

Accounting native to Salesforce

Real-time financial reporting and audit traceability
connected to the work your teams manage in Salesforce.

Complete accounting. Flexible ERP connections.

GL | AP | AR | Banking | Fixed assets | Reporting

Separate systems create a fragmented financial picture

When CRM, operations and accounting live in different systems, every handoff introduces delay, reconciliation work and uncertainty.

1 Duplicate data

Customer, project and transaction details are copied or synchronized between systems.

2 Delayed visibility

Finance and operating teams wait for imports, batches or month-end work before results are reliable.

3 Broken context

A financial number is separated from the customer, project, order or activity that created it.

The cost is more than integration maintenance

It is slower decisions, more manual control work and less confidence in the numbers.

Accounting on the same platform as your business

GoldFinch Accounting brings financial records, controls and reporting into Salesforce so finance can work from the same trusted data as customer-facing and operational teams.

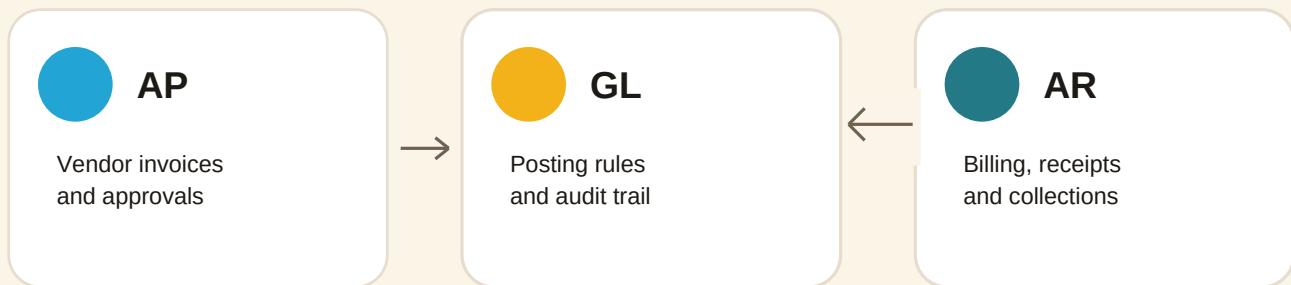


Real-time reporting with audit-ready traceability

Trace any reported balance through its accounting entries to the Salesforce record, workflow or transaction behind it.

Complete accounting, connected to operational context

Manage payables, ledger, receivables, banking and fixed assets with real-time reporting and drill-through to the Salesforce activity behind each result.



Real-time financial reporting

Balance Sheet, P&L and Trial Balance with drill-through from reported results to source activity

Banking and cash

Reconcile accounts, monitor balances and manage cash activity across entities.

Fixed assets

Maintain asset records, depreciation schedules and the resulting accounting entries.

Designed for finance teams that need control without losing operational context

Financial control across entities and currencies

Manage multiple companies and ledgers while preserving the local detail needed for review, audit and reporting.

Profit & Loss Consolidated

[Back to Report List](#)

Report Period

Starting Accounting Period

Ending Accounting Period

View By

Show Filters

Run Report

Download

This Year-to-Date

2026-01

2026-08

By Year

	2026			
▶ Expand All	Actual-US	Actual-CA (USD)	Elimination	Consolidation
▶ Revenue	12,245,251.14	3,625,000.00	(250,000.00)	15,620,251.14
▶ Cost of Goods Sold	(2,699,401.38)	1,812,500.00	(250,000.00)	(1,136,901.38)
GROSS PROFIT	14,944,652.52	1,812,500.00	0.00	16,757,152.52
▶ Expenses	1,000,500.00	870,000.00	0.00	1,870,500.00
NET OPERATING INCOME	13,944,152.52	942,500.00	0.00	14,886,652.52
▶ Other Income	14,900.00	7,250.00	0.00	22,150.00
▶ Other Expenses	10,000.00	2,900.00	0.00	12,900.00
NET OTHER INCOME	4,900.00	4,350.00	0.00	9,250.00
NET INCOME	13,949,052.52	946,850.00	0.00	14,895,902.52

Live consolidated P&L with entity, elimination and consolidated columns

- MULTI-ENTITY** Companies, ledgers and intercompany activity
- MULTI-CURRENCY** Foreign-currency transactions, revaluation and gains/losses
- CONSOLIDATION** Combined reporting with drill-through to the underlying records

One view for leadership. Detailed records for finance.

Review consolidated results without losing the transaction-level evidence behind them.

Use AI to prepare invoices, not bypass controls

GoldFinch helps finance teams reduce invoice-entry work while keeping review, validation and posting decisions visible.



AI Document Processing Console

OCR Requests

- OCR-0000110** Success
Horizon-INV-45872
AP OCR
Aug 19, 2026, 10:05 AM - Email
- OCR-0000109** Success
Purchase Invoice ...
AP OCR
Aug 19, 2026, 10:01 AM - Manual Upload
- OCR-0000108** Failed
DQ08841116-02 ...
Sales Quote Extract
Aug 07, 2026, 06:07 PM - Console

Create New Request | **Process Document**

* Record Type to Create: **Purchase Invoice**
Template: AP OCR

Drag or Browse for a File Below | Paste Email Body

Drop **one** file here, or browse PDF, PNG, JPG, TIFF, CSV, XLSX · max 3 MB
One document at a time — a new file replaces the staged one.

Document Preview
Horizon-INV-45872 47.9 KB
Open full preview

Processing Status

- File staged
- Request created OCR-0000110
- AI extraction Completed
- Record creation Success

Extract time 11.6s

AI Document Processing

Extraction **Completed** | Record Creation **Success**

Re-extract | Record Created

Open Created Record

AI document processing with source preview, extraction status and created-record traceability

Automation should make control work easier to see

Keep human review where judgment is required and preserve an audit-ready path from the source document to the created accounting record.

Choose the operating model that fits your business

GoldFinch Accounting can be the finance layer for Salesforce processes, part of the complete GoldFinch ERP, or connected to an ERP you retain.

1 Salesforce + Accounting

For service, project and nonprofit processes managed primarily in Salesforce.

2 GoldFinch ERP + Accounting

For inventory, warehouse, manufacturing and finance on one Salesforce-native ERP.

3 Existing ERP + Accounting

For organizations that keep an operational ERP while moving financial management to Salesforce.

Best suited for

Mid-market manufacturers, distributors and nonprofits using Salesforce as an operating platform.

PREDICTABLE PRICING

STARTING AT

\$400

per company / month

Pricing shown as of September 2026 and subject to change. Confirm current pricing with GoldFinch Cloud Solutions.
Nonprofit discounts are available.



PERSONALIZED DEMONSTRATION

See GoldFinch Accounting in your Salesforce context

Bring your current accounting process, entity structure and ERP approach. We will show how GoldFinch can fit the way your finance team works.

A FOCUSED DEMO CAN COVER

- Real-time financial reporting and drill-through
- Audit traceability from report to source record
- AI document processing and AP controls
- ERP and Salesforce integration options

REQUEST A DEMO

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GoldFinch Cloud Solutions