



CUSTOMER STORY · QUICKBOOKS + SALESFORCE

VertiMax ends double data entry

VertiMax · Athletic training equipment · QuickBooks Online + Salesforce

Once

entered in Salesforce, created in QuickBooks

Real-time

invoice status in Salesforce

Faster

invoicing & collections

The challenge

VertiMax's business development team worked in Salesforce, but every closed-won opportunity had to be manually re-entered into QuickBooks Online by accounting. Their previous integration was unreliable, broke down often, and lacked true bi-directional sharing — causing delays, duplicate entry and errors that hurt collections and inventory management.

The solution

Breadwinner connected QuickBooks Online directly to Salesforce, so invoices are created in QuickBooks straight from Salesforce opportunity data — no re-entry. Sales reps gained real-time visibility into payment history, outstanding invoices and account balances on every Account and Opportunity record.

The results

- Eliminated double data entry between Salesforce and QuickBooks.
- Sales team tracks invoice payment status directly in Salesforce.
- Invoice PDFs generated and sent from Salesforce — no QuickBooks access needed.
- Faster invoicing drove faster collections; reps stopped selling to overdue accounts.

"With Breadwinner, our business development team enters the information once in Salesforce and it gets created in QuickBooks when the accounting department selects."

Hany Zaki · Finance Officer, VertiMax

See what Breadwinner can do for your team · Request a personalized demo
breadwinner.com/quickbooks-salesforce-integration