ERPFOCUS

CERTINIA (FORMERLY FINANCIALFORCE ERP)

EXTENDED PROFILE

certinia

OVERVIEW

Certinia (formerly known as FinancialForce) is a cloud-based Enterprise Resource Planning (ERP) and Professional Services Automation (PSA) that has been built as a bespoke solution to complement the Salesforce1 solution. FinancialForce is marketed as an ERP solution for customer-led economies.

Certinia continues its deep integration with the 2,000+ existing applications in the Salesforce ecosystem and can be customized to an individual customer’s requirements. This large integration capability enables businesses to link their ERP, PSA, and other Salesforce apps to create a seamless, real-time flow of data across departments. Built natively on Salesforce, it also shares the same customer record, user interface, and advanced analytics, providing a single source of certainty for businesses.

The system comes with ordering and financial capabilities plus Human Capital Management (HCM), services automation, and Supply Chain Management (SCM) tools. Its key feature is the easy integration and expansion through apps from the Salesforce Ecosystem or Salesforce1 Platform.

FinancialForce’s original suite of mobile applications has been expanded in Certinia, supporting not just ERP and PSA access but also broader customer success apps. The updated mobile app ensures secure access to all core business functions from anywhere and supports both iOS and Android devices.

F.A.Q.s

WHAT IS CERTINIA, AND HOW DOES IT DIFFER FROM FINANCIALFORCE?

Certinia is the rebranded name of FinancialForce, a cloud-based ERP and PSA solution. It is still built on the Salesforce platform, but the new name emphasizes its broader focus on delivering customer-centric solutions that align sales, finance, and services teams around a single customer record.

While FinancialForce primarily marketed ERP for customer-led economies, Certinia enhances integration, customization, and mobile access, maintaining all the benefits of FinancialForce with added features and a focus on modern business needs.

WHAT IS THE "SINGLE SOURCE OF CERTAINTY?"

This refers to its native integration with Salesforce, where all apps share the same customer record and user interface. This creates a unified system where sales, finance, and services teams access real-time data from a single, centralized source. This setup ensures accuracy and alignment across departments, reducing errors and improving collaboration.

WHAT TYPES OF BUSINESSES BENEFIT MOST FROM USING CERTINIA?

Certinia is ideal for customer-centric organizations, particularly those in fast-growing industries that need a scalable solution to manage sales, services, and financial processes efficiently. Its seamless integration with Salesforce, customizable features, and real-time insights make it valuable for businesses looking to streamline operations, enhance collaboration, and drive customer engagement.

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SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Certinia (formerly FinancialForce ERP)
BUSINESS SECTORS	
DISTRIBUTION	✔
GOVERNMENT & NPO	✔
MANUFACTURING	✔
RETAIL	✔
SERVICES	✔
INDUSTRY	
AEROSPACE & DEFENSE	✔
AUTOMOTIVE	✔
CHEMICAL	✔
CONSTRUCTION	✔
COSMETICS	✔
ELECTRONICS	✔
ENERGY/POWER/UTILITIES	✔
ENGINEERING	✔
FASHION	✔
FINANCIAL SERVICES	✔
FOOD & BEVERAGE	✔
LOCAL GOVERNMENT	✘
MEDIA	✔

MEDICAL & HEALTHCARE	✓
METALWORKING	✓
OILFIELD	✓
PACKAGING	✓
PAINT & ADHESIVES	✓
PHARMACEUTICAL	✓
PLASTICS & RUBBER	✓
PRINT & DESIGN	✓
RENTAL	✓
TELECOMMUNICATIONS	✓
WOODWORKING	✓
CANNABIS	✗
EDUCATION	✗
NONPROFIT	✓
ERP SOFTWARE FEATURES	
BILLING	✓
BUSINESS INTELLIGENCE/ANALYTICS	✓
COSTING	✓
CRM	✓
CUSTOMER SERVICE	✓
PRODUCT DESIGN	✓
FINANCIALS & ACCOUNTING	✓
HR	✓
INVENTORY MANAGEMENT	✓
ORDER MANAGEMENT	✓

PLANNING & SCHEDULING	✓
PROJECT MANAGEMENT	✓
PURCHASING	✓
QUALITY CONTROL	✓
SALES	✓
SHIPPING & DISTRIBUTION	✓
SUPPLY CHAIN MANAGEMENT	✓
WAREHOUSE MANAGEMENT	✓
ASSET MANAGEMENT	✓
DOCUMENT MANAGEMENT	✓
CUSTOMER SUITABILITY	
ENTERPRISE (1000+ EMPLOYEES)	✓
MEDIUM SIZE (251-1000 EMPLOYEES)	✓
SMALL BUSINESS (1-250 EMPLOYEES)	✓
ADDITIONAL PRODUCT INFO	
MULTI LANGUAGE	✓
MULTI CURRENCY	✓
CUSTOMIZABLE	✓
SYSTEM HOSTING	
CLOUD	✓
INSTALLED ON PREMISE	✗
FURTHER INFORMATION	
PRICING	Not Available

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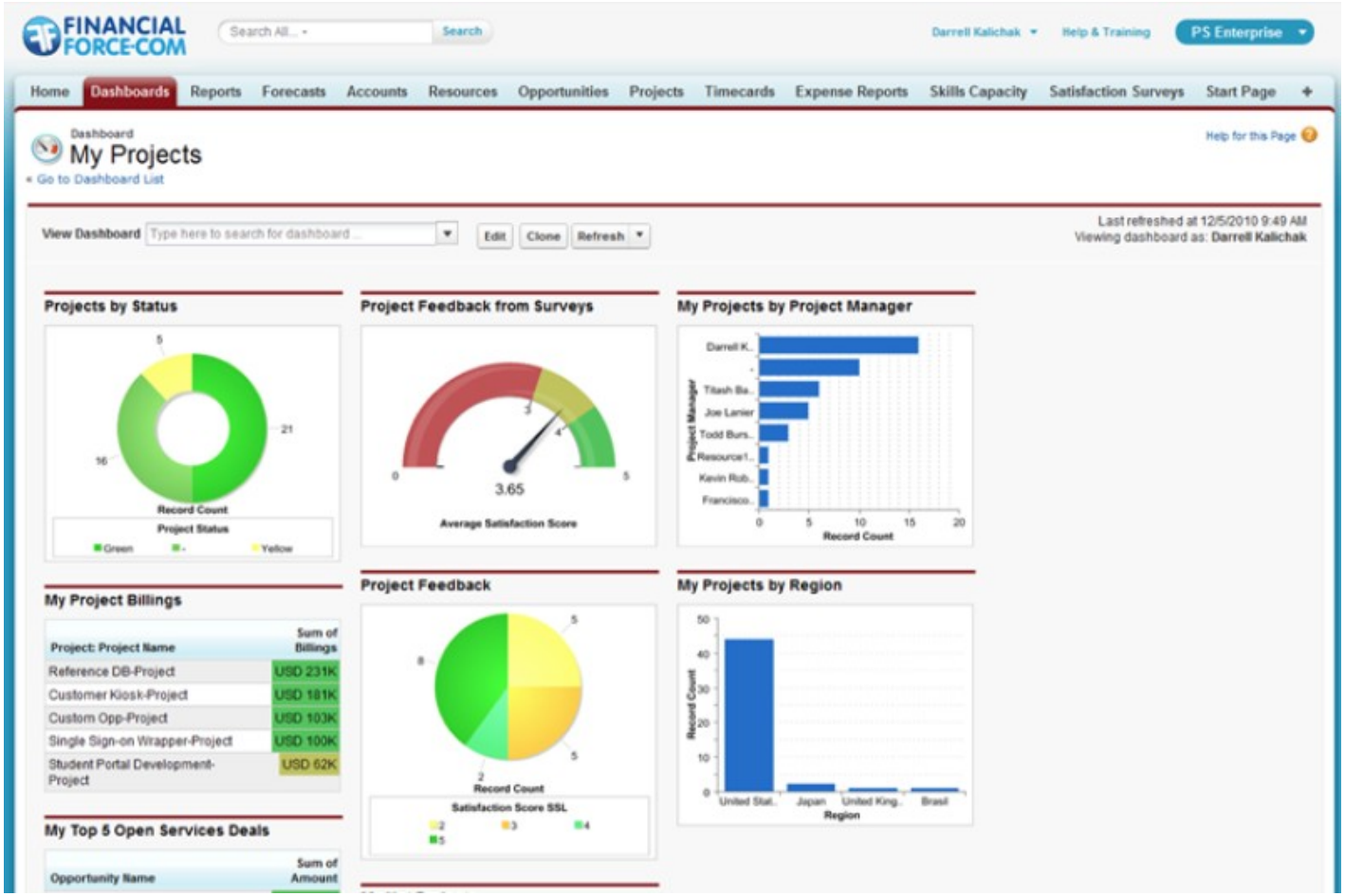
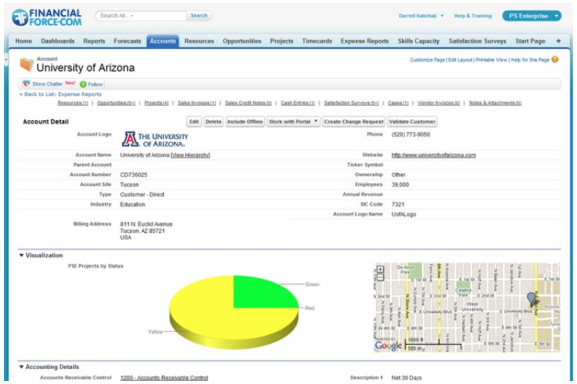
SOFTWARE SCREENSHOTS




FINANCIAL FORCE.COM
Home Dashboards Reports Forecasts Accounts Resources Opportunities Projects Timecards Expense Reports Skills Capacity Satisfaction Surveys Start Page
University of Arizona
Account Detail
Edit Delete Include Offline Work with Portal Create Change Request Validate Customer
Account Name University of Arizona
Phone (520) 773-9050
Website http://www.universityofarizona.com
Account Number CD736025
Ownership Other
Account Site Tucson
Employees 39,000
Type Customer - Direct
Industry Education
SIC Code 7321
Billing Address 811 N. Euclid Avenue Tucson, AZ 85721 USA
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PSE Projects by Status
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Red
Yellow
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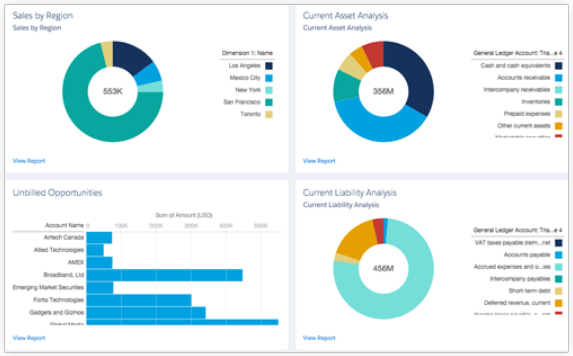
Accounts Receivable Control 1200 - Accounts Receivable Control
Description Net 30 Days


Sales by Region
Sales by Region
553K
Dimension 1: Name
Los Angeles
Mexico City
New York
San Francisco
Toronto
View Report
Current Asset Analysis
Current Asset Analysis
356M
Cash and cash equivalents
Accounts receivable
Intercompany receivables
Inventories
Prepaid expenses
Other current assets
View Report
Unbilled Opportunities
Sum of Amount (USD)
Account Name
Airtech Canada
Allied Technologies
AMEX
Broadband, Ltd
Emerging Market Securities
Fortis Technologies
Gadgets and Gizmos
View Report
Current Liability Analysis
Current Liability Analysis
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Accounts payable
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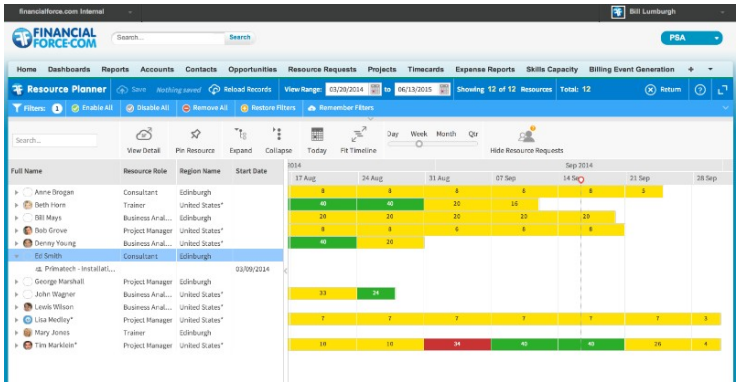
Intercompany payables
Short-term debt
Deferred revenue, current
View Report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Bill Lumburgh
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PSA
Home Dashboards Reports Accounts Contacts Opportunities Resource Requests Projects Timecards Expense Reports Skills Capacity Billing Event Generation
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View Range: 03/30/2014 to 06/13/2015
Showing 12 of 12 Resources
Total: 12
Return
Filters: 1 Enable All Disable All Remove All Restore Filters Remember Filters
View Detail Pin Resource Expand Collapse Today Fit Timeline Day Week Month Qtr Hide Resource Requests
Full Name
Resource Role
Region Name
Start Date
Sep 2014
17 Aug 24 Aug 31 Aug 07 Sep 14 Sep 21 Sep 28 Sep
Anne Brogan Consultant Edinburgh
Beth Horn Trainer United States*
Bill Mays Business Anal... Edinburgh
Bob Grove Project Manager United States*
Denny Young Business Anal... United States*
Ed Smith Consultant Edinburgh
cl. Primatech - Installati... 03/09/2014
George Marshall Project Manager Edinburgh
John Wagner Business Anal... United States*
Lewis Wilson Business Anal... United States*
Lisa Medley* Project Manager United States*
Mary Jones Trainer Edinburgh
Tim Markiein* Project Manager United States*