, incoming supply, and manufacturing needs, giving planners a stronger basis for purchasing and production decisions across multiple configured products and orders.

A NOTE FOR FINANCE LEADERS: WHERE THIS SHOWS UP ON THE BALANCE SHEET

Every challenge in this paper eventually becomes a financial one.

Disconnected planning doesn't just create shortages and excess inventory on the shop floor — it ties up working capital in materials the business doesn't need yet, while simultaneously risking rush freight and premium purchasing on materials it needed weeks ago.

Rework, re-quoting, and reconciliation aren't visible as their own line items either. They show up as labor hours that don't map to a specific job, margin that erodes between quote and delivery, and profitability that isn't clear until well after the invoice is sent.

None of this requires a new problem to solve. It's the same connected-process problem — viewed from the CFO's seat instead of the shop floor.

7. Special-Order Components Lose Their Connection to the Customer Order

The challenge

Configured products often require components that are purchased specifically for one customer order. Once those materials are received into inventory, their original purpose can become unclear.

The component may be used elsewhere while the order it was purchased for remains short.

What good looks like

Special-order material should retain a clear relationship to the manufacturing requirement or Work Order that created the purchase.

The GoldFinch approach

GoldFinch supports special-order purchasing linked to the manufacturing Work Order requiring the material. Teams can trace why material was purchased from the original requirement through receipt and eventual production consumption.

8. Production Does Not Have a Complete Build Definition**The challenge**

A BOM identifies the parts required, but Production may also need the selected options, routing, quantities, specifications, drawings, and special instructions that define the approved product.

When that information is scattered across quotes, emails, notes, and spreadsheets, the shop floor must reconstruct what it is expected to build.

What good looks like

The Work Order should provide Production with a complete, usable build definition tied to the approved customer configuration.

The GoldFinch approach

GoldFinch brings the configuration, BOM, routing, and related order information into the Work Order process. Production can work from a connected record rather than reconciling multiple documents.

9. Quoted Margin Does Not Match Actual Job Profitability**The challenge**

Two units of the same product family may have different configurations, material requirements, labor needs, rework, and expedite costs. Product-level average margins can hide whether a particular order, configuration, or customer was profitable.

What good looks like

Management should be able to compare the commercial expectations established at quote with the actual purchasing, inventory, production, and accounting activity associated with the order.

The GoldFinch approach

GoldFinch connects Sales Orders, Work Orders, inventory costing, and accounting information. This provides a foundation for analyzing actual job cost and margin as relevant transactions are recorded, rather than relying only on a retrospective reconstruction after shipment.

10. Service Does Not Know What the Customer Actually Bought

The challenge

For manufacturers that install or service equipment, the configure-to-order challenge continues after shipment. Years later, a technician may need to know exactly what was built for a customer—not just a generic item number.

That may include the configuration, components, order history, equipment or serial information, warranty details, and prior service activity.

What good looks like

Service teams should be able to access the relevant history of what was sold and built without relying on disconnected systems or the memory of the people involved in the original order.

The GoldFinch approach

GoldFinch can integrate manufacturing and order information with Salesforce Field Service, extending the connected operational record from the original configuration through ongoing customer service.

The Bigger Issue: One Configuration, Multiple Systems

The ten challenges in this paper are symptoms of one underlying issue: the information required to configure, sell, plan, build, and account for a product does not stay connected throughout its lifecycle.

For configure-to-order manufacturers, the objective is not simply to automate individual departments. It is to preserve one customer requirement and one approved configuration from the initial quote through production and financial reporting.

Why the Salesforce Platform Matters

For many manufacturers, CRM and ERP operate as separate systems connected through integrations. As an opportunity becomes a quote, Sales Order, Work Order, inventory transaction, and financial record, information must be synchronized between databases and reconciled when it does not match.

GoldFinch ERP runs natively on the Salesforce Platform, allowing customer, sales, and operational information to remain on the same platform.

For configure-to-order manufacturers, this can reduce the need to synchronize and re-create configuration information as an order moves from opportunity through quoting, planning, production, inventory, and accounting.

The benefit is not simply ERP on Salesforce. It is stronger continuity between what the customer requested, what the business committed to build, and the operational and financial activity that follows.

Evaluating Salesforce-Native Options

Manufacturers evaluating Salesforce-native solutions should begin with their operating model—not a feature checklist alone.

For a configure-to-order manufacturer, the key question is whether the platform can preserve the customer's configuration from the initial quote through planning, production, inventory, accounting, and service.

Evaluation area	Questions to Ask	Why it matters
Configure-to-order process	Can the selected configuration drive or inform pricing, BOMs, routing, approvals, and Work Orders?	Prevents Sales, Engineering, and Production from recreating the product definition at each handoff.
Manufacturing and planning	Can the system support multi-level BOMs, lead times, material requirements, inventory, purchasing, and production planning?	Helps the business identify shortages and supply requirements early enough to meet delivery commitments.
Accounting and profitability	How are inventory, purchasing, production costs, job profitability, and financial reporting connected?	CFOs need to compare expected margin with actual order and job results.
Salesforce architecture	Which information lives natively on Salesforce, and where are integrations or separate applications required?	Determines how much synchronization, reconciliation, and data governance the business must manage.
Implementation fit	What changes to product data, configuration rules, processes, and employee responsibilities are required?	A capable platform still needs a realistic implementation approach and internal ownership.
Total cost of ownership	What are the licensing, implementation, integration, support, and ongoing administration costs?	The lowest initial subscription cost may not produce the lowest long-term operating cost.

How GoldFinch Fits

GoldFinch is designed for mid-market manufacturers that want manufacturing, inventory, supply planning, order management, and accounting to operate on the Salesforce Platform as one connected ERP process.

It may be a strong fit when the business wants to reduce the number of separate applications and preserve configured order information from sales through production and accounting.

"I was personally impressed with the capabilities of the software to perform MRP and production planning functions in addition to standard ERP. This was a limitation of many software packages we evaluated."

Frank Bertucci
System Manager, Sedia Systems

How to Evaluate Other Salesforce-Native Options

Other Salesforce-native products may be appropriate depending on the organization's needs.

For example, a manufacturer with highly complex or specialized manufacturing requirements may prioritize the depth of its manufacturing platform. An organization whose primary need is Salesforce-native accounting may prioritize a financial-management solution and determine separately how manufacturing, inventory, and planning will be handled.

The right choice depends on your manufacturing model, accounting requirements, process complexity, implementation capacity, integration strategy, and total cost of ownership.

From Bottleneck to Competitive Advantage

Configure-to-order manufacturing will always involve complexity.

The goal isn't to eliminate that complexity.

The goal is to stop making employees manage it manually.

When quoting, engineering, purchasing, production, inventory, and finance operate from different versions of the truth, employees spend their time reconciling those differences.

The consequences eventually reach the customer through a delayed quote, a missed ship date, an incorrect configuration, or a higher price.

When those processes are connected, the same complexity can become a competitive advantage.

Sales can respond faster.

Engineering can spend less time reconstructing what was sold.

Planners can see requirements earlier.

Purchasing can understand why material is needed.

Production can build from the configuration the customer approved.

Finance can better understand the economics of the order.

And management can see the business as one connected process rather than a collection of departmental systems.

That's ultimately what configure-to-order ERP should accomplish.

One customer requirement. One configuration. One connected process—from quote through production and accounting.

GoldFinch CLOUD SOLUTIONS**Ready to Evaluate Your Configure-to-Order Process?**

You don't need to replace everything at once.

Start by identifying where information currently breaks down between sales, engineering, purchasing, production, inventory, and accounting. Then determine whether those gaps are primarily process problems—or system problems.

GoldFinch Cloud Solutions can walk through your existing configure-to-order workflow with your team and show how the same process could operate on GoldFinch ERP.

Bring your actual workflow. We'll start there.

[Request a Personalized Demo → goldfinchcloudsolutions.com/request-a-demo](https://goldfinchcloudsolutions.com/request-a-demo)

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