

CERTINIA (FORMERLY FINANCIALFORCE ERP) EXTENDED PROFILE



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.



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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University of Arizona

Customer Page (Edit Layout / Printable View / Help for this Page)

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Reported On: 09/29/2014

Submitted: 09/29/2014

Submitted By: SARA CASH/MSA/US

Submitted To: CASH/MSA/US

Submitted By: SARA CASH/MSA/US

Submitted To: CASH/MSA/US

Submitted By: SARA CASH/MSA/US

Submitted To: CASH/MSA/US

Account Detail

Account Logo

THE UNIVERSITY OF ARIZONA

Account Name

University of Arizona (5555555555)

Account Number

C0719825

Account Size

Medium

Account Type

Customer - Direct

Account Industry

Education

Account Billing Address

611 N. Euclid Avenue
Tucson, AZ 85721
USA

Account Phone

(520) 773-8050

Account Email

mailto:universityofarizona.com

Account Website

http://www.universityofarizona.com

Account Logo Name

USRA Logo

Visualization

PSI Projects by Status

3D Pie Chart

Map

Accounting Details

Accounts Receivable Control

1200 - Accounts Receivable Control

Description 1

Net 30 Days

Sales by Region

Sales by Region

Donut Chart

553K

Dimension 1 Name

Los Angeles

Manila City

New York

San Francisco

Toronto

View Report

Current Asset Analysis

Current Asset Analysis

Donut Chart

356M

General Ledger Account Title # 4

Cash and cash equivalents

Accounts receivable

Inventory

Prepaid expenses

Other current assets

View Report

Unbilled Opportunities

Sum of Amount \$USD

Horizontal Bar Chart

Account Name

Amtech Canada

Amtech Technologies

ASDC

Broadband Ltd

Emerging Market Securities

Forbes Technologies

Gadgets and Gizmos

View Report

Current Liability Analysis

Current Liability Analysis

Donut Chart

456M

General Ledger Account Title # 4

VAT taxes payable (item...)

Accounts payable

Accrued expenses and o...ies

Intercompany payables

Short-term debt

Deferred revenue, current

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Billing Event Generation

Resource Planner

Nothing saved

Reload Records

View Range

05/29/2014

to

06/13/2015

Showing 12 of 12 Resources

Total: 12

Return

Filters

Enabled All

Disable All

Remove All

Reset Filters

Remember Filters

Search

View Detail

Pin Resource

Expand

Collapse

Today

Fit Timeline

Hide Resource Requests

Full Name

Resource Role

Region Name

Start Date

17 Aug

24 Aug

31 Aug

07 Sep

14 Sep

21 Sep

28 Sep

Anne Doogan

Consultant

Edinburgh

03/09/2014

8

8

3

4

8

3

Beth Horn

Trainer

United States*

40

40

25

15

Bil Mays

Business Anal...

Edinburgh

25

25

25

25

25

Bob Grove

Project Manager

United States*

5

5

4

4

5

8

Danny Young

Business Anal...

United States*

40

25

Ed Smith

Consultant

Edinburgh

Primatech - Installat...

03/09/2014

George Marshall

Project Manager

Edinburgh

33

34

John Wagner

Business Anal...

United States*

7

7

7

7

7

3

Lewis Wilson

Business Anal...

United States*

18

18

34

40

40

26

Lisa Medley*

Project Manager

United States*

Mary Jones

Trainer

Edinburgh

Tim Marklein*

Project Manager

United States*