



WHITEPAPER

Exact Synergy

or Salesforce.com?

Choosing the best solution to complete
your midsize company's ERP system

=exact

Introduction

Why ERPs need a human touch

Your enterprise resource planning (ERP) system is crucial to your business' success. If you already have one in place, then you know how valuable it is. For many companies, their ERP system, (also known as a "system of record,") is at the heart of the business' software applications. But do you feel like your ERP lacks a soul? Surely there are ways to make it more interactive? More "human?"

Like most midmarket company leaders, you're probably always on the lookout for newer, more innovative ways to support and empower your workforce. Ways that make communication and collaboration easier than ever, all in the name of increased productivity. At the same time, you're always focusing on opportunities to increase customer satisfaction and improve client relationships.

Still, you might be facing some common challenges with your ERP. This probably sounds familiar: your employees dislike working in and out of the ERP system. When employees are required to interact outside of their ERP system, they do so by using tools and workarounds of their own. As a result, valuable customer data gets lost. This can mean that you're working with outdated or incomplete information when making important business decisions.



App fatigue

Perhaps it's no surprise that employees look for solutions outside the ERP system. We all resort to apps that help us perform single tasks more efficiently. Yet, with so many apps easily available on the market for every kind of task, there's a new phenomenon on the rise: app fatigue.

In 2019, the average employee used 28 different apps just to perform basic tasks. Almost three-quarters of employees surveyed in 2019 reported working with at least five apps open simultaneously. Additionally a 2018 study by RingCentral found that most workers toggle between apps up to ten times each hour. That means that companies lose up to 32 days of productive work per employee every year.

For most businesses, the ERP system is at the center of their technology investments. The transactions housed inside your ERP system are considered by some as a measure of your company's financial worth. But most ERP systems are missing the "human" side of your business: the interactions that lead to your transactions.

A human interface for your ERP

Fortunately, technology exists to allow companies to digitize their business interactions. New technologies let you add a human interface to your ERP. Industry experts often group this type of technology under the term "business process management" software. You've probably considered using Salesforce.com, one of the most widely used process management tools in the market today. Salesforce.com is equipped with considerable functionality and has name brand recognition in the marketplace. But here's the truth: as a mid-sized company with major investments in your ERP software, it is important to you that your people maximize the use of your existing ERP system. Many companies try to achieve this by subscribing to Salesforce.com as a way of supplementing the shortcomings of their ERP. The solution's popularity owes largely to its vast business process configuration options, CRM components and widely used Lightning Platform (Force.com) for extending the software's capabilities. But all of this comes at significant costs to a business, so when making sizable technology investments to complete your ERP, you will definitely want to shop around before deciding on the right business process

management solution for your business.

An ideal software solution emulates your real-life business process interactions. That means it replicates departmental business process workflows and gives you intuitive document storage and sharing features. Add in customer relationship management (CRM), human resource management (HRM) and project management capabilities, and you have a solution that unites all your automated processes in one convenient place.

If this sounds appealing, then it's worth looking at how Exact Synergy can add that human touch that your ERP currently lacks. This whitepaper is all about Exact Synergy, a business process management software solution by Exact, a Dutch-based, internationally recognized mid-market business software organization. It looks at how Exact Synergy stacks up in comparison with Salesforce.com.



Contents

This whitepaper will highlight five key points that any mid-sized company will want to consider when choosing a business process management tool to enhance their ERP:

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Choose the best solution

Product focus

Your employees need ways of interacting with business-related information. This includes step-by-step workflows, creating and viewing documents associated with your ERP transactions, approval processes and collaborating across departments and project teams. They also need to be able to action their assigned tasks, regardless of their location or which device they are using. All of this takes place within or around the ERP system you've set up for your business.

You also need to monitor business transactions, initiate actions and tasks and then automate the processes that follow. To keep things on track, you'll need to prompt employees to perform actions without forgetting. You'll also want to alert them to situations in which the results are outside the preset parameters. That means monitoring business activities with options to automate actions and responses, based on a customizable set of rules.

Lastly, the tool for supporting these tasks must be easy to integrate with your ERP or other systems. It needs an easy-to-use tool for performing mappings that are not provided out of the box. The tool must also generate data overviews and automate transactions back to the ERP based on documented rules, all while running within the same platform via published APIs.

While Salesforce.com can check all these boxes, Exact Synergy is designed specifically to perform these functions. It's important to understand your software solution's focus. Let's compare the focus of these two programs:



Exact Synergy

Exact Synergy enhances your ERP (transactions/ interactions) in many ways. It lets companies report on and interact with ERP information using Microsoft SQL reporting services, open APIs and embedded query builders. Its business activity monitoring capabilities allow companies to automate processes and initiate automation of ERP transactions directly from within the Exact Synergy workflow.

As an internationally recognized software provider for more than 35 years, Exact has been focusing on the ERP market for decades. With its intimate familiarity with the ERP market, Exact designed Exact Synergy to overcome three critical weaknesses that plague mid-sized companies in their existing ERPs:

- + Lack of natural abilities to share information.
- + Lack of features for digitizing your business process interactions with workflow, document management and social functionalities.
- + Lack of automation capabilities for speeding up business processes that are otherwise performed manually.

Another key strength of Exact Synergy is its useful out-of-the-box capabilities. Upon initial deployment, Exact Synergy includes already configured, out-of-the-box workflow and document management components for your ERP users. It is a plug-and-play solution with minimal initial configuration allowing companies to immediately begin seeing a return on their investments.

Salesforce.com

Salesforce.com offers similar features compared with Exact Synergy. However, due to its vast subscriber base, it has a much broader focus. Salesforce's platform provides capabilities that touch on many business areas surrounding ERP users but not necessarily directly impacting those ERP users. These include sales, service, marketing and commerce. Salesforce.com also has a significant number of configuration options. When subscribing to Salesforce.com, a company must take considerable care on choosing the right configuration to maximize user adoption. While Salesforce.com has out-of-the-box configurations, these are not geared solely for the usability of the ERP market. Seeking the advice of a specialist or established consulting firm can often help you to choose the right configurations that align with your company's ERP needs. Before deciding, always clearly define which features you need. Then start comparing your options.

Choose the best solution

Ease of use

Access to information is also often a major challenge facing companies today. Not all employees have access to their company's ERP system. Some employees have lower needs for information. For them, it's hard to justify the cost of a full user license. Yet, increasingly, it is important for everyone within the organization to have efficient access to information easily. That means accessing data in a natural way, and being part of the process, not external to it or removed from it.

Companies around the world can become more efficient by removing the technology barriers they face. All employees within a business need access to information, without necessarily tying up a costly ERP user license. They need to be able to interact naturally with the information and automate transactions that keep the business operational.

When tools like business process management software are added to your ERP, you equip your employees to do their jobs better.

With business process management software, you can share and interact on comprehensive information to all who need it, in all parts of the organization. This breaks down those technology barriers at an affordable cost. It provides all the information that is important to people, so they can use it in a more natural way.

Modern collaboration tools allow your employees to capture each human interaction that takes place within your business and clearly link them with everyday transactions. This provides a transparent, actionable record for any transaction, whether its financial, sales, customer service, purchasing, production, inventory or beyond.

Salesforce.com and Exact Synergy are both powerful systems that support you in your "ease of use" technology goals but to varying degrees. In this section we'll discuss some of the key differences between the two.



Exact Synergy

Exact Synergy requires minimal configuration. It easily connects with your ERP using out-of-the-box examples for workflow, document management, homepages and workspaces. Each of these out-of-the-box examples can be modified to emulate your specific business processes surrounding your ERP solution. For example, workflow configurations can be modified either directly in the live company or via a test company environment and be imported into the live company using standard XML export/import features. Exact Synergy's easy-to-use interaction features like workflow, document management and social functionality will enhance your ERP by bringing natural interaction into your organization. This improves communication throughout your company and ensures quick adoption. Employees are quick to embrace this new way of working, and it requires very little

training. Many Exact Synergy customers say that the program's workspaces, card views and reporting options enable their company to provide exactly the right amount of relevant information. This prevents overloading users with ERP related information that isn't necessary. Exact Synergy's navigation is intuitive, so users can easily find what they need without wasting time. Everything they need is at their fingertips, whether its workflow and document management, customer cards, supplier cards, item cards, project cards, human resource cards or more.

Salesforce.com

Salesforce.com enables significant information sharing, with deep levels of customization options. With its powerful artificial intelligence capabilities, it also leverages considerable automation in its processes. While this can often

help achieve desired productivity goals, having too much automation can make an application feel less natural for end users.

From a configuration standpoint, Salesforce.com offers many options, however if not managed well, subscribers also can run the risk of "information overload" on account cards and on similar types of frequently accessed screens. If preventing app fatigue and achieving maximum ERP solution adoption are two of your main goals, then minimizing unnecessary information with a welcoming environment should be two of your software solution selection priorities.

When seeking a business process management solution to complete your ERP, choose an interface that is not cumbersome and one where it does not take multiple screens to process a single transaction.

Choose the best solution

Costs

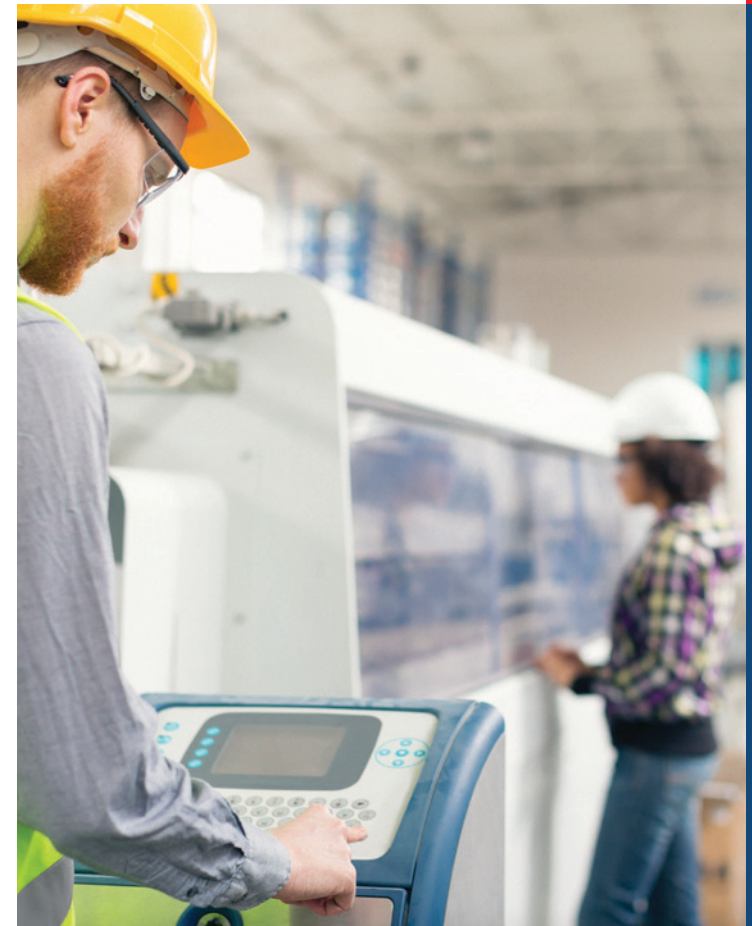
Cost is always a concern when shopping for business software. In some cases, the costs of integration are even higher than the costs of licensing the software itself. This is a major concern, particularly for mid-sized companies that lack the budget to redesign their business processes overnight.

When comparing subscription options for Salesforce.com versus Exact Synergy, it's important to think about cost in a few different ways. First, consider the cost of not having a business process management solution like Salesforce.com or Exact Synergy. You'll usually find that this cost justifies an investment in new software. Let's look at how this works in detail:

Costs of missing functions in your ERP

Is your ERP lacking a function that you really need? In that case, your software selection process will probably consider various cloud-based solutions that give you the functionality you require, for a justifiable price. However, finding a solution and buying it are only the first steps. Next, you must consider the costs of integration, IT maintenance and technical support going forward.

Meanwhile, if your employees are slow to adopt the new solution, then app fatigue can quickly set in. When that happens, employees will resort to tried-and-true methods: email, manually developed Microsoft Excel spreadsheets and phone calls. Interactions like these often take place without being saved in a collaborative and sharable system. As a result, information is incomplete.



How will you and your employees ever improve on making informed business decisions without access to complete, accurate information? How much business is your company missing out on as a result? By now, you start to realize how much money your ERP is costing your business. It's time to consider integrating a solution like Exact Synergy or Salesforce.com.

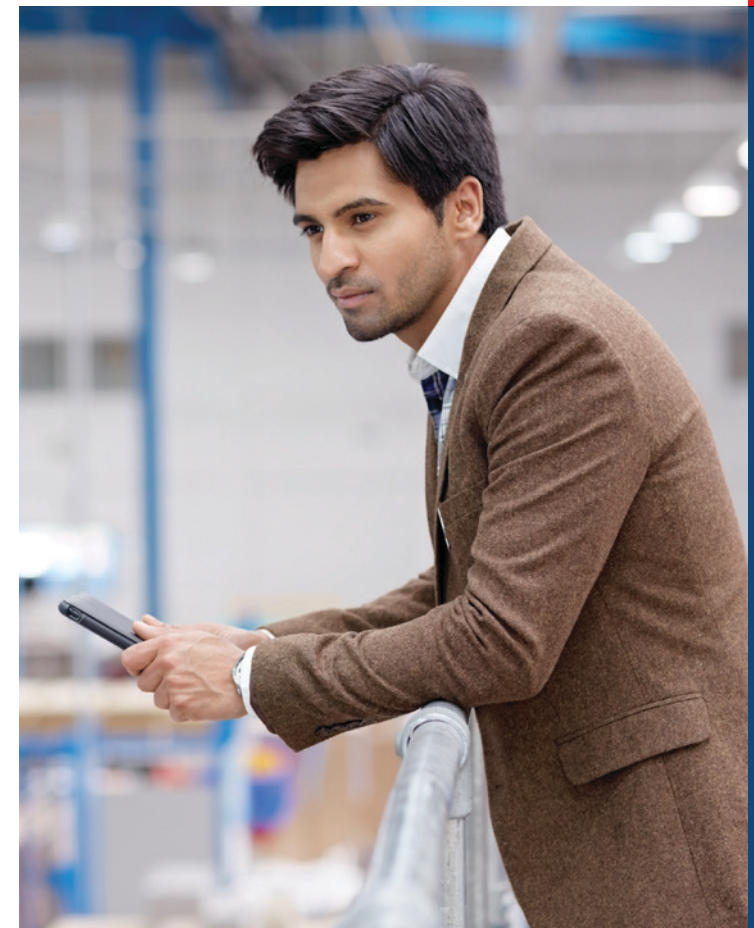
Productivity costs

Next, consider the productivity costs involved in not having an effective solution for managing business process interactions. Your ERP stores tons of information mostly related to business transactions. Common ERP transactions include customer orders, purchase orders, sales invoices, manufacturing activity and financial transactions. While your ERP system provides standard reports, these rarely tell the full story around your business transactions.

Say you want to see the actual emails and records of phone conversations with customers or suppliers, or review transaction approvals from department heads. Traditional ERP software reports cannot help you with this. That means employees must spend precious time tracking down information from multiple sources. The result is lower productivity and soaring accountability costs.

Software costs

Finally, consider the software's actual price tag. How much does a license for Exact Synergy or Salesforce.com cost? Be sure to consider the various types of licenses available. Each type offers different functionalities. You may decide that not all your users need the same degree of access or capabilities. It's important to know your options, so you can pick the most cost-effective solution.



	Salesforce Professional \$75 Per month USD/user	Exact Light \$8 Per month USD/user	Salesforce Enterprise \$150 Per month USD/user	Exact Medium \$51 Per month USD/user
Account, Contact, Lead and Opportunity Management	✓	✓	✓	✓
Email Integration with Gmail or Outlook	✓	✓	✓	✓
Salesforce Mobile App	✓	✓	✓	✓
Lead Registration and Rules-Based Lead Scoring	✓	✓	✓	✓
Collaborative Forecasting	✓	✓	✓	✓
Workflow and Approval Automation	✗	✓	✓	✓
24/7 Support and Configuration Services	✗	✓	✗	✓

Note: In addition to user subscriptions, Exact Synergy has a flat fee, base price of \$96.00 USD per month. Depending on deployment, hosting or on-premise costs may still apply.

Choose the best solution

Implementation

The implementation of a business process management solution can sometimes be another major concern if you want to find the right solution for completing your ERP.

Chances are, you selected your ERP system based on three factors:

- + Functionality
- + Ease of use
- + Total cost of ownership

Yet, best-in-class organizations also consider these factors:

- + Ability to tailor functionality without programming
- + Accessibility
- + Ease of implementation

In the past, an application's deployment model wasn't always a key criterion in decision-making. Yet, in the age of cloud-based solutions, implementation is a key concern. When considering whether to enhance your ERP with solutions like Exact Synergy or Salesforce.com, always research which implementation options are available and which ones make you most comfortable. Your main choices for implementation models are on-premise, cloud-based or SaaS (see below).

On-premise

ERP systems have traditionally been implemented on servers that are stored and managed in-house. Your in-house IT department is then responsible for any customizations, application upgrades and maintenance. Some software functions are outsourced to ERP vendors or external implementation consultants.

Advantages: You're fully in control of your own IT and software.

Disadvantages: You need a lot of IT and software expertise in-house.

And to keep up with the times, you'll have to continually invest in new hardware.

Cloud-based

Cloud-based ERPs are supplied via the internet. The software and servers are located elsewhere (hosted by the ERP vendor, a third party or by your own company). Cloud-based implementations give you the freedom to choose how much control you want over your software and technology environment.

Advantages: Cloud-based deployments reduce the complexity of your in-house IT. You don't need to pay for hardware upgrades, and you have the same configuration capabilities as if the software were

installed on-premise. You enjoy easy access to the application, and the data stored in the cloud is 100% yours.

Disadvantages: You still need to invest in expertise e.g., annual software updates, to keep your software application up to date.

Software as a service (SaaS)

SaaS ERPs are fully cloud-based too, which means that your software vendor manages everything: availability, security and maintenance. You usually pay a fixed fee per user, per month.

Advantages: You don't need to invest in hardware and you have always the latest version at your fingertips. You can also connect various SaaS applications with each other in the cloud. As the SaaS software that you choose is typically in the same environment as

other customer deployments, you typically get greater computing capabilities without having to pay for a new technology infrastructure. The web-based interface also eliminates the need for time-consuming software installations.

Disadvantages: With SaaS solutions, some things are out of your control, such as the timing of product updates. Additionally, the preconfigured customer environments of some SaaS solutions can limit your options for customizing the software. Lastly, you may lose full ownership of the data you enter in a SaaS application, which may lead to other costly delays. You might also run into difficulties trying to access certain data extracts; this often requires paying for assistance from specialists or consultants to gain access to data.



Exact Synergy

In terms of implementation, a major benefit of Exact Synergy is that you get to choose your own deployment method. Many of its deployment options give you full access to your Exact Synergy database. In this case, you fully own and can flexibly access your company's data.

Exact Synergy also sets no requirements for requesting data extracts as you have full control of your data. You can also easily customize your environment using the Exact Synergy software development kit (SDK). Exact also provides access to Exact Synergy's REST web services based, application program interfaces (APIs) at no additional charge. What's more, subscribers of Exact Synergy benefit from Exact's global services and support team, along with regional business partners who specialize in the deployment of Exact Synergy for your ERP solution.

Salesforce.com

Salesforce.com runs on its own cloud server, with its own maintenance schedule. This eliminates any concern that you might have about additional investments in hardware or IT expertise. While this may be true, you may need to take into consideration that you will encounter minimal disruptions where you may not have access to your environment (e.g. during maintenance activities).

There are a few other benefits of Salesforce.com that you can consider. Subscribers can easily register with Salesforce.com and purchase it through a cloud-only model. Salesforce.com also has an extensive partner network to support you with an implementation. However, it's important to consider that some implementations can often be costly, especially if you are considering the vast amount of configuration options available to companies.



Choose the best solution

Extensions (apps, APIs)

Exact Synergy and Salesforce.com both eliminate the need for so many disconnected applications within your organization. You're probably curious about connecting the apps that are most important to your business and more specifically, your ERP solution. It's important to consider the technical abilities, areas of focus and availability of common extensions. Let's see how the two programs stack up:

Exact Synergy

There are many apps designed for connecting with Exact Synergy. Exact Synergy apps and extensions mainly focus on improving the ERP user experiences with workflow-based, interaction tools. They also capture the transaction history that supports those interactions. This gives you a 360-degree view of every business situation.

Key capabilities and apps include:

- + A RESTful web service layer for any developer to connect to Exact Synergy. Any app provider can easily connect to Exact Synergy. The web services layer is free of charge. Providers can also subscribe to "Exact for Connectivity" for integration support from Exact experts.
- + Exact technology partners around the world create valuable add-ons for Exact Synergy. For instance, ConnectIt, from Exact technology partner GLM Systems, enables companies to share, interact and automate on virtually any ERP system using Exact Synergy.
- + Other best-in-breed solutions can easily connect with Exact Synergy. Options include marketing automation integrations with industry leaders like HubSpot. Integrations have even been written to support the connection between Exact Synergy and Salesforce.com.
- + Due to its ERP-specific focus, Exact Synergy does not have as many out-of-the-box extensions available as Salesforce.com.

Salesforce.com

Salesforce.com has more choices for apps and extensions than most business process management providers. Yet more isn't always better. When deciding between Exact Synergy or Salesforce.com to complete your ERP experiences, ask yourself how many additional integrated apps you really need? Also consider whether the out-of-the-box app integration is flexible enough to meet the customized needs of your business.

Salesforce.com meets so many different business needs and focuses. As such, many of its app extensions may also focus on areas unrelated to your ERP needs. Having an app for everything isn't necessarily the same as having the best apps for completing your ERP. When evaluating and selecting a business process management solution, it's important to keep this point in your overall consideration.



Conclusion

The right addition to your ERP

As you can see, considering the five factors in this white paper are critical when selecting the perfect business process management solution to complete your ERP. One thing is clear: it's more important than ever for your employees to share and interact on business information while automating the flow of information whenever possible. These are crucial factors for the success of your business.

While Salesforce.com is often a "go-to" investment for companies, Exact Synergy should also be a consideration when your focus is on "completing" the functions that ERP users

need most. Exact Synergy focuses precisely on these critical functions and offers the ease of use that you need to prevent "app fatigue." With its affordable licensing price point and hassle-free implementation, companies can get up and running quickly with Exact Synergy. By adding focused extensions that surround your ERP and BPM needs, you'll have what you need to completely add that human element to your ERP solution.

To learn more about how Exact Synergy can benefit your business

visit Exact at www.exact.com/us/software/exact-synergy or contact your regional Exact representative.



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Exact inspires SMEs to grow. They support the economy, and we help them do it. Just like SMEs, Exact has no fear of the unknown. We're ambitious and like to lead the way. We're familiar with the challenges and make software to overcome them with innovative solutions focused on the needs of our customers. Exact offers SMEs and their accountants an overview of today and insight into tomorrow. This way, we help our global customers achieve their ambitions.

Exact. Cloud business software.