

Make everyone a genius

Run a more predictable, efficient business and exceed customer expectations with embedded analytics and reporting in FinancialForce ERP - powered by Salesforce Einstein.



Intelligent, predictive, and actionable insights

Your business has captured more structured and unstructured data about your customers and financial trends than any human, spreadsheet, or traditional analytics tool could realistically process. Turn that valuable data into action with FinancialForce Analytics & Reporting. Use pre-built dashboards and fine-tuned data to keep your operations running lean, consistent, and predictive, with your customer needs at the center.

Data that drives success

Lead the charge on bringing more revenue to your business with unparalleled business insights generated by analytics and reporting in FinancialForce. Make data-driven decisions to expand your business footprint and elevate operational efficiencies without waiting for monthly or quarterly financial close.



Analytics from opportunity to renewal

Crunch millions of transactions in seconds and generate comprehensive business insights based on sales, orders, service delivery, and financial data across the entire opportunity-to-renewal lifecycle.

CFO dashboard

Get both global and detailed views into your revenue, spend, collections, AP/AR, and profitability, supporting multi-company, multi-currency, and multi-accounting book scenarios. Easily detect revenue patterns and know when to course-correct. Get up to the minute numbers on DSO and identify trends in your cash flow.

Scorecards and metrics

Configurable to your specific business needs, get instant access to critical metrics, including high-level scorecards for revenue, EBITDA, subscription billing, deferred billing, and “As of” aging as well as detailed margins by customer, product, and region. User-defined alerts will notify you when thresholds and conditions are met on any metric.

Audit traceability

Automatically build and maintain an audit trail so you can easily drill down into any transaction and answer audit-related questions.

Get predictive

Leverage the predictive power of Salesforce Einstein across your general ledger and balance sheet. Get the data that helps you predict future revenues, collections, cash flow, and other business outcomes.

Powerful reporting

Search tens of millions of rows of accounting transactions, including details and context. Create your own reports or choose from financial statement templates including: Trial Balance, Balance Sheets, Income Statement, Consolidated Statements, and Profitability, Trends and KPI Analysis. Financial statements enhanced by Lightning Web Components (LWC) add additional customization and configuration options.

Advanced visualizations

Use geomaps, treemaps, and bubble charts to make multi-dimensional analysis easy to read. Get deeper business insights and make better decisions.

No pre-aggregates

Get analytics and reports built directly from accounting transaction details, eliminating the need to run cumbersome balances and update processes. All aggregates are computed in real-time using the in-memory technology of Einstein.

