



Seamless Financial Sync and Scalable Operations for **Evans National**

Key Highlights

72%

Reduction in manual reconciliation efforts.

68%

Improvement in financial data accuracy.

74%

Faster invoice and payment processing.

About The Company

Evans National is an independent insurance agency providing comprehensive commercial insurance and employee benefits solutions tailored to businesses' unique needs. They combine expert risk management guidance with deep carrier relationships to help protect assets, optimize workforce benefits, and support organizational growth with proactive, client-focused service.



The Problem

Evans National required an advanced Salesforce–QuickBooks integration to manage large-scale financial data and document workflows efficiently. Legacy data existed only in QuickBooks, and the lack of real-time synchronization caused delays, inconsistencies, and manual effort in financial reporting and reconciliation.

Key challenges included:

- No centralized historic financial data available in Salesforce
- Delays in syncing invoices, payments, and balances between systems
- Manual reconciliation due to mismatched or duplicate records
- Limited visibility into customer balances and payment history
- Need to support multiple QuickBooks companies within a single Salesforce org
- Requirement for scalable, automated syncing without developer dependency

Solutions

QB Sync Made Easy delivered a customized integration under the Platinum Package, including advanced features and one month of post-deployment support to ensure a smooth rollout and long-term stability.

The solution included:

- Historic data sync from QuickBooks to Salesforce for complete legacy visibility
- Real-time bidirectional sync to instantly reflect updates across both systems
- Unlimited data synchronization to support high transaction volumes
- Dynamic field mapping with support for custom objects
- Salesforce Flow-based automation for efficient sync control
- Detailed error logs for proactive monitoring and troubleshooting

