

GUIDE · XERO + SALESFORCE

How Sales and Finance Stop Working in the Dark

Three friction points every Xero + Salesforce company knows, and what fixing them is worth.

Sales lives in Salesforce. Finance lives in Xero. Between them sits a gap that costs both teams hours every week: reps asking "did they pay?", finance re-keying closed-won deals, and month-end reconciliation of contacts nobody kept in sync. Here's what closing that gap looks like in practice.

1 · Sales stops selling to overdue accounts

Without live financial data, reps walk into renewal calls blind, and sometimes extend terms to customers who are 90 days overdue. With Xero payment status, account balances, and payment history on every Salesforce account, reps see what the CFO sees before the conversation starts. Studylinks has run this way for 5+ years: "My team have visibility of the finance things to make their job quicker and more accurate." (Ailie Fan, Managing Director, Studylinks)

2 · Finance stops re-keying what sales already typed

Every closed-won opportunity that gets manually re-entered into Xero is a chance for a typo, a delay, and a slower invoice. When reps raise the Xero invoice straight from the opportunity (branded, populated, and validated against your Xero rules), invoicing time collapses. Port & Starboard cut monthly invoicing across 50+ clients from 3 days to 3 hours, an 88% reduction.

3 · Both teams stop reconciling at month-end

One contact, edited in two systems, told to nobody. That's how month-end reconciliation is born. Two-way contact sync with address-matching means one edit updates both systems, and discrepancies surface side-by-side for a one-click fix instead of a spreadsheet handoff.

The pattern: the fix isn't more meetings between sales and finance; it's putting the same live numbers in front of both teams. Breadwinner does it natively in Salesforce: no middleware, no extra Xero licenses, live the same day.

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