

Partner Enablement

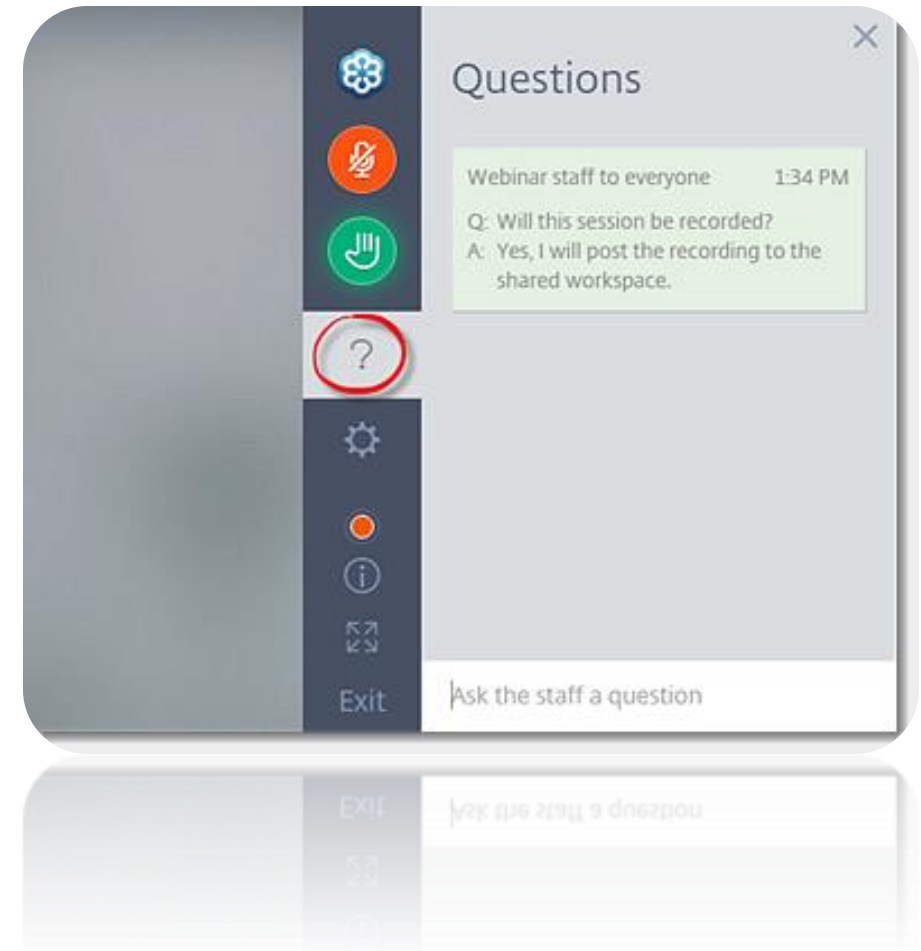
Accounting Seed Financial Analytics

Agenda

- Selling Financial Analytics
- Implementing Financial Analytics/Creating Demo Orgs
- Demo Walkthrough
- Pricing/Licensing
- Availability
- Q&A

Housekeeping

- We'd love to hear your questions, thoughts, and ideas!
- Please use the “?” feature to send any questions or comments to the team. We'll save time at the end to answer your questions.
- This enablement session is being recorded. We'll share the recording on the Partner Center.



Selling Financial Analytics

Data Driven Growth

- Data is better together
- Data at different altitudes



Complexity from Fragmented Data

Separate data sources require:

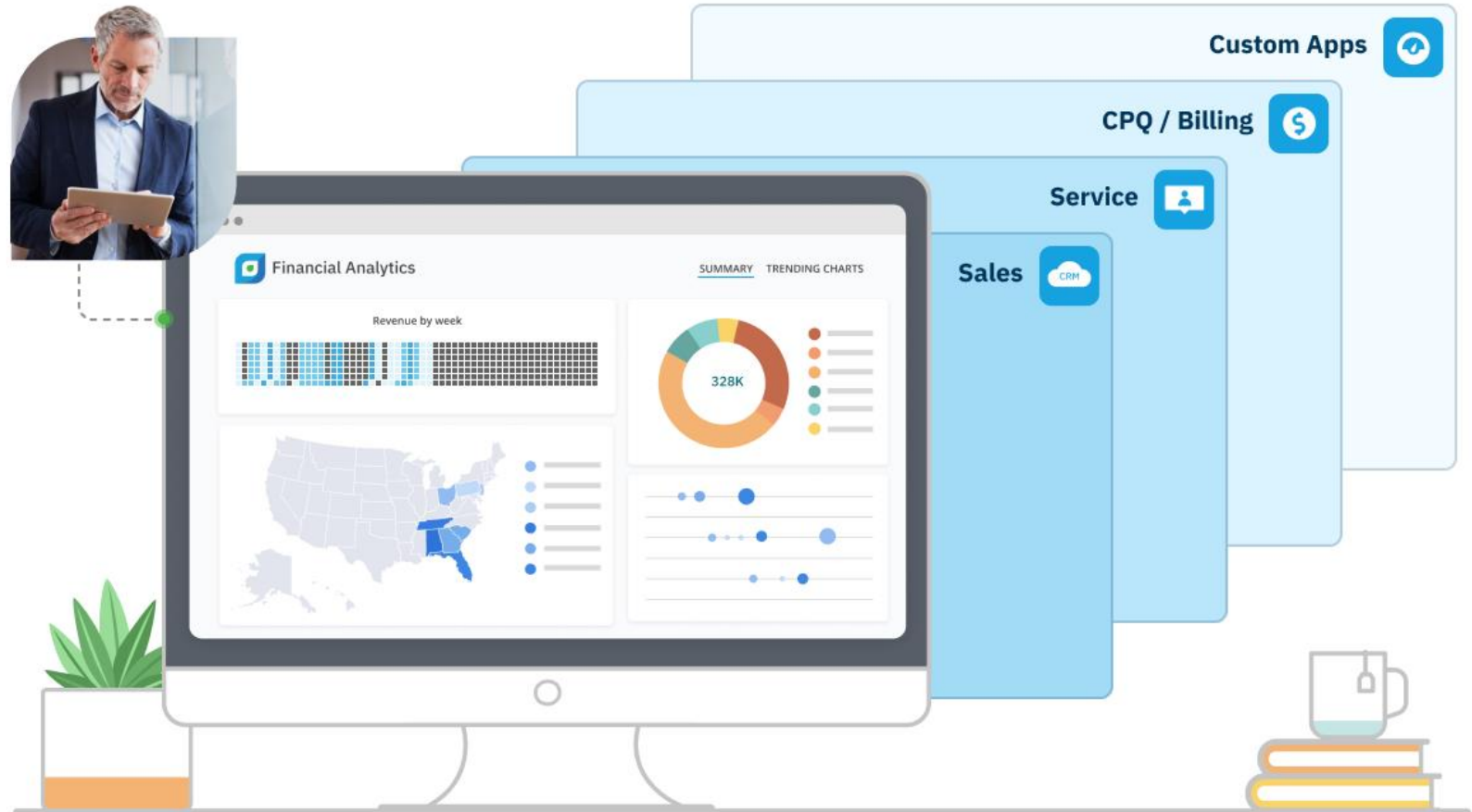
- Syncing
- Mapping
- Merging
- Audit
- Maintenance



Simplicity in Unified Data

“Single Pane of Glass”

- Data Storytelling
- Progressive Discovery
- Connections across the entire business



Trade your green visor for pilot wings

Data visualizations should provide progressive discovery . . .

- What is our revenue for this quarter?
 - Who are my most profitable customers?
 - What products are they buying?
- How does my actual spend compare to budget?
 - Which departments are under budget?
 - Are their expenses delayed this quarter?



From Reporting to Intelligence

Reports and Dashboards

- **Powerful reporting** on platform
- Easy to create reports/dashboards
- Report on data across the organization

Accounting Seed Financial Analytics

- **Intelligence** on platform
- More than just charts and metrics
- Ability to combine data from any source and transform the data to reveal additional insights
- For deeper analysis of data

About Accounting Seed Financial Analytics



Built on CRM Analytics, a Salesforce native Analytics/Business Intelligence tool



Performance at scale – ability to analyze billions of rows of financial data at lightning-fast speeds



Data enrichment provides key financial metrics out of box, such as Days Sales Outstanding and Days Payables Outstanding



Multi-dimensional analysis – analyze financial data across any number of dimensions



Ad-hoc analysis – flexible data analysis with ability to analyze financial data in open and closed periods



Drill down – from any dashboard to source documents in Accounting Seed



Visually appealing dashboards – to help tell the story and drive decision-making



Trending Charts – to increase understanding, spot patterns and reveal deeper insights

What's in it for you . . .



Deeper understanding of your business (multi-dimensional/trend analysis)



Improved and more efficient data-driven decision making (performance at scale)



Increased overall productivity (no more exporting multiple reports out to Excel)



Increased performance and profitability (from deeper, actionable insights)



Newly revealed business opportunities and threats (from access to multiple data sources)



Optimized cost (business intelligence, on platform)

Artificial Intelligence

The AI revolution:

“Every Business will
get recreated with
Artificial Intelligence.”

- Marc Benioff,
[Dreamforce, September 2023](#)



Financial Analytics and AI



Financial Analytics data provides the foundation for:

- **Models** - accepts inputs (one or more explanatory variables) and produces outputs (a predicted outcome, top factors, and improvements)
- **Predictive analytics** - predicting future outcomes based on analysis of past outcomes.
- **Prescriptive analytics** - suggesting ways in which to improve your predicted outcomes.

Financial Analytics and AI (*continued*)

Financial Analytics Model provides the foundation for Generative AI:

- Cash Flow
- Customer Lifetime Value
- Forecasts and Budgets
- Improvements to Financial KPIs
(suggested actions)



Implementing Financial Analytics & Creating Demo Orgs

Implementing Financial Analytics

- Financial Analytics Configuration Setup articles in Knowledge Base:
 - <https://support.accountingseed.com/hc/en-us/articles/19065203880467-Accounting-Seed-Financial-Analytics-Configuration-Setups>

Demo Orgs

- Request a Larkspur demo org, which is CRM Analytics enabled. Note, these are temporary 30-day orgs.
- If you already have a demo org you want to use, make sure it's CRM Analytics enabled.
 - If it isn't, submit a case to Salesforce requesting that they provision CRM Analytics licenses in the org.
 - OR,
 - You can create a new CRM Analytics enabled org here:
 - <https://trailhead.salesforce.com/content/learn/projects/quick-start-einstein-analytics/sign-up-for-an-analytics-org>
- If the Financial Suite package installed in the demo org is earlier than Winter '24 Preview 2, then install Winter '24 Preview 2 (or later).
- Make sure Multi-Currency is enabled in the org.
- After installing Winter '24 Preview 2 (or later), submit a case to Accounting Seed Support requesting that we enable Financial Analytics in this org. Be sure to include the Org ID.

Demo Orgs – licenses/permissions

- Assign a license and permission set to the **Integration User**:
 - "Accounting Seed Financial Suite" license
 - "Financial Suite Analytics" permission set
- Assign a license and permission sets to the **System Administrator**:
 - CRM Analytics Growth (or Plus) Permission Set License Assignment
 - "CRM Analytics Growth (or Plus) Admin permission set
 - Accounting Seed Full Admin
- Assign a license and permission sets to **Other Users**:
 - CRM Analytics Growth (or Plus) Permission Set License Assignment
 - "CRM Analytics Growth (or Plus) User permission set
 - Accounting Seed Full Admin, or Accounting Manager, or GL Accountant, etc.

Creating the Financial Analytics app

- Navigate to Analytics Studio, and in the left pane select "Template Gallery."
- Start typing, "Accounting Seed..." In the Search box at the top and then select the "Accounting Seed Financial Analytics" template.
- Click Continue, Continue.
- Give your new app a name.
 - **Best Practice Recommendation:** we recommend appending the name with a version #, e.g., "Financial Analytics v3.205," so that when you install a later release, you can create a new app and be able to differentiate the older app with the newer app.

Scheduling/Running Dataflows/Recipes

- Step 1: Go to Data Manager and click on Connections, and run SFDC_LOCAL to sync Salesforce data
 - Step 2: If Transactions were archived,
 - From Connections, run AcctSeed__Transaction_Archive__b
 - From Manage Dataflows->Dataflows & Recipes, click on the Dataflows tab and run the "TransactionArchiveExtraction" dataflow
 - Click on Recipes, and run FinancialTransactionArchiveData
 - Step 3: Run the remaining Recipes:
 - FinancialTransactionData, CreditMemoData, CurrentYearEarningsData, RetainedEarningsData, Main
- Best Practice Recommendation:*** we recommend that these flows/recipes be scheduled to run on a regular basis.

Scheduling Dataflows/Recipes "After Events"

Best Practice Recommendation for scheduling Dataflows & Recipes:

- Start by scheduling the FinancialTransactionData to run on a schedule, e.g., daily at 1:00am
- Schedule CreditMemoData to "Run After" FinancialTransactionData
- Schedule CurrentYearEarningsData to "Run After" CreditMemoData
- Schedule RetainedEarningsData to "Run After" CurrentYearEarningsData
- Schedule Main to "Run After" RetainedEarningsData

Note: When Running On Demand, just run the FinancialTransactionData, and the others will then run automatically.

Customizing the Financial Analytics app

- Datasets and Dashboards are fully customizable
- We recommend extending the datasets and dashboards with business specific data and charts to add more context to the dashboards
- If edits were made and at some point, you want to revert back to the default datasets and dashboards, you can simply create a new app



Salesforce CRM Analytics and Accounting Seed Financial
Analytics expertise



Available to assist customers implementing customizations to
the dashboards



Available to assist and advise partners when implementing
customizations for their clients

Demo Walkthrough

Pricing & Licensing

Pricing & Licensing



Financial Analytics extension

Licensing starts at \$4,000 / year



Accounting Seed/Financial Analytics Users require the following licenses:

Salesforce License
Accounting Seed License
CRM Analytics Growth (or Plus) License



The Integration User requires an Accounting Seed License

An additional AS license will need to be purchased and assigned to this user

Availability

Financial Analytics Released in Winter '24!

For the latest updates, get the Winter '24 (push release)

Key Dates for auto-pushes to orgs:

- **Sandbox Push:**
 - Sunday, October 15, 2023
- **Planned Production Pushes:**
 - Sunday, November 19, 2023
 - Sunday, November 26, 2023

Important to Know...

- View data for one ledger at a time
- View dashboards in Ledger currency
- Foreign currency translation not yet available (2024)
- Multi-Currency must be enabled in the org

Q&A

Thank you!

accountingseed.com/support/partner-center