



A Guide to Accounting Apps

Find the right accounting solution for you.

If you are looking for a new accounting solution, you need to really pinpoint the “why.” To simply say “it isn’t working right” isn’t a clear enough reason to ensure you get the solution you need. Start your journey with these qualifying questions and include any staff or teams that will need to be involved in the decision-making process.



HIGH-LEVEL QUESTIONS TO ASK YOURSELF

- What are the pain points we're facing in our current environment?
- What does our ideal environment look like?
- Do we keep our system on-premise or move to the cloud?
- What are the cost savings we expect to achieve? What is our budget for new software?

DEEPER QUESTIONS TO ASK YOURSELF

These are great questions to ask after you have outlined your needs and pain points at a high level. Additionally, these are questions to bring to your vendor to ensure the accounting software you are exploring is scalable, flexible to your needs, and is using the latest technology to grow with you!

- Is it important that we are able to customize reporting outside of canned accounting reports (such as Profit and Loss, Profit and Loss vs Budget, etc.)?
- Is it important for us to be able to process transactions in large batches?
- Is it important for revenue recognition to be automated?
- Do I need automations around several different accounting tasks?
- Is it important that our accounting system speaks seamlessly to our customer relationship management system (CRM)?
- Is it important to us to have orders and inventory management in our accounting system?
- Is it important to have recurring billing, payables, or journal entries?
- Do we need to have the ability to restrict access and/or give certain permissions to staff outside of accounting?
- Do we need a system that can handle multi-currency and multi-company?
- Do I work with a number of different banks and credit card companies that need to be integrated into my accounting software?
- Do I want to move to online checks vs paper checks?
- Do I want to see my bank account balances in real-time?
- Do I need a system that works with the following apps:
 - Avalara
 - Conga
 - Stripe
 - Field Service Lightning (Salesforce App)
 - CPQ & Billing (Salesforce App)
 - Communities (Salesforce App)
 - Nonprofit Success Pack (Salesforce App)





QUESTIONS FOR YOUR VENDOR

These are questions to ask after demoing a product to ensure the level of support needed throughout your journey is met and costs are as clear as possible given your requirements.

- What level of consultation and staff training will we need before and after the implementation?
- What can be configured out of the box? What of my needs will require customization?
- What type of support will we get after implementation and is it included in our subscription?
- How are future upgrades managed and are they included in our subscription?
- Will our requirements be included in the scope of the project and implementation costs? How accurate will these costs be?

Accounting Seed offers all of these things and more! As a top-rated accounting solution by G2 Crowd, SoftwareReviews, and Finances Online, Accounting Seed's technology has been helping companies overcome issues with inaccurate data and manual processing for more than 10 years. Native to the Salesforce Platform, Accounting Seed connects the front and back office for a single source of truth.

QUESTIONS ABOUT OUR APP?

Contact Accounting Seed at sales@accountingseed.com



“With Accounting Seed, we have a 360° view of our customers. All channels from sales to invoicing to customer support are centralized in a single database, delivering the best service to customers.”

- Yohann Lecornet
CTO & CIO at Zenconnect





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