CFI Suite™

The **Premier DBOS** for the teknion Dealer Network

Built on Oracle-NetSuite® for
the Contract Furniture Industry

Powered by

CFI Suite
NetSuite® for the Contract Furniture Industry

ERP SUCCESS
P A R T N E R S

Overview

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

Why **CFI Suite?**

› 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 personalizations enable the dealers to **self-maintain** and **optimize** the platform over time, reducing the total cost of ownership.

› With an extensive partner ecosystem including **500+ plug-and-play Extensions (SuiteApps)**, the dealers' platforms can be further extended with additional functionalities and integrations through one click.

CFI Suite | **teknion**

NetSuite® for the Contract Furniture Industry

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 on 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 cost 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.

True Cloud Computing

Run your contract furniture operations with nothing more than a browser and an Internet connection. Integrate with any third-party 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.
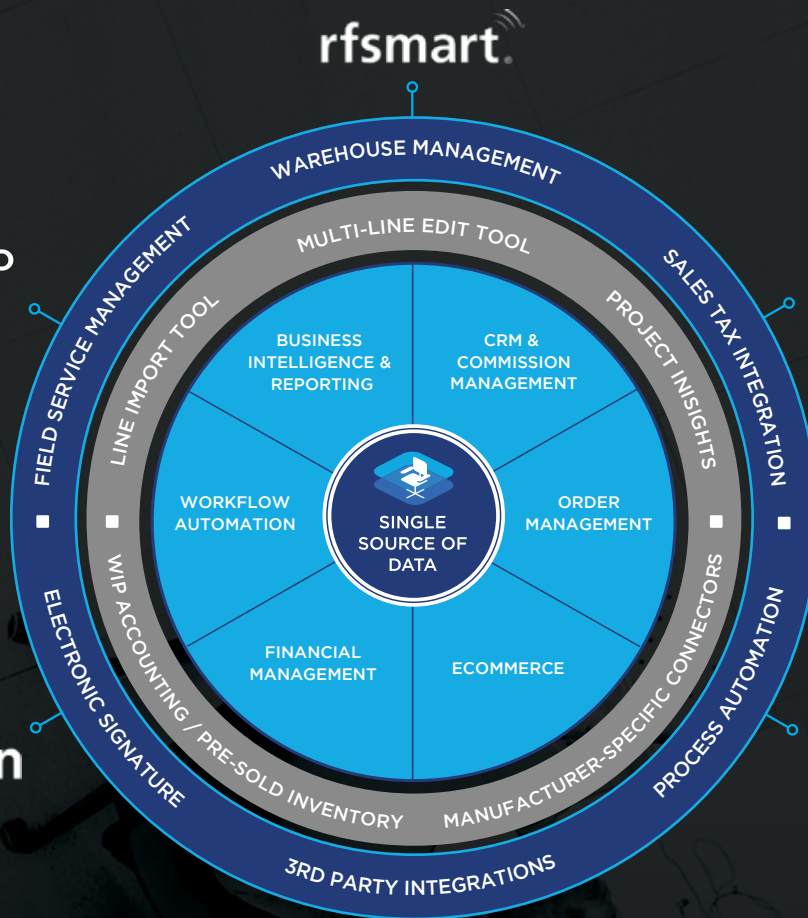
Business Analytics

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.

A Unified Platform

rfsmart

Field Ops Pro
A product by ERP Success Partners

Avalara

DocuSign

avanta

celigo

WAREHOUSE MANAGEMENT
FIELD SERVICE MANAGEMENT
SALES TAX INTEGRATION
MULTI-LINE EDIT TOOL
LINE IMPORT TOOL
PROJECT INISIGHTS

BUSINESS INTELLIGENCE & REPORTING
CRM & COMMISSION MANAGEMENT

WORKFLOW AUTOMATION
SINGLE SOURCE OF DATA
ORDER MANAGEMENT

FINANCIAL MANAGEMENT
ECOMMERCE

WIP ACCOUNTING / PRE-SOLD INVENTORY
MANUFACTURER-SPECIFIC CONNECTORS
ELECTRONIC SIGNATURE
PROCESS AUTOMATION
3RD PARTY INTEGRATIONS

Extensions (SuiteApps)

Line Import Tool

Project Insights

Document Capture Tool

Multi-Line Edit Tool

Customer Assets 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.

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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.

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Document Capture Tool

Document Capture Tool (DCA) is a Record Creation Automation that allows dealers to automatically create transactions in CFI Suite using a robust OCR Technology. DCA ensures data is created by simply capturing it from an email inbox.

Our Business Intelligence tools and reports ensure the best customer experience on handling of the transaction creations and error handling mechanisms.

Key Features

› Character Recognition Technology.

› Auto Capture from Microsoft Outlook.

› Open API.

› Support for different transaction types.

› Real-time data capture.

› 15-minutes close synchronization.

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.

Customer Assets Management

Our Customer Assets Management (CAM) ensures users are able to handle the inventory management of assets owned by clients. With the accounting complexity in managing inventory owned by customers, our SuiteApp has been designed to provide a complete 360 visibility on customer inventory.

The CAM dashboard enable users to never miss any billings approval or any inventory control reminders. Hence, providing the adequate assurance for your company to ensure customer satisfaction.

Key Features

› Customer Assets Tracking

› Assets Transfer

› Storage and Handling Services

› Dashboard and Reporting

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.

ERP SUCCESS
PARTNERS

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

“ CFI Suite™ will give the Teknion 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

CFI Suite | teknion

5 STAR PARTNER 2022

5 STAR PARTNER 2021

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