



# CFI Suite™ for Steelcase

Built on Oracle NetSuite® for  
the Contract Furniture Industry

Powered by





## CFI Suite

NetSuite® for the Contract Furniture Industry

Built on the **global-leading** Cloud-Based ERP, CFI Suite™ is our edition of Oracle-NetSuite® for the Contract Furniture Industry. It is a suite of industry specific configurations, personalizations and applications that run **seamlessly** inside of NetSuite® and enable the dealer to operate their entire business on **one software platform**.

# Best-in-Class Cloud Solution

## CRM



A complete and integrated Customer Relationship Management Solution that gives you a 360° view of your customer. From Sales Force Automation, Partnership Management to Full-Fledge Marketing Automation, NetSuite automates your CRM processes while keeping a single source of truth in-line with your Cloud-Based ERP. This contributes to the ability of overseeing the entire life-cycle of your customer's journey within immediate reach, from lead-to-sales opportunities, to sales orders, renewals, fulfillment, cross-sell, upsell and support.

## Accounting & Financials



The **#1 Cloud Financial Management Solution** used by 37,000+ companies globally, helps expedite your Financial Transactions, accelerate your Financial Close and ensure compliance. The Multi-Company Cloud Platform ensures realtime visibility into the Financial KPIs of your company from Consolidated to Individual Transactions. Fully integrated with your CRM, Order Management, Inventory Management and E-Commerce, NetSuite helps to streamline the overall company's processes.

## Automation & Integration



The native functionality of NetSuite allows dealers to benefit from the leading industry best-practices with tools that provide point and click customizations of business processes. From Approval Routing, Validations to Automated Emails, NetSuite Automation ensures that redundant tasks are processed effortlessly. CFI Suite™ can easily connect to other Third-Party plugins available in its Market Place, and Open APIs which can be integrated for more complex connections.

# Built for **Modern Businesses**



## Project Management

CFI Suite™ allows dealers to get an accurate Insight into their Orders and an understanding of the true costs and profit of their projects. Our application ensures to provide calculations of Gross Profit, Commissionable Gross Profit along with identification of discrepancies across the order chain.

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## True Cloud Computing

Run your contract furniture operations with nothing more than a browser and Internet connectivity. Integrate with any third-party system using Open APIs. With CFI Suite™, Software Upgrades, Security, Compliance and Downtime are no longer constraints. As the world largest Cloud ERP Vendor run by more than 37,000 customers, NetSuite provides Cloud Infrastructure to ensure businesses can run with complete confidence anytime, anywhere.

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## Business Intelligence Analytics

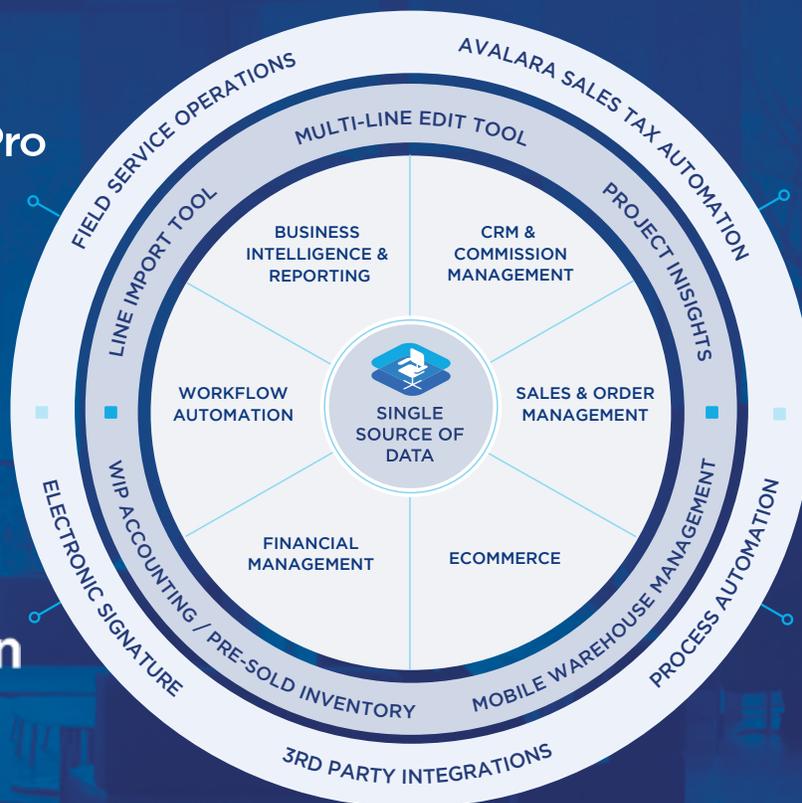
CFI Suite™™ includes an accurate view of your business, from the executive level to the front lines, thus making room for reduced time in effective decision-making. Dealers now have access to powerful reporting and query capabilities into their data with easy-to-use analysis tools that includes Excel-like formulas and pivoting of data. CFI Suite™ comes with real-time dashboards for each of your departments and roles, ensuring they all have a snapshot on their duties, KPIs, goals and reminders.

# Why CFI Suite™?

Steelcase

- CFI Suite™ is currently being used by numerous dealers and is rapidly becoming the **platform of choice** for forward-thinking dealerships that want to diversify their business channels while consolidating their data and operations into **one system**.
- Point and Click customizations enable the dealer to **self-maintain** and **optimize** the platform over time, reducing the total cost of ownership.
- Our team has **15+ years** experience implementing and supporting dealers on the NetSuite platform.
- With an extensive partner ecosystem that includes **500+ SuiteApps** that further extend the platform, additional functionality and integrations are just a click and download away.

 **Field Ops Pro**  
A product by ERP Success Partners



Avalara

DocuSign

avanta

celigo

# Extensions (SuiteApps)



Line Import Tool

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Project Insights

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Steelcase CRM Connector

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Multi-Line Edit Tool

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Mobile Warehouse  
Management



## Line Import Tool

Using the Line Import Tool, project coordinators, CSRs, or sales team members, simply drag-and-drop files such as SIF and CSV into the system to create a transaction with line items. This eliminates the need for Excel edits, double efforts, and potential data errors.

### Key Features

- › Uses SuiteScript 2.0 and NetSuite's latest technology for speed and efficiency.
- › Supports the dragging-and-dropping of line items to both quotes and sales order transactions.
- › Allows users to create their own field mapping in the NetSuite user interface.
- › Can handle the hundreds or thousands of different line items that populate the typical contract furniture order.
- › Accounts for items that don't exist in the catalog by creating the items based on a predefined configuration.



## Project Insights

Project Insights Tool allows dealers to accurately forecast Gross Profit, manage WIP and Cash balances for their orders and providing them an overview of their Gross Profit throughout the order chain. Project Insights also allows dealers to analyze their project Gross Profit when dealing with several orders tied to a similar job, facilitating their decision-making process for a particular order at any given time. Being much of an incentive-driven industry, Project Insights Tool can additionally calculate the Commissionable Gross Profit for sales representatives.

### Key Features

- › Forecast Gross Profit Orders.
- › Forecast Project Gross Profit.
- › Compare Forecast versus Actuals.
- › Forecast Cash Balances.
- › Real-Time Visibility into WIP/ Pre-Sold Inventory.
- › Manage Discrepancies.





## Steelcase CRM Connector

The Steelcase CRM Connector allows dealers to seamlessly connect CFI Suite™ with Hedberg, ensuring a complete communication of the CRM across both business systems.

NetSuite CRM is a complete, integrated, CRM solution that gives you a 360° view of your customer's processes; Sales Force Automation (SFA), Partner Relationship Management and Marketing Automation, are all integrated with your cloud-based ERP. You are able to access all the lifecycle information of your customer's journey in real-time, through a few clicks.

### Key Features

- › Real-time sync.
- › 360-degree view on leads, prospects and customers.
- › Integrated Sales Processes.



## Multi Line Edit Tool

Multi Line Edit Tool provides dealers the ability to filter and update column values on Transactions in Mass including modification of Pricing fields. The Tool saves users the need to export their SIF File that may require modifications and re-upload, helping to optimize tremendous amount of operation efforts.

You are able to update the lengthy transaction when having enormous Item Lines with Multi Line Edit Tool. The detailed criteria feature allows dealers to sort and filter the relevant lines on their transactions and update the required ones only; making it possible to modify complex and heavy transactions. Stay within the system for your modifications without the need to export your transactions and work externally, ensuring data integrity, data security and better compliance.

### Key Features

- › Complex Filtering Capabilities.
- › Include Criteria to Filter Down to specific Transaction Lines.
- › Mass Update Values on Transaction Lines.
- › Pricing Calculator.
- › Allows Update to Sell and Cost Fields through identification of Target GP or Discount Values.
- › Supports Multiple Transaction Types.





## Mobile Warehouse Management

Mobile Warehouse Management for Steelcase dealers offers a comprehensive solution for optimizing warehouse operations. It simplifies package receiving, resolves exceptions, streamlines bin transfers, eases truckload staging, enables barcode-assisted physical counts, and facilitates inter-warehouse transfers. This solution developed by ERP Success Partners and included as part of CFI Suite™, is being further enhanced to comprise of additional key functionalities. This will empower Steelcase dealers to enhance efficiency and accuracy throughout their warehouse operations.

### Key Features

- › Real-time sync.
- › Wi-Fi enabled.
- › Package Receiving.
- › Receiving Exceptions Resolution.
- › Bin Transfers.
- › Truckload staging & more.



# The Right Platform The Right Partner

**With over 15 years** of experience implementing, supporting and customizing NetSuite® for our clients, we want to make our past experience your future success.

*\*Pricing starts as low as USD 76  
per user on a monthly basis*



**ERP SUCCESS**  
PARTNERS



**CFI Suite**  
NetSuite® for the Contract Furniture Industry



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“ CFI Suite™ will give the Steelcase dealer a powerful platform to operate their furniture business and seamlessly incorporate additional business divisions such as construction, flooring, AV, office supplies, etc.

” **Mark Rhyman**  
**Partner | ERP Success Partners**

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★ ★  
**5** STAR PARTNER  
— 2022 —  
★ ★

★ ★  
**5** STAR PARTNER  
— 2021 —  
★ ★

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2020 ★ ★ ★ ★

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