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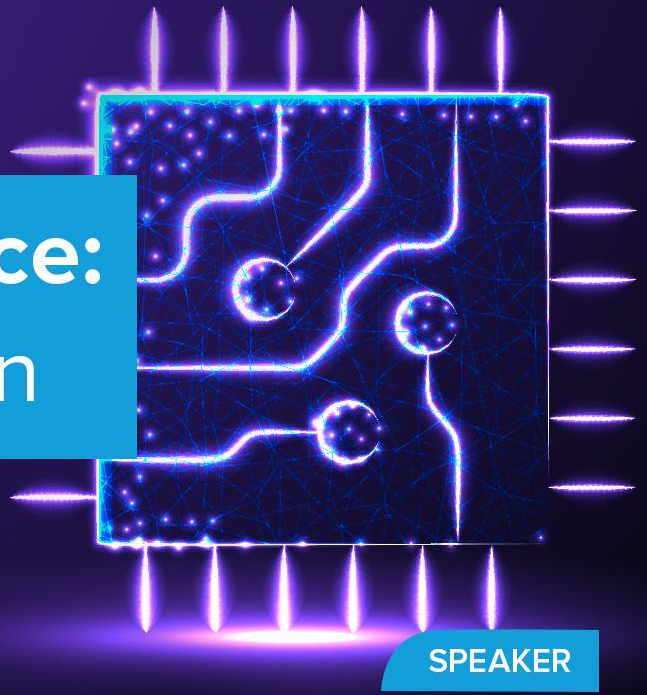
APIs and your FinancialForce:
Benefits of an API Integration



Thursday, February 03, 2022 - 1:00 PM ET

SPEAKER

Neeraj Garg
COO, AblyPro

Understanding the FinancialForce Landscape

Break Product Silos

If multiple departments of the same system do not communicate well customers service can be hampered

Banks have a product-focused approach in which they are divided by departments and each deals with a specific banking product

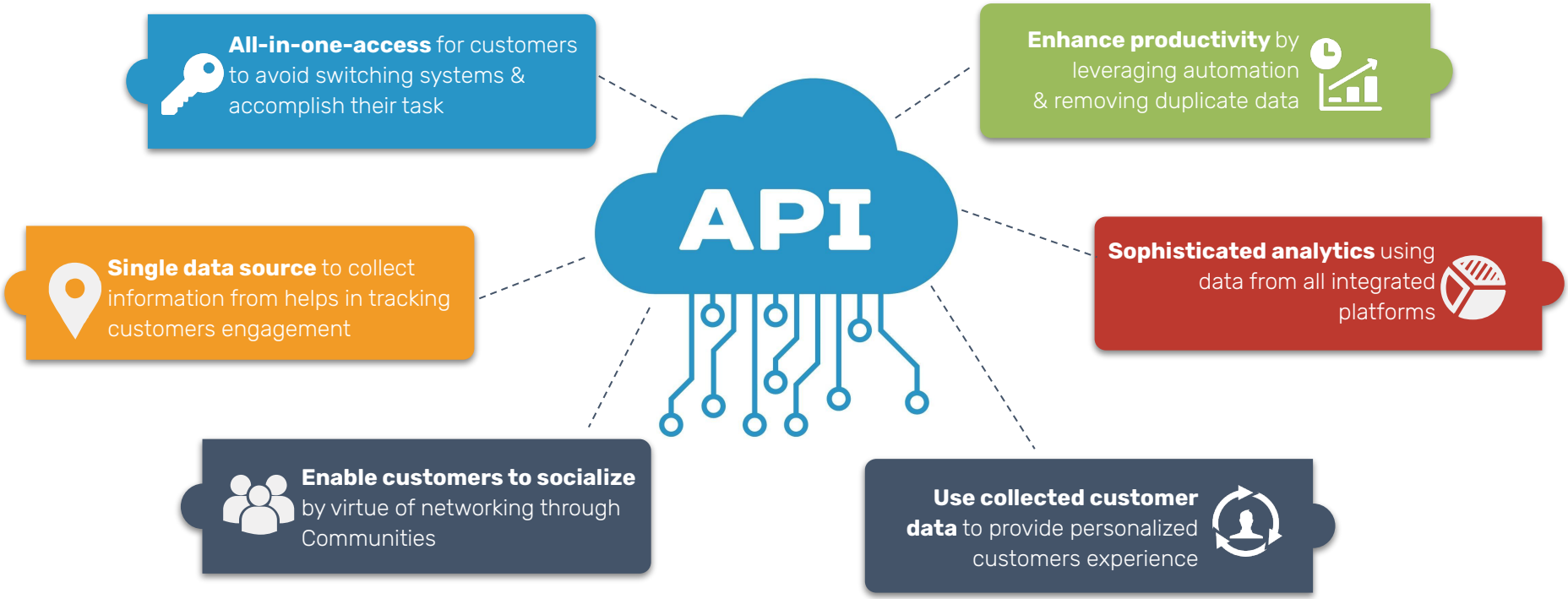
However, with customer accounts fragmented and distributed around different departments data silos are predictable.

Hence making difficult to provide a seamless, attentive and personalized service - sounds familiar ?

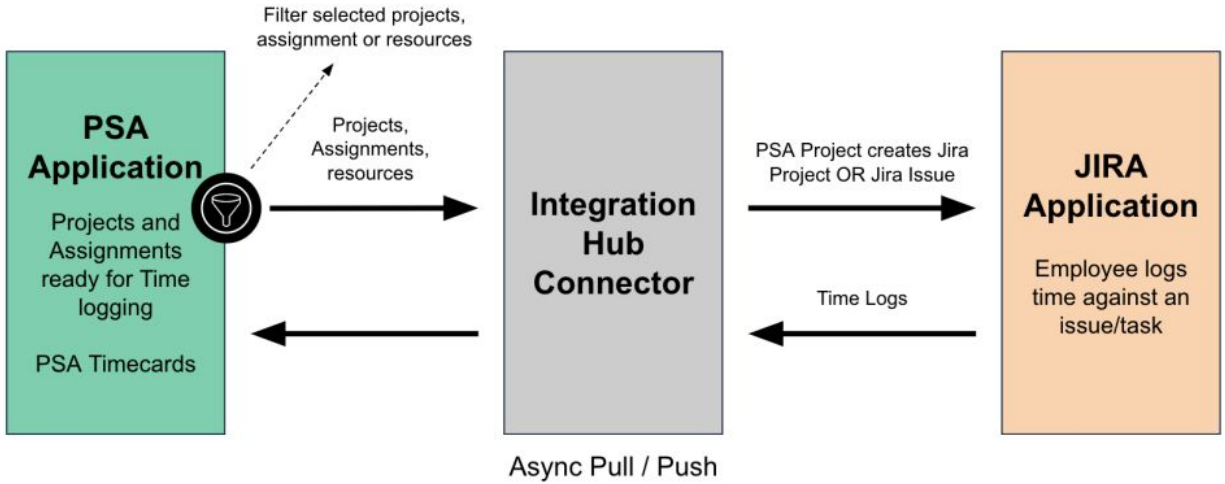
Rearranging company's data centers and centralizing all the databases will be extremely beneficial in terms of customer service

Why Integrate?

What to expect out of a FinancialForce API integration



FinancialForce-JIRA Integration: Benefits Explained



- Comprehensive view of project health
- Shorter time to invoice
- Resources enter critical data once
- Full synchronization between FinancialForce PSA and Jira, no re-entry

FinancialForce and DocuSign Integration

DocuSign is a product which provides the facility of digital signature of document

DocuSign

To optimize business process, integration of FinancialForce and DocuSign has been adopted by organizations on large scale to increase digital process.

1. Sign 90% of contracts on the same day
2. Directly send data from FinancialForce
3. Increase close rates and productivity
4. Create a better customer experience
5. Track where a document is in the pipeline process
6. Removes tedious paperwork and data entry

FinancialForce and Zoom Connector Integration

Collaborate efficiently in the pandemic environment

Digital Marketing

FinancialForce's PSA Zoom Connector enhances productivity for remote and distributed teams, allowing them to quickly convene Zoom meetings while collaborating on projects in FinancialForce PSA.

Schedule

Schedule and join Zoom calls within the FinancialForce PSA application

No Charge

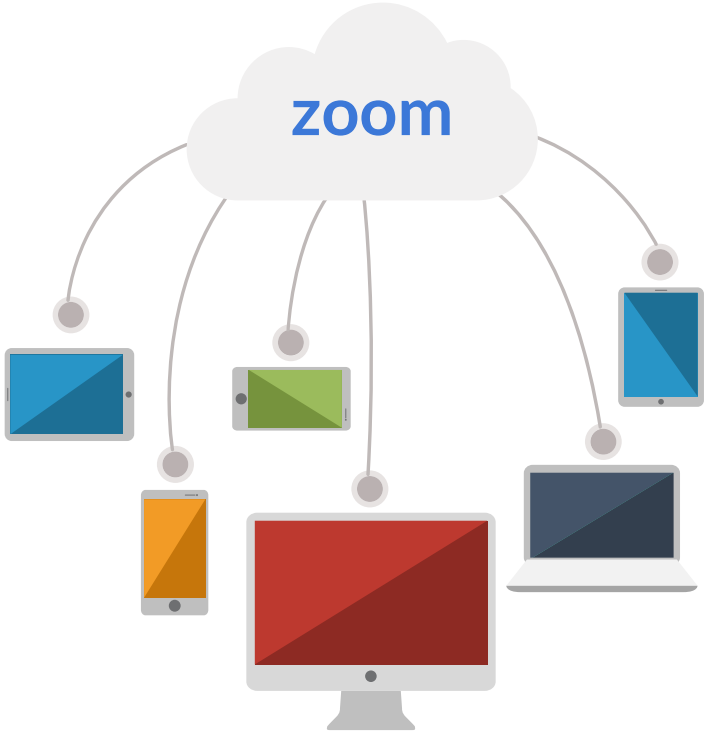
No extra charge through the FinancialForce Customer Community

Impact

Project stakeholders can spend more time on impactful activities

Transformation

Support our customers' digital transformation



How to Determine If You Should Integrate

5 questions to help you make the right decision

Are you equipped with the technical skills to perform a seamless integration?

Does your app have an API that connects with FinancialForce?

Are you seeking analytics beyond the scope of Salesforce & your FinancialForce?

Are you wasting a chunk of your time in syncing data between FinancialForce & apps?

Do you want to use the same technology for the next 3-5 years & investing in integrations is worthwhile?

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3 Scenarios While Syncing Data

Data only in FinancialForce

This will happen when FinancialForce is already in use you have just integrated with an API

Data only in app

You are already using an app and have just implemented FinancialForce

Data both in FinancialForce and the app

Both in use but are silo systems

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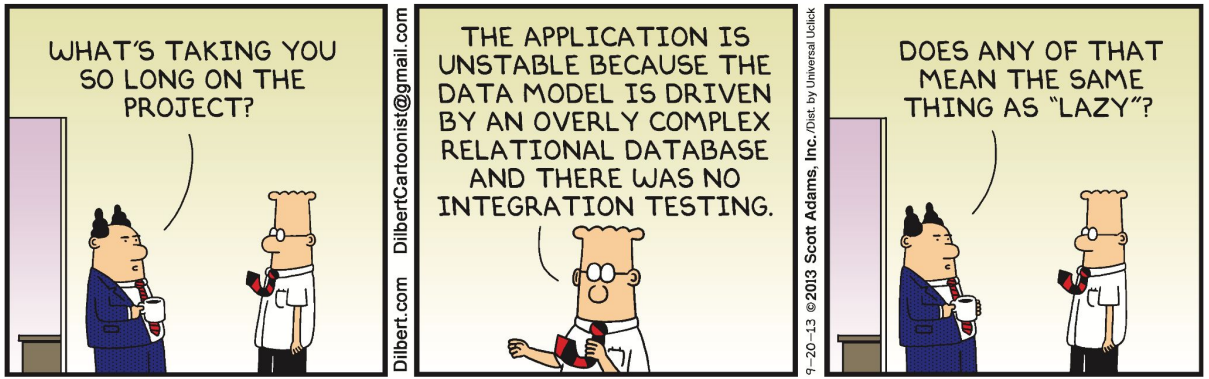
API Integration Project Pitfalls to Avoid

- Starting a project with no clear scope
- Custom configurations not taken into account
- Propagation of bad data
- Improper field mapping
- Professional Salesforce Experts not involved



Contact Us

AblyPro - FinancialForce Success Consultant

Address

AblyPro
12410 Milestone Center Drive
Suite 600
Germantown, MD 20876

Phone & Email

240-259-3076
wecare@ablypro.com

Social Media

Facebook.com/ablypro
Twitter.com/ablypro
Linkedin.com/company/ablypro