

Commercient SYNC for QuickBooks Desktop and Salesforce

Commercient SYNC, the #1 data integration platform that integrates your data between QuickBooks Desktop and Salesforce. The Commercient SYNC Agent is rapidly deployable and gives you access to your QuickBooks Desktop customer and order information in Salesforce. We work with the following: QuickBooks, QuickBooks Enterprise, QuickBooks Pro, QuickBooks Premier, and QuickBooks® Online.

About SYNC:

Commercient SYNC is created by ERP and CRM data integration experts. By having that, SYNC creates a simple data integration pathway between your QuickBooks Desktop and Salesforce. Once the data integration takes place, your QuickBooks Desktop data is automatically loaded into your Salesforce without programming, coding, mapping, or servers required. SYNCing data is a cloud-based experience that ensures your data is protected. SYNC has the following benefits:

- Data integrated from QuickBooks Desktop to Salesforce becomes native data inside Salesforce CRM. Being native data inside the CRM means bringing data from your QuickBooks Desktop over to Salesforce in which you can perform any function from that data and manipulate it to the way you need it, for example, connecting to third-party apps and creating dashboards
- Inside Salesforce, the system provides the function of a user-friendly search engine to look up data that is SYNCed from QuickBooks Desktop because the data is native, it is searchable. For instance, looking for a serial number that relates to a Sales Order record or Invoice Record
- The Commercient SYNC app developed for QuickBooks Desktop and Salesforce detects changes in either database whether it is QuickBooks Desktop or Salesforce and SYNC only those changes in the data within either system

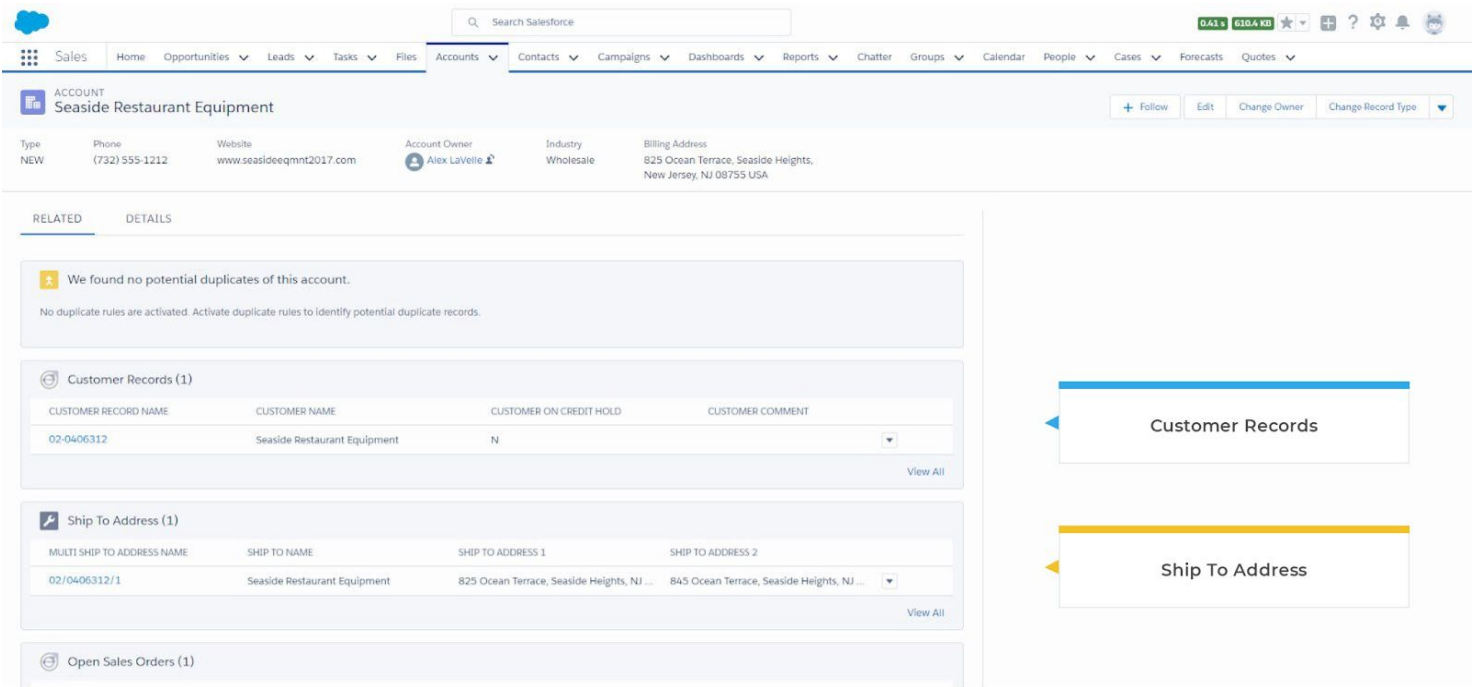
What if I have an existing Salesforce database?

When you have existing data in both systems (QuickBooks Desktop and Salesforce) the following steps will take place, first, the data will need to be backed up, second, you will come to a point when integrating the data and you will have to do deduplication on 3 items that we have a native function inside our Commerciant SYNC app that also leverages artificial intelligence(AI) for following items listed below:

- Accounts: Deduplication happens here when customer names are spelled incorrectly and deduplication for child-parent relationships, form part of the standard purchase of Commerciant SYNC at no additional costs.
- Customers: They need deduplication as there are customers with no accounts that are contacts and there is an AI for this.
- Products/Items: Deduplication happens for this when there is a different item description over the same product.

What does SYNC offer?

Customers in QuickBooks Desktop are integrated into Salesforce. The first item to be SYNCed is your **AR Customer Record** and once this is completed, all the fields can be shown. Customers Ship To and Bill To address in QuickBooks Desktop are merged into Salesforce, which can be displayed according to their needs. By clicking on the QuickBooks Desktop Customer Record, you can see all the fields that are synchronized.



ACCOUNT
Seaside Restaurant Equipment

Type: NEW | Phone: (732) 555-1212 | Website: www.seasideeqmnt2017.com | Account Owner: Alex LaVelle | Industry: Wholesale | Billing Address: 825 Ocean Terrace, Seaside Heights, New Jersey, NJ 08755 USA

RELATED | **DETAILS**

We found no potential duplicates of this account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Customer Records (1)

CUSTOMER RECORD NAME	CUSTOMER NAME	CUSTOMER ON CREDIT HOLD	CUSTOMER COMMENT
02-0406312	Seaside Restaurant Equipment	N	

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Ship To Address (1)

MULTI SHIP TO ADDRESS NAME	SHIP TO NAME	SHIP TO ADDRESS 1	SHIP TO ADDRESS 2
02/0406312/1	Seaside Restaurant Equipment	825 Ocean Terrace, Seaside Heights, NJ ...	845 Ocean Terrace, Seaside Heights, NJ ...

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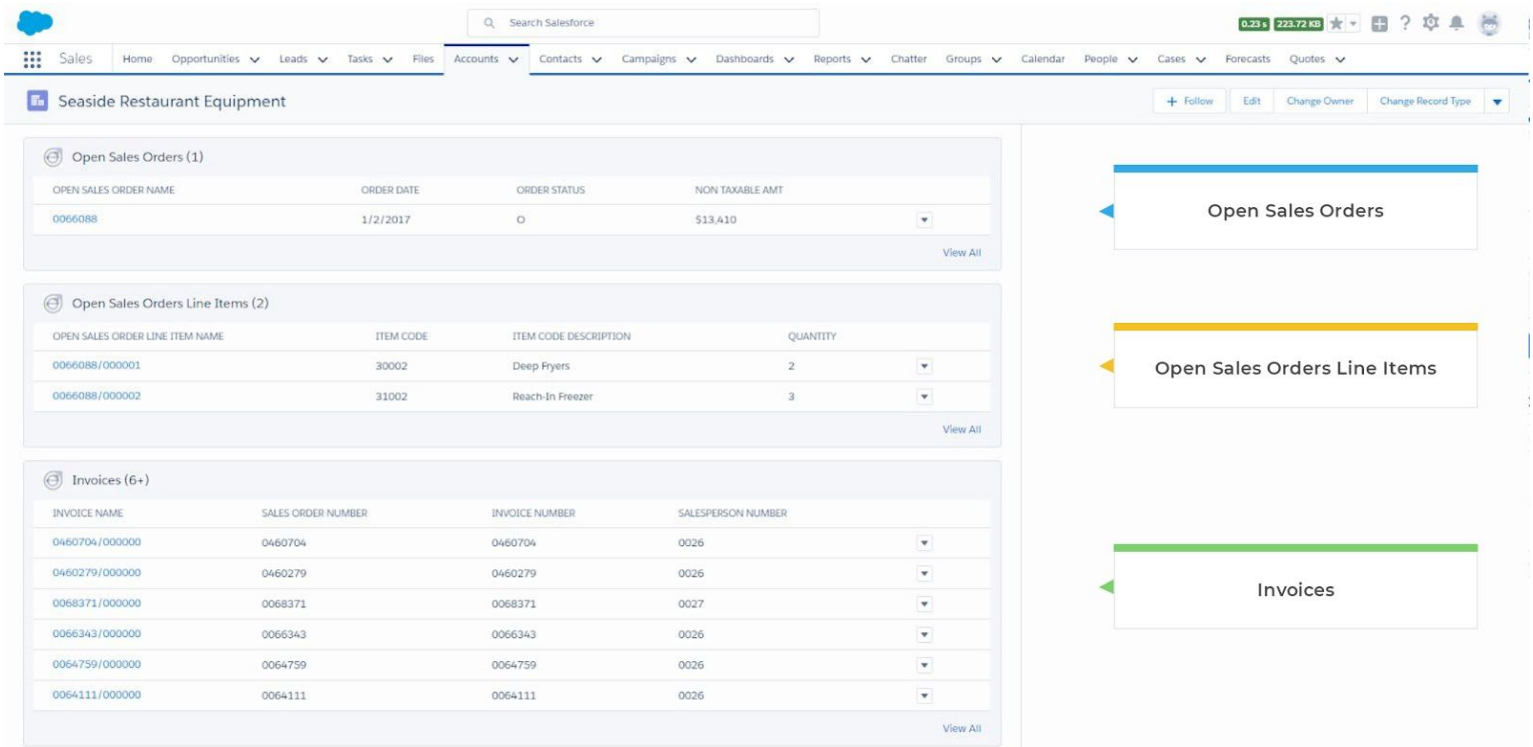
Open Sales Orders (1)

Customer Records

Ship To Address

Sales Order With Line Item Details

Once the Customer Record is in Salesforce, Commercient then SYNCs the **Sales Orders and their Detail Lines** which relates them to the corresponding Salesforce Account record. A customer object is then created in Salesforce as the Sales Order data and Invoice Sales Order data is combined into one since each customer's needs are unique. This allows customers to see their invoices that have their orders and details as well as, viewing the different statuses of their sales orders as they change in QuickBooks Desktop. When removing QuickBooks Desktop Sales Order data that has been canceled from Salesforce, it performs automatically.



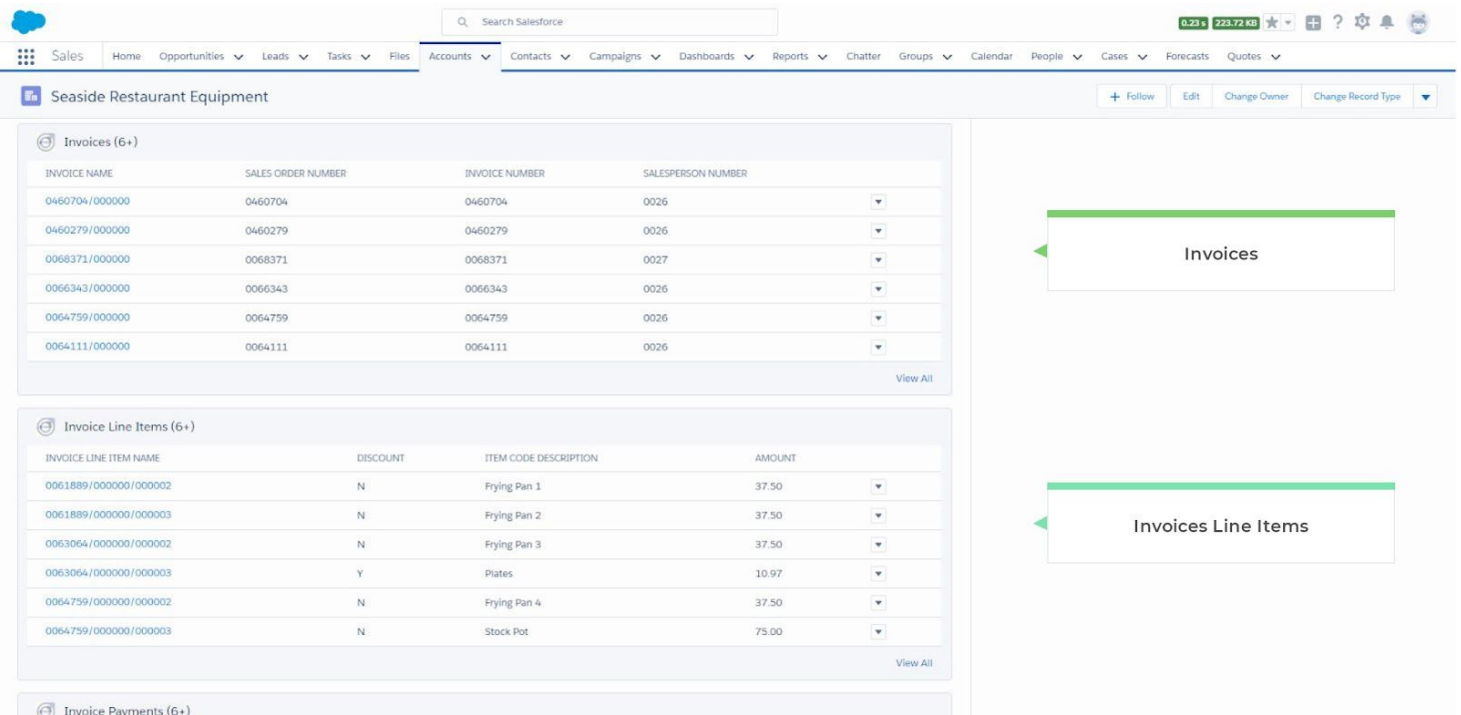
The screenshot displays the Salesforce interface for a record titled "Seaside Restaurant Equipment". The interface includes a top navigation bar with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Quotes. Below the navigation bar, there are three main sections:

- Open Sales Orders (1)**: A table with columns: OPEN SALES ORDER NAME, ORDER DATE, ORDER STATUS, and NON TAXABLE AMT. It shows one record with ID 0066088, date 1/2/2017, status O, and amount \$13,410.
- Open Sales Orders Line Items (2)**: A table with columns: OPEN SALES ORDER LINE ITEM NAME, ITEM CODE, ITEM CODE DESCRIPTION, and QUANTITY. It shows two records: one for "Deep Fryers" (quantity 2) and one for "Reach-In Freezer" (quantity 3).
- Invoices (6+)**: A table with columns: INVOICE NAME, SALES ORDER NUMBER, INVOICE NUMBER, and SALESPERSON NUMBER. It shows six records with various invoice numbers and sales order numbers.

On the right side of the interface, there are three colored boxes with arrows pointing to the corresponding sections: a blue box for "Open Sales Orders", a yellow box for "Open Sales Orders Line Items", and a green box for "Invoices".

Sales Order Screen Showing Account Object

Commercient has designed the relationships with the data objects in Salesforce that can give you the freedom to decide which objects you would like to display on the screen. You are always able to click to other **parents- or child-related objects**. For instance, an Admin user can remove the Sales Orders from the Account screen but leave their **Detail Lines**. This allows our customers to see what was sold and shipped from the main account screen. By clicking on the Sales Order link on the detail line, they can view the full Sales Order.



Search Salesforce

0.23 s 223.72 KB

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Quotes

Seaside Restaurant Equipment + Follow Edit Change Owner Change Record Type

Invoices (6+)

INVOICE NAME	SALES ORDER NUMBER	INVOICE NUMBER	SALESPERSON NUMBER
0460704/000000	0460704	0460704	0026
0460279/000000	0460279	0460279	0026
0068371/000000	0068371	0068371	0027
0066343/000000	0066343	0066343	0026
0064759/000000	0064759	0064759	0026
0064111/000000	0064111	0064111	0026

View All

Invoice Line Items (6+)

INVOICE LINE ITEM NAME	DISCOUNT	ITEM CODE DESCRIPTION	AMOUNT
0061889/000000/000002	N	Frying Pan 1	37.50
0061889/000000/000003	N	Frying Pan 2	37.50
0063064/000000/000002	N	Frying Pan 3	37.50
0063064/000000/000003	Y	Plates	10.97
0064759/000000/000002	N	Frying Pan 4	37.50
0064759/000000/000003	N	Stock Pot	75.00

View All

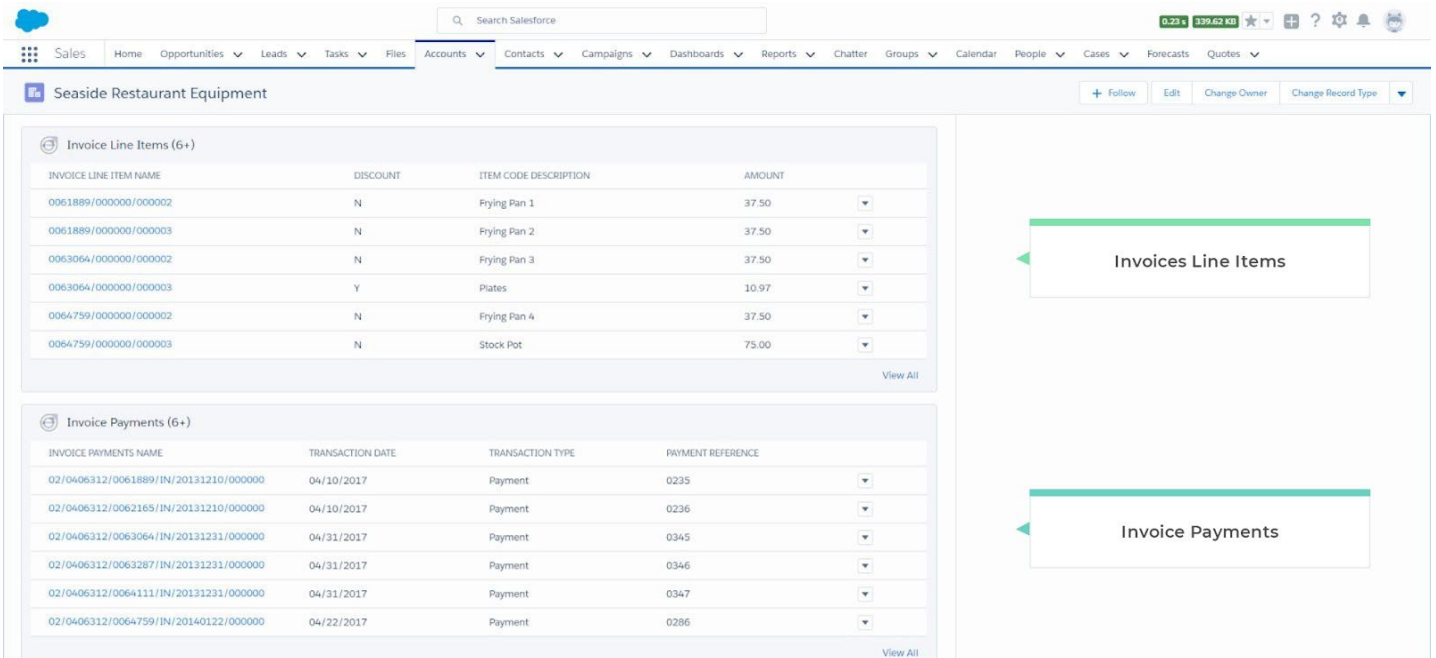
Invoice Payments (6+)

Invoices

Invoices Line Items

The AR Invoice

- The AR Invoice is a record that is synced and related to the **Invoiced Sales Order Data**, and **Invoice Payments**.
- The AR Invoice data is useful for identifying unpaid invoices and locating the data, in which the customer needs to pay for the services used.
- The other records which are used in SYNC include the **AR Customer Ship to Tax Exemptions**, **Item Master**, and **Item Warehouse**.
- The **Item Master** is used to create **Salesforce Products** by Commercient and links the entire **Item** and **Warehouse** records to the **Product**.
- This gives you the ability to have accurate product data and Inventory availability. In addition, you can **SYNC any Database, table, or view**.



The screenshot displays the Salesforce interface for a record titled "Seaside Restaurant Equipment". The interface includes a navigation bar at the top with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Quotes. Below the navigation bar, there are two main sections: "Invoice Line Items (6+)" and "Invoice Payments (6+)".

Invoice Line Items (6+)

INVOICE LINE ITEM NAME	DISCOUNT	ITEM CODE DESCRIPTION	AMOUNT
0061889/000000/000002	N	Frying Pan 1	37.50
0061889/000000/000003	N	Frying Pan 2	37.50
0063064/000000/000002	N	Frying Pan 3	37.50
0063064/000000/000003	Y	Plates	10.97
0064759/000000/000002	N	Frying Pan 4	37.50
0064759/000000/000003	N	Stock Pot	75.00

[View All](#)

Invoice Payments (6+)

INVOICE PAYMENTS NAME	TRANSACTION DATE	TRANSACTION TYPE	PAYMENT REFERENCE
02/0406312/0061889/IN/20131210/000000	04/10/2017	Payment	0235
02/0406312/0062165/IN/20131210/000000	04/10/2017	Payment	0236
02/0406312/0063064/IN/20131231/000000	04/31/2017	Payment	0345
02/0406312/0063287/IN/20131231/000000	04/31/2017	Payment	0346
02/0406312/0064111/IN/20131231/000000	04/31/2017	Payment	0347
02/0406312/0064759/IN/20140122/000000	04/22/2017	Payment	0286

[View All](#)

On the right side of the interface, there are two callout boxes with arrows pointing to the respective tables: "Invoices Line Items" and "Invoice Payments".

Can I limit or control the data that I SYNC?

Yes. Commercient has created an open methodology of allowing you to control the filtering of data in the SQL WHERE statement while maintaining the integrity of relationship mapping and efficient syncing methodologies. Within the WHERE you can perform sub-queries, filters, and cross-table and cross-database sub-queries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply).

What else does Commercient do with Salesforce?

Data synchronization is the first step towards a total solution. Ask about these additional modules for QuickBooks Desktop:

- Quote Processing
- Web-based Product Configurator
- Opportunity and Quote -> Sales Order Conversion
- Products and Price Book SYNC
- Product Record Types
- Cases with Serial Numbers Invoiced and Service Orders
- Opportunity Commissions Calculations based on QuickBooks Desktop Invoices
- Automatic QuickBooks Desktop Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/ Wholesaler Self-Service Portal
- Custom Data Synchronization
- Account Conversion to QuickBooks Desktop AR Customer

Company Information:

Commercient is a cloud-based company that connects Salesforce directly to your QuickBooks Desktop system. Our open SYNC Agent works with software such as Epicor, SYSPRO, TRAVERSE, and other ERP accounting systems. Commercient improves the efficiency of getting CRM, B2B, and B2C eCommerce orders directly into your accounting system in real-time, with all of the associated business rules.

For more information, please use the Contact Us link on <http://www.commercient.com>