

INTEGRATION GUIDE

Connect Salesforce Accounting to Your Operations

Connect accounting with CRM and operations on Salesforce while preserving the systems that support your business today.

ONE ACCOUNTING PLATFORM. THREE FLEXIBLE PATHS.

01

Salesforce CRM

Pair accounting with CRM and existing quoting, order, service or project apps when operations already run on Salesforce.

02

External ERP

Keep your established ERP while GoldFinch Accounting provides a connected financial layer inside Salesforce.

03

GoldFinch ERP

When you are ready to consolidate, expand into inventory, purchasing, sales and manufacturing on the same Salesforce-native platform.

BUILT FOR YOUR INDUSTRY AND OPERATING MODEL

- **Professional services firms:** Connect CRM, projects, time and expenses, billing, revenue and profitability.
- **Nonprofits:** Link programs, funds, purchasing, expenses, grants and financial reporting.
- **Multi-entity organizations:** Support multiple entities, currencies, intercompany activity and consolidation.

EXAMPLE FLOWS BY INDUSTRY**PROFESSIONAL SERVICES**

Opportunity to project delivery to billing and profitability

NONPROFITS

Program activity to expenses to fund and grant reporting

MULTI-ENTITY

Transaction to entity and currency rules to intercompany and consolidation

CUSTOMER PROOF

"The GoldFinch Accounting platform was built by people who understand accounting deeply. The logic and controls built into the back end reflect that expertise."

Elaine Chen, VP of Finance, Beyond Better Foods

Choose your next step**EXPLORE INDUSTRY FIT****BOOK A TAILORED DEMO**