



Manufacturing ERP:

10 Reasons you need ERP on Salesforce

Get a complete, unified view of your customers and business with Rootstock ERP on Salesforce

Now is the Time for Cloud ERP on the Salesforce Platform

Legacy ERP systems are the weakest link in digital transformation, particularly when disconnected from a CRM solution. Integrating everything from supply to sales on a single platform enhances value, flexibility, and visibility - ultimately improving customer service.

Transitioning from a legacy ERP to a modern system may seem daunting, but delaying this shift or waiting for the next technology innovation can significantly hinder your business. Many businesses have faced this challenge, initially hesitating to migrate to a modern cloud-based ERP. However, those who made the switch soon realized the benefits and regretted not doing it sooner.



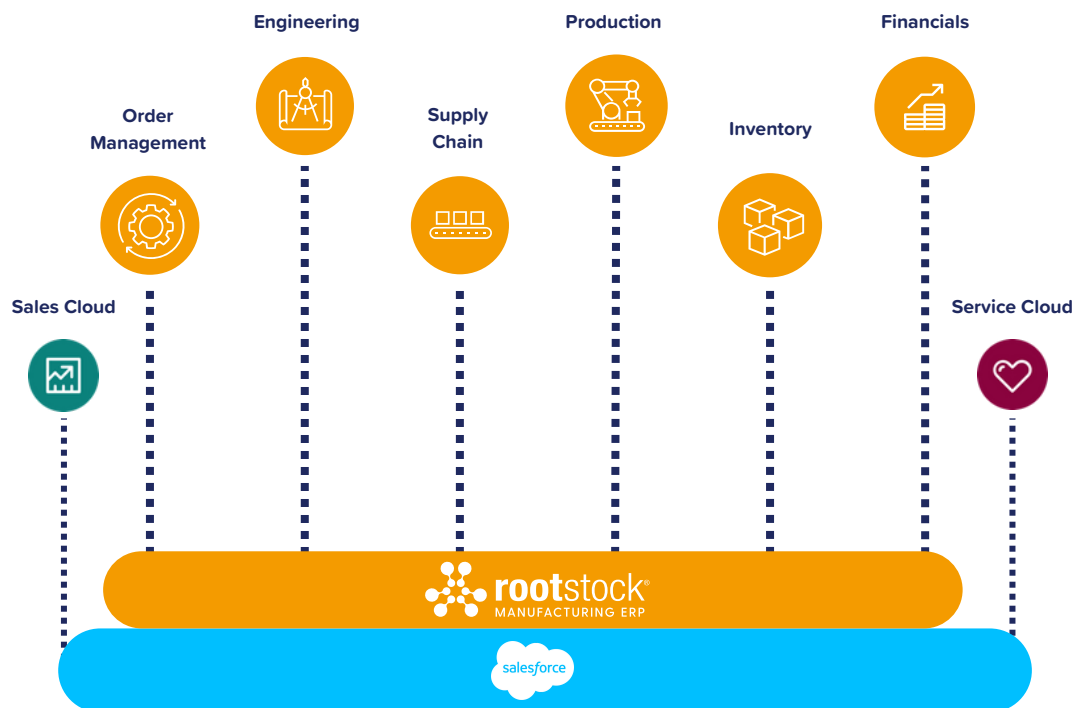
A set of common benefits has become reality for these businesses soon after moving to a Cloud ERP solution, specifically Rootstock ERP. The benefits extend across your organization, from the production line to the C-suite and even on to your customers. Best of all, they combine to make your business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

About Rootstock ERP



Rootstock ERP offers a comprehensive cloud-based enterprise resource planning solution designed to streamline and optimize business operations.

Built natively on the Salesforce platform, Rootstock ERP seamlessly integrates with Salesforce CRM, providing a unified system for managing everything from supply chain and production to inventory and financials. This integration enhances data visibility and operational efficiency, enabling businesses to respond swiftly to market changes and customer demands.



Rootstock ERP's flexible, scalable, and user-friendly interface makes it an ideal choice for companies looking to replace their outdated legacy systems with a modern, cloud-based solution that supports digital transformation and drives business growth.

One record. One view. One customer experience. One cloud.

Success hinges on selecting a modern ERP solution built on a platform that supports your entire business end-to-end. Rather than having separate systems for operations, sales, finance, and services, a single unified platform is essential. For Rootstock, this begins with leveraging Salesforce as the cloud foundation for your entire company, which your sales team is already familiar with.

Unfortunately, many companies use disjointed systems that depend on integrations, which, while functional, prevent full utilization of data to serve customers effectively. For instance, a call center might manage support cases in one system but be unaware of the shipment status of required products. Similarly, the sales team may lack visibility into the operations pipeline, leading them to rely on outdated spreadsheets or ad hoc email requests. This lack of visibility hampers overall business efficiency.



With systems built on multiple platforms, valuable time is wasted bridging data gaps while trying to keep these issues hidden from customers. This inefficiency drags down your business, inflates costs, and prevents you from gaining the visibility needed to improve performance continuously.

We have identified the top 10 reasons why companies transition to Rootstock Cloud ERP on the Salesforce platform and the benefits they experience. These reasons demonstrate how leveraging the Salesforce platform benefits your entire organization, while Rootstock Cloud ERP uses business data to drive more efficient operations and unlocks operational data to enhance and accelerate other aspects of your business.

Enhancing Business Effectiveness

Improved information sharing and visibility empower employees to be more effective. With complete information available to the right workers at the right times, they can perform their jobs accurately, gain insight into others' challenges, and identify areas where they can assist. This access enables faster, smarter work and better decision-making, while fostering collaboration by eliminating data silos that separate teams.

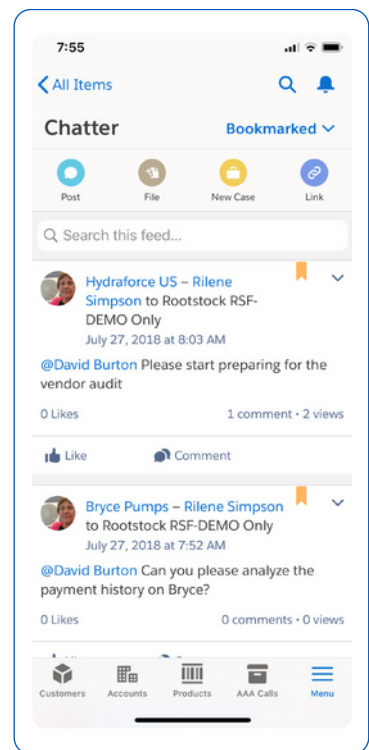
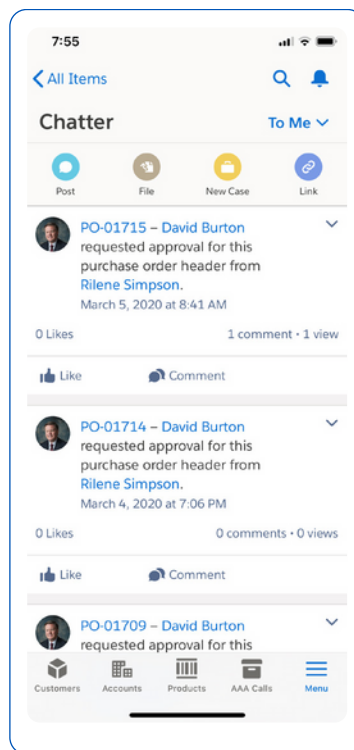
Rootstock Cloud ERP on the Salesforce platform extends frontline tools typically reserved for Sales to all employees, providing comprehensive access to information. This results in a more effective business that is highly responsive to customer needs.

1 | BETTER COLLABORATION

In many companies, departments are separated not only by organizational and reporting structures but also by disparate systems. Workers, especially those on the floor, often have access only to the systems relevant to their specific roles. However, they frequently need upstream or downstream information to perform their jobs effectively. Without this visibility, they resort to emails, tracking people down, or making educated guesses.

This lack of access is understandably frustrating and tends to widen departmental divides. Worse, these ad hoc decisions and conversations are often hidden from those not included in the email chain, making them difficult or impossible to trace later.

With a common collaboration tool such as Salesforce Chatter, artificial departmental divides disappear. Workers can quickly engage in conversations, access the data they need, and return to their tasks. Additionally, Chatter conversations are attached to data objects, like invoices, ensuring that all discussions are visible and contextualized.

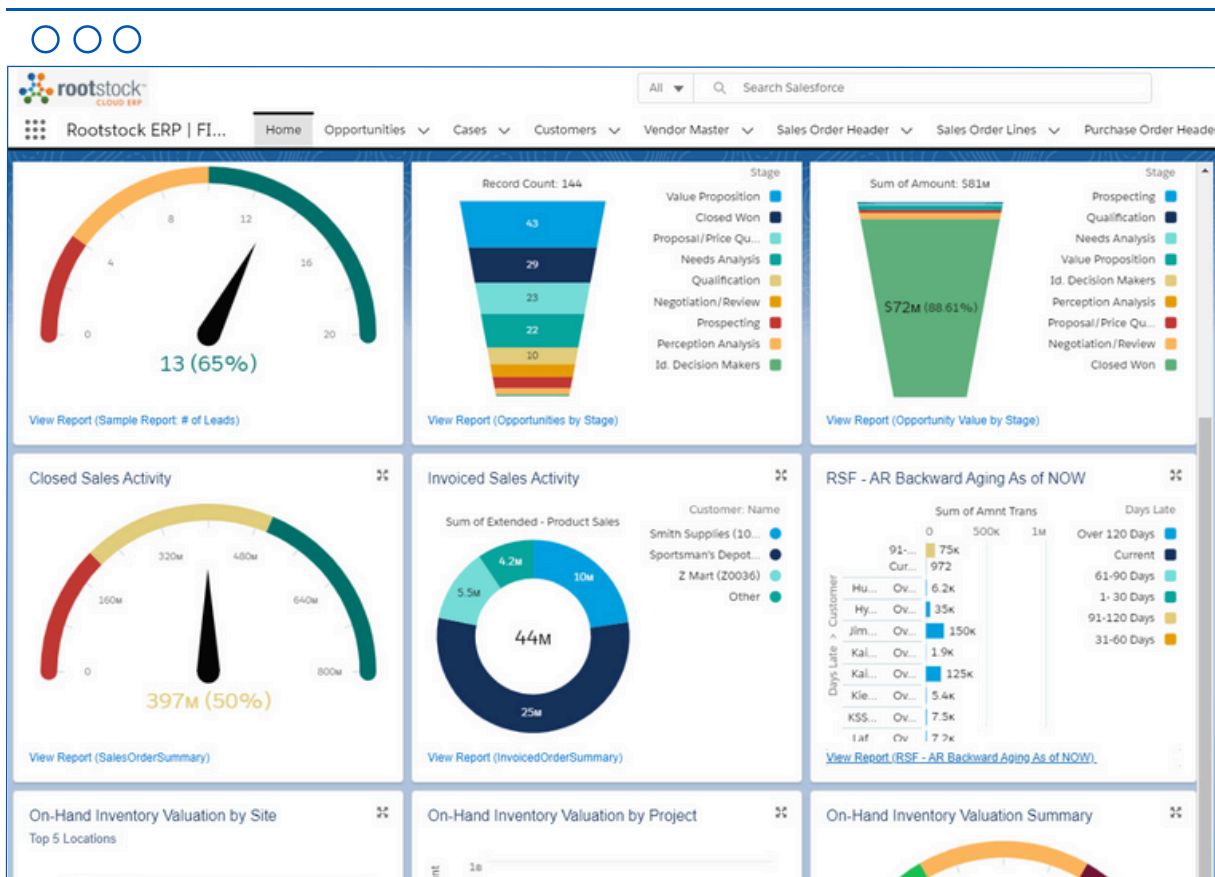


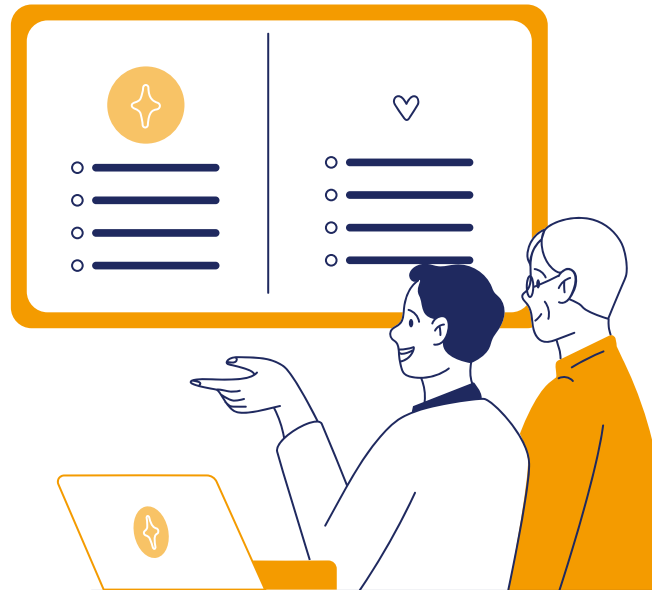
2 | AUTOMATIC DRILLDOWN AUDIT TRAILS

Audit trails are essential not only for regulatory, financial reporting, and compliance purposes but also for troubleshooting, error detection, and identifying improvement opportunities. When data and decision-making are managed through spreadsheets, text messages, and emails, auditing becomes impractical. Reconstructing the trail afterward diverts time and resources from more critical tasks. Automating audit trails eliminates this tedious process, keeping auditors focused, satisfied, and efficient.

Integrating CRM, ERP, and other solutions on a single platform, and providing communication and collaboration tools to keep employees on that platform, makes auditing straightforward. As data and transactions flow through these systems, they are automatically tracked. Sales opportunities link to their quotes in CRM, which then connect to sales orders, fulfillment, inventory, and work order transactions in ERP.

Related shipments are tracked for auditing, triggering invoices and updating accounts receivable and the general ledger. Payments are also tracked, creating a comprehensive trail that connects the initial sales opportunity to the eventual cash received, forming a continuous audit trail.





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

Agility is a significant challenge for manufacturing organizations. As the economy accelerates, so do customer expectations and competitive pressures. This makes collaborative Sales and Operations Planning (S&OP) more crucial than ever, as it transforms customer demand into an actionable operational plan. Reducing delays and eliminating guesswork can enhance productivity, efficiency, and customer experience.

Sales acts as an early warning system for the entire business. Gaining visibility into customer demand spikes or drops allows Operations to respond more effectively to market changes. Ensuring both teams operate on the same platform provides Operations with quicker and more accurate insights into Sales' observations.

This capability has been significantly enhanced by the recent integration of Salesforce Manufacturing Cloud with Rootstock Cloud ERP. This combination enables Sales to manage run rate and long-term pricing agreements more effectively and produce more accurate account-based forecasts. With a 360-degree view of the customer, Sales can see actual data from ERP systems, track a customer's progress against agreements, and predict future behavior accurately. Operations benefits from these continuous, real-time, and precise forecasts, allowing for quicker responses to demand fluctuations.

Keeping everyone on the same platform ensures seamless data sharing and fosters a more collaborative approach between Sales and Operations in developing improved production and supply chain plans. More timely and accurate plans lead to reduced waste, better resource utilization, lower inventories, and substantial bottom-line improvements.

Increased Flexibility

Manufacturing organizations need unprecedented flexibility to meet buyers' demands for advanced customization, faster response times, expanded delivery options, and more. While operational flexibility is essential, behind-the-scenes adaptability is equally important. How your business responds and adjusts to changing customer requests influences both internal operations and customer satisfaction. An inflexible organization experiences constant stress, leading to frustrations, delays, mistakes, and dissatisfied customers. In contrast, organizations that can adapt effectively are better positioned to provide exceptional service and meet customer expectations.

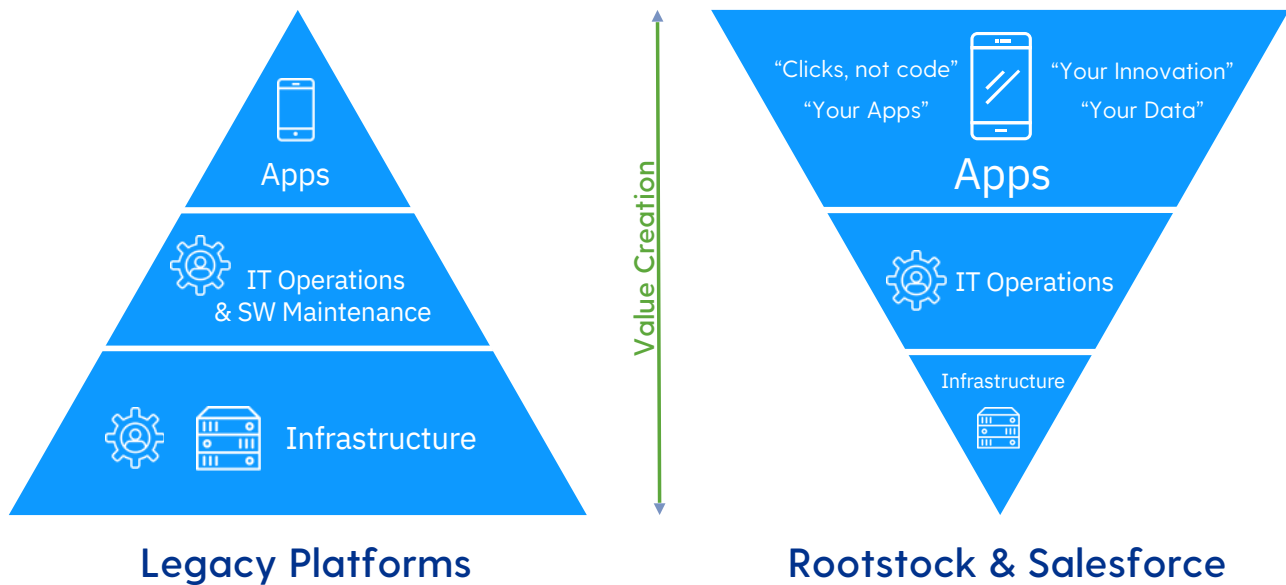
4 | MANUFACTURING FLEXIBILITY

Quickly adapting to shifting demand and market conditions is essential for business success. The real opportunity to stand out and delight customers lies in handling day-to-day changes effectively. Scaling production up or down, accommodating product customization, and managing non-standard orders are just a few ways customers test your manufacturing agility. Internally, changes in business direction can impact every department, from engineering to scheduling, quality control, and shipping.

Rootstock Cloud ERP offers comprehensive manufacturing capabilities that support various manufacturing modes simultaneously, including make-to-stock, personalized, and hybrid approaches. While some manufacturers operate with just one mode, ERP enhances visibility and control to optimize productivity and efficiency. Many companies, however, use a combination of manufacturing modes for increased flexibility. This demands agility in configuring, estimating, pricing, and quoting orders, as well as in shop floor scheduling and supply chain management.

Rootstock Cloud ERP provides visibility and control across these processes, ensuring continuity between CRM and ERP systems. When ERP and CRM are integrated on a single platform, instilling flexibility becomes significantly easier.





5 | APPLICATION FLEXIBILITY

Every business is unique, so your business applications should be tailored to fit your specific needs. Outdated, rigid applications that are costly and time-consuming to configure are no longer suitable. Today's expectation is for software that offers customized, role-specific interfaces and workflows tailored to each task. However, achieving these configurations shouldn't require extensive consulting teams and months of implementation.

Rootstock Cloud ERP leverages the Salesforce platform's clicks-not-code configuration approach, making it easy for business users to adjust configurations and processes without needing IT or external experts. This method allows Salesforce administrators to handle complex changes and configurations with ease, only occasionally needing consultants for more technical tweaks.

Unlike many ERP systems, which lack this level of flexibility, Rootstock Cloud ERP brings the same intuitive, clicks-not-code customization to ERP. This means companies can utilize their existing Salesforce system administration skills and platform knowledge within a powerful ERP solution.

Better Customer Experience

Every industry is shifting towards a more customer-centric approach, and manufacturing is no exception. Buyers now seek vendors who can meet their demands, exceed expectations, and adapt to changing requirements. While price remains a key factor, prioritizing the customer experience is crucial. This requires customer-facing employees to deeply understand customer needs and respond swiftly to inquiries. Achieving this demands a comprehensive platform where every process is connected back to the customer.

6 | UNIFIED CRM AND ERP

Building your business on a unified technology platform streamlines data sharing and integrates processes across the company. With Sales already using Salesforce CRM and Rootstock Cloud ERP built on the same foundation, extending the initial customer interactions—such as sales quotes, orders, and contracts—directly into production is a logical step. This ensures customers receive what they want, when they want it, and prevents requests from falling through the cracks.

The Opportunity to Cash process stands to gain the most from having CRM and ERP on a single platform. Data flows seamlessly between departments, leading to significant productivity improvements and enhanced customer experiences. Sales can access real-time inventory information to provide accurate delivery dates, Operations can align orders with production schedules to meet those dates, and Fulfillment is well-informed about customer expectations. Invoices are generated promptly and accurately, leading to faster cash collection. This integration eliminates disjointed processes, isolated information, and redundant spreadsheets, allowing everyone to work smarter, more efficiently, and with fewer errors.

7 | A SINGLE DATA MODEL ACROSS CRM AND ERP

Transitioning to Rootstock Cloud ERP on the Salesforce platform provides a unified data model, eliminating the need for integrations since all data resides within the same application. This setup allows employees to instantly access critical information about sales, profitability, inventory levels, and more.

Beyond enhancing daily operations and customer experiences, this unified data model supports advanced analytics across the entire enterprise. It removes time delays and the inefficiencies associated with transferring information between CRM and ERP systems, creating a continuous, real-time stream of data. This integration also bypasses the cumbersome master data management and ETL processes that many companies face when consolidating data for analysis. With ERP and CRM on a single platform, businesses can view all their key performance indicators in real-time through a single, streamlined dashboard.

8 | 360° VIEW OF THE CUSTOMER

The primary reason companies choose to implement Rootstock Cloud ERP on the Salesforce platform is to achieve a comprehensive 360-degree view of their customers. In a competitive manufacturing landscape where service is increasingly critical, having complete and real-time access to customer information is essential.

A holistic view of the customer enables employees across all departments—marketing, sales, service, operations, and finance—to provide exceptional service. It eliminates the need for customers to be passed from one department to another, reduces the risk of providing incorrect information, and enhances the ability to meet customer needs efficiently because all relevant information is consolidated in one place.

Moreover, this unified approach improves analytics by integrating data on sales, returns, profitability, and service history, allowing businesses to predict future buying patterns and identify their ideal customer profiles. This integrated system, combining CRM for engagement and ERP for record-keeping, ultimately benefits the customer by providing a seamless and informed service experience.

9 | ELEVATE YOUR SALES GAME

While we've mentioned this benefit before, here it specifically relates to the customer experience provided by Sales. Customers today prefer working with knowledgeable partners rather than traditional, high-pressure salespeople. Integrating ERP and CRM data on a single platform allows sales teams to manage accounts proactively and enhance the perception of their service.

With both ERP and CRM systems unified, Sales gains not only a clearer view of what they can promise but also real-time tracking of each order as it progresses from placement through production and delivery to the customer's warehouse. Salespeople can enter customer meetings equipped with comprehensive information about outstanding orders, delivery statuses, returns, credits, support cases, and unpaid invoices. They will also be aware of any prior interactions the customer has had with your company, eliminating surprises and ensuring they are well-prepared to address any issues. Ultimately, this integration transforms your salespeople into a one-stop resource for customers, providing a seamless and informed service experience.

A Better Overall Value

In business, profitability is key. Every dollar invested should generate a substantial return. This principle applies equally to evaluating ERP systems. The 10 benefits we've discussed, even if only a few are realized, offer an exceptional return on investment across your entire organization. For instance, Matouk, a premium textile manufacturer, achieved an impressive annual ROI of 223% by implementing Salesforce CRM and Rootstock Cloud ERP. This leads us to Reason #10

10 | RETURN ON INVESTMENT

Rootstock Cloud ERP offers a superior ROI by reducing operational and management costs while delivering greater value to meet the evolving needs of your business. It enhances productivity by allowing employees to focus on their tasks rather than searching for information or dealing with cumbersome applications. This benefits not only Sales and Operations but also Service, Support, Supply Chain, Finance, and other departments. IT teams also benefit from reduced effort and complexity.

Most importantly, Rootstock Cloud ERP improves the customer experience by providing faster and more accurate fulfillment of their needs, ultimately leading to higher satisfaction.

REQUEST A DEMO

Experience Rootstock ERP firsthand with Cloudteam Company. Cloudteam Company helps transform your business by implementing cloud-based solutions on the Salesforce platform. Whether you're looking to improve efficiency, integrate systems, or gain valuable insights, our demo will provide a comprehensive overview tailored to your specific needs.

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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