

QUICKBOOKS INTEGRATION

salesforce

Scope:

Integrate Salesforce records for:

- Accounts
- Products
- Sales Orders
- Sales Order Lines
- Purchase Orders
- Purchase Order Lines
- Invoices
- Invoice Lines
- Payments

Challenges:

- Client had no prior integrations before implementing this application.
- Aiming to integrate various processes with Salesforce.
- Indicates the need for a new integration approach to enhance functionality.

Solution:

- Developed integration with Quickbooks Online for syncing Salesforce data.
- Implemented auto-sync functionality from Salesforce to Quickbooks Online.
- Executed initial sync from Quickbooks to Salesforce.
- Enabled manual mapping between Quickbooks and Salesforce.
- Incorporated manual sync capability from Salesforce to Quickbooks Online.

Results:

- Achieved automatic synchronization of all records with Quickbooks Online.
- Streamlined the process of syncing data between Salesforce and Quickbooks Online.
- Ensured real-time and seamless integration of records for enhanced efficiency.

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Integration

