Workday Financial Management Connector for Salesforce

Workday Financial Management Connector for Salesforce is a pre-packaged connector that provides visibility and accuracy across the opportunity-to-cash process without the administrative burden of developing and maintaining a costly custom integration. Easily integrate opportunity and customer data from Salesforce.com with Workday and update customer activity in Salesforce to keep your back office aligned with your sales organisation. This eliminates siloed information from CRM, finance, and HR systems as well.

With Workday Financial Management Connector, administrators can map objects in Salesforce.com to objects in Workday with total control over the conditions and timing of data synchronisation. Easy scenario mapping and user-friendly dashboards provide a seamless experience and continuous sync monitoring within the familiar Salesforce.com user experience.

Workday Financial Management Connector for Salesforce capabilities

- Integrate Salesforce CRM and Sales Cloud with Workday Financial Management using a pre-packaged connector.
- Determine integration scenarios through detailed field and value mapping, specifying your desired frequency for data synchronisation.
- Configure the mapping of all sales and custom objects in Salesforce to objects in Workday.
- Update customers in Workday when accounts are updated in Salesforce.
- Update customer activity in Salesforce when invoices, payments, or adjustments are made in Workday.
- Easily and accurately create opportunities, contracts, projects, invoices, and resource plans in Workday from Salesforce events.
- Keep tabs on integrations and trigger timing with the sync log activity dashboard.
- Lightning-mode capable.

Key benefits

For sales and finance

- Streamline and automate the opportunity-to-cash process.
- Eliminate manual or duplicate processes, reduce errors, and increase visibility across the opportunity-to-cash process.
- Improve customer satisfaction with deeper alignment among sales, finance, and operations on key business initiatives.
- Track time, costs, and revenue associated with sales opportunities for insight into opportunity costs and profitability.

For IT

- Decrease time, costs, and effort required to implement a custom integration by 30 to 50 per cent.
- Reduce administrative burden by allowing Salesforce administrators to easily and quickly configure the integration without costly developers.
- Reduce post-deployment maintenance by insulating administrators from back-end API changes.
- Easily view and maintain scenario mapping for a seamless experience within the Salesforce.com user interface.

For project and resource management

- Support resource management early in the project life cycle with visibility into pre-closed or pre-approved projects.

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