



GUIDE · QUICKBOOKS + SALESFORCE

Avoid These Common Integration Mistakes

The most common pitfalls when syncing QuickBooks with Salesforce — and how to sidestep them.

Syncing QuickBooks to Salesforce is straightforward when you do it right. Breadwinner's native integration handles most of the heavy lifting automatically — but even with the right tool, a few setup mistakes are worth knowing about before you go live.

1 · Not cleansing data before integration

Skipping data cleanup leads to inaccurate transfers, duplicate records and confusion. Clean up accounts, contacts and customer/vendor data first, and clarify invoice statuses before you connect the two systems.

2 · Failing to prepare your staff

An integration changes how people work. Involve staff in planning, define clear goals, run training, set process rules, and establish access permissions so launch day doesn't descend into disarray.

3 · Misunderstanding how real-time works

Teams often assume “real-time” means instant everywhere. With two systems involved, some flows replicate live while others run on intervals — understand the actual cadence so your workflows are built around it.

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