

## Pre-Sales and ERP Systems

The pre-sales process encompasses sales activities prior to an order being placed, such as selecting and configuring products and generating quotes. These activities are distinguished by the need for rapid vendor response and a flexible approach to specifying products to meet your customers' unique requirements.

TechniCon's CustomCommerce combines comprehensive sales and configuration tools; flexible data structures, a modular architecture and an overall ease-of-use to satisfy this need.

### PRE-SALES VS POST-SALES

Once a sale has been made, quotes need to be entered as orders. Orders need to initiate manufacturing processes. These post-sales activities have typically been the province of ERP systems. As all pre-sales activities will hopefully lead to post-sales processing, it would appear that these functions should also be part of the ERP system.

However, the systemic differences between the pre- and post-sales environments make this problematic. The pre-sales phase is concerned with "what might be." The post-sales phase operates on "what is." ERP systems are designed to be systems-of-record, e.g. what was ordered, what parts need to be manufactured, what accounts are paid or overdue. They excel at managing this type of hard data.

Using ERP systems to generate and store quotes plays against these systems' strengths. Entering quotes that may or may not become orders into the ERP system "pollutes" the system's database. Prospects get mixed in with actual customers. Where there are many quotes to one order, the system becomes flooded with unapproved quotes.

With CustomCommerce, the sales system is separated from the ERP system. Quotes don't enter the ERP system until they're approved orders.

Sales systems need to be able to present special pricing and product attributes to meet customer requests. Do you add special pricing or a special color into the ERP system for just one quote? Will the sales rep have to wait for an ERP analyst to enter this data?

Even when no special request exists, ERP systems have to process through their massive data stores to generate a quote, resulting in frustrating delays that discourage sales staff from using these systems. Introducing pre-sales and marketing data into an ERP system further burdens the system with extraneous information and creates downstream maintenance problems.

By design, ERP systems sacrifice a level of flexibility and responsiveness to maximize data integrity and reliability. CustomCommerce-based systems use more flexible data structures and need to track far less data than the typical ERP system, so they're responsive and easy-to-use.

### RIGID VS FLEXIBLE DATA STORES

To be effective, ERP systems require fixed formats and rigid structures in order to manage the massive amounts of data that they need to store. Data fields such as product descriptions are limited in length, necessitating the use of abbreviations and internal jargon.

This makes these fields poorly suited for online presentation to customers. Abridged product descriptions can lead to order errors and costly returns, especially where customers have to choose between similarly described products.

CustomCommerce data fields can accommodate descriptions of any length, so product descriptions can be detailed and targeted to your customers. CustomCommerce can also repurpose product descriptions from your ERP system, automatically expanding abbreviations, removing jargon and cleaning up spelling and typographical errors.

ERP systems typically manage individual part data in an item master database, using fixed length, non-configurable SKUs. For configurable products that can offer millions of combinations of options and accessories, a SKU would need to be entered in the item master for each combination.

As only a small percentage of configurations are actually used, the item master typically contains only SKUs for those products that have been ordered. TechniCon's configurator supports customized products, not just SKUs in a catalog. The configurator can substantiate any configuration and generate its SKU. If the SKU doesn't exist in the item master, CustomCommerce can automatically insert it into the database.

#### ▪ **Organizing Data for E-Commerce**

Properly setting up your product data is the key to the success of your sales and configuration system. ERP systems work with individual items in an item master. CustomCommerce works with product lines, categories and products.

CustomCommerce uses product taxonomies and classifications to organize catalog structures so that catalogs are easy to browse and products can be quickly located. Taxonomies are structures that organize data into a hierarchy. Hierarchies classify products into product trees that go from the general to the specific, e.g. furniture/seating/task chairs. As users drill down the tree, they narrow their selections.

An arbitrary number of taxonomies can be defined for a single set of data to create customer and industry-specific tree structures. For example, a furniture product tree for a customer with a multi-campus site might reference locations (e.g. main campus/building 3/conference room) to make it easy to select a chair for a specific space.

#### ▪ **Working With Marketing Data**

CustomCommerce is designed to store data that is typically foreign to ERP systems, such as collateral materials, CAD drawings and other non-transactional content.

While ERP systems store the "hard" configuration constraints used for manufacturing, TechniCon systems allow both "hard" and "soft" constraints. Soft constraints include marketing constraints, such as "this product is not recommended for this application, but can be used" or "this product is available, but will be replaced in ten months."

ERP systems restrict the number of fields associated with a product. CustomCommerce's enhanced product attribute structure allows unlimited, dynamic additions to the product database. In addition to feature criteria, product attributes can store content such as up and cross-selling information or promotional dates. Product affinities can be defined, e.g. a mounting kit should be sold for every sign and post order.

### **OFFERING COMPELLING SYSTEMS**

Real e-commerce success comes not from simply putting products on the Web, but from doing so in a compelling manner. When customers have to decide between similar components from two suppliers, they're going to select the supplier that makes their job easier.

CustomCommerce makes it simple for customers to find the information and order the products they need by offering a high level of system interactivity with an appealing user interface and site design. Customers access real-time product data with minimal delay.

And unlike ERP systems, CustomCommerce's user interface can be easily customized to convey your unique branding and identity.

### **DESIGNED FOR THE BUSINESS USER**

TechniCon develops systems designed for both ease-of-use and ease-of-maintenance. Our ContentStudio catalog management solution provides a central interface for managing all your product data.

With their complexity and role as systems-of-record, organizations are often reluctant to open up access to their ERP systems to non-operations staff.

Designed for sales and marketing personnel, ContentStudio allows content stakeholders to manage product attributes and configuration rules without the need for costly and often overloaded programmers or special production staff. Product structures can be quickly modified to accommodate special customer requirements and pricing.

ContentStudio supports any number of associated price lists for products and options. Product managers can perform “what-ifs” to try out new pricing models. Adjustments can be applied across an existing price list to create “virtual” price lists. A spreadsheet interface provides a familiar mechanism to perform changes.

Complex product lines are characterized by rapid product turnover and modifications. Placing control of your catalog content in the hands of business users accelerates your ability to make product changes and target evolving markets.

### **THE RIGHT ARCHITECTURE**

Using a modular architecture that separates the pre- and post-sales functions, CustomCommerce lowers maintenance costs while increasing system flexibility for both the ERP and sales systems.

In this environment, the sales system can be tested, modified and updated independently without impacting ERP system users company-wide. The ERP system can similarly be modified without affecting your sales system. Your IT staff is not forced to contend with one monolithic application.

Neither front nor back-end functionality needs to be compromised. Companies can choose the ERP and sales systems that best satisfy their requirements.

This distributed architecture also offers long-term advantages, providing a logical pathway to the use of emerging Web services technologies.

#### **▪ Working With Your ERP System**

Working with legacy product data and ERP systems is an essential part of all TechniCon engagements. Committed to industry-standards and open systems, we leverage Web services, APIs and other technology standards to integrate our systems to your ERP, CAD and other computing systems.

TechniCon has developed transparent and easily maintainable mechanisms for transferring product and order data between CustomCommerce and ERP systems ranging from Oracle and J.D. Edwards installations to homegrown systems.

The long-term success of our clients is paramount to TechniCon. TechniCon provides ongoing support for the interface between sales and ERP systems as part of our system maintenance services.

### **FOCUS AND EXPERTISE**

Companies benefit by seeking out technology providers that offer solutions targeted at specific business problems and initiatives. Such solutions link the advantages of lower costs and faster implementation with clearly definable objectives.

TechniCon has been developing interactive sales applications for over a decade and a half. Our focus is on one goal, creating sales and configuration systems that set the standard for the industry. We can leverage our experience to make certain your product data is properly modeled and your system implementation is surprise-free.

### **FOR MORE INFORMATION**

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