

# **SALES ORDER** (ERP)

The information from the CRM sales quote is used to generate a sales order in the ERP.

CRM-ERP

**Integration Pathway** 

Integrating Customer Relationship

Management (CRM) and Enterprise Resource Planning (ERP) software can simplify operations for the entire team by sharing data across the organization. This leads to better forecasting, faster quotes, increased customer

revenue, and streamlined production.

The CRM-ERP Integration Pathway

demonstrates how these systems work

together, to make business

processes a breeze.

#### What Comes Next?

After one successful sale to a new account, the CRM & ERP coact to streamline any additional sales.

- 1. New Opp Shortcut When new opportunities are prompted internally, they are added to the existing CRM account.
- 2. Sales Order Shortcut When existing customers place subsequent orders, new sales orders are automatically generated in the ERP.

#### **PROFITS**

Integrating systems streamlines data, eliminates silos, and enhances customer relationships. This enables better data-driven decision making across the organization.



## **SALES QUOTE**

Products from the ERP provide the necessary information to create a sales quote in the CRM, which is attached to the CRM opportunity.

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CRM ERP

# **SALES ORDER** (CRM)

A read-only version of the sales order appears in the CRM to share with the customer.



### **CRM UPDATE**

Once the order is fulfilled and payment is complete, the ERP's financial data is shared with the CRM.

#### **LEAD NURTURE**

The sales team uses the CRM to urge leads to consider a purchase and help opportunities find the best-fit product for their needs.

# **FULFILLMENT**

sales order requirements with existing product inventory to address demand and track the completion and fulfillment of the sales order.



#### **PAYMENT**

The ERP tracks payment status, updating once the customer's payment goes through.

# **LEAD AND**

A CRM captures and tracks the progress of leads and opportunities as well as any associated contacts and accounts.



#### **Cargas Fast Facts:**

Our purpose of Shared Success means when our customers succeed, we do too.

We have a 99% success rate for software implementations.

We're partners with industry leaders like Microsoft. Salesforce, Sage, Acumatica, and HubSpot.

# INVOICE (ERP)

A final invoice is generated in the ERP for the finance and sales teams to reference.

# INVOICE (CRM)

A read-only version of the invoice appears in the CRM to share with the customer.

