

Rootstock for Distribution & Supply Chain

Connecting your customers to sales, production,
distribution and service



Rootstock Software® is a proven provider of powerful distribution and supply chain solutions built on the Force.com® cloud computing platform.

- ✓ 100% Native Force.com App
- ✓ Real-time management of manufacturing and supply chain operations
- ✓ Complete solution for shorter implementation times, lower costs and a significant return on investment

Learn more at www.rootstock.com



CPQ (Configure-Price-Quote)

The Rootstock Configurator provides accurate and immediate estimates for various product designs and customer needs. It is fully customizable, making it easy to tailor the configuration process around specific business requirements. The Configurator guides the user through the process via user-defined, modular Selection Groups. Each selection can spawn sub-selections, and the user can eliminate certain options and require others based on prior selections. At the end of the process, the user can direct the resulting Configuration Set to many destinations, the most common being a Sales Order or Quote Line.



Sales Order Management

Automatically convert customer quotations into orders for your products. Process sales orders for virtually any product or service from order entry through invoicing. Sales orders can be entered automatically or by direct entry into Rootstock by:

- Converting Sales Cloud Opportunities or Quotes into a Sales Order
- Passing orders from a web store or ecommerce site
- From an EDI trading partner
- Rootstock's Product Configuration

For direct purchase items, Sales Order Management can automatically create a Purchase Order for the item with instructions to the designated supplier to ship directly to the buyer. This feature greatly reduces time and effort required in a non-stocking distribution model.



Service, Warranty & Reverse Logistics

Rootstock's Warranty Management module provides a flexible system for tracking shipped serialized items (parent and sub-assembly), maintaining data on warranty status, current customer and installation location, etc. All transactions and actions (RMAs, servicing Cases and Sales Orders) are linked to each individual unit through the Shipped Item Warranty object and associated Device History Record.



Recurring Billing

Rootstock's Recurring Billing module provides for the establishment and processing of Sales Contracts from which Shipped Serialized Products are associated with Recurring Services. Then they are processed at user-defined intervals generating detailed service billings.

Rootstock integrates “out of the box” with native apps by [salesforce.com](https://www.salesforce.com)®.

- **Connected:** Connect and collaborate with customers, suppliers, employees and other stakeholders via Communities™, Chatter® and all popular social media platforms.
- **Mobile:** Salesforce® Lightning mobile access enables the automation of inventory, production, shipping, fulfillment, and labor transactions on any mobile device.
- **Open:** Seamlessly integrate with Salesforce Sales & Service Cloud and with many best-of-breed manufacturing and supply chain solution providers.



Inventory Control

Maintain and control inventory through easy-to-use screens for updating item inventory quantities and details, inventory valuation and planning, and the setting of item policies like lead-time and replenishment planning. Includes Purchase Requisition Maintenance for Direct Material Items and Supply Demand Review (an output of Replenishment Planning), to show demand, supply and projected on-hand balances by time period.



Warehouse Management

Detailed areas (Location IDs and Location Numbers) provide the basis for advanced picking and put away techniques. Easy integration with automated warehouse systems is provided. Combined with features of Inventory Control, Sales Order Management and Purchasing, complete control of the warehouse is available.



Financials and Reporting

Leverage your investment in the Salesforce platform and extend Rootstock's operational software to the financial management side of your business. Our Accounts Receivable, Accounts Payable, and General Ledger and Financial Reporting modules connect seamlessly to our manufacturing software and support both complex business environments, with multiple operational entities doing business in multiple currencies and reporting in multiple ways, and simple manufacturing and distribution environments.



Cost Control

Maintain and track from as few as one to as many as eight cost elements for an item. These cost elements are maintained on either a standard cost method or an average actual cost method. For distributors, Rootstock also supports FIFO costing of purchased items.



Multi Company, Multi Division, Multi Site

Grow your business without outgrowing your applications. Support multiple plants in various locations throughout the world. Distributors of all sizes gain from Rootstock's inter-division and inter-site planning and coordination capabilities throughout all applications.



Lot & Serial Control (all level traceability)

An item's lot or serial number can be registered through Purchasing Receipts, Inventory and Sales Order Management. Within Rootstock Item Master Maintenance, an item can be classified as "Serial Controlled", "Lot Controlled", "Both Lot and Serial Controlled" or "Neither Lot nor Serial Controlled". As Lot and Serial Number controlled items are consumed, a full traceability tree is constructed and maintained.

It supports Lot Expiration dates and product recalls if ever required.

A comprehensive history of a serialized device of "as shipped", "as installed" and "as maintained" is provided.



Distribution Resources Planning (DRP)

Rootstock's DRP module is an Inventory Location Replenishment process consisting of a Location Replenishment Master table, a DRP Processing Engine and Planned Location Transfers. It supports variable planning granularity (Site to Row-Aisle-Bin) and contains a variety of options for utilizing minimum balances, replenishment multipliers, etc., and considers existing supplies and demands as well as on-hand inventory.



Automated Data Collection (Barcodes)

Reduce distribution and supply chain costs and increase accuracy and efficiency with Rootstock's reliable and flexible barcode and Mobile data collection capabilities. Whether using dedicated barcode devices, tablets or smart phones, Rootstock transactions can be reported, verified and committed via these mobile devices. The new RootScan® mobile app enables the automation of inventory, production, shipping, fulfillment, and labor transactions on any mobile device to deliver time and cost savings.



Purchase Order (PO) Management

Automatically generate orders for your suppliers. Enter and track multi-line purchase orders with independent (by PO line) required dates and locations for direct materials, indirect materials, or services. Manage the entire purchasing process from requisitions to materials receiving or services rendered approval. PO Management maintains a comprehensive record of purchase order revision details and key vendor information.



Replenishment Planning

Automatically convert Salesforce Sales Cloud Opportunities or Quotes into Rootstock Sales Orders to drive the demands in the Replenishment Planning process. Rootstock Replenishment Planning considers both sales order and forecasted demands to deliver a robust demand planning solution for distributors of all sizes. Replenishment Planning first suggests reschedules for firmed (or greater) purchase order supplies and then creates planned purchase requisitions that can be automatically converted to Purchase Orders. The seamless integration between Rootstock and Salesforce improves forecast accuracy and operational responsiveness to changing customer demand.



Merchandising/Item Management

Manage product definition and setup with Product and Item Master Maintenance, including Item Revision Control, Pricing, Kitted Products, Configured Products and Stock Products. All key Direct Material Item attributes are maintained in Item Master Maintenance.

Convenient policy settings by Product Groups and Item Commodity Code minimize the effort of initial setup and ongoing updating of policies for Products and Items.



Integration Strategy

Rootstock's open API's provide for easy integration with existing IT solutions, allowing businesses to take full advantage of existing IT investments and eliminating any duplicate entry of data.

Rootstock Modules

- » **Financials and Reporting**
 - General Ledger and Financial Reporting
 - Accounts Payable
 - Accounts Receivable
- » **Manufacturing Cost Control**
- » **Project Control**
- » **Purchase Order (PO) Management**
- » **CPQ (Configure-Price-Quote)**
- » **Sales Order Management**
 - Product Configuration
 - Container Management & Tracking
 - Service Contract Entitlements
- » **Services & Warranty**
- » **Recurring Billing**
- » **Inventory Control**
- » **Lot & Serial Control (all level traceability)**
- » **Material Requirements Planning (MRP)**
- » **Scheduling & Capacity Planning**
- » **Shop Floor Control**
- » **Distribution Resources Planning**
- » **Multi Company, Multi Division, Multi Site**
- » **Production Engineering**
- » **Product Lifecycle Management (PLM)**
 - Distribution Resources Planning
 - Recurring Billing
 - Warranty/Entitlement Management

About Rootstock Software

Rootstock Software® provides powerful and nimble cloud-based manufacturing, distribution and supply chain solutions backed by unparalleled executive experience and industry expertise. Our solutions enable real-time management of operations from front to back, anytime and anywhere, giving our customers the control and visibility they need to control costs and elevate their total performance.

Built and deployed on the popular and powerful Salesforce1 platform, our manufacturing, distribution and supply chain apps integrate “out of the box” with Sales Cloud by salesforce.com and, when extended with other native Salesforce applications, create an enterprise-wide, true cloud solution. Rootstock is available on the AppExchange® by salesforce.com.

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