

# Unlock ERP on the Salesforce Platform



## The Transition from Legacy to Cloud ERP

As companies look to modernize and digitally transform, one area holding them back is ERP.

Most organizations are still running old on-premises ERP applications, many of which came to market in the 90's and still have not yet transitioned to Cloud ERP. This is particularly true of companies that manufacture, distribute or service tangible goods with complex supply chains and extensive manufacturing operations. Nevertheless, the mounting costs, technical obsolescence and lack of flexibility of legacy ERP systems have finally instigated an ERP replacement cycle across all industries.

Because ERP is a large, complex, mission-critical system and any disruption to ERP has serious business consequences, companies are understandably cautious about how fast and how many resources they can devote to transitioning to the cloud. At the same time, companies realize that they can no longer be locked in by an old ERP system and need to begin making the transition in whole or in part. With that in mind, Rootstock offers three options to help companies migrate to Cloud ERP depending on a company's particular business circumstances and desired approach.

## 1 Fully Replace ERP with Rootstock Cloud ERP on the Salesforce Platform

Some companies need to move all ERP processes to the cloud now and are in a position to devote the resources and management attention to the project. The company may move in phases, but the intent is to move all operations from sales order management, inventory, shop floor control, engineering, supply chain and financial management to the cloud.

For companies moving all of ERP to the cloud, Rootstock ERP and the Salesforce Platform are an ideal combination to help make a smooth transition for three primary reasons.

First, by moving ERP alongside Salesforce CRM on the platform, it eliminates the laborious exercise of integrating CRM and ERP. ERP “snaps in” to the same cloud environment as CRM, simplifying cross functional workflows, business processes and reporting. Companies with Rootstock ERP and Salesforce CRM enjoy one source of information across the entire company. This includes a single 360° view of customers and more efficient processes that traverse your company’s front and back offices.

Second, companies with experience using Salesforce CRM can quickly leverage the skills they have in-house to manage users, set up workflows, write reports,



build dashboards and convert/integrate legacy data. Rootstock uses the same cloud administrative tool set as Salesforce CRM. And if you need to supplement your internal team there is also a huge pool of available Salesforce talent to draw from in the ecosystem.

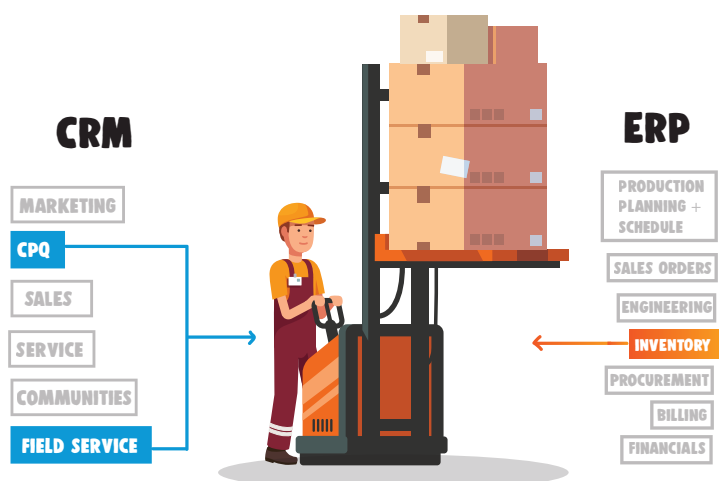
And third, the “clicks not code” approach to configuring Rootstock ERP and the platform eliminate the difficult and time-consuming ERP configuration issues that legacy ERP is known for. This puts more capability in the hands of business users and less onus on IT.

In short, if your company is moving ERP to the cloud, Rootstock ERP on the Salesforce Platform is a far easier and less costly alternative, especially compared to legacy systems and hosted legacy systems packaged as cloud solutions.

## 2 Move a Process or Business Unit to Rootstock Cloud ERP

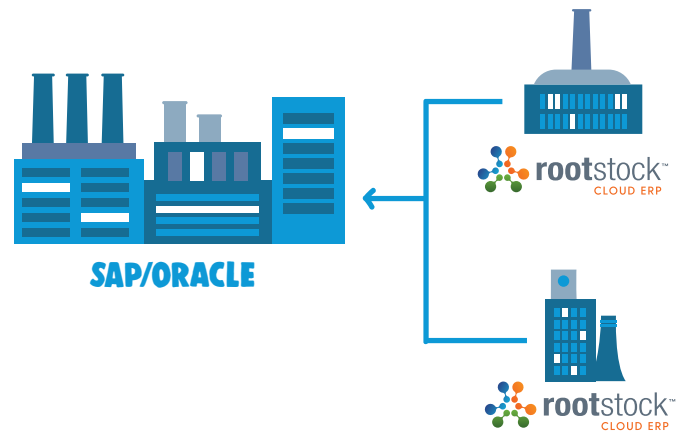
Some companies may need to take a more incremental implementation approach and prioritize a targeted area for ERP modernization. For instance, they may want to move a special business unit to the cloud quickly and not be delayed by a corporate-wide effort. In this two-tiered ERP approach, a company has a specialized business operation using Rootstock ERP, while also being connected to the corporate legacy system. Rootstock lets you take a two-tiered approach by migrating a business process or business unit.

This process is aided by the fact that Rootstock is designed in a modular manner, so portions of ERP can be moved to the cloud incrementally. For instance, your



company might want to move inventory management to the cloud so inventory and available-to-promise information are accessible within Salesforce CRM and CPQ. Organizations using Salesforce Field Service Lightning (FSL) might also need a specialized inventory system apart from a corporate system that is completely integrated with FSL at the field level. In both cases, Rootstock ERP is integrated with the existing ERP system where appropriate. The two-tiered ERP approach by process might be a good fit for companies looking to improve customer service or improve customer-facing operations that tightly involve CRM and ERP.

The second option for a two-tiered approach is to move a whole business unit onto the cloud using Rootstock ERP. The business unit can be managed as a relatively self-contained operation, running sales,



manufacturing, distribution, supply chain and financial management on one cloud. In this mode, Rootstock ERP periodically feeds financial data to the parent company's ERP system for consolidation and corporate reporting. This approach might fit companies that need a more agile ERP system in a business unit, or for business units that don't fit the ERP configuration of the current legacy system running at the parent company.

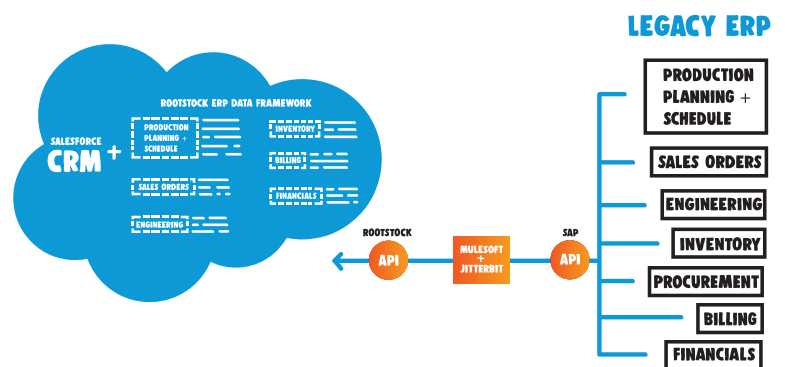
### 3 Get Visibility of Legacy ERP Information Inside Salesforce CRM with The Rootstock ERP Data Framework

This third implementation option is also an incremental approach where just legacy ERP information is populated on the Salesforce platform, primarily to increase visibility of ERP information to Salesforce users. The business process remains on the legacy ERP system, only the data is transferred. To easily accomplish this, Rootstock has developed an ERP Data Framework to streamline this approach.

Simply put, the Rootstock ERP Data Framework is a collection of preset ERP data objects residing on the Salesforce Platform that can be populated with legacy ERP data. The Data Framework eliminates the need to define custom ERP objects on the Salesforce Platform that match the fields and tables of the legacy ERP system. The Data Framework can be populated through Rootstock's API using a variety of methods including Mulesoft, Jitterbit, Salesforce Connect or your integration tool of choice. Installation wizards speed the installation process. Because of the Data Framework and the APIs and connectors that Rootstock provides for tools like Mulesoft, mapping data from the legacy system is greatly simplified, reducing the time needed for the integration effort.

Once the ERP Data Framework has been populated on the platform, Salesforce users get a complete 360° view of customers and ERP information such as inventory, production schedules, costing, invoices, customer credits, returns and other ERP information. While not as ideal as moving all ERP processes and information to the same cloud as CRM, the superior end user capabilities of the Salesforce platform can be leveraged around a combined ERP and CRM data set.

In summary, no matter where you are on the spectrum of transitioning from legacy to Cloud ERP, Rootstock Software can help you get to your goals faster, at a lower costs and with lower risks.





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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. Rootstock Cloud ERP is a flexible, modern, and digitally-connected system that transforms companies to deliver a more personalized customer experience, efficiently scale operations, and out-service the competition.

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