



ONE VISION AND
SALESFORCE
INTEGRATION



INTRODUCTION

Project-based organizations face unique challenges because their teams are focused on project life-cycles and specific tasks related to those stages. Salesforce has become a \$40 billion company based, in part, on the solutions the company offers for project-based organizations. The customer relationship management (CRM) tools Salesforce provides help companies of all sizes manage their customer relationships, analyze data and make better decisions that affect the bottom line.

Through the integration of enterprise resource planning (ERP)

solutions, companies that rely on Salesforce experience a more comprehensive business platform. Users continue to increase the number of leads they generate, the number of customers they win over and the level of satisfaction that produces return customers. When ERP interfaces with Salesforce, additional aspects of the business outside of sales also begin to fall into place, including better visibility into financial and operational management issues.

Limitation of Salesforce for Your Financial and Operational Management

A sales organization's goals are generally focused on increasing sales, but the CRM continues to support the organization as the project is planned, time and expense is captured, project billings are generated and as the revenue is collected. However, these tasks might be better left to an ERP solution.

Companies may experience significant gaps between their CRM and financial systems. There can also be breaks between the sales department and the finance department. It can occur in companies that utilize and are proficient in the applications of Salesforce CRM. However, Salesforce alone is not a solution for financial management. When a sale is made, Salesforce plays an important role and continues to serve as a tool to monitor and increase sales growth, but an integrated ERP is necessary to handle other aspects of the business.

Without an integrated financial and operational management system to run alongside Salesforce, teams are required to manually enter data, creating additional time-consuming work that is prone to error. The resulting errors also result in additional time spent fixing mistakes. A better solution is a system that integrates with Salesforce, offers automation tools and makes managing finances easier and more productive.

Organizations that have integrated systems that include tools for synchronizing transaction data and back-office details to Salesforce CRM are gaining financial and operational management efficiencies. For instance, an integrated system removes the need to reconcile sales orders, which saves time and money.



ERP and CRM Together

ERP systems have traditionally been linked to large companies and/or corporations. However, the advantages of an integrated ERP are not limited to large organizations. More affordable and customizable ERP solutions are becoming increasingly available to companies of all sizes.

Businesses are now looking to adopt ERP in addition to their CRM. They are seeking a way to integrate applications, and they want to automate and manage their back office functions, such as tasks related to human resources, technology and services. There are additional advantages of integrating ERP: product planning, development, marketing, sales and manufacturing are all areas that can be positively affected by ERP and CRM as they work together.

Some companies have integrated their CRM and ERP seamlessly, so that the two systems appear to be one software solution. The systems are equipped to handle transferring information automatically, such as a customer's financial summary information made available throughout the integrated systems. This job, often done manually, is time consuming and creates an opportunity for human error.

The correct mix of solutions is required in order for ERP and CRM to work together effectively. Additionally, an otherwise perfect integration may fail due to poor adoption. For this reason, every department must be fully invested in the project. A successful installment and integration of a software solution involves not only the right solutions and the right provider, but also the full buy-in of the departments using the software.

ONE VISION SOLUTIONS SALESFORCE INTEGRATION

Salesforce integrated with One Vision's solutions offer an ERP/CRM combination that brings better control of financials as well as customer relationship tasks – all in a seamless fashion.

Intacct, one of One Vision's solutions, is a best-in-class, cloud-based ERP solution that streamlines operational and financial management tasks. The American Institute of Certified Public Accountants has endorsed One Vision's Intacct solution.



One Vision clients have access to built-in report libraries as well as customizable reports, role-based dashboards, customizable forms, fields and documents. With its integration with Salesforce, clients enjoy a seamlessly automated solution that handles tasks common to project-based industries.

The integration allows sales reps easy access to data that they require for accurate forecasting and gain more visibility into information that can lead to better customer service. Information including account balances, billing, payment status, shipment details and inventory levels are accessible in a way that is easily understood, and decisions are based on quality data.

One Vision's integration with Salesforce provides customer-based customization related to billing, contract renewals and revenue recognition. Automation removes issues related to invoices being issued at the right time or accounts receivables being updated properly. Customer and order data fields are automatically populated for improved efficiency.

There is no loss of functionality with this integration. Role-based dashboards allow each user to access the information they need. Comprehensive financial reports can be fine-tuned to the level of detail that fits the clients' needs. For real-time visibility, clients are able to combine reporting, analysis and inquiry in a single solution. When information from Salesforce is included with information entered into One Vision ERP solutions, users are able to analyze key business information.

CONCLUSION

For businesses still using manual processes to carry out tasks related to financial and operational management, One Vision offers the integration of Salesforce, which marries powerful CRM capabilities, to equally powerful ERP solutions. Sales organizations eliminate the data entry and isolated data sets that require manual report generation and financial reports with an integrated solution from One Vision.



ABOUT ONE VISION

One Vision, a leader in implementing end-to-end business systems, enterprise resource planning systems and role-based dashboards, offers solutions with decision-making tools so organizations can efficiently drive the operational and financial management of the business with real-time visibility. For more information on how One Vision's enterprise resource planning consulting services can take your business to the next level, visit onevisionllc.com.

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