



DISTRIBUTION & Supply Chain Apps

Built and deployed on the Salesforce1™ Platform
(the world's most scalable & secure enterprise cloud platform)



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.



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. Standard barcoded forms and reports support this automated data collection solution.



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 and cost effective demand planning solution for



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



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.

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.

distributors of all sizes. The seamless integration between Rootstock and Salesforce improves forecast accuracy and operational responsiveness to ever changing customer demand.

The Replenishment Planning Engine uses industry proven algorithms and user-defined inventory control parameters to accommodate demands and safety stock requirements – netting out the inventory and firming (or greater) supplies. Replenishment Planning first suggests reschedules for firming (or greater) purchase order supplies and then creates planned purchase requisitions that can be automatically converted to Purchase Orders as appropriate.

Rootstock distribution and supply chain apps integrate "out of the box" with native apps by salesforce.com®.

- » **Connected:** Connect and Collaborate with all customers, suppliers, employees and other stakeholders via Communities™, Chatter® and all popular social media platforms
- » **Mobile:** Salesforce1™ mobile access – iPhone®, iPad®, Android®
- » **Open:** Seamlessly Integrated with Salesforce® Sales Cloud®, FinancialForce.com® + other popular accounting solutions



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.

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.



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.

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.



Applications

- » Sales Order Management
 - Product Configuration
 - Direct Purchase/Drop Shipments
 - Container Management & Tracking
 - Service Contract Entitlements
- » CPQ (Configure-Price-Quote)
- » Purchase Order (PO) Management
 - Requisitions
 - Direct Purchase/Drop Shipments
- » Inventory Control
- » Warehouse Management
- » Product/Item Management
- » Lot & Serial Control
- » Forecasting - Replenishment Planning
- » Cost Control
- » Multi Company, Multi Division, Multi Site

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.

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 distribution and supply chain operations
- ✓ Complete solution for shorter implementation times, lower costs, a quick payback of investment and a significant return on investment.

Learn more at www.rootstock.com

About Rootstock Software

Rootstock Software® is a proven provider of powerful and nimble manufacturing, distribution and supply chain solutions built and deployed on the Salesforce1 Platform (the world's #1 cloud computing platform). The Rootstock solutions enable real-time management of manufacturing, distribution and supply chain operations from front to back, anytime and anywhere. The company's manufacturing, distribution and supply chain apps integrate "out of the box" with Sales Cloud by salesforce.com and other ERP-centric applications written on the Salesforce1 Platform. With unparalleled executive experience in

manufacturing and distribution software and an established base of installed and implemented cloud customers, Rootstock offers a better and more reliable way to plan and execute required activities, deliver essential information to all parts of the organization, and improve timely and informed business decision making. The Rootstock apps also provide the control and visibility required to elevate the total performance of manufacturing, distribution and supply chain operations. Rootstock is available on the AppExchange® by salesforce.com, the world's most popular marketplace for business apps.

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