Navint Revenue Cloud Connect

Uniting the front and back office for lead-to-revenue success

Salesforce and ERP are the backbone of any organization's technology stack. However, as the scope of finance capabilities grows within Salesforce, so too does the complexity of connecting these systems.

The first step towards Sales and Finance unification is determining where the hand-off will occur between Salesforce and ERP. This undertaking has become simpler with the introduction of Navint Revenue Cloud Connect—a proprietary approach that allows organizations to connect Salesforce Revenue Cloud to ERP at four distinct points within the lead-to-revenue lifecycle.

Four handoff options in the Lead-to-Revenue lifecycle

Option 1: Lead to Order –
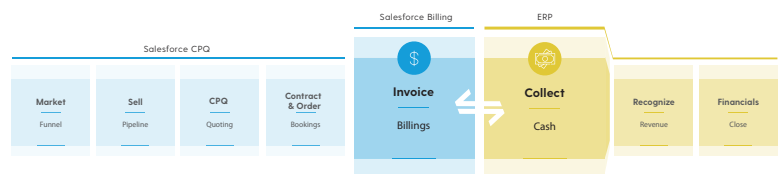Salesforce order to ERP order

Salesforce CPQ owns quoting, pricing and order generation. The activated order is handed off to ERP for processing, invoicing and payments.
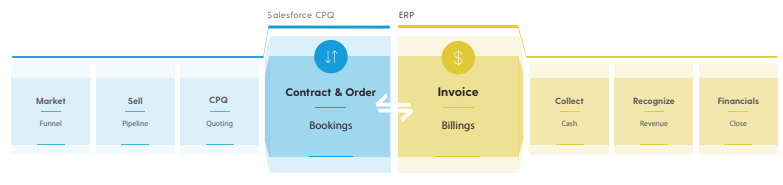
Option 2: Lead to Invoice –
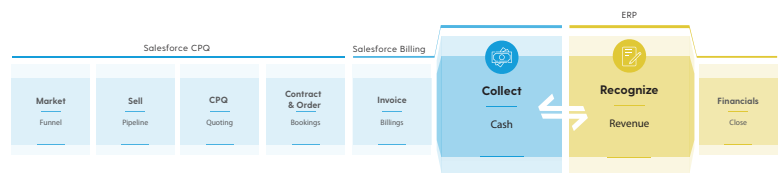Salesforce Invoice to ERP Invoice

Salesforce CPQ owns quoting, pricing and order generation. Salesforce Billing uses data from the order to calculate invoices. Invoice detail is handed off to ERP for AR management.

Option 3: Lead to Payment –
Salesforce Payment to ERP Payment

Salesforce CPQ owns quoting, pricing and order generation. Salesforce Billing uses data from the order to create invoices. Salesforce owns AR and sends invoice and payment details to ERP.

Option 4: Lead to Ledger –
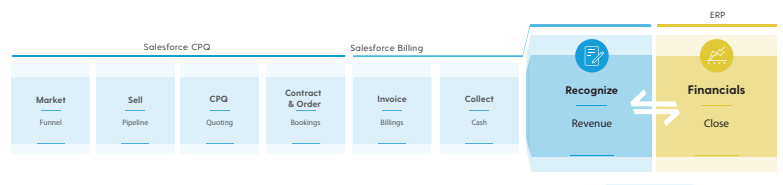Salesforce Journal to ERP Journal

Salesforce CPQ owns quoting, pricing and order generation. Salesforce Billing uses data from the order to calculate invoices. Salesforce owns AR and sends journal entries to ERP.

Which handoff is right for my business?

Navint works with organizations to determine the optimal handoff point based on each client's unique needs, existing systems and capabilities.

01 **Lead to Order**
Salesforce Order to ERP Order

· Companies w/ complex quoting but no change orders
· Companies that rely on SF CPQ but do not use SF Billing
· Companies that sell physical goods or perpetual models
· Companies w/ little billing pain in the back office or ERP

02 **Lead to Invoice**
Salesforce Invoice to ERP Invoice

· Companies w/ complex quoting & change orders
· Companies needing to streamline contract amendments
· AR is working well in ERP
· No plan to change ERP in the foreseeable future

03 **Lead to Payment**
Salesforce Payment to ERP Payment

· Companies w/ complex quoting & change orders
· Companies w/ payment challenges, often due to bulk recurring credit card transactions
· Companies that require detail-level reporting in ERP

04 **Lead to Ledger**
Salesforce Journal to ERP Journal

· Companies w/ complex quoting & change orders
· Companies w/o a robust ERP, are uncertain about the direction of their ERP, or are considering an ERP transition

Navint Services

· Salesforce Advisory and Implementation
· ERP vendor evaluation and selection
· Enterprise architecture design & integration
· Business process re-engineering
· Vendor coordination & management
· ERP & Financials integration
· Change management

Partners & Platforms

salesforce · Microsoft Dynamics GP · SAP

ORACLE · ORACLE NetSuite

sage Intacct · workday.
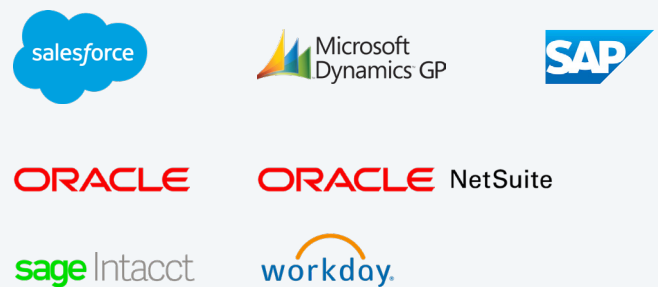
Learn More

To learn more about how to connect your sales and finance operations, please download our article Finance at the Forefront: Recognizing the crucial role of finance operations in optimizing a recurring revenue model or contact us at info@navint.com.

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