

certinia

Financial Management (FM) Cloud

Streamline, simplify, and automate your financial operations with the FM cloud solution native to Salesforce



Scale Your Business, Not Your Workload

Designed to serve startups and the most complex multinational organizations alike, Certinia FM Cloud unifies your entire Lead-to-Ledger journey on Salesforce. By automating the day-to-day opportunity-to-cash process, you gain the precision to manage complex revenue streams and the flexibility to adopt new business models with ease. Empower your team with a solution that is simple to implement, straightforward to learn, and trouble-free to maintain—enabling your business to grow without the manual overhead of disconnected systems.

Align finance & GTM teams

FM Cloud eliminates the functional silos that typically slow down go-to-market teams by unifying Sales and Finance on a single customer record. When both teams work from this shared source of truth, collaboration becomes a reality and the focus shifts toward strategic growth. Since every transaction is grounded in a **Deterministic Data Core** of ledger-backed facts, you remove the “reconciliation lag” from data and manual errors caused by syncing disparate systems.

Turn financial insights into proactive action

A clean data foundation allows your team to shift from being “**data janitors**” to **strategic architects**. Rather than spending hours manually verifying invoices, you can focus on accelerating cash flow by leveraging a unified record that reduces disputes and typically improves DSO by 33–50%. By using ledger-backed signals to predict “**Days to Pay**,” finance teams can move beyond reactive reporting to proactively mitigate margin risk and revenue leakage.

Operationalize financial best practices

Standardize complex governance across your organization, from multi-element revenue recognition to multi-tax jurisdiction compliance. This framework ensures your business is always **M&A and global-ready**, allowing you to bring new acquisitions onto a unified ledger in weeks rather than months. By utilizing repeatable templates for **spend management**, you can capture vendor commitments the moment they are approved to prevent “silent margin erosion.”

Scale without the cost

Scale without headcount drag by automating up to 95% of core finance motions—including bank reconciliations, journal entries, and intercompany eliminations. As transaction volumes increase, your team can maintain institutional-grade scalability with significantly less manual effort. This efficiency allows you to grow revenue aggressively without the “**Complexity Drag**” of continually adding administrative headcount.

Customers using Certinia solutions have experienced numbers like:*

33–50%

Improved days sales outstanding (DSO)*

50–100%

Improved close times*

1 Click

Reporting in seconds, not hours

* Certinia customer success story

Institutional-Grade Capabilities

Financial Reporting: More than just financial statements—it's real-time financial analysis and modeling with day-to-day operational reporting and trackable KPIs. View critical info from mobile, analyze data your way, and choose from dozens of financial statement templates or create your own. Built-in compliance reports include: ASC 606, IFRS 15, Making Tax Digital (MTD) for VAT, SOC 1, and more.

General Ledger: Built to handle the most diverse business requirements while streamlining the most tedious, time-consuming tasks. Benefit from a flexible, multi-dimensional chart of accounts, multi-currency/multi-company transactions, and inter-company journals to transfer costs quickly between business units.

Receivables & Collections: Using the same customer record as Salesforce CRM, cash processing is organized and accurate, keeping you and your sales teams on the same page. Create invoices accurately the first time, post to AR instantly, see customer credit standing, and view sales/service activities in a single place.

Consolidations: Measure your firm's financial health across its entire portfolio. Handle transactions, reporting, and reconciliations from multiple companies in multiple currencies effectively and painlessly. Leverage the inter-company reconciliation engine to consolidate all company entity data in one report.

Payables & Settlement: Use your own unique workflow and processing rules to automate accounts payable processes. Configure routing pathways to match your organizational structure and control processes. Capitalize on contract terms and discounts, never pay a vendor late, and gain leverage with integrated Procurement Management.

Fixed Assets Management: Take complete control of what you own. Know what each asset costs, where it is, and how much it's worth now. Track the entire lifecycle from procurement to disposal using various depreciation methods (Straight Line, Double Declining, etc.) while tracking deployment and warranty information.

Cash Management: Monitor cash inflow and outflow across multiple bank accounts. Cash balances are always accurate and ready to reconcile across any currencies you're transacting in. Automate your reconciliation process and use dashboards to track or forecast cash from any device.



We've automated 95% of our finance functions—from the moment a timesheet is approved all the way through to recognizing revenue.

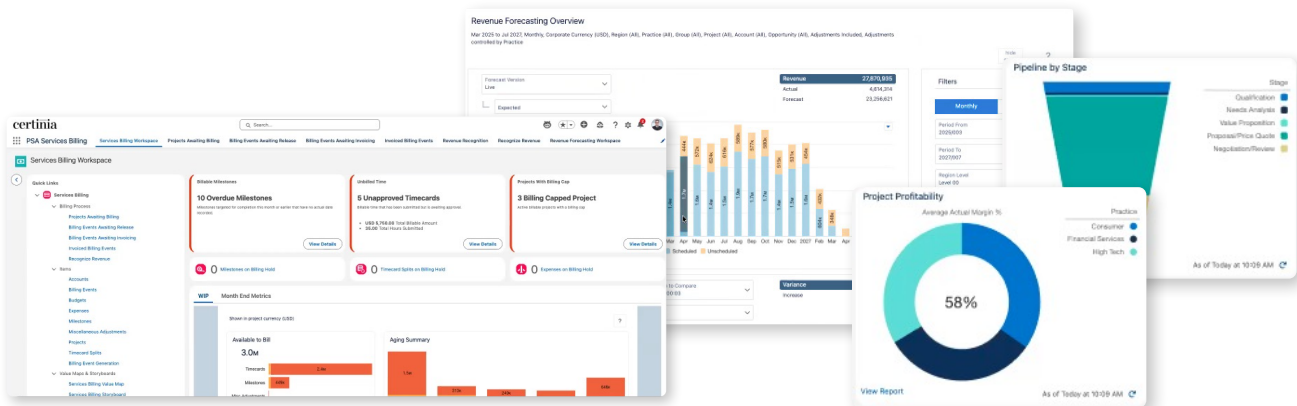
Stephen Horrocks, CFO, Methods

Fuel the Next Generation of Intelligence

Establish the deterministic foundation required for Veda, Certinia's native intelligence layer, to transform your ledger into a strategic asset. By centralizing your financial truth on Salesforce, you gain a "Zero-Export" AI advantage, ensuring your data remains secure within your platform of record. This architecture provides the structural readiness to adopt high-fidelity, predictive insights the moment you choose to scale your intelligence strategy.

Avoid "Heroic Acts of Accounting"

In conjunction with Professional Services and Customer Success Clouds, FM Cloud manages the entire customer lifecycle on a single platform. By identifying financial risks early and automating the end-to-end journey, the system fosters a proactive environment that eliminates the need for "heroic" manual workarounds. The result is a streamlined operation that ensures you remain permanently audit-ready even as your business model evolves.



Talk to our FM Cloud experts

See FM Cloud in action at [certinia.com](https://www.certinia.com)

Certinia is the industry's leading Professional Services Automation system, unifying sales, delivery, finance, and customer success on a single record powered by a comprehensive AI engine that acts with certainty across the entire services journey. Founded in 2009 and headquartered in Austin, Texas, Certinia is backed by Haveli Investments, General Atlantic, and Salesforce Ventures.

For more information, visit www.Certinia.com.

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