



Consolidating Professional Services Data from Multiple Systems into Salesforce

Professional services organisations often rely on a variety of systems to manage different aspects of client engagements. These systems may not always natively integrate with Salesforce. By consolidating data from disparate sources, such as through SFTP, Smartsheets, or other external platforms, companies can bring timesheet, expense, and project data into Salesforce. This provides a holistic view of client projects and allows for better decision-making around resource allocation, profitability, and customer satisfaction.

Each system might use different formats or standards for recording data, requiring careful data mapping and transformation to ensure consistent records in Salesforce.

Managing the timing of data imports (batch processing via SFTP or API) can be a challenge, particularly for time-sensitive data like expenses or resource tracking. Consolidating data from multiple systems into Salesforce's project management structure requires aligning complex data relationships (e.g., linking timesheet entries to the correct project and customer).

CONVAYR handles all of this using sophisticated mapping and scheduling technology, through a simple point and click interface. Integrating project, expense, and time tracking data into Salesforce creates a single source of truth for client projects, enabling professional services teams to better manage project timelines, control costs, and ensure that resources are allocated efficiently. A unified view of all project data also enhances reporting and forecasting for ongoing and future engagements.

Learn more at the
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