ROOTSTOCK PLUS SALESFORCE CLOUDS:

ONE PLUS ONE EQUALS THREE

rootstock®
MANUFACTURING ERP

Rootstock Plus Salesforce Clouds: One Plus One Equals Three

Because Rootstock is built natively on the Salesforce Platform, there is a multiplier effect for every additional Salesforce component it is connected with. The Salesforce Platform was designed for "connectability" which means there is no "integration" required and all components are configurable to every other component.

Rootstock + Salesforce
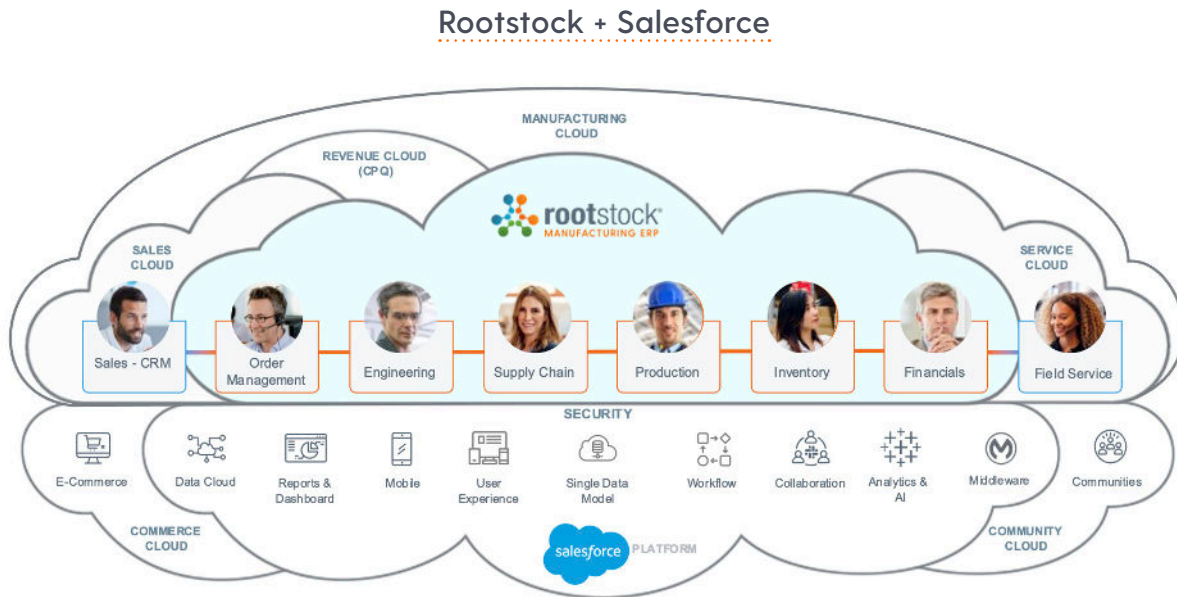
Rootstock Manufacturing Cloud ERP

Rootstock ERP sits in the center of the above diagram because ERP is the functional "core" of a manufacturing business. Regardless of what other components are added, ERP behaves as the central control mechanism for the business from Order-to-Cash through Procure-to-Pay and across Plan-to-Produce. All processes weave their way through Rootstock ERP to provide end-to-end visibility from dashboards down to each individual transaction.

The Salesforce Platform

Rootstock on the Salesforce Platform enables a future-proof eco-system for digital transformation for both customers and Rootstock itself. Customers enjoy a common data model, common, tailorable user experience, and workflow automation as well as robust functionality add-ons they can deploy as desired. Moreover, they can take advantage of 1000s (>7000 at last count) of additional enterprise systems and point solutions available on the Salesforce marketplace, the AppExchange. Rootstock benefits from not having to invest in non-differentiating, foundational elements like collaboration or mobile and can focus on manufacturing ERP innovation.

Salesforce Sales Cloud

Since its inception, Rootstock has maintained a tight connection to Salesforce's flagship customer relationship management (CRM) solution, Sales Cloud. Salesforce Sales Cloud delivers a best-in-class solution for the Lead-to-Opportunity-to-Quote process. Rootstock ERP is a natural extension to Salesforce CRM extending to cover the Order-to-Cash processes. Having customer master data, sales transactions, and after-sales service activities in synchronization with the operational side of fulfilling sales and service on the same cloud data model means no data re-entry (which could introduce errors). With CRM and ERP both leveraging the same real-time data, every interaction is more accurate for greater customer delight. This is what is known as a 360° view of the customer.

Salesforce Revenue Cloud

Salesforce Revenue Cloud automates the full quote-to-cash process for all business models across the enterprise including one-time, subscription, usage, services, and warranties, helping teams close complex deals faster. Moreover, with the Salesforce Configure-Price-Quote (CPQ) solution, the exact configuration sold to the customer becomes the foundation for the bill-of-materials for that specific order. The order is converted into a sales order in Rootstock that governs everything from orders to procurement from suppliers to work orders for production, and where to ship the finished goods. For the rest of that customer relationship, all of that information—including business relationships like warranties or other contracts—are available for review (or audit) forever.

Salesforce Service Cloud

For those customers who manufacture, distribute, or service products that require after-sale service (or initial installation), the same value of common data on a common platform applies from sale to manufacture to service. When attendants on the service desk receive a request for service, they can easily pull up all of the customer's information including specifically which product—by serial number—the customer owns. Moreover, the entire history of that product including when and where it was manufactured, whether it is covered by warranty, and if the required replacement part is in stock. This is where Rootstock comes in, as it provides the inventory management for Salesforce Field Service. It can tell the service technician which parts to load on their truck—if they're not already showing in their truck inventory—as well as manage the replacement of inventory consumed by adding components to MRP to be replaced or to add to production demand.

Community Cloud

The Salesforce Community Cloud enables you to share the same value of a 360° experience to your extended enterprise. With Community Cloud you can build custom sites, portals and online forums faster than ever before and feed it from the same common data model for a self-service environment that reduces the demands on your support teams.

Salesforce Community Cloud makes it easier to do business with both customers and suppliers by tailoring portals for their specific business needs. For example, you can connect business partners directly with the business data they need, in context of why they need it such as customers checking on an order or suppliers updating their capabilities. Rootstock leverages the Community Cloud as part of the Supplier Collaboration solution for Supplier RFQs. Suppliers who have received an RFQ respond to requested information that populates the RFQ page where procurement can compare the responses side-by-side to make final selection easier.

Commerce Cloud

The Salesforce Commerce Cloud gives Rootstock customers an easy way to extend their business with an always on, ecommerce solution for B2B, B2C, or any combination of the above. Because Commerce Cloud sits on the same common data model, it becomes another engine for demand generation that is a 24/7/365 storefront. You can not only increase revenue, but productivity as well, because transactions are automatic and deliver the autonomous customer experience people increasingly desire. Because of the underlying Salesforce Platform, you can be confident that every connection is secure. Customers have real-time access to place, revise, or cancel orders that leverage all the same back-office operations for production orders, inventory management, and shipping fulfillment using Rootstock. One Rootstock customer whose sales engine was thwarted by the COVID19 pandemic stood up their ecommerce site in less than three weeks to sell robots on-line.

Salesforce Manufacturing Cloud

Salesforce Manufacturing Cloud enables the "front office" for the "business of manufacturing" with a Sales and Operations Planning (S&OP) solution synchronized with Sales Agreements and Account-Based Forecasts to help ensure accurate sales forecasts, maximize revenue, and create more precise production and supply chain plans. Those Manufacturing Cloud forecasts are then aggregated into the "back office" where Rootstock manufacturing executes the processes to produce the products necessary to fulfill the forecast.

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