

Expandable ERP Integration for SalesforceCRM



Abstract

Expandable ERP Integration for SalesforceCRM drives a much needed mid-market ERP solution to the front office sales force automation providing a corporation's sales force with critical customer information all on the same CRM business application.

Description

Most successful sales force automation implementations require up to date and complete information on customers served by a business' back office systems. Not only is the information important but also the timely delivery of that information to account managers and sales services allowing the users to quickly address customer needs. Expandable ERP Integration brings critical back-office customer information to Salesforce CRM such that the data is directly at the finger tips of the sales team. Using the Salesforce.com platform's standard objects and custom objects all the power of the Salesforce CRM sales tools are available to report, view and bring together a complete view of customer's business activity. Sales Orders, Invoices, Activity, Buying History and Customer (bi-directional) synchronization, Products and Price Book synchronization of ERP data are brought in to the Salesforce CRM.

Highlights

Name	Description	Type
Customer Package	1. Expandable Customer Master to Salesforce Account Master, Customer Activity, & Sales History included in package	■ □
Account Insertion	4. Salesforce Account insertion to Expandable Customer Master with flexible ERP ID formats	■
Sales Order & Invoice Package	2. Expandable Sales Order Master/Detail and Invoice Master/Detail made available through custom objects linked to end-customer accounts	■ □
Serial Parts Package	3. Expandable Serial Parts shipped to customers are recorded in the Salesforce Asset object providing a view of serial products the end-customer purchased and linkage to service cases.	⚡
Products & Price Books	5. Expandable CRM Parts and Price Lists to Salesforce Products and Price Books	⚡
Opportunity to Sales Order	6. Salesforce Opportunity w/Products converted, validated and inserted into the Expandable ERP for order fulfillment complete with opportunity handling options Close-Win, No Action etc.	⚡

Name	Description	Type
Pervasive DI Universal Edition	Salesforce.com Certified Integration engine providing the ETL (Extract, Transform and Load) functionality for the integration and scheduling data synchronization	Client App X

■ = Custom Object, □ = Custom Tab, ● = Custom Link, ◆ = Custom S-Control

⌘ = Plug-In, X = Composite Component, ⚡ = Standard Object

Features & Benefits

- Integration Leverages Salesforce** Standard and Custom Objects on the force.com platform allow common reporting, standard look and feel user interface and security tools in management and use of the integration data.
- Increase Customer Satisfaction** with 360 View of Customers sales staff has direct access to customer related information insuring quick resolution to customer inquiries and issues.
- Data Consistency, Accuracy and Up-To-Date** a Data Integration engine allows for scheduled ETL in maintaining consistent, accurate, order insertion and timely Back-Office Customer Information coordinated with the front office SalesforceCRM
- Flexible Feature Packaging** take all Expandable ERP Integration for Salesforce to maximize a 360 degree view of your customer or select only the features need to run the business; Expandable Integration is packaged and priced to fit any business model.

Requirements

External Products	Expandable Integration for Salesforce CRM version 9.0.0+ Pervasive Data Integrator version 9.2.0.24
Salesforce.com Edition	Professional*, Enterprise or Unlimited

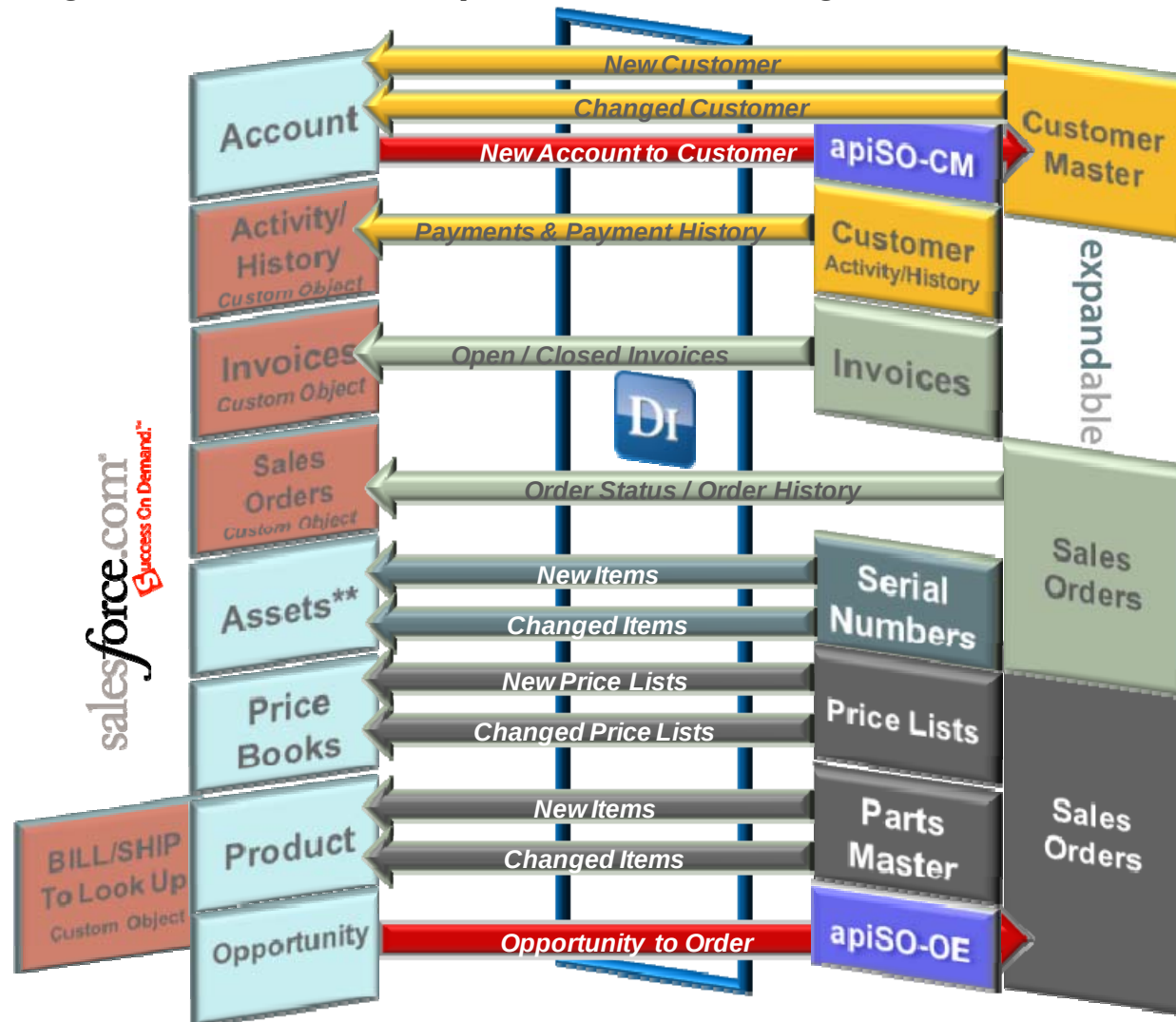
Specifications

Publisher	Expandable Software, Inc.
Type	Client Application w/SF Custom Objects
Salesforce.com Certification	Certified
Pricing	Expandable User Dependant Planning Range: \$10,000 to \$30,000 Contact Expandable 1-800-680-6050 OR sales@expandable.com for Details www.expandable.com

* Salesforce APIs must be in place for integration contact salesforce.com

Integration Block Diagram

Block Diagram of Available Expandable ERP Integration for Salesforce CRM²



² Expandable Software continues to add integration functionality, contact Expandable for current functionality and Salesforce Integration product roadmap.