

Invoicing and the bottom line

Companies using Salesforce have everything they need at their fingertips to focus on the bottom line. With Salesforce, the different teams in the organization share a real-time view of the customers, prospects, sales, marketing, and support, allowing them to combine their efforts to sell more, and be more effective. Reps have valuable insights into their prospects and customers so they are better prepared to follow the leads and serve the existing client base. Marketers have fresh metrics to guide the campaigns, and managers and execs have always an up-to-date view of the whole operation to steer the organization. The end result is that these companies can close more deals faster and more efficiently, with less administration.

Rising the invoices for these sales, however, is a different story. For many companies invoicing is a back-office type of activity, normally done in a system separate from the one used to manage the customer relationships, and handled by people far from the front line that do not necessarily know the customers. This is not without consequences.

Billing with a separate system always involves creating multiple redundant entries of the same data to keep the billing and CRM systems in sync. This ties up valuable resources, increases the costs, and is prone to errors that cost dearly down the line. In addition, the customers invoicing and payment information is locked elsewhere, without feeding back into the sales and support teams. So, when customer has a query about an invoice, the reps are flying blind. And, although they may know what the customer had for dinner last night from the social networks, they do not have access to the customer financial history with the company at the time of engaging the customer. Further, the reports generated by back-office systems are normally not good enough for sales and business needs, so managers and execs relay on an impaired view of the complete operation to make decisions. In general, organizations have to put considerable resources to fill these gaps and get things done, at further costs and increased risk. It does not have to be this way.

**Invoicing is as much
a customer facing activity
as sales, marketing, and
support**

Invoicing can be as simple as a few clicks

Invoices for Salesforce was designed to add efficient billing to Salesforce, alongside sales, marketing, and support. As a native Salesforce application, it blends naturally with any customization of Salesforce, and it is as easy and intuitive to use. Invoices for Salesforce automatically creates invoices out of the sales records, so there is no need to move and maintain sales data in a separate system for invoicing, freeing key people to focus on more strategic tasks, dramatically slashing down the operational costs, and mitigating the risk of inaccurate invoices reaching the customers. The invoice records are linked to the respective sales and accounts, so all the teams across the organization, from sales to accounts, can share a 360-degree view of the customers, from leads, through sales, to invoices and payments. And because the invoices and payments information is alongside the customers and sales data, execs and managers can easily create reports and dashboards to gain greater visibility into the whole operation. With Invoices for Salesforce the billing process boils down to a few clicks and it takes minutes. And the invoice documents automatically sent to customers reflect the company brand, in line with the sales and marketing material, are easy to design.

Invoices for Salesforce provides out of the box:

- **Automatic invoice creation out of sales data**
- **Bulk and single invoicing modes**
- **Automatic invoice delivery**
- **Invoicing of products with one-time and recurrent payments**
- **Invoices batch printing**
- **Easy design of professional looking invoices**
- **Accurate invoices**
- **Invoices history and delivery tracking**