



How ***RUNMYBOT***[®] Creates a Unified and Seamless CPQ Experience Across Enterprise Systems

RUNMYBOT[®]

Proprietary and Confidential to actionfi

Overview

RUNMYBOT®, a product by actionfi, delivers a centralized integration and orchestration layer connecting Salesforce CRM, Xait CPQ, and Acumatica ERP into a unified transactional ecosystem.

Built to support complex Configure, Price, Quote (CPQ) workflows, **RUNMYBOT®** enables seamless synchronization of commercial, product, and operational data across platforms in real time while ensuring secure communication, transaction consistency, and uninterrupted user experiences

Client Success

Enterprise CPQ & ERP Operations

RUNMYBOT® was implemented to streamline and automate the complete lifecycle of quote-to-order processes across Salesforce, Xait CPQ, and Acumatica ERP.

The platform acts as the orchestration backbone between customer relationship management, product configuration, quoting, and backend ERP fulfillment systems, enabling organizations to eliminate disconnected workflows and manual processing.

The integration framework supports synchronized data exchange between all platforms, allowing sales teams, operations teams, and manufacturing units to work from a single source of truth throughout the sales and fulfillment cycle.

By automating quote generation, BOM synchronization, sales order creation, and product catalog management, **RUNMYBOT®** enables organizations to scale CPQ operations efficiently while improving data accuracy and operational speed.

Customer Satisfaction & Growth

The successful deployment of **RUNMYBOT®** created a fully connected commercial workflow environment where users could seamlessly transition between Salesforce, Xait CPQ, and Acumatica ERP without experiencing fragmented processes or duplicate data entry.

actionfi provided centralized orchestration, transaction monitoring, retry handling, and operational support to ensure reliable synchronization across all systems. The integration framework enabled organizations to accelerate sales cycles, improve quote accuracy, reduce operational overhead, and support business growth through scalable automation.

The continued adoption of **RUNMYBOT®** across enterprise CPQ workflows reflects strong confidence in the platform's ability to manage high-volume transactional integrations while maintaining performance, reliability, and security.



Centralized Transaction Orchestration

Seamless Cross Platform Synchronization

RUNMYBOT® automates and orchestrates multiple integration workflows between

- Salesforce, Xait CPQ, and Acumatica ERP, including:
- Salesforce Opportunity to Xait Opportunity synchronization
- Account and Contact synchronization
- Acumatica Product to Xait Parts synchronization
- Acumatica Product to Salesforce Product synchronization
- Xait Quote to Salesforce Quote synchronization
- Approved Xait Quote to Acumatica ERP Sales Order processing
- Structured Bill of Materials (BOM) transfer
- Automated transactional validation and schema transformation

This orchestration framework ensures all systems remain continuously synchronized while enabling real time visibility into commercial and operational processes.

Real Time Quote & Order Automation

Accelerating Commercial Operations

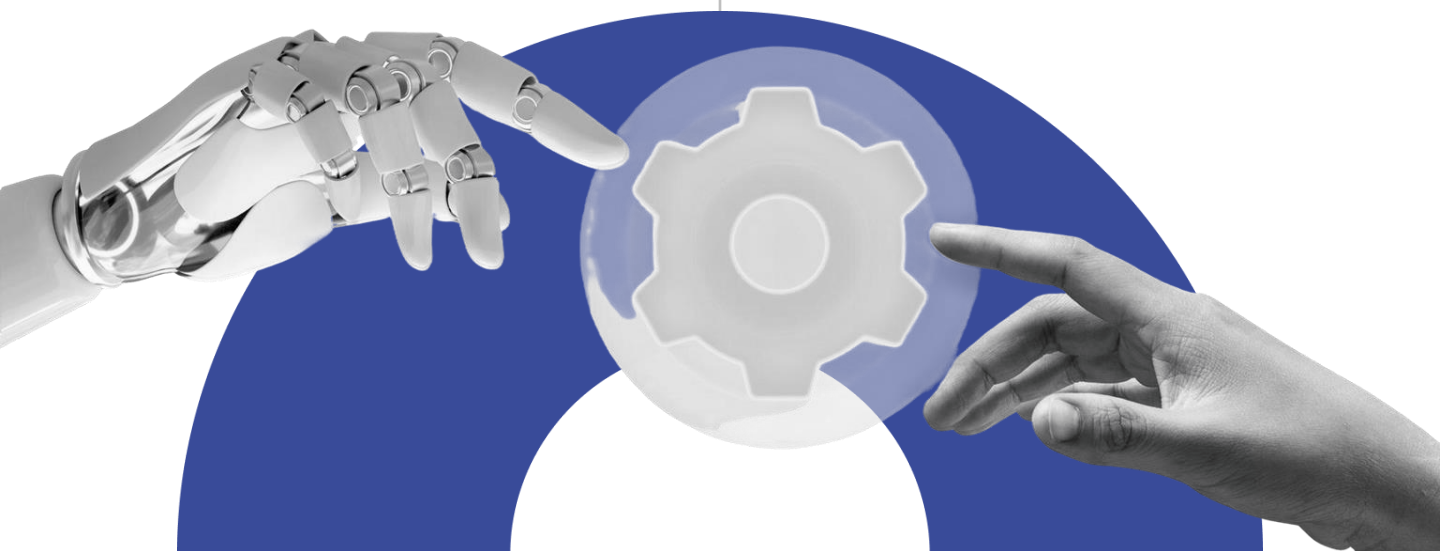
Opportunity records created in Salesforce automatically initiate the CPQ workflow within Xait CPQ through **RUNMYBOT®** orchestration.

The platform validates, transforms, and synchronizes Opportunity, Account, and Contact data to create corresponding records within Xait CPQ, enabling sales teams to immediately begin product configuration and quote generation.

Quotes generated and approved within Xait CPQ are automatically synchronized back into Salesforce to maintain a complete customer engagement and commercial history.

Once approved, **RUNMYBOT®** transfers finalized quote structures, including line items and structured BOM data, into Acumatica ERP for automatic Sales Order creation and downstream fulfillment processing.

This end-to-end automation eliminates manual intervention, reduces errors, and accelerates quote-to-cash operations.



Product & CatLog Synchronization

Ensuring Data Accuracy Across Systems

RUNMYBOT® synchronizes product master records from Acumatica ERP into both Xait CPQ and Salesforce, ensuring all systems maintain access to the latest product catalog, pricing structures, and configuration intelligence.

This synchronization framework ensures accurate product availability, standardized pricing, and consistent commercial information across CRM, CPQ, and ERP environments.

The structured synchronization process also enables organizations to maintain reliable manufacturing and fulfillment workflows by transferring accurate BOM structures directly into Acumatica ERP without relying on manual document handling or PDF-based transfers.

Secure Integration & Compliance

Authentication and Transaction Security

RUNMYBOT® manages secure OAuth 2.0 authentication between Salesforce, Xait CPQ, and Acumatica ERP systems, including:

- Secure token management
- Encrypted credential storage
- Automated token refresh handling
- Secure API communication
- Transaction validation and audit logging

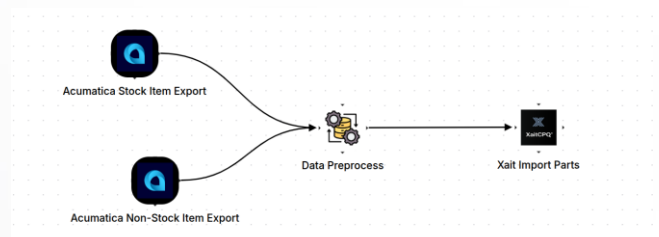
The platform ensures all transactional data flows remain secure, traceable, and compliant with enterprise integration standards.

Monitoring & Reliability

Centralized Visibility and Exception Handling

RUNMYBOT® provides centralized monitoring, transaction tracking, retry management, rollback handling, and exception processing capabilities across all integration workflows.

This operational visibility enables rapid issue resolution, reliable synchronization, and uninterrupted transaction processing while ensuring complete auditability of all commercial and operational activities.

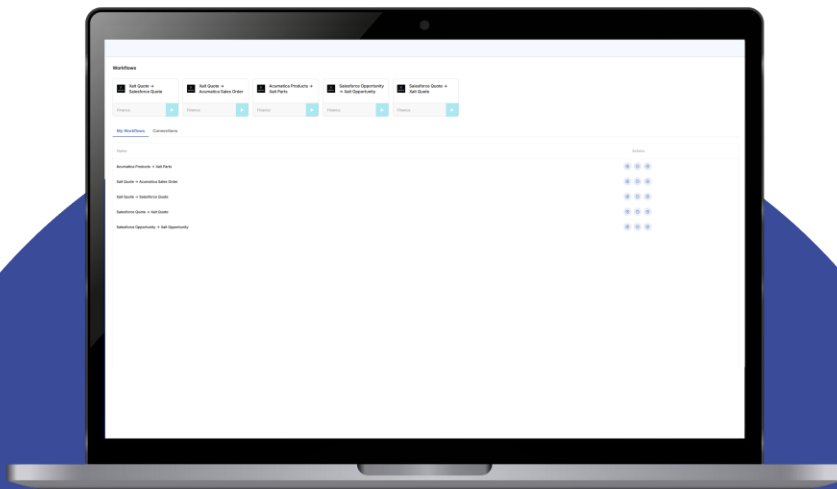
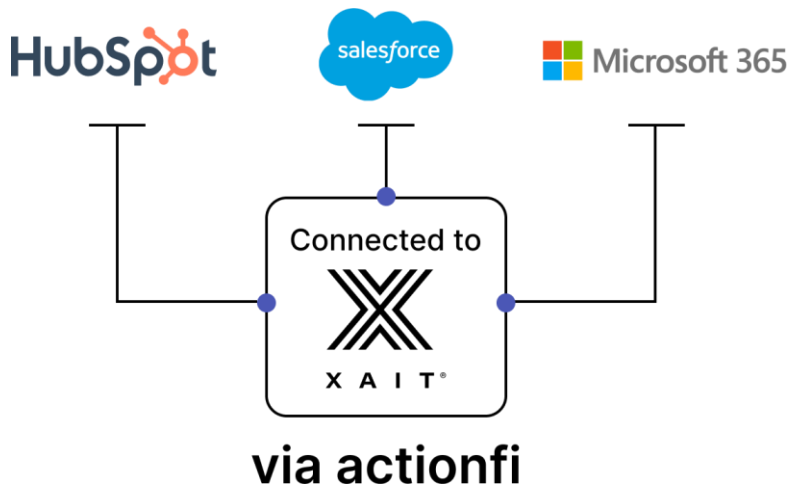


Outcome

Organizations leveraging **RUNMYBOT®** benefit from fully automated CPQ and ERP orchestration, real time commercial visibility, and seamless transactional synchronization across Salesforce, Xait CPQ, and Acumatica ERP.

The platform eliminates manual reconciliation, reduces operational complexity, improves quote and order accuracy, and accelerates fulfillment workflows while delivering a unified and frictionless user experience across all connected systems.

RUNMYBOT® enables enterprises to scale CPQ operations efficiently, making it a critical integration backbone for modern quote-to-order and manufacturing ecosystems.





1441 Broadway, #5,
New York, NY 10018
E: hello@actionfi.com,
P: +1 646 290 631
www.actionfi.com