



CLOSE IT, BILL IT AND COLLECT IT ALL ON THE SALESFORCE PLATFORM. FinancialForce Billing generates invoices directly from Salesforce CRM data, transforming your billing into a streamlined, efficient, error-free process. Customers are pleased, billing is done on time and cash flow improves.

Optimize your Opportunity to Cash Cycle

FinancialForce Billing streamlines your invoice process - so there's no need for manual re-keying or complex integrations. Invoices can be created with just a click from any opportunity, support case or custom object captured in Salesforce CRM. The benefits are huge:

- Creates invoices effortlessly.
- Establishes one system of record.
- Puts accounting controls at the front of the process.
- Improves invoicing accuracy.
- Shortens period close.
- Improves cash flow and decreases Days Sales Outstanding (DSO).

Bridge the gap between Salesforce CRM and your ERP system

Because the invoices are created directly from CRM, there are no CRM/Billing discrepancies. Plus the system auto-generates the associated General Ledger and Accounts Receivable entries with each invoice. These entries can be exported to your ERP system of choice for posting. The export and posting can be completely automated using the Salesforce platform or third party integration tools.

Get a 360° view of your customer, including A/R

FinancialForce Billing shares the same account object as Salesforce CRM. This means sales, services and billing activity are seen in one view. This includes every customer interaction with your company—and Accounts Receivable activity from your ERP system posted back to FinancialForce Billing. The system can store invoices, payments, credits, refunds and write-off transactions on the customer account object. This allows anyone in your company with a Salesforce CRM license to view the customer's credit history, eliminating the need for an ERP login, manual credit reports and A/R inquiries from your sales team.

Harness the power and ease of Salesforce, the #1 cloud platform

- Real-time analytics.
- Mobile device support.
- Chatter, social collaboration tool for business.
- Configuration and integration tools.
- Easy integration for your custom and third party applications with FinancialForce ClickLink™.
- Authorization workflow tools.
- Development tools to build your own app on the same cloud in less than 1/5 the time.
- 2900+ applications listed on the AppExchange.



FINANCIALFORCE BILLING™

The screenshot displays the FinancialForce Billing interface. On the left, a sidebar shows the invoice details for SIN000520, including the company (Merlin Tech, Inc.), account (Darker Lighting), and invoice status (In Progress). The main area shows a detailed view of the invoice, including the company address, billing and shipping addresses, and a table of invoice line items. The line items table includes columns for Product Name, Quantity, Unit Price, Tax Rate, Tax Value, and Net Value. The invoice summary shows a net total of 7,780.00, a tax total of 661.30, and an invoice total of 8,441.30. The invoice status is 'In Progress' and the print status is 'Not Printed'.

Improve collections with Chatter

Track sales, services, billing and receivables activity easily on Chatter, Salesforce's enterprise social media application. Teams can collaborate on issues like collections by attaching Chatter streams to the customer account object. This captures and centralizes personal interactions about the account that typically occur in email and conference calls. The 360° account view, combined with Chatter, also allows salespeople to effectively participate in the collections effort.

FinancialForce Billing For Salesforce

- Create accurate invoices in one click.
- Generate invoices from opportunities, quotes, or custom objects.
- Customize invoice formats for email or printing.
- Simplify the integration between the cloud and on-premises ERP.
- Integrate with FinancialForce Accounting or your ERP system of choice.
- Give finance, sales & service a 360° view of the customer.
- Reduce the resources needed for billing and A/R inquiries.
- Improve visibility with full account and revenue reporting on the Salesforce platform.
- Shorten your period close.
- Improve credit and collections, cash flow and DSO.
- Use "My Account" to post invoices online in a customer portal.



To find out more about FinancialForce solutions, please contact us at:

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