

# 5 Ways To Improve Finance Productivity With Salesforce

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## WELCOME!

Hi there! Welcome to our e-book, 5 Ways To Improve Finance Productivity With Salesforce. We are delighted you have landed here and are interested in unifying your accounting with Salesforce CRM.

As you know, Finance is critical for every business and impacts many business processes. Therefore business leaders and professionals always look for new development ideas and investments to improve their financial staff productivity. Before starting on any investment, knowing the challenges faced by finance teams is important. Many businesses share the same difficulties in the finance department's workloads, such as slow processes, manual data entry, using legacy on-premise systems, and a lack of collaboration tools. However, there are some excellent technologies like Salesforce that help businesses to improve their productivity.



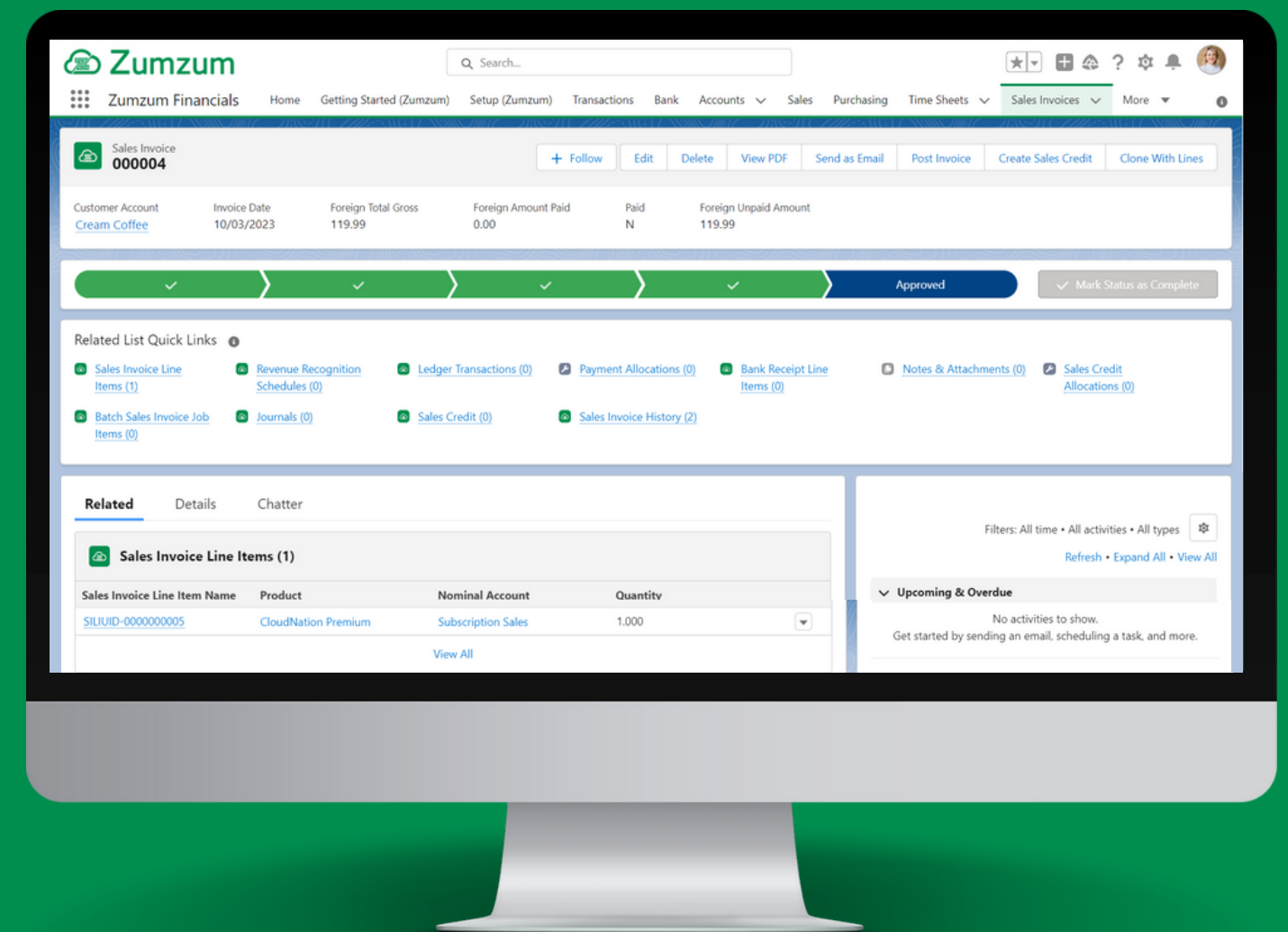
If you integrate Salesforce with a Salesforce native accounting system, you could eliminate financial threats to your business. Accounting on Salesforce automates manual processes, reduces errors, and increases efficiency and collaboration. In this way, you can unite your finance team with the rest of your business so your teams can collaborate better. You can transform your business into a more powerful version of it.

If you want to know more about the benefits of integrating your accounting with Salesforce, look at the opportunities listed below. Start process improvements to be had from Accounting on Salesforce.

## 5 Ways To Improve Finance Productivity With Salesforce

### 1. Avoid Manual Data Entry

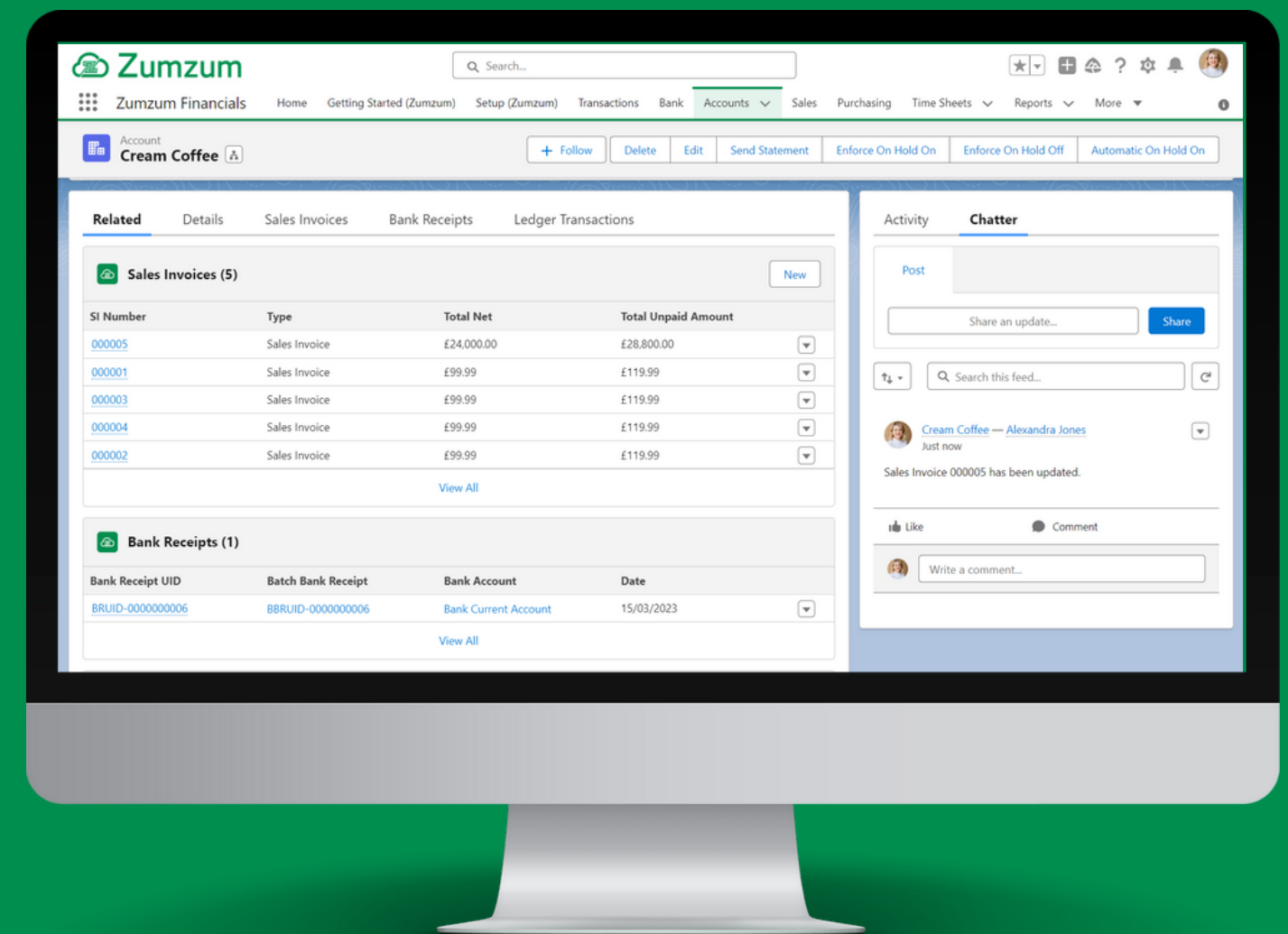
Manual work is error-prone, time-consuming, and slows down business processes. Therefore manual data entry can cause problems such as rekeying data from one system to another. However, accounting on Salesforce helps you to eliminate manual work and automates processes. It allows you to keep all information in one place with the same data model and moves data seamlessly from one process to another. So your team does not need to rekey data between different systems. You can save time and money by avoiding manual data entry and making your finance team more productive.



## 5 Ways To Improve Finance Productivity With Salesforce

### 2. Improve Collaboration With a Single System

By unifying your finance, service, and marketing on the Salesforce platform, you can get a 360-degree view of your customer and access the same information. Using the same customer information means everybody is on the same page with the customer's needs.. Teams can use collaboration tools like Chatter or Slack to work together. As this builds an excellent collaboration environment, the finance team collaborates with the rest of the business and improves productivity.

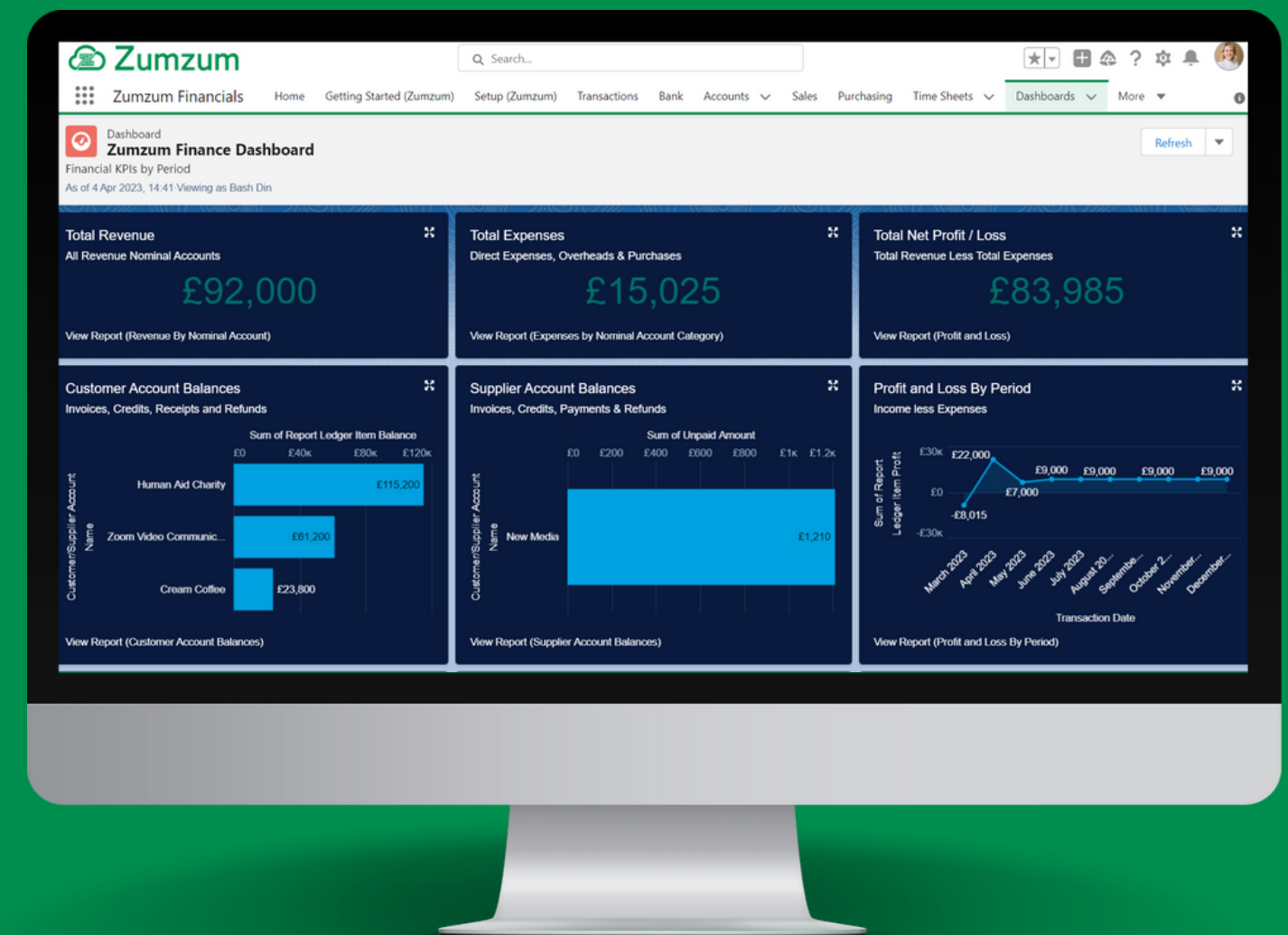


## 5 Ways To Improve Finance Productivity With Salesforce

### 3. Automate Finance Processes

Powerful automation tools like Salesforce Flow means finance can automate repetitive manual tasks with the help of a Salesforce Admin rather than long development cycles of traditional on-premise software.

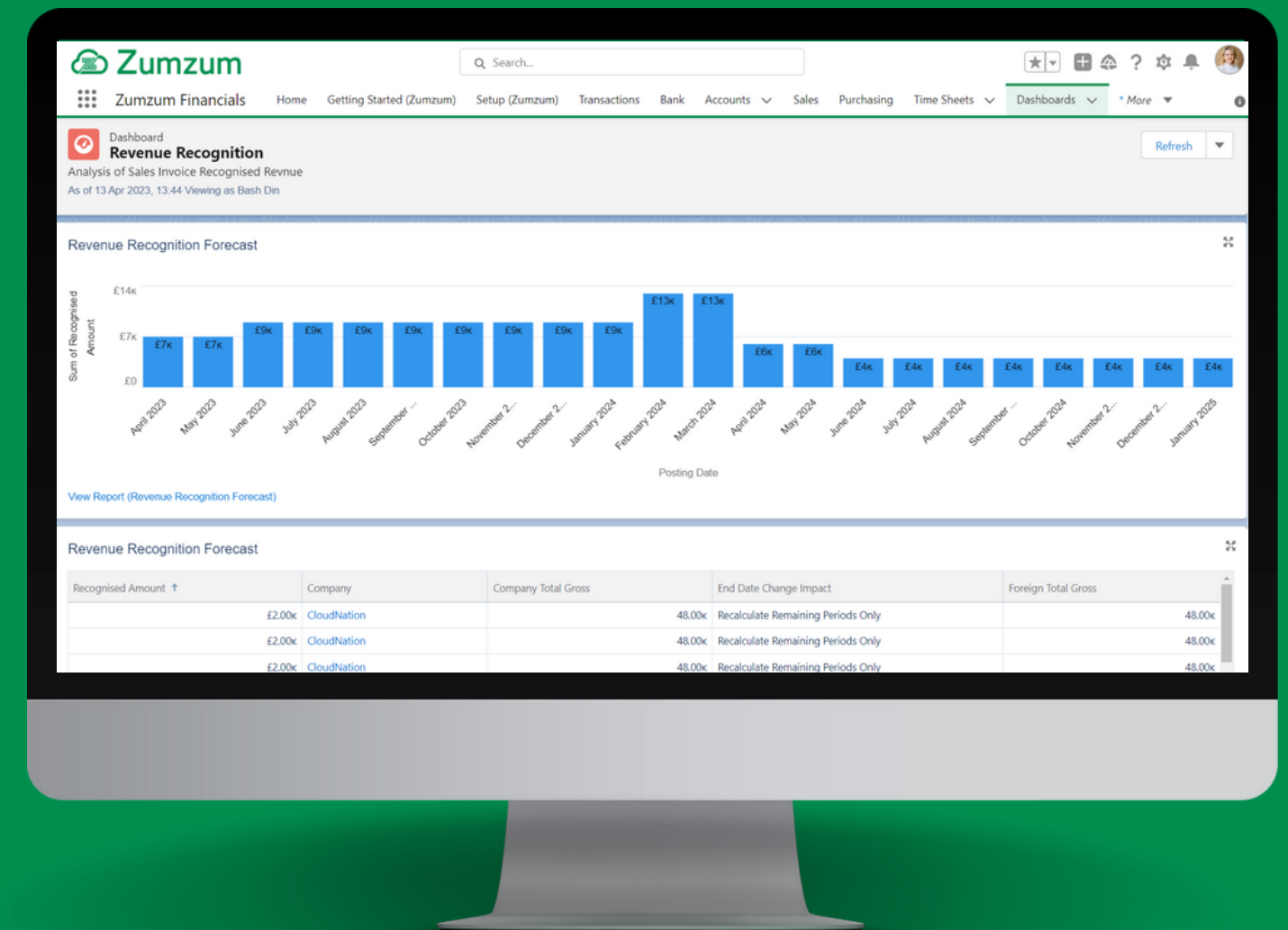
For example, with automation tools, you can automate the accounts receivable and dunnings process. This allows sending regular reminders for unpaid invoices to customers from Salesforce. You do not need to keep track of the invoices manually. Let the automation tools work for you.



## 5 Ways To Improve Finance Productivity With Salesforce

### 4. Faster Business Insights With One Single Dataset

Rather than finance users wasting time gathering and consolidating data in spreadsheets, users can spend more time analysing and acting on data insights. Combining CRM and finance information into a single dataset means users can start creating reports and dashboards which show real-time data.



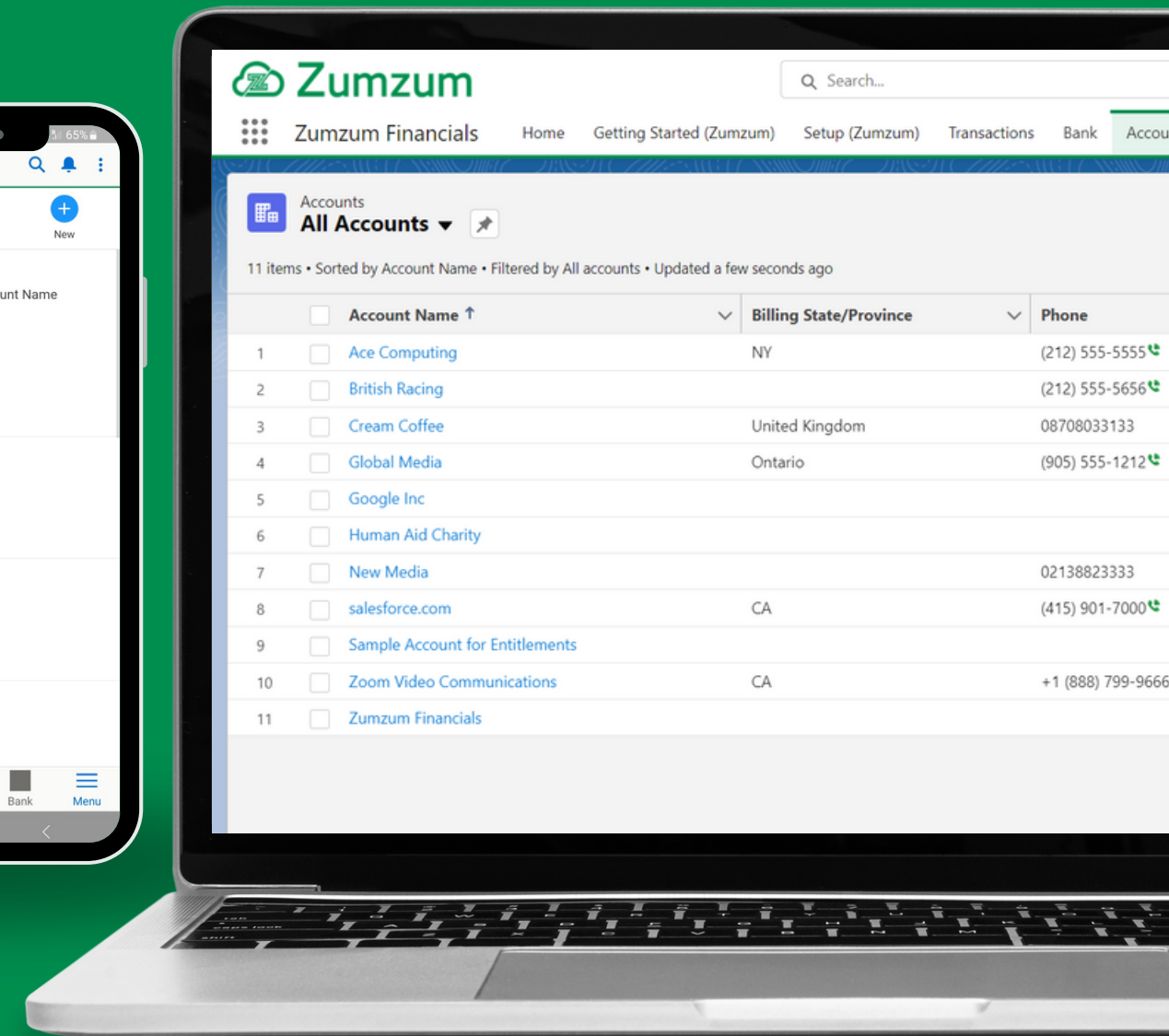
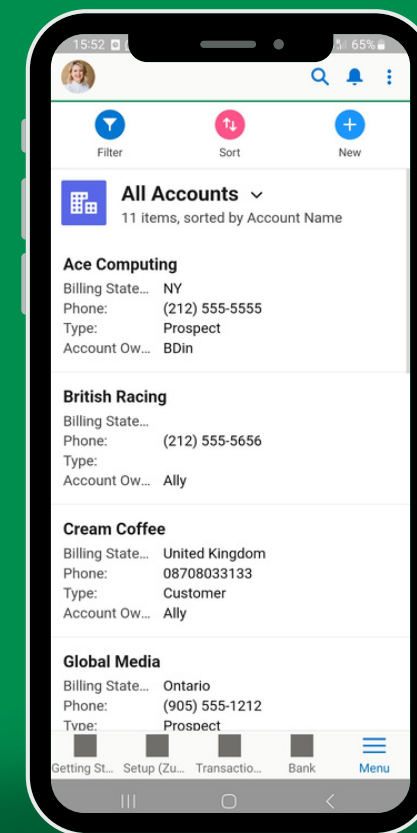


## 5 Ways To Improve Finance Productivity With Salesforce

### 5. Work from Anywhere

For most businesses, their accounting data is stuck in legacy, on-premise systems. Most traditional accounting systems run onsite and are difficult to access without complex networking infrastructure. With newer cloud-based systems, you can keep all your data in one place and get easier access from any device anytime.

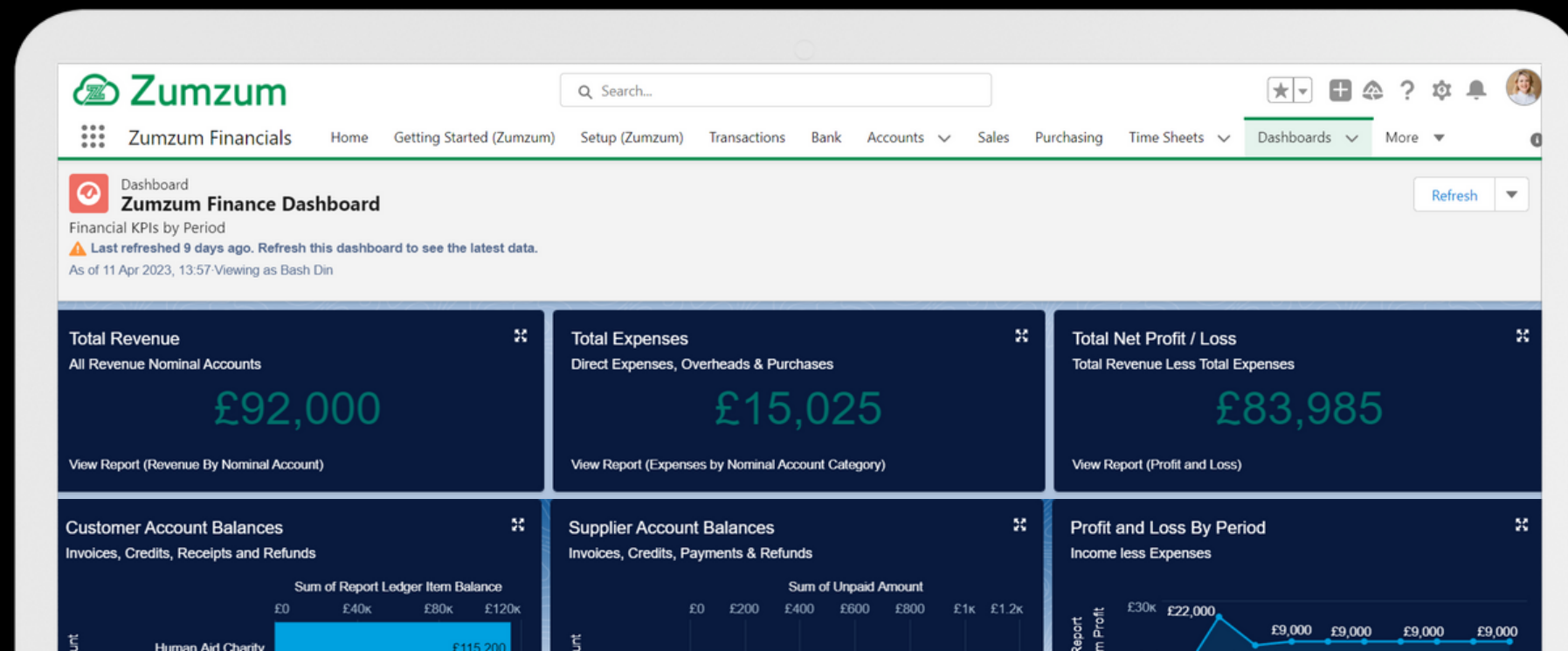
It's now more accessible, less expensive, and more secure to access applications on the Salesforce platform rather than on-premise systems.



## 5 Ways To Improve Finance Productivity With Salesforce

Salesforce should be the platform of choice when migrating finance and accounting processes to the cloud. Additionally, the Salesforce Lightning Platform is the enterprise choice for work-from-anywhere.

Keeping your data in a more secure and collaborative cloud system allows you and your team to work anytime and anywhere. You can access real-time data anytime with a single click on the same platform, which means a productive business.



## 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.

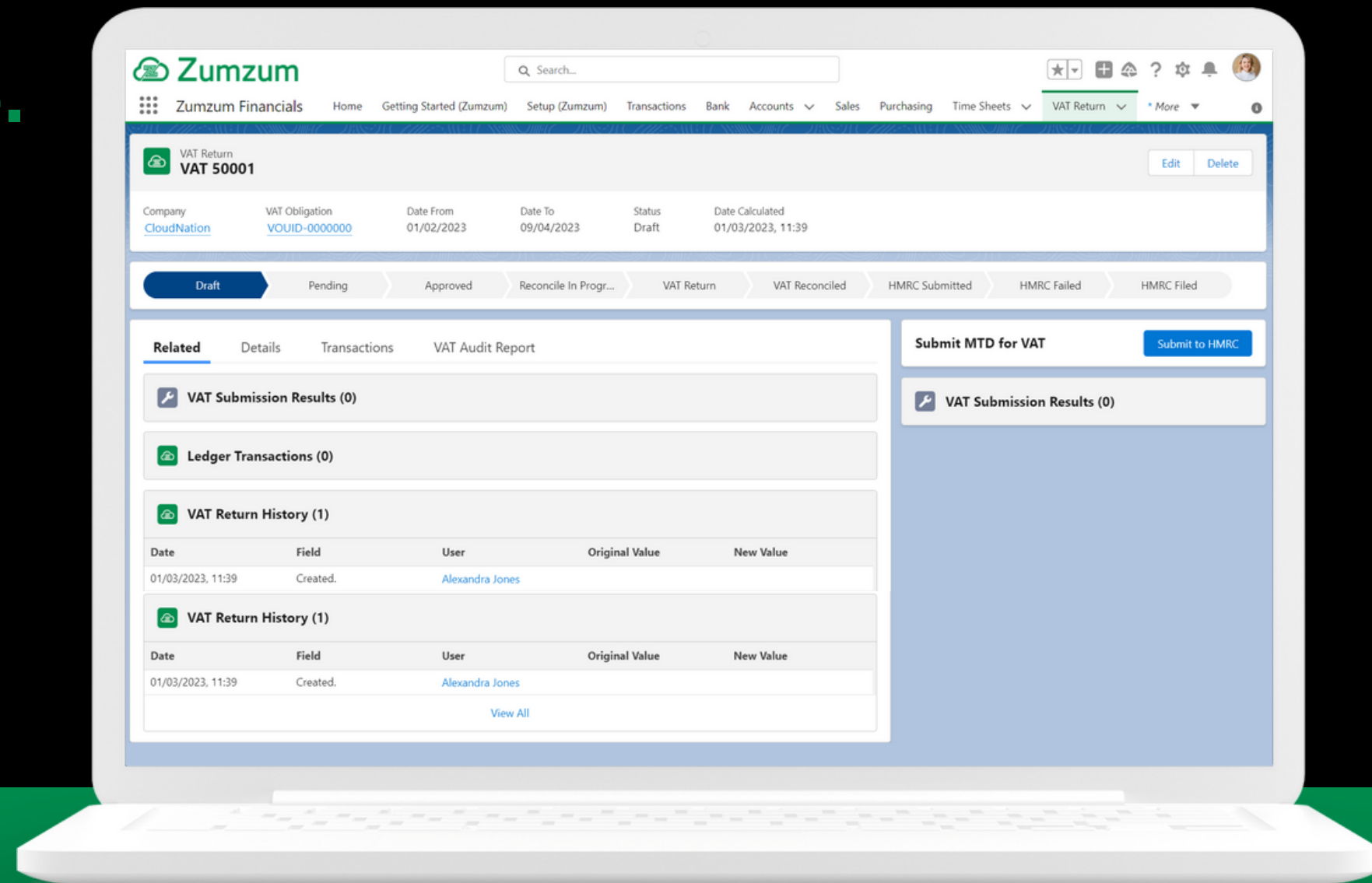


## Get Started With Zumzum Financials

### Unify your front and back office.

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

 **Install Now!**



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