

How To Select Accounting Software For Salesforce

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WELCOME

Hi there! Welcome to our e-book, How To Select Accounting Software For Salesforce. We are delighted you have landed here and are interested in automating your finance processes on Salesforce.

Upgrading with advanced technology has become crucial for every business. While digital platforms such as CRM systems have continuously recorded higher demand in the last decades, businesses are now more interested in efficiency whilst using these technologies.

Salesforce, the world's #1 CRM platform, is an excellent example, as it offers valuable solutions for marketing, sales, services, accounting, finance, and more.



How To Select Accounting Software For Salesforce

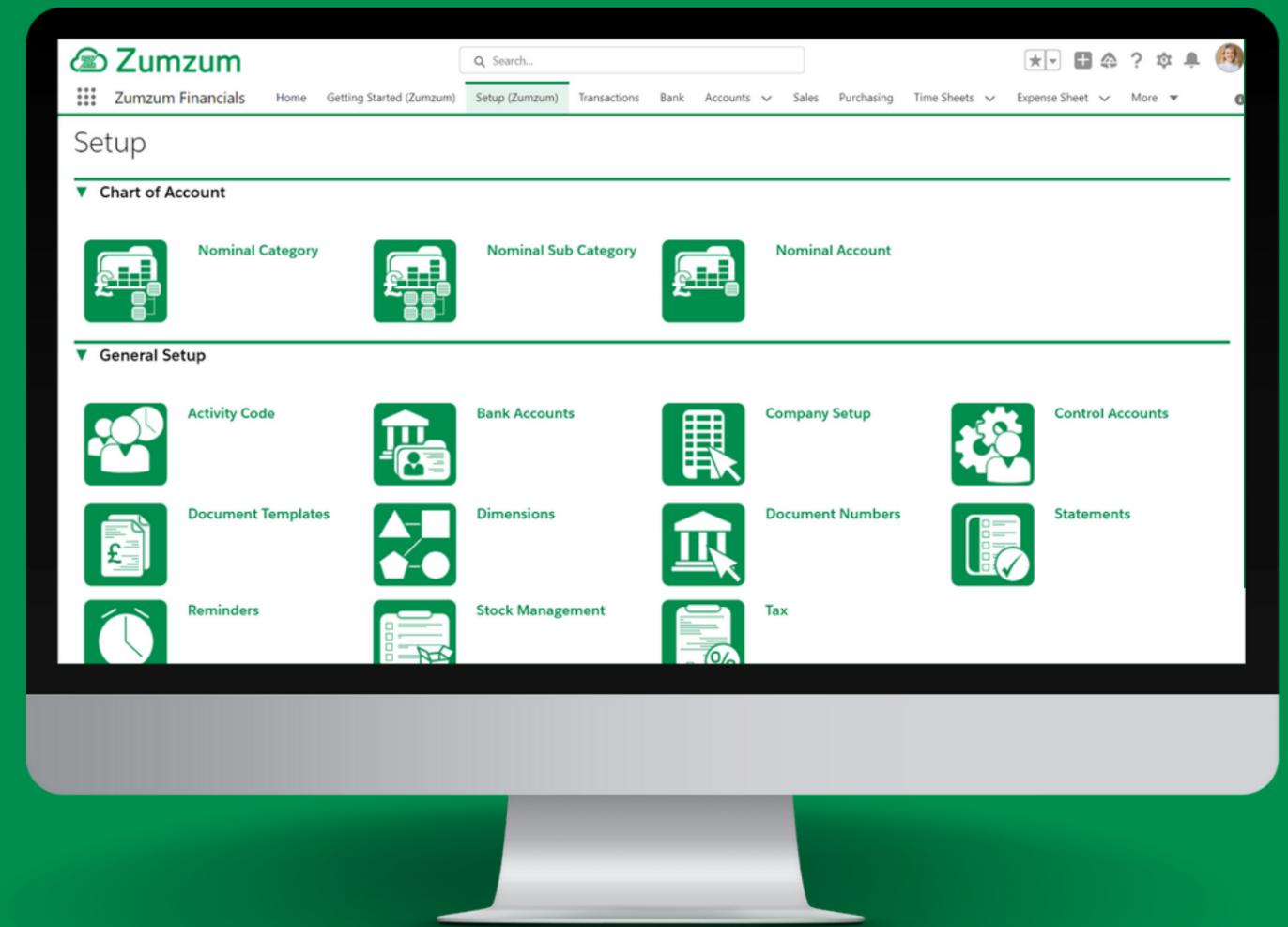
Businesses can get extensive use for their specific needs on the Salesforce platform through customised applications such as finance apps, chatbot apps, DevOps apps, customer success apps, and many more great applications. The most important is to find the best fit for your business.

Salesforce is an excellent CRM platform; however, it is not a comprehensive financial system on its own. Therefore, combining Salesforce CRM with finance-dedicated software helps businesses to simplify financial processes and automates manual accounting tasks. When planning financial improvement with Salesforce, businesses must determine specific criteria and compare the features and benefits of each accounting software. Let us help you, and check our tips listed in this e-book. Get ready to transform your business.

How to select accounting software for Salesforce

Ease Of Implementation

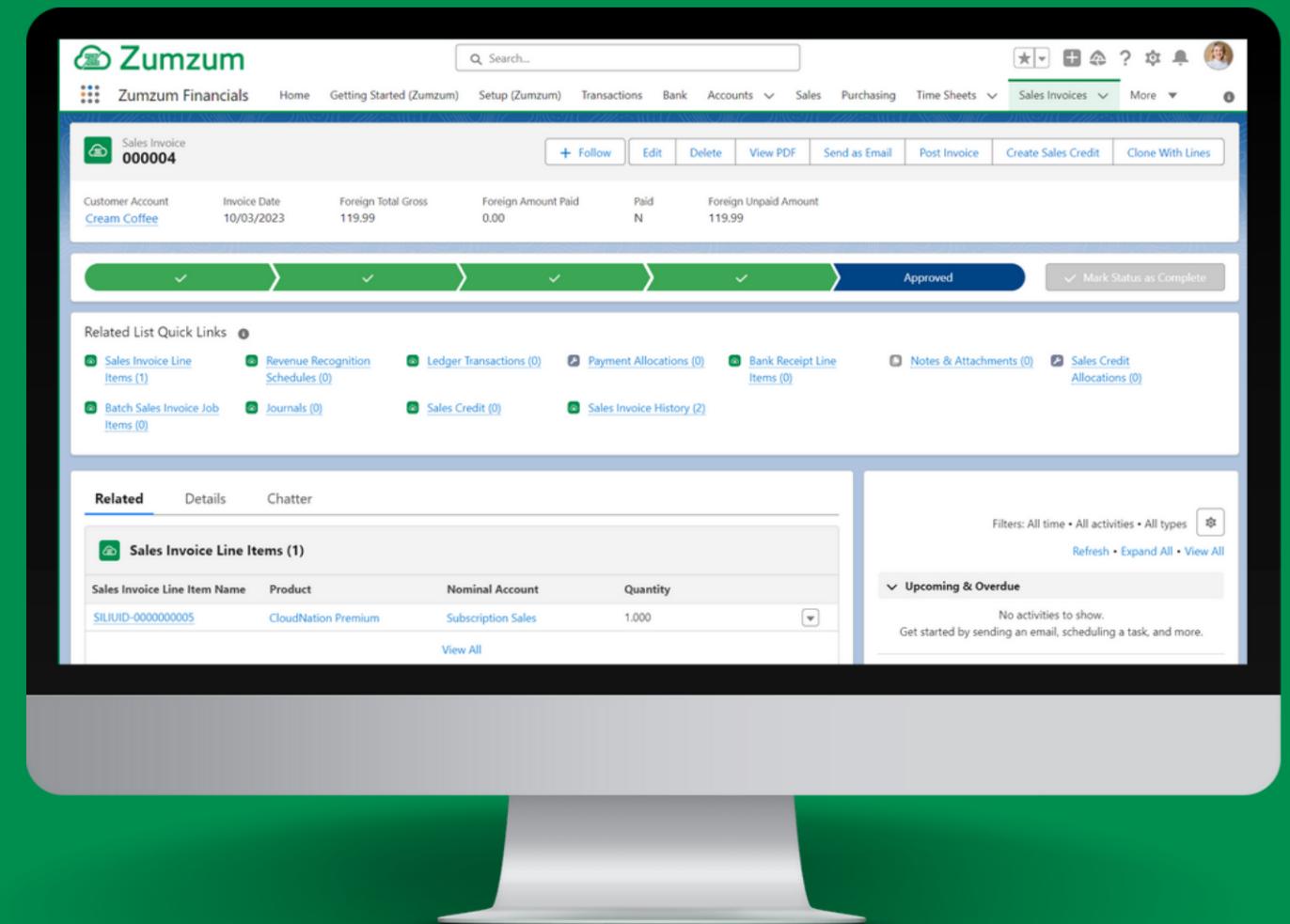
Implementation should be quick and smooth, avoiding unexpected costs and delays. To make the implementation process easy for you, ask whether the vendor offers a consultation as part of the implementation. You can also consider testing features before installing the application. Take a look at accounting software that has a free trial on Salesforce.



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Flexibility

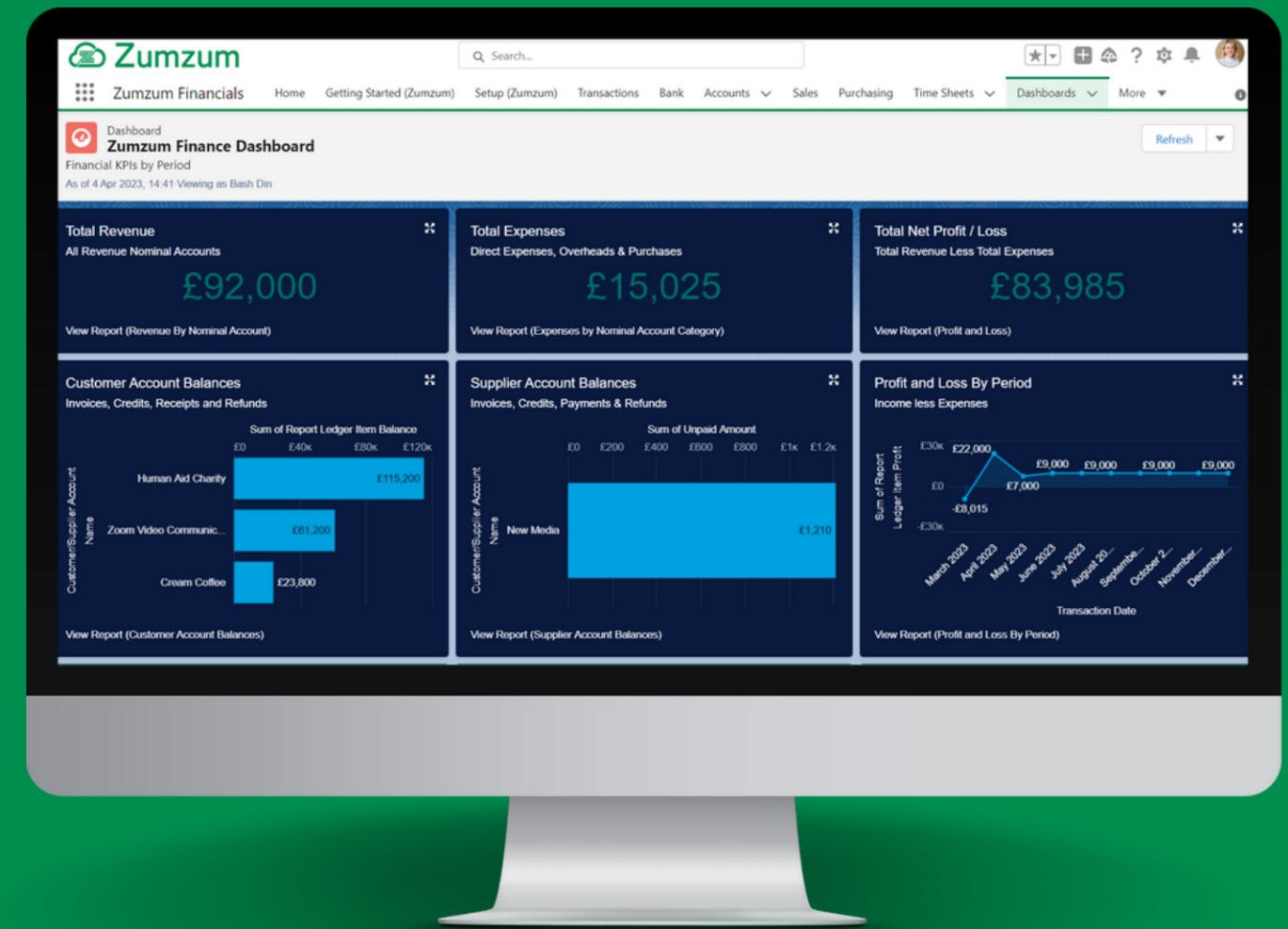
Flexible software can easily adapt to user requirements and comes with extensive modules such as cash management, tax management, revenue management, invoice management, and many more features for accounting. Flexible accounting software on Salesforce allows you to streamline all your financial processes.



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Scalability

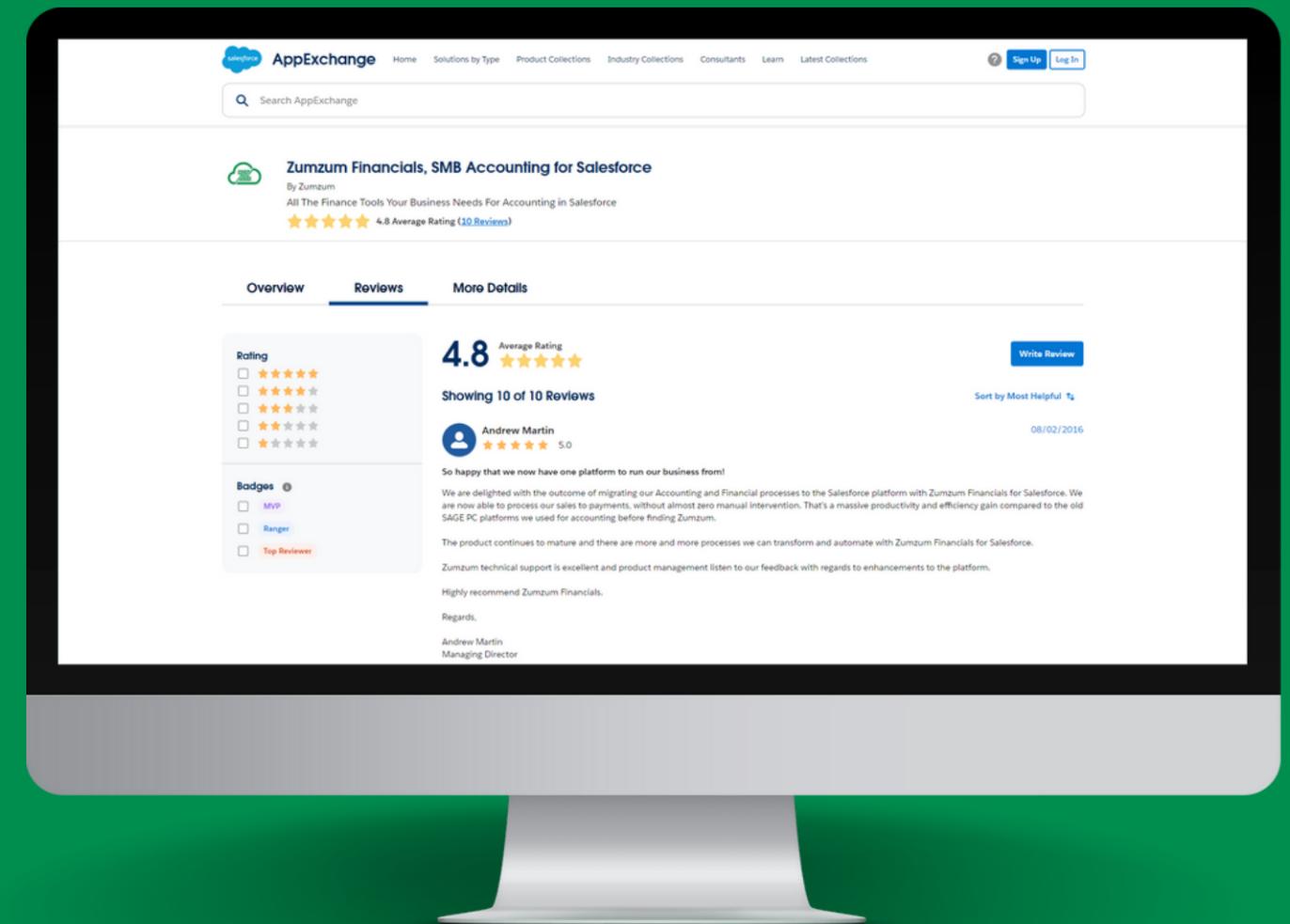
When choosing accounting software for Salesforce, you need to consider how the system would grow with your business, as your needs may change. A scalable accounting system allows you to easily change module configurations to increase functionality, such as adding more users and functions. Cloud-based accounting systems can offer just that. Consider moving from an ineffective on-premises accounting process to a cloud system.



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Reviews

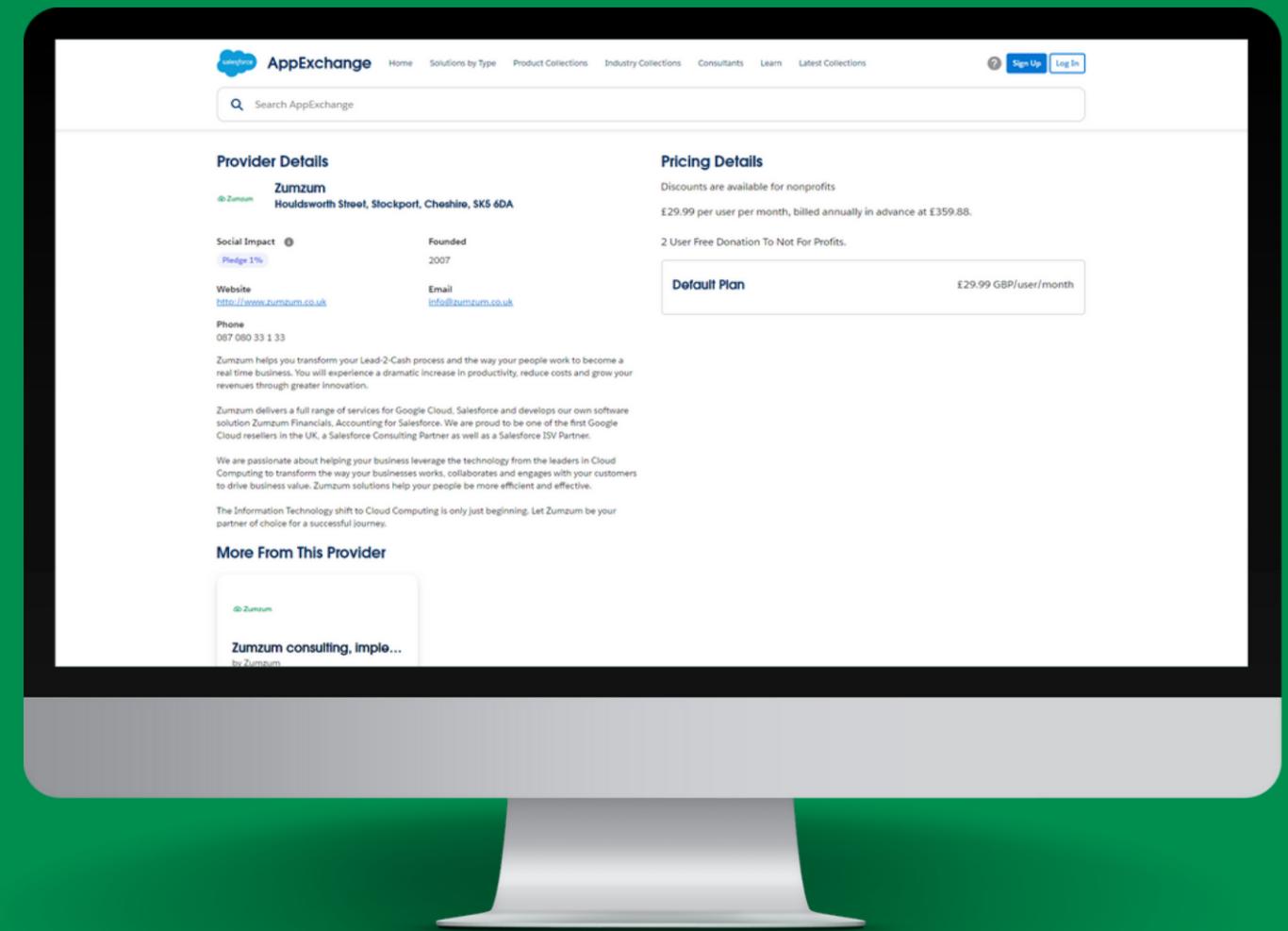
Customer reviews tell many things, but they don't always mean that the most reviewed services are the best fit for your business. Take some time to read customer reviews and case studies of your options before making a decision. Pay attention to industries that accounting software works with. For example, in technology, telecom, education, or nonprofit, whichever sector you are in, evaluate accounting software with a portfolio of customers in the same industries as you.



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Price

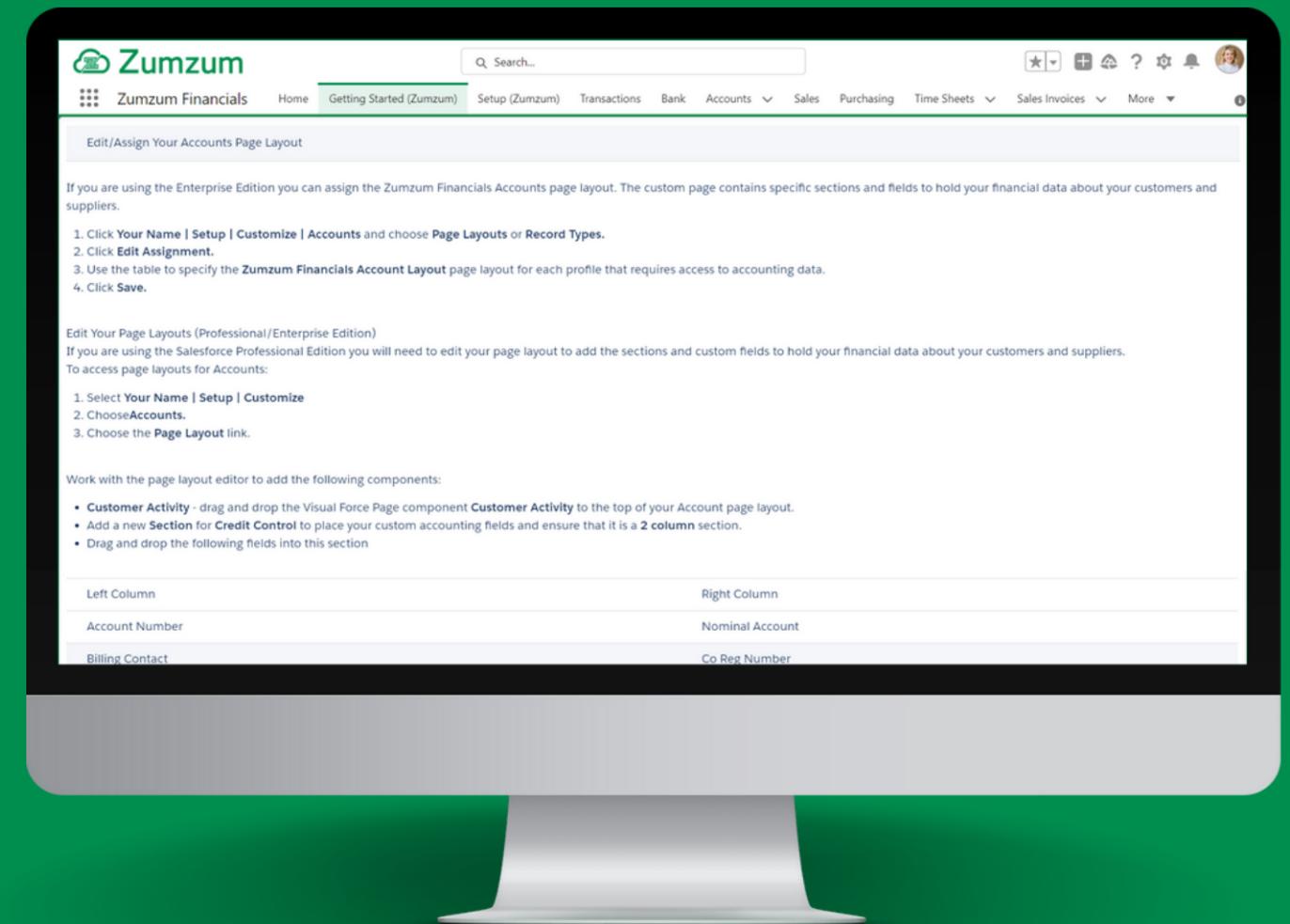
Does your potential finance app clear about its pricing? You should know how much this investment will cost your business. If you are dealing with a small budget, you can start with an application that is specific to SMB accounting. Accounting software for SMBs would be a good fit for small budgets. Or, if you are a nonprofit, you can increase your efficiency with an accounting system that provides free service to a certain number of users.



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Training

Does the software provide you with training materials on how to use it? Rather than investing in software you don't know how to operate, consider solutions that will offer consultation and training materials with your software purchase.



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.

Zumzum Financials is built 100% native on the Salesforce platform; our solution delivers dramatic increases in productivity and collaboration by eliminating manual tasks and breaking down data silos. Connect your people and gain a 360-degree view of your customer relationship with real-time analytics. Streamline financial processes from regular bookkeeping tasks to automate invoices, simplify accounting tasks, and provide accurate, real-time data.



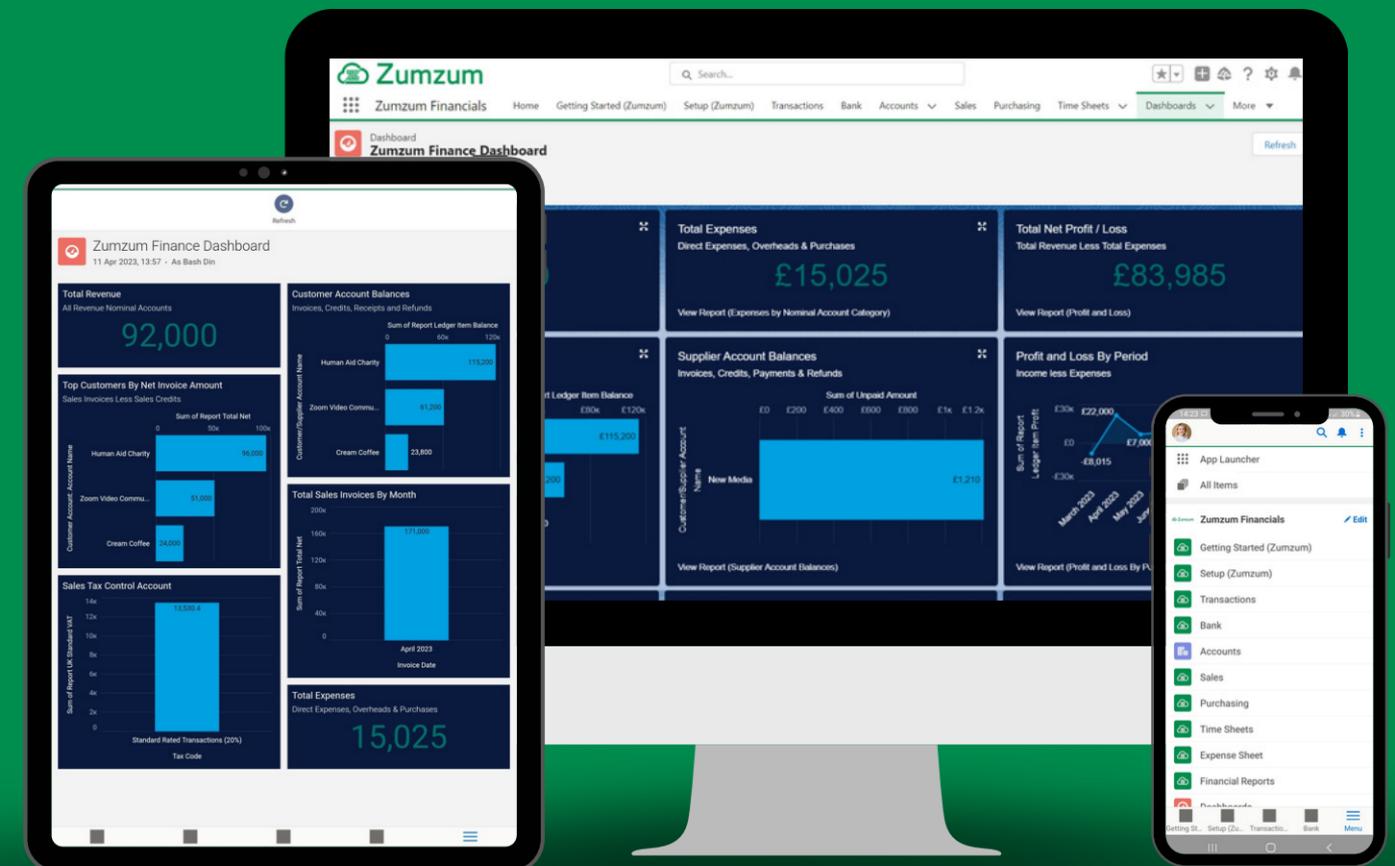
Zumzum Financials Overview

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

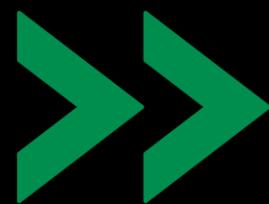
Login anytime, anywhere.

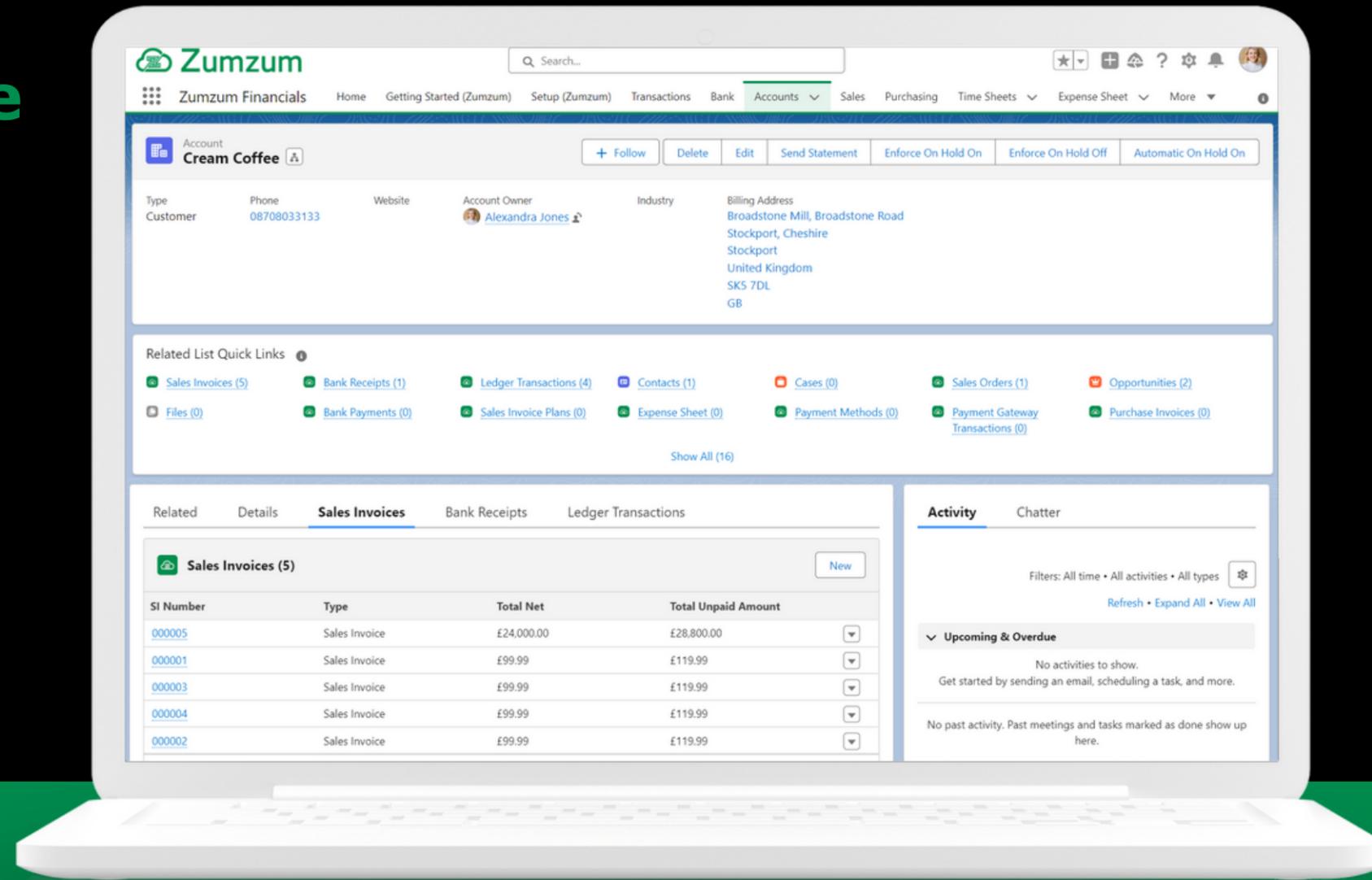


Get Started With Zumzum Financials

Unify your front and back office

Now that you know how to choose accounting software for Salesforce, why not start your journey with Zumzum Financials? Install your free trial and get started.

 **Install Now!**



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