

10 Accounting Processes That Run Better On Salesforce

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WELCOME!

Hi there! Welcome to our e-book, 10 Accounting Processes That Run Better On Salesforce. We are delighted you have landed here and are interested in unifying your accounting with Salesforce CRM.

As you may know, many businesses have migrated to cloud-based Customer Relationship Management (CRM) systems to improve customer services and sales processes in the last few years. Now businesses are interested in getting even more value out of these technologies. One of the examples of increasing the benefits of using CRM technologies is companies connecting departments on a single platform. Working on the same platform means everybody can see the same data and information, so teams become more collaborative and productive.



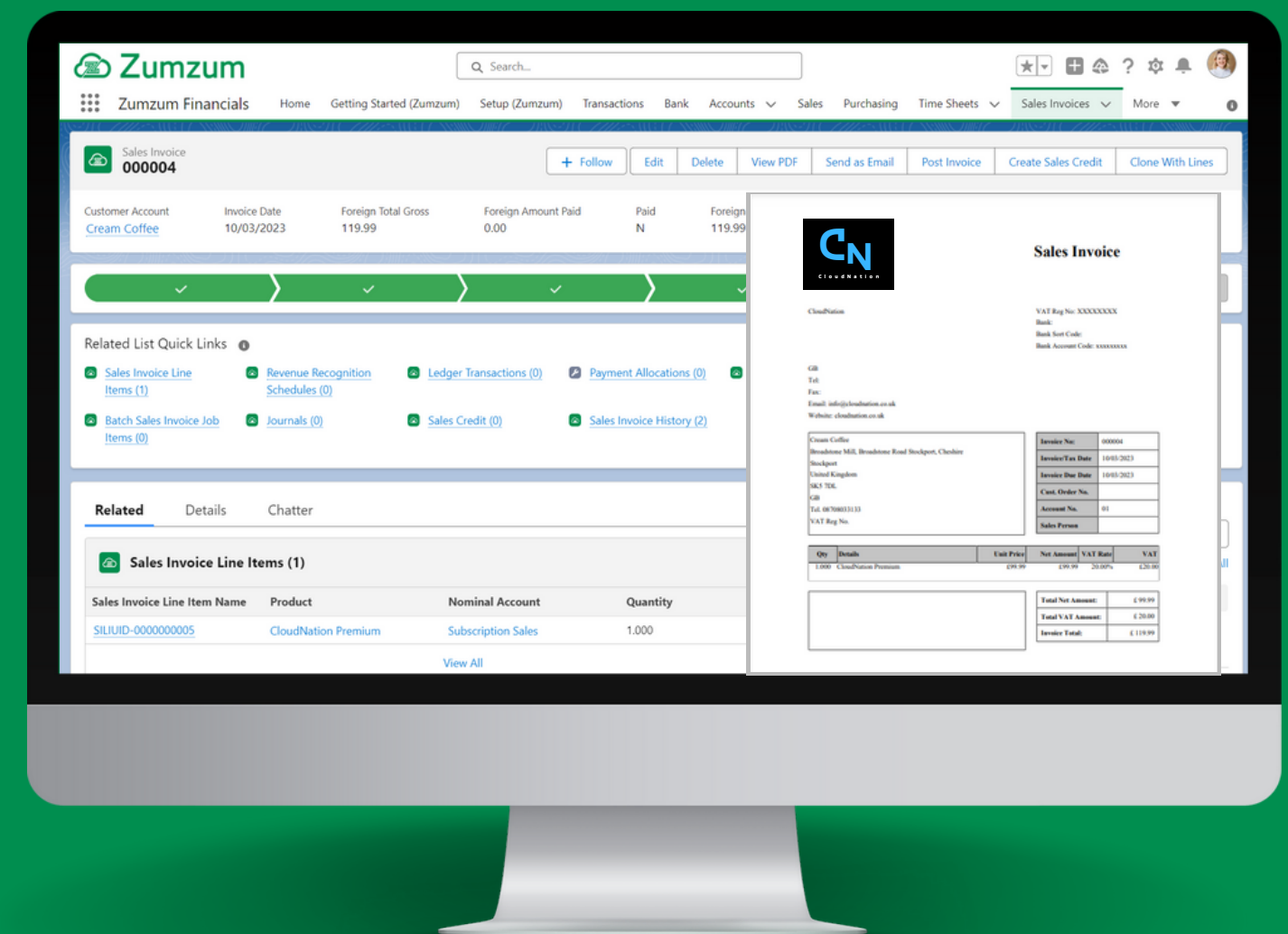
Salesforce is an excellent example of unifying applications on the same platform, as it allows using complementary add-ons and plugins dedicated to each department. Finance and accounting systems are among the essential add-ons to the Salesforce platform to help companies streamline and automate business processes.

If you`re interested in optimising your usage of Salesforce to maximise your return on investment, you can benefit from the accounting apps available on the Salesforce AppExchange. You can find a finance app that meets your specific requirements to suit your size of company and fits your budget. Accounting on Salesforce streamlines your finances and automates manual business processes. It saves time by eliminating repetitive manual tasks and allows you to manage everything from a single platform. In this e-book, we have listed 10 accounting processes that run seamlessly on Salesforce for you to evaluate better the benefits of accounting on Salesforce.

10 Accounting Processes That Run Better on Salesforce

Sales Invoicing

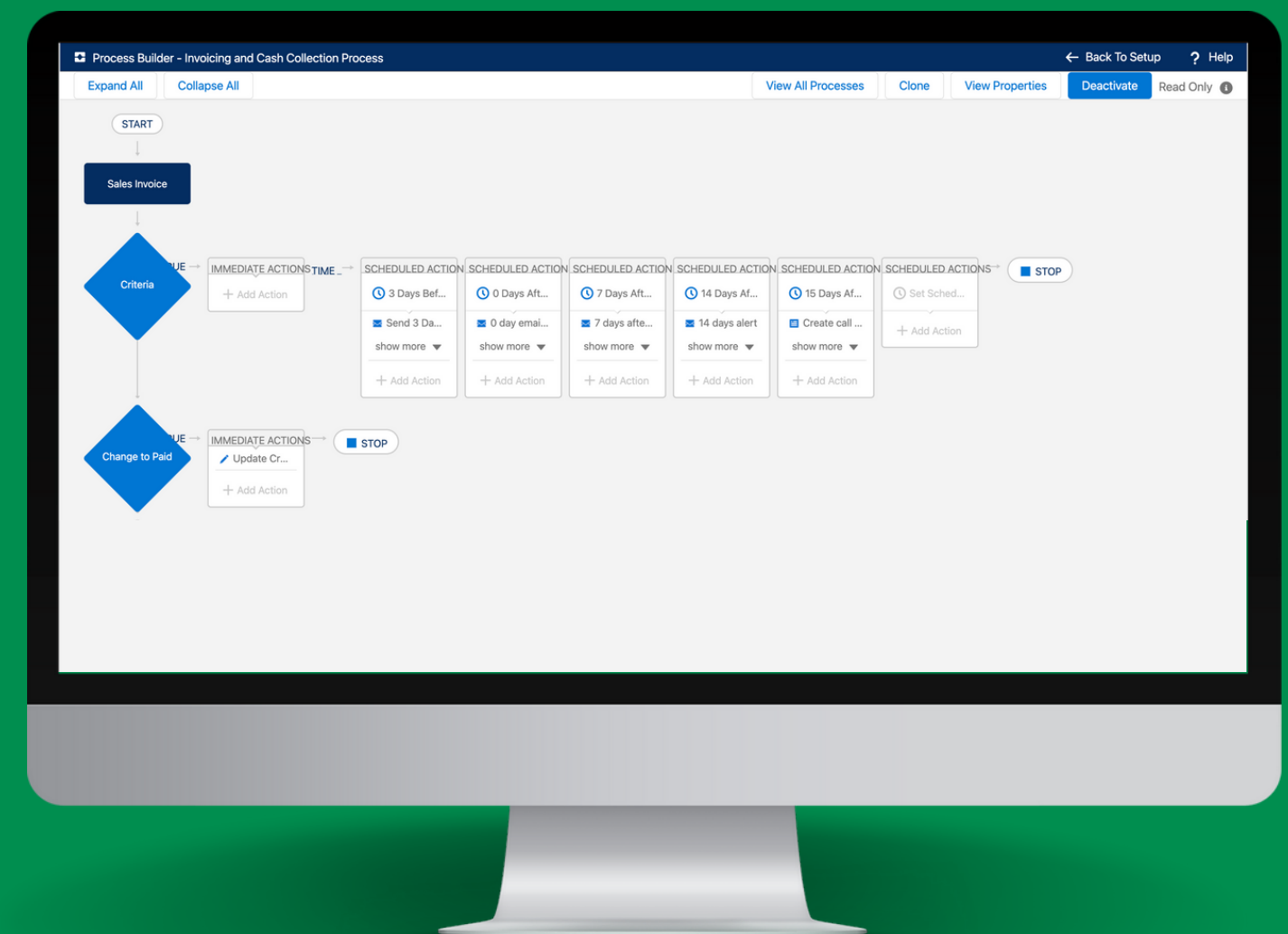
Accounting on Salesforce helps you turn your opportunities into invoices with one click. You can avoid repetitive manual data entry and deliver more accurate invoices to your customers. With Salesforce native accounting software, you can create and send customised branded invoices to your customers and send automated invoice reminders.



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Automated Invoice Reminders

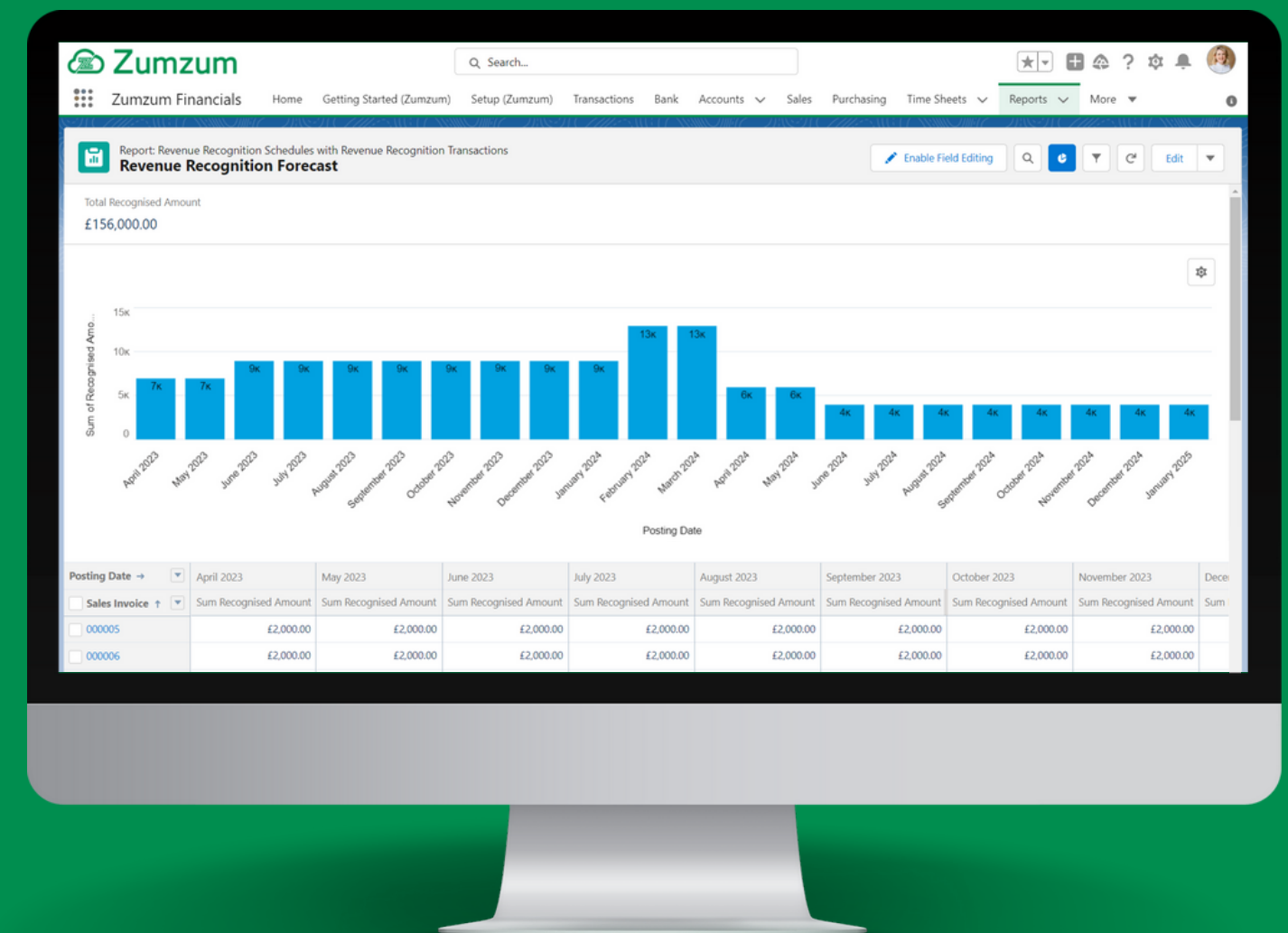
Get paid faster with automated invoice reminders. Send automated invoice reminders to your customers. Decide how often reminders are sent and take the work out of chasing payments.



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Revenue Recognition

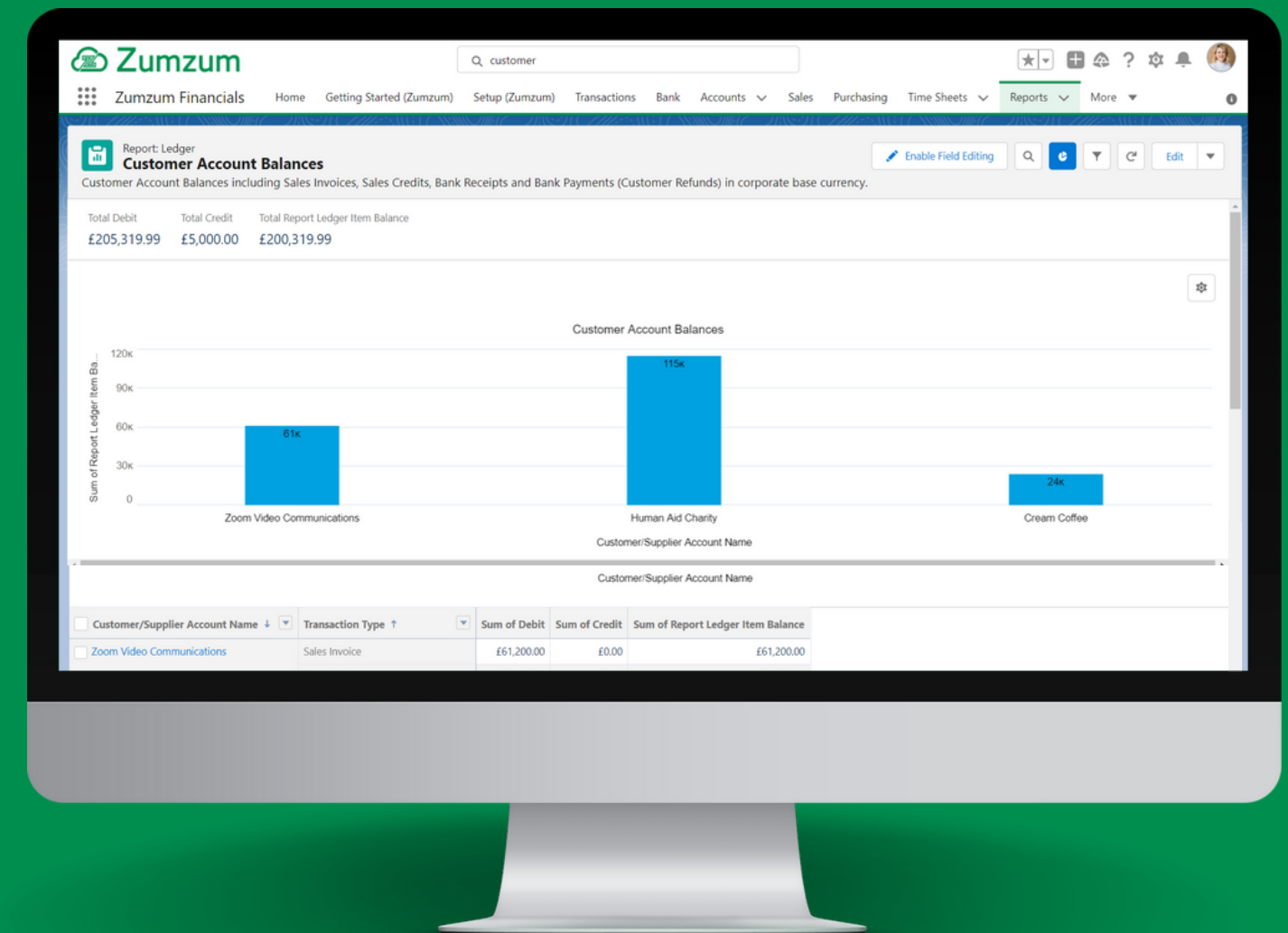
Create automatic deferred revenue calculations and journals from sales invoices to give you real-time visibility into deferred revenue. One-click access to deferred and recognised revenue by Company, Account, sales invoice, and products with daily, weekly, monthly, or quarterly schedules.



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Customer Balances

Easily track customer balances on Salesforce. You can maintain accounts, paid and unpaid invoices, expenses, transactions, credits, and more processes. All the people who need to see this information can easily view it on the customer record in one single platform.



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Sales Orders

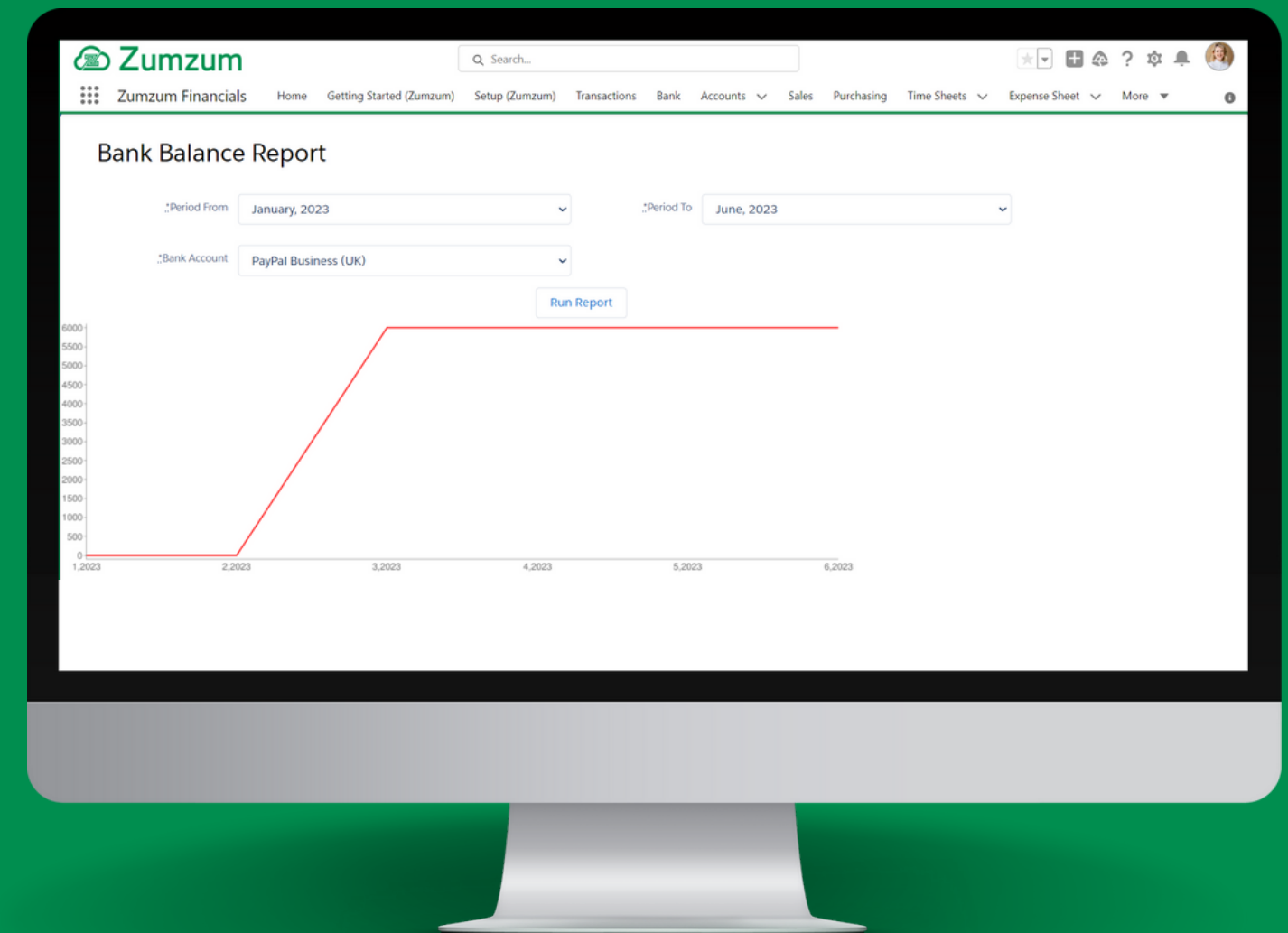
Automate and accelerate your sales order management on Salesforce. You can give sales and finance teams a fully integrated environment for processing sales orders and managing warehouses, inventory, and shipping. Gain complete visibility into inventory at all locations, instantly access available quantities, reserve the inventory and fulfill orders with streamlined workflows.



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Financial Reports

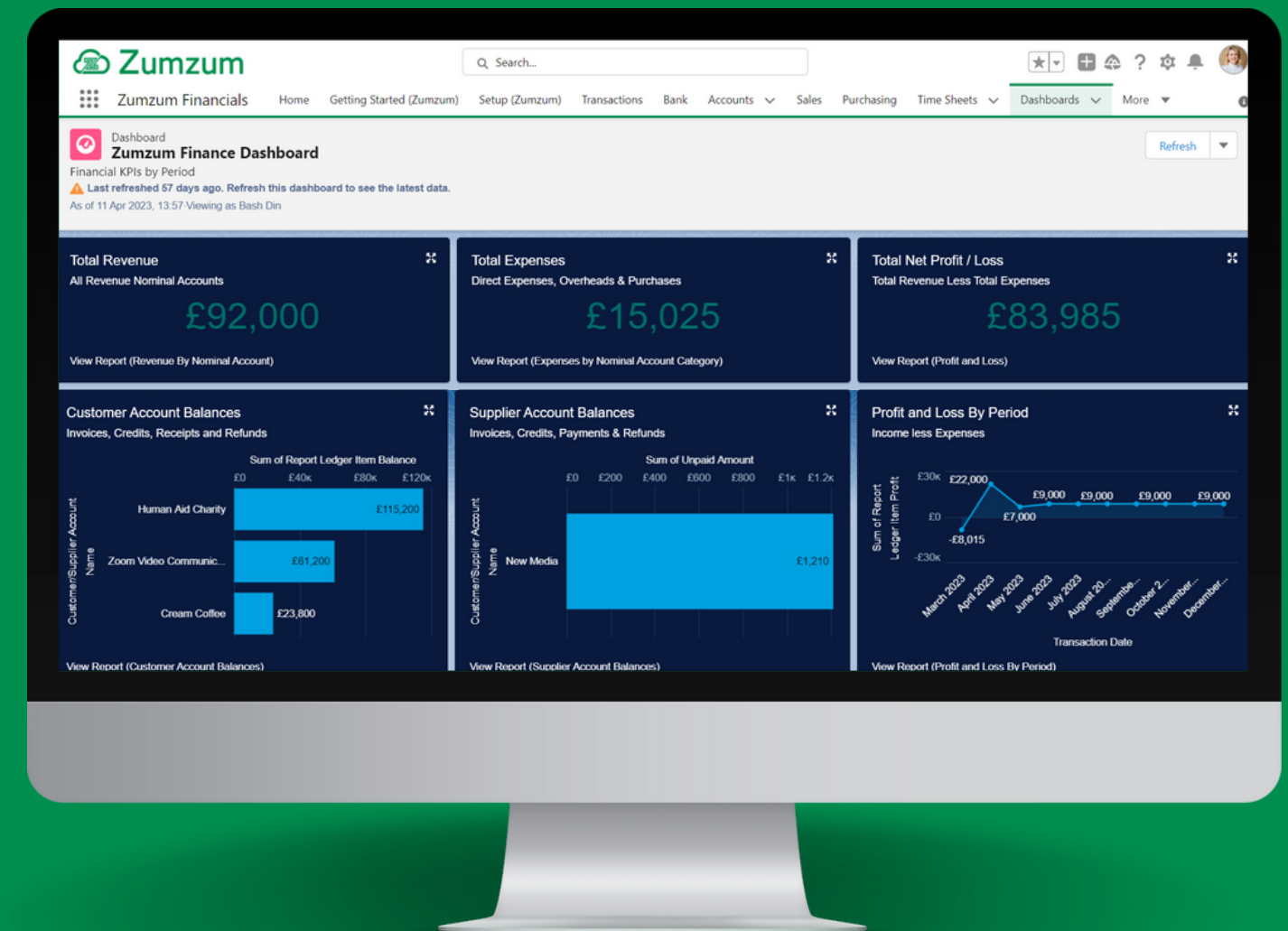
Make better business decisions with real-time financial reporting. Your finance team gets accurate, real-time financial statements, while your entire business benefits from detailed insights into organisational performance for improved decision-making. Use standard, out-of-the-box financial reports or easily create your own custom reports.



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Finance Dashboards

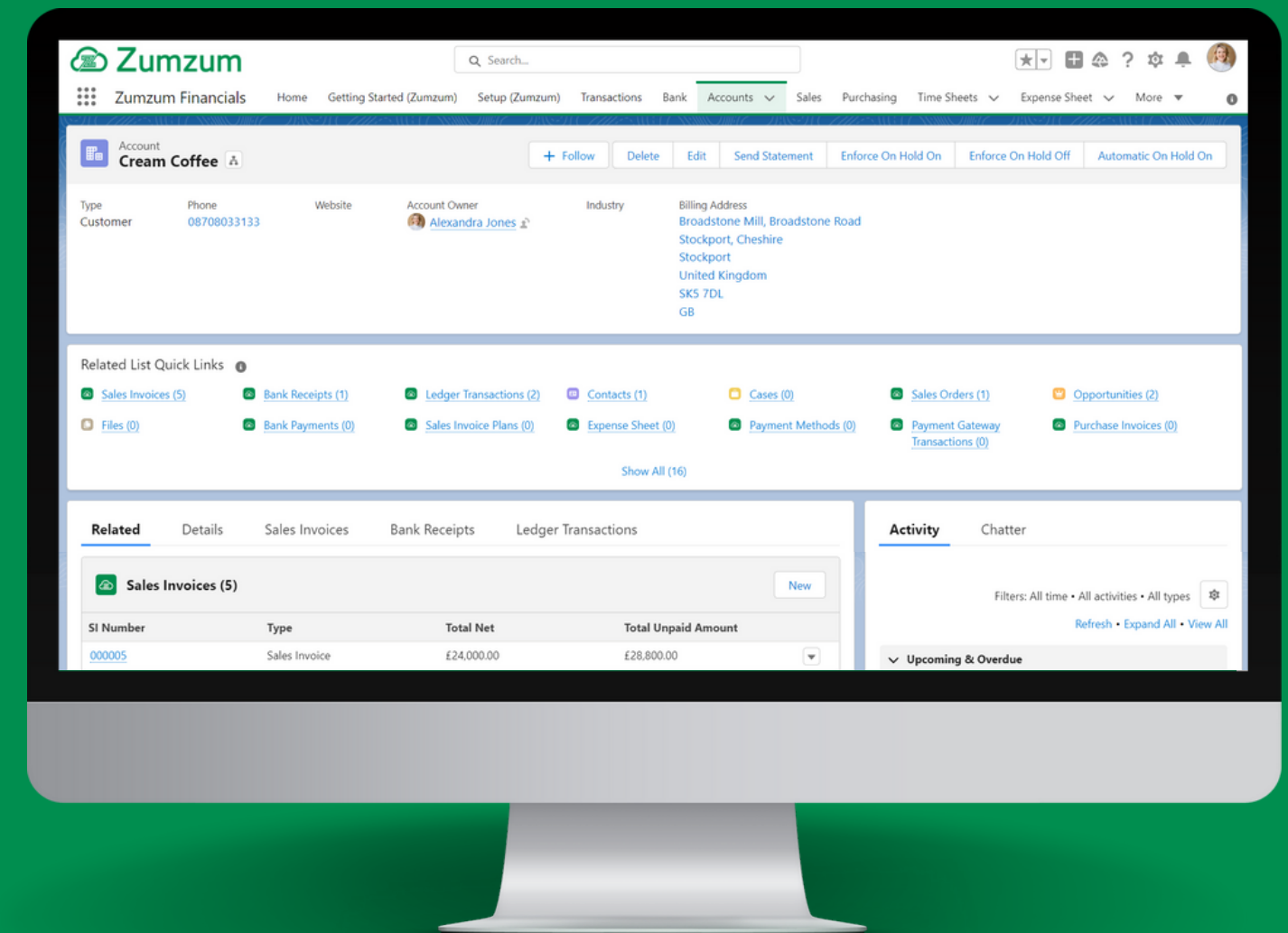
View all your key information in one place with real-time financial dashboards. You can customise financial dashboards, eliminate spreadsheet-based reporting with real-time reports and dashboards and make better decisions. See the big picture in real-time, spot trends, and drill down to source transactions instantly from dashboard components and reports.



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Customer Self-service

With a self-service digital experience, your customers can access finance information in the same place as other customer information. A digital experience is a cost-effective way of increasing the productivity of finance teams by making accounting information available to customers. For example, customers can view orders statuses, pay Invoices or download statements on their own schedule.



Meet Zumzum Financials

Zumzum Financials is a comprehensive SMB Accounting software for Salesforce that helps you unify your Sales, Service, Marketing, Accounting, and Finance on the Salesforce App Cloud.

Built 100% native on the Salesforce platform, Zumzum Financials delivers dramatic increases in productivity and collaboration by eliminating manual tasks, breaking down data silos, and automating processes.



Zumzum Financials Overview

Zumzum Financials has all the functionality you need to run your business.

- Fully comprehensive, secure online accounting
- One-click or batch invoicing
- Multi-company, multi-currency support
- Full revenue recognition capability
- Sales ordering and invoicing
- Warehouse and stock management
- Invoice reminders and statements
- Purchase orders and purchase invoice processing
- Time and expense management
- Reporting & dashboards
- VAT returns
- Making Tax Digital (MTD for VAT)
- Access via mobile devices

Up To Date Financials From Any Device

Login anytime, anywhere.

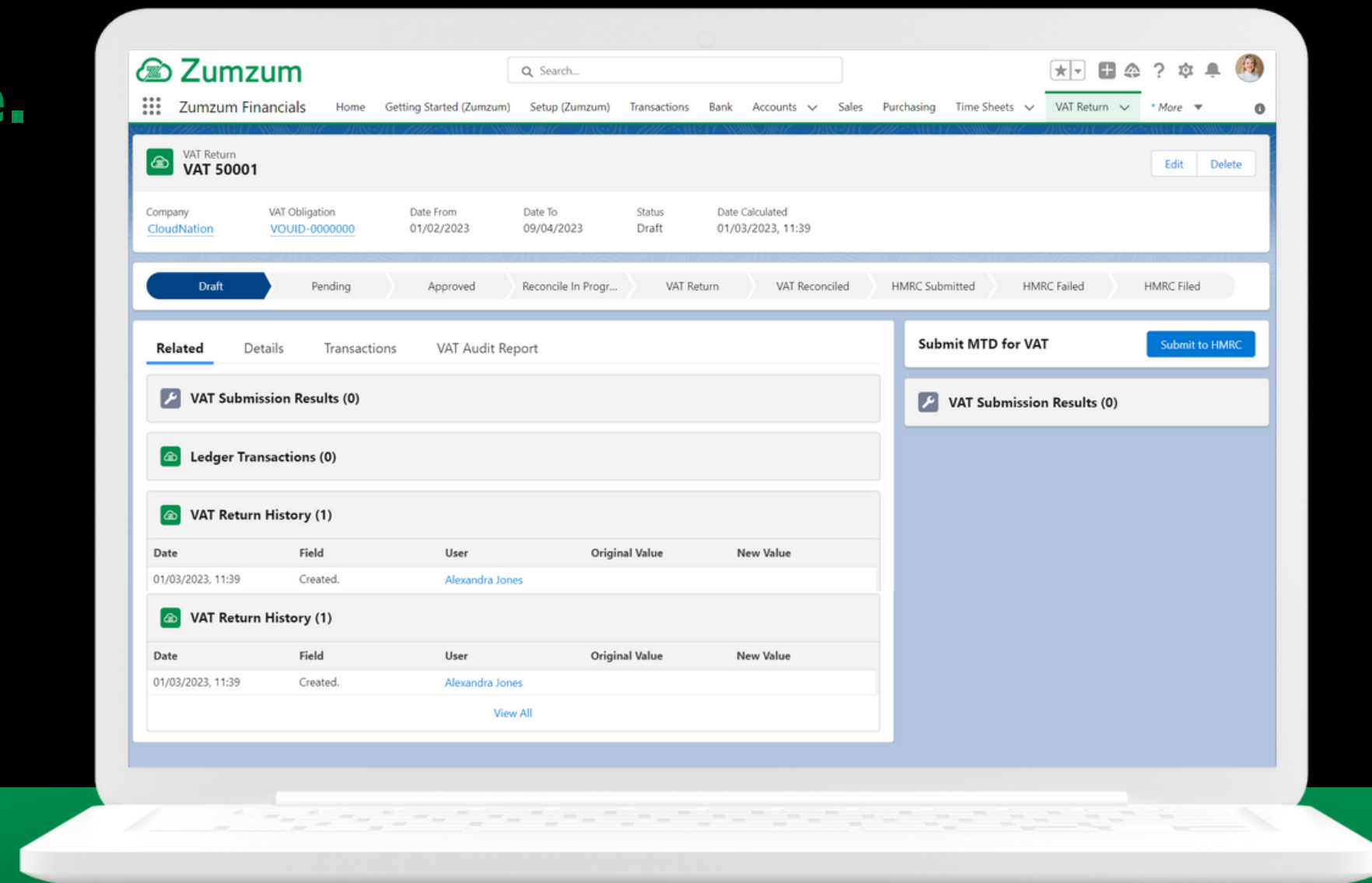


Get Started With Zumzum Financials

Unify your front and back office.

Now that you know the accounting processes that run better on Salesforce, why not get started with Zumzum Financials? Install your free trial and start your journey.

Install Now!



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