

Custom
Development
of Salesforce



Integration App for a Financial SaaS Firm

Overview

Explore how Synexc helped a global SaaS accounting firm eliminate operational friction caused by disconnected CRM and Accounting tools.

Why This Matters for Other Businesses

Fragmented systems cripple SaaS operations across industries through billing delays, data errors, and slow response times.

How Synexc Helped

Fragmented systems cripple SaaS operations across industries through billing delays, data errors, and slow response times.

Key Improvements



Reduction in
initial post-launch
support inquiries



Reduction
in billing
disputes



Faster
invoice
collections



About the Client



Client is a forward-thinking SaaS provider specializing in automating bookkeeping and payment processes for small and medium sized businesses across the US. Recognizing the critical need for seamless CRM and accounting data synchronization, Client embarked on a strategic initiative to develop a native Salesforce application that tightly integrates with QuickBooks Online.

Challenges Faced by the Client

Challenge 1

Fragmented Financial Visibility Across Teams

Sales and support teams lacked real-time access to customer financial data within Salesforce, hindering the ability to proactively manage client expectations.

Challenge 2

Manual, Error-Prone Data Handling

Financial data had to be manually exported and re-entered between QuickBooks and Salesforce, leading to inefficiencies, inconsistencies, and the risk of costly errors.

Challenge 3

Salesforce Platform Complexit for App Launch

The client, while strong in financial software, had no in-house Salesforce experts to meet AppExchange standards, especially around security review and app architecture.

Challenge 4

Limited Cross-Department Collaboration

The siloed systems prevented seamless interaction between sales, finance, and support, causing forecast inaccuracies and delays in billing.

Solutions Offered



Custom App Development for Salesforce QuickBooks Integration

Developed a secure and scalable custom QuickBooks–Salesforce integration app with Two-way Invoice & Payment sync capability. Mapped Salesforce Accounts with QuickBooks Customers with field-level accuracy.



Development of Custom Lightning Component for Finance View in Salesforce

To embed a Sales Financial Overview dashboard, a custom lightning component was built into Account and Opportunity pages to give users instant access to financial data.



Implementation of Intelligent Background Processing

Apex Batch Jobs were scheduled nightly for syncing bulk data. Scheduled Apex Jobs ran on an hourly basis to detect mismatches or sync failures.



App release on Salesforce AppExchange & Compliance Adherence

Published the app on AppExchange by implementing OAuth 2.0 for secure authentication, Named Credentials for safe API key storage, and Permission Sets to manage user-level access to financial data.



Results



Reduction
in Manual
Workload



Faster Sales
Cycles and
Improved
Cash Flow



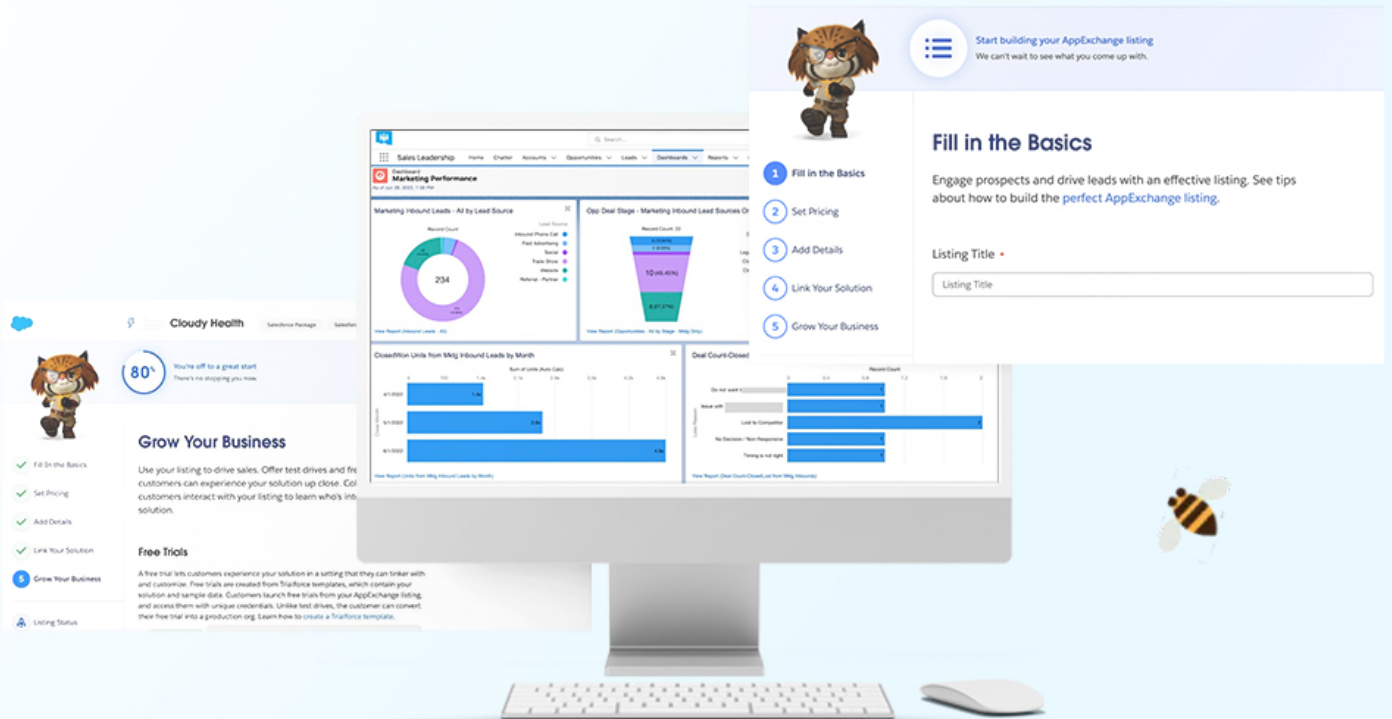
Seamless
Customer
Support
Experience



Improved
Cross-
Functional
Alignment



Market-
Ready,
Compliant
App



Client testimonial

"Synexc made our AppExchange launch seamless, handling compliance, passing the security review on the first try, and helping us land new enterprise clients."

David S.

CEO, Global Software Partners

Reach out to us for a Free Consultation Now!

