



ROOTSTOCK ERP for Manufacturing & 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



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.



Manufacturing 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. Rootstock also supports FIFO costing of purchased items.



Project Control

Identify, plan, and control material purchases, inventories, and costs within a division by project. Project Control enables an additional dimension for inventory control, tracking and planning, and costing of items. Project Control is ideal for build-to-order, assemble-to-order, and engineer-to-order manufacturing environments to plan, cost, and track by "item within a project".



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



Services & Warranty

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 and then processed at user-defined intervals generating detailed service billings.



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.

Rootstock integrates "out of the box" with native apps by salesforce.com®.

- **Connected:** Connect and collaborate with customers, suppliers, employees and other stakeholders via Communities™, Chatter® and all popular social media platforms.
- **Mobile:** Salesforce1™ mobile access – iPhone®, iPad®, Android®. RootScan® mobile app 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 MRP planning. Tune MRP to reflect actual vendor performance and your actual production, manufacturing and distribution environments.



Lot & Serial Control (all level traceability)

An item's lot or serial number can be registered through Purchasing Receipts, Inventory, Shop Floor Control and Sales Order Management. Trace the sources of supply or production for any item. As Lot and Serial Number controlled items are consumed in the manufacturing process, a full level traceability tree is constructed and maintained. Supports Lot Expiration dates and product recalls if ever required. A comprehensive Device History Record of "as designed", "as built" and "as maintained" is provided.



Material Requirements Planning (MRP)

Automatically convert Salesforce Sales Cloud Opportunities or Quotes into Rootstock Sales Orders to drive the top-level demands in MRP. Rootstock MRP considers both sales order and forecasted demands to deliver a robust and cost effective demand planning solution for manufacturers of all sizes. This seamless integration between Rootstock and Salesforce improves forecast accuracy and operational responsiveness to ever-changing customer demand.



Multi Company, Multi Division, Multi Site

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



Production Engineering

Create precise lists of items and instructions needed to build each product. Manage production engineering with Item Master and Bill of Materials Maintenance, Item and Bill of Materials Revision Control, and Engineering Change Control. A separate component record and standard information associating the component to an assembly can be kept on the Rootstock Bill of Materials.



Product Lifecycle Management (PLM) Integration

Automatically synchronize design engineering data with manufacturing data. The capability prevents manual data entry errors and ensures that manufacturing configuration data is up to date and fully synchronized. Maintain manufacturing planning and shop floor operations through PLM updates for Items, Item Revisions, Bill of Materials, and Engineering Changes.



Scheduling & Capacity Planning

Balance your production capabilities with material supply. Manage and monitor the scheduled dates

of work order operations required to meet the MRP Work Order's Scheduled Due Date into Stock. The Scheduler shows the capacity of work centers on a day-by-day basis (in terms of labor hours or machine hours) in a colorful, graphical format. Drag and Drop functionality changes the priority or adjusts the schedule for work orders within a work center.



Shop Floor Control

Streamline production and material flow with your suppliers and in your factories. Manage the lifecycle and the routing of work orders. Routings define the steps or processes required to assemble and/or manufacture an item on the shop floor. Rootstock's Shop Floor has many capabilities, including Routing Maintenance, Work Order Add & BOM Explosion and Work Order Firming, among others.



Distribution Resources Planning (DRP)

Rootstock's DRP module is an Inventory Location 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.

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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