



## DELEGATE CX RELIES ON ACCOUNTING SEED'S MULTI-COMPANY FUNCTIONALITY FOR QUICK START

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Owning multiple companies certainly has its headaches, but the bookkeeping of those companies doesn't have to be one, especially when a business owner already has a successful organization in Salesforce and Accounting Seed. Recently, we caught up with Craig Dunlap, Founder and CEO of Delegate CX, to see how they're utilizing Accounting Seed.



## WHY READ:

- Learn how Accounting Seed enabled Delegate CX to start up so quickly.
- Gain insight into how a multi-company business owner utilizes Accounting Seed for reporting.
- Learn how multi-company business owners simplify their tax accounting needs with Accounting Seed and Salesforce.
- Become proficient in effective multi-company billing practices through the use of Accounting Seed.



[Delegate CX](#), located in Dallas, Texas, helps companies grow by outsourcing business tasks to highly trained teams around the globe. Outsourcing anything from marketing to accounting and order entry makes their customers' lives a lot easier. They focus on growth-minded companies that need assistance so that they can focus on what helps them grow. Delegate CX has about 35 employees.

Dunlap is also a founding partner at [Meyer Dunlap](#), a superior promotional products and services company in Dallas, Texas. Both companies are managed almost entirely with Salesforce and Accounting Seed at the wheel.

## SALESFORCE RUNS THE SHOW

There are many perks to having your business run through Salesforce, especially for a multi-company business owner. The ability to pilot your entire operation through a single platform is truly remarkable and revolutionary. Delegate CX and Meyer Dunlap are both on Salesforce. For Dunlap, it's not only the CRM he chooses to run his companies through, it's the best technology available to any business owner. "It's (Salesforce) enhanced the experience of the full life-cycle of the client from prospect to collections. Having that all in one place, in the best technology out there, there's just no better technology in the B2B world than Salesforce. I can be a small company with access to the best automation, the best marketing, the best tools out there," Dunlap said.

[Salesforce](#) is used by over 150,000 companies, across every industry. Most notably Adidas, United Healthcare, Western Union, and T-Mobile. Global entities such as these strive to use the best technology available to them. Dunlap continued to say, "It's Fortune 500, world-class technology available to small businesses. I now have the capability of any company of any size. It's a powerful tool." Dunlap's assertion is definitely relatable because these companies are using the same technologies available to any business owner in the world. Companies who choose to use Salesforce as their CRM are truly growing their business.

## ACCOUNTING SEED AND SALESFORCE

Accounting Seed is used by over 15,000 people across the globe because of our innovative accounting features and our seamless connection to Salesforce. Dunlap is a big fan of Accounting Seed and has used the application since 2017. "We're huge Accounting Seed fans, it's a really cool platform. One of the things I love Accounting Seed for is the native accounting in Salesforce. It makes me never question or doubt the matching of our sales forecast and our revenue. I love being able to know the data that's being shown to the sales people is real and it's accurate," he said.

## THE PERKS OF RUNNING MULTIPLE COMPANIES ON ACCOUNTING SEED

It's no secret, the obstacles and mind-numbing tasks that come with starting a business are easier for Accounting Seed users. Dunlap found it much easier starting his second business because of the groundwork already in place from starting his first business with Accounting Seed. "Being able to run multiple companies in Accounting Seed has been really nice. From an Accounting Seed standpoint, I've done a lot of automation under my previous company (Meyer Dunlap) and being able to run another company on the accounting side, it was really nice to not have to rebuild everything. The multi-company features, especially with my new company, have been a real lifesaver," Dunlap said of running two companies.



### MULTI-COMPANY BILLING EFFICIENCY

Delegate CX hit the ground running after their Accounting Seed set up was complete. The invoice management features of our platform allowed their team to waste no time configuring billing. “We were able to set up billing on day one because we already had everything set up. That’s a really nice feature to have,” Dunlap said about their billing process.

The implementation of Accounting Seed into most businesses’ financial life cycle usually depends on the users’ comfort or experience level in Salesforce. For Delegate CX, the implementation process was very smooth because of their previous experience with Accounting Seed. They set up their multi-company ledger with ease. “The setup was very easy, just adding a few fields. It’s been really nice sharing. So we base all of our sharing of records off the multi-company ledger field. Having that in place has been pretty good. There’s segmentation of both companies. So, it’s relatively easy to put in place,” Dunlap said.

### INSTANT MULTI-COMPANY REPORTING

Financial reporting can get very confusing when other companies’ financials are added to the mix. That’s why it’s important to have an accounting solution that manages multi-company ledgers with effortless reporting functionality.

The multi-company reporting functionality for Accounting Seed users is very powerful and can save users precious time. “The reporting function is so easy and so instantaneous, it’s perfect from the Accounting Seed reports and the custom Salesforce reports. The reporting functionality alone is saving me countless hours and dollars,” Dunlap agreed.

When asked how much time, Dunlap continued, “We’re closing five to seven days faster, we’re billing four to five days faster, and we’re collecting five to 10 days faster than our previous platform. We’ve saved 20-30 hours, around 20-25% across the board of our time. This is a marked improvement.”

### MULTI-COMPANY TAX ACCOUNTING

Another feature that Dunlap finds very useful is the multi-company tax accounting functionality. Accountants like automated tax accounting functionalities because they make their job a lot easier. Accounting Seed offers multiple options to help your business pay taxes effectively.

Our users thoroughly enjoy the stress-free process often associated with tax compliance by having all of their accounting records organized and stored in one secure cloud-based platform. “The ability for my tax accountant to say, ‘Hey do you have this information?’ and I can go pull that number for them within minutes is so nice,” Dunlap said of the multi-company tax accounting functionality.

### CHOOSE ACCOUNTING SEED FOR MULTI-COMPANY ACCOUNTING

The multi-company accounting features provided by Accounting Seed are allowing Delegate CX to thrive as a company. Remarkably, they were able to start billing on their first day of business thanks to the multi-company billing features. Their back-office teams and executives easily make decisions based on the instantaneous multi-company financial reporting abilities. And their tax accounting is a clean, seamless process thanks to our multi-company tax accounting functionality.

In conclusion, if you’re waiting to pull the trigger on another business opportunity, make sure you have the support of a bonafide, cloud-based accounting platform like Accounting Seed. Multi-company accounting features can be a true lifesaver for your next business.



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- Craig Dunlap, Founder and CEO





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410.995.8406

[accountingseed.com](http://accountingseed.com) | [appexchange.salesforce.com](https://appexchange.salesforce.com) | [sales@accountingseed.com](mailto:sales@accountingseed.com)