

QuickBooks Synchronisation With Salesforce Improve Business Performance



salesforce

Salesforce &
QuickBooks Online
Integration

 Forcesquares

 Dotsquares™



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Executive Summary

With the expansion of technology, companies are moving towards the cloud to place their work online. Moving a business to the cloud is the best option for growth. Big business and non-profit organisations are using QuickBooks to track their financials. Integration of QuickBooks with Salesforce enhance business visibility to run and make necessary improvements. The connection of QuickBooks and Salesforce eliminates duplicate entry, increase productivity, and drive more insight for better forecasting.

Introduction about QuickBook

Using accounting software helps in tracking business finance to get overwhelming results. Quickbooks is a famous bookkeeping software to keep your business records. This accounting software helps in managing and organising finance. Unlike other accounting software, it offers an add-on service for managing inventory, payroll, sales and credit card processing. Every year, some new features are listed in this accounting software.



Use of QuickBooks

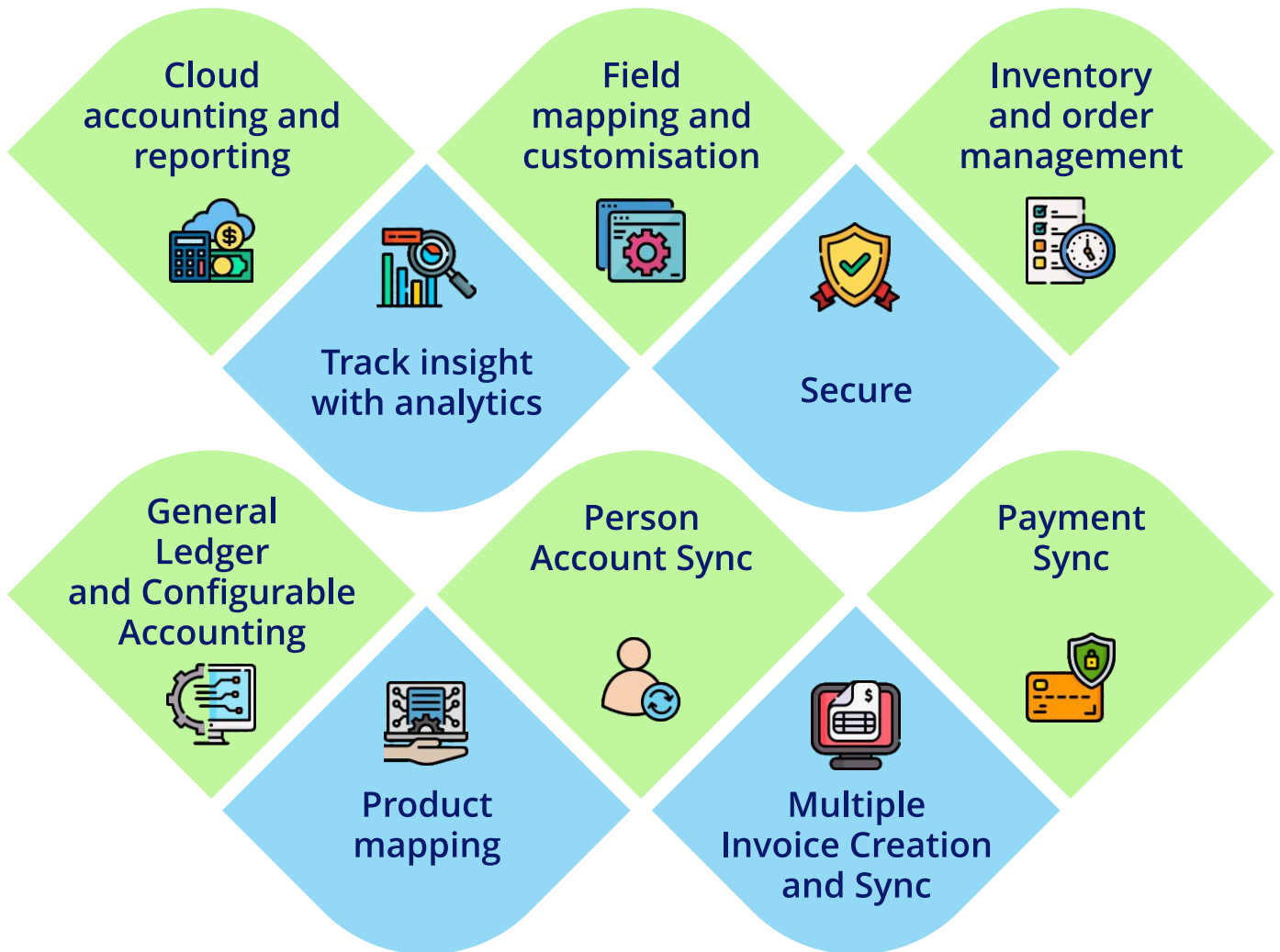
QuickBooks do many things for its user. Customisation is also available for it, such as doing a sync between different things like creating attractive, professional-looking invoices, forecasting and sales receipt. QuickBooks can be used to:

- Print professional reports and memorise custom reports.
- Prepare payroll and reminders or alerts for the tax payment.
- Make business paperless by storing PDF copies of the invoices, bills and attaching them with QuickBooks transactions.
- Develop trial balance for financial reporting and fiscal management
- Manage business anytime with a mobile app.
- Track outstanding items at a glance.

If you want to make a sound financial decision and keep track of daily accounting transactions, then QuickBooks is the best solution with many features in one place.

Salient features of QuickBooks

QuickBooks by Dotsquares offers features to keep your financials in one place. QuickBooks salient features are:



With QuickBooks, a user can create a link to make a payment. These are the extended features provided by the DS QuickBooks Synchronizer. It offers a customisation option to create customised invoices, automate schedule sync & can share payment receipts through the mail from QuickBooks. A custom payment option for clients is also available on demand.

What you can do more with QuickBooks?

QuickBooks manages the financials of a company to make a valid and informed decision. Companies can track multiple information through it. It is not just a simple bookkeeping software but you can do a lot more with it. Out of many others software, DS QuickBook Synchronizer is the best one because it gives you an option for customisation. You can add features that you like most.

A business can get detailed analytics through the report as well as keep a sight on inventory and management as well. Some more things from DS QuickBook Synchronizer are:

- **Ustom invoices can be created from Salesforce to QuickBooks.**
- **Payment can be transferred from Salesforce to QB**
- **Sync between Invoices, estimates, Orders, Payments, and balance data from QuickBooks**
- **Manage income and sales – it specifically includes the detail of the current and past invoice**

If you want to make a sound financial decision and keep track of daily accounting transactions, then QuickBooks is the best solution with many features in one place.

Used cases of DS QuickBook Synchronizer

Dotsquares team of developers are specialised in QuickBooks with an ability to meet clients' requirements. Some cases on which the team has worked are as follow:

- ☁ Create a custom payment option
- ☁ Custom invoice sync in QuickBooks from Salesforce
- ☁ Automatic or Instant Schedule Sync
 - Order with invoice
 - Product with Item
 - Account/contact with customers

These are some practical applications of the project. These salient features are only provided with DS QuickBook Synchronizer.

The process to sync data from Salesforce to QuickBooks

QuickBooks is an accounting software to manage sales, expenses and business transactions. There are different processes to sync QuickBooks with Salesforce & the best one is “DS QuickBook Synchronizer”. With this application, sync becomes easy for the business. You can do it instantly or schedule as well. It helps in syncing accounts/ contacts with customers, the product with item, & orders with an invoice.

Intuit Developer Account Set Up

Configuration in Salesforce



01 Install QuickBook Synchronizer

03 Connection Setup between Salesforce and QuickBooks

What will you get from us?

DS QuickBooks Synchronizer is the best tool to sync QuickBooks with Salesforce. You can do it immediately or do it later & keep regular track of activities. With the app by Dotsquares, users can do product mapping, make online payment link, sync orders with the invoices accounts with customers and a lot more.

