How to set up the ultimate Salesforce dashboard for a manufacturing company

See what it looks like when you integrate key data from Salesforce and your ERP into one central dashboard.

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DO YOU HAVE THE KEY TO YOUR ERP?

Your business might be feeling the manufacturing squeeze right now, with supply chain challenges, volume demands and the pressure to deliver products faster. To keep up with accurate price forecasting, complex bills of materials, delivery dates and end-to-end supply chain visibility, your sales team needs critical customer order and product data from your ERP. But, how do they access this data?

Valuable ERP information is often siloed out of sight from sales and customer teams who need access to pricing, delivery timing, previous customer orders and payments, and more. While you could give your sales team a separate login and use up one of your ERP seats, this is an additional expense and an entirely new system to learn.

Build a better dashboard for a bigger picture

A better solution is to integrate your ERP with Salesforce so that this critical information is available at-a-glance in a central dashboard.
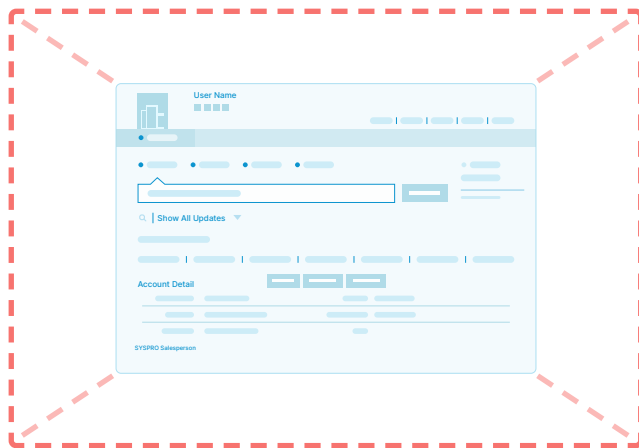
Let's take a look at the key parts of an integrated Salesforce/ERP dashboard.

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SETS YOUR SIGHTS ON

Dashboard views

ERPs contain rich data and part of the challenge is zeroing in on what to pull in and where. To get the most out of your ERP, we recommend enhancing two key Salesforce dashboards:

1 **Customer dashboard** | This is where you'll pull in critical customer information that's usually only accessible in your ERP, like previous sales information and customer balances.

2 **Product dashboard** | Finally, a way keep track of products to help with accurate inventory and delivery date estimates.

Now we'll show you what to include in each dashboard— and what they could look like.

THE FULL 360

Customer dashboard

This customer dashboard pulls important details from your ERP directly into Salesforce. Here, we're showing the Salesforce Account Form integrated with SYSPRO ERP. We recommend pulling these key ERP details into your dashboard to help answer key sales and support questions.

How do we deliver?
No need to ask twice for key logistical details, like addresses and tracking numbers.
- Delivery addresses
- Shipping preferences

Is this a quality lead?
Pull key customer information from your ERP into your CRM to help support sales prospecting.
- Balance information
- Credit status
- Customer rating

What do they need?
Look up a customer's full sales history.
- Previous sales
- Pricing/contracts
- Volume of business
- Trends
- Seasonality

WHAT'S IN STOCK?

Product dashboard

Give sales a product-centric view of the customer to help better service accounts with details like inventory levels and delivery date estimates—all in one place. Here, we're showing Salesforce with a SYSPRO ERP integration. We recommend pulling these key ERP details into your dashboard to help answer key sales and support questions.

What's available?
View the complete inventory.
- Product type
- Quantity
- Unit(s) of measure

Is it in stock?
Pull up what's in the warehouse.
- Quantity on hand
- Quantity allocated
- Quantity on backorder

How much is it?
Don't wait to get back to hot leads with pricing.
- Price list

Where is it?
Streamline the delivery process and timeline.

Product: Information
15 Speed Mountain Bike Girl

General

ID	Unit Group	Product Type	List
Name	Default Unit	Quantity On Hand	Supported
Subject --	Currency	Unit	Unit Price

Description

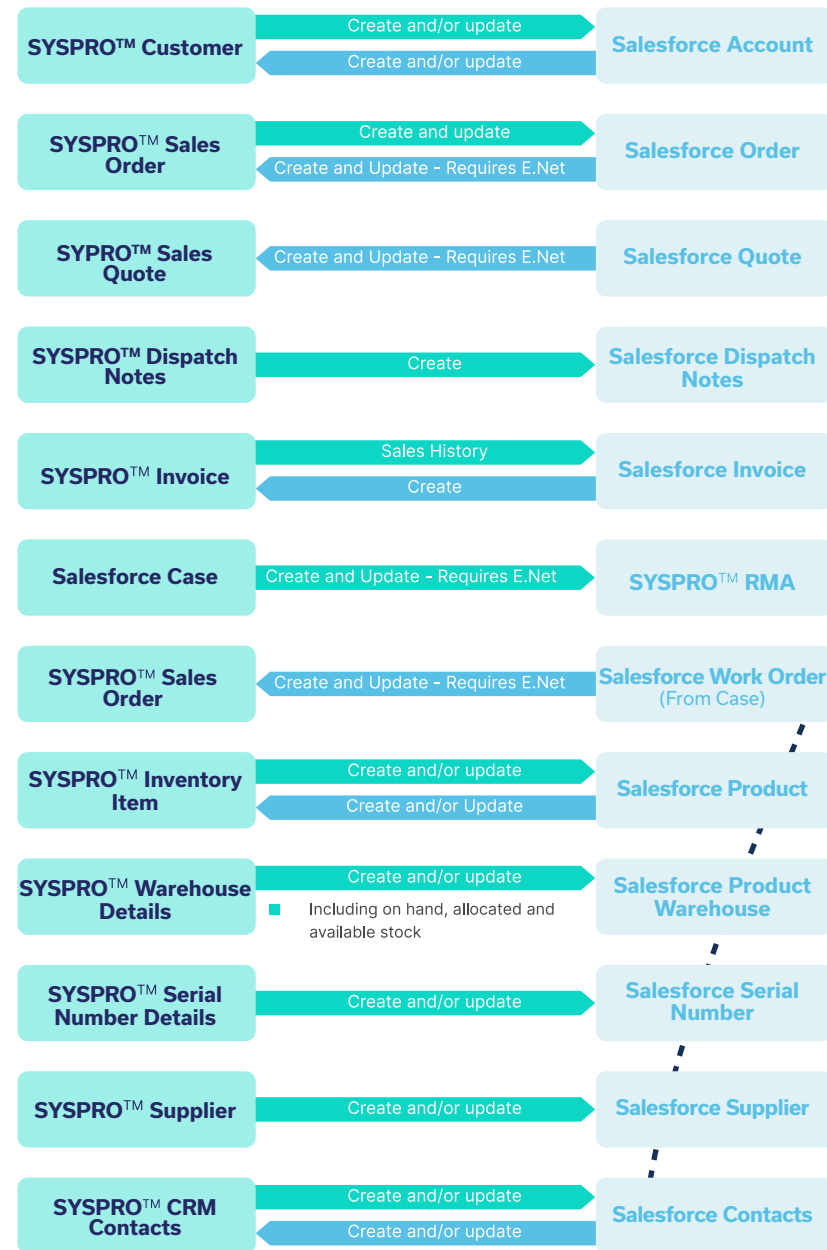|			
Vendor	Vendor Number	Stock Wieght	Stock Volume
Standard Cost	CurrentCost		

▼ SYSPRO Details

Note

Status: ACTIVE

Active

GET THE SOLUTION

So, how you do achieve these Salesforce/ERP integrations?

Salesforce Connector for SYSPRO is our proprietary integration product that is pre-built and ready to customize to your needs. The integration passes data between Salesforce and SYSPRO in both directions, so your Sales and Operations teams can both see the information they need to make key business decisions.

> **What would you add to your Salesforce dashboard if you could easily pull in key data from your ERP?**

| SYSPRO™ Customer | Create and/or update → | Salesforce Account |
| | ← Create and/or update | |

| SYSPRO™ Sales Order | Create and update → | Salesforce Order |
| | ← Create and Update - Requires E.Net | |

| SYPRO™ Sales Quote | ← Create and Update - Requires E.Net | Salesforce Quote |

| SYSPRO™ Dispatch Notes | Create → | Salesforce Dispatch Notes |

| SYSPRO™ Invoice | Sales History → | Salesforce Invoice |
| | ← Create | |

| Salesforce Case | Create and Update - Requires E.Net → | SYSPRO™ RMA |

| SYSPRO™ Sales Order | ← Create and Update - Requires E.Net | Salesforce Work Order (From Case) |

| SYSPRO™ Inventory Item | Create and/or update → | Salesforce Product |
| | ← Create and/or Update | |

| SYSPRO™ Warehouse Details | Create and/or update → | Salesforce Product Warehouse |
| | ■ Including on hand, allocated and available stock | |

| SYSPRO™ Serial Number Details | Create and/or update → | Salesforce Serial Number |

| SYSPRO™ Supplier | Create and/or update → | Salesforce Supplier |

| SYSPRO™ CRM Contacts | Create and/or update → | Salesforce Contacts |
| | ← Create and/or update | |

Let's talk about your ultimate Salesforce dashboard!

Request a complimentary analysis of your CRM/ERP Integration requirements

1-855-7ON-LINE (1-855-766-5463)

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Let's talk!

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