



Unify Finance and Delivery. Make AI work. ✨

Financial Management (FM) Cloud + Professional Services (PS) Cloud + AI

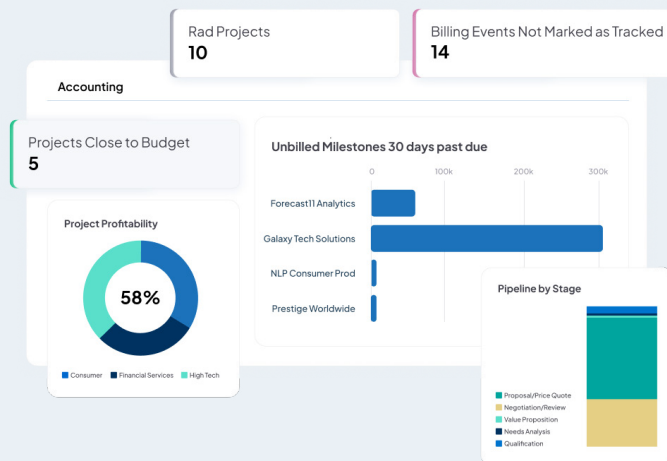
Services businesses don't lack data, they lack alignment.

Disconnected finance and delivery systems create conflicting forecasts, late surprises, and margin erosion. Layer AI on top, and the problem only scales.

Certinia Financial Management (FM) Cloud creates a real-time financial backbone across billing, revenue, and compliance. **Certinia Professional Services (PS) Cloud** connects delivery to that same platform—unifying finance and services on a single system of record.

Add Veda AI, Certinia's intelligent operations engine, and you get an operator with judgment, not a scribe. Teams move faster, act earlier, and run with greater precision.

Close the gap between delivery and finance



The operational backbone for reliable AI

AI is only as effective as the data it consumes. Certinia eliminates stitched-together reporting by running your entire business on a single Salesforce platform. This unified context creates the foundation needed to run predictive workflows and forecast revenue with total confidence.

Services organizations using Certinia solutions achieve metrics like:

10X
Faster financial reporting

111%
Customer retention

98%
Faster invoicing





The combination of Salesforce and Certinia gives us everything we need for managing our customer relationships, projects, and accounting. This end-to-end solution is just what our business needs to continue its growth path.

Daniel Cox, Group Manager - Technology **PROXIMITY**

Certinia + Salesforce: One Platform, Total Financial Control

- **Run finance and delivery as one business**
Connect financial management and services operations on Salesforce so performance is visible in real time not reconstructed after close.
- **Protect margins before they slip**
Align estimates, pricing, and resource plans early so projects are delivered profitably, not explained later.
- **Put the right talent on the right work**
Use skills-based staffing to drive utilization, delivery quality, and employee engagement.
- **Plan with confidence**
Forecast revenue, margin, utilization, and cash from a single system leaders can rely on.
- **See risk early. Act faster.**
Monitor project and financial health continuously and course-correct before profitability erodes.
- Make AI work on trusted data**
Stop running AI experiments. Ground your AI agents in the master customer record and real-time ledger data, allowing predictive and automated workflows to run with strict financial guardrails.
- **Eliminate manual financial friction**
Automate billing, revenue recognition, and compliance processes to reduce risk and reclaim time.

Want to see it in action? Talk to an expert

Over 1,400 companies are already using Certinia solutions.

PHILIPS

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