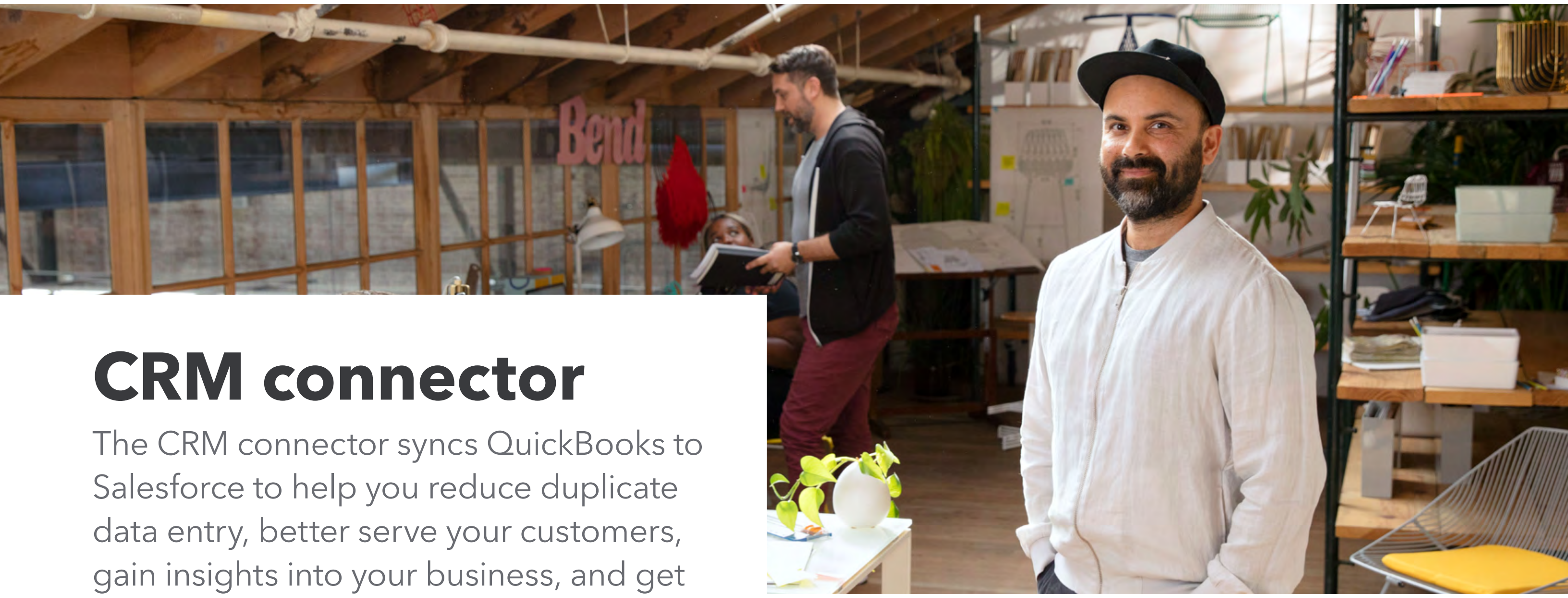

CRM connector

The CRM connector syncs QuickBooks to Salesforce to help you reduce duplicate data entry, better serve your customers, gain insights into your business, and get paid faster.

Bend Goods
Los Angeles, CA
QuickBooks Desktop Enterprise customers

Minimize double data entry to save time and reduce errors

Two-way sync lets you enter data once so your sales, accounting, customer service, and procurement teams all work from the same data set. You decide what and when to sync and have control over what data each person can see.

Serve customers better

One source of information means your sales and support reps have account information like payment history and order status at their fingertips, so they can process orders faster and resolve customer issues quickly.

Gain insights into your business

Make better business decisions with more visibility into your entire sales pipeline. You'll get a more accurate overview of your projected revenue as well as opportunities.

Streamline workflows and get paid faster

You don't have to wait for your sales team to notify your accounting team a lead has been closed in Salesforce. Instead, automatically generate a sales order or invoice in QuickBooks.

Map your data your way

Connect Salesforce fields like Accounts and Opportunities to QuickBooks fields like Customers, Sales Orders, and more. Use pre-built sync options or customize the integration for your business needs.

CRM connector is only available as an add-on subscription service to QuickBooks.

See reverse for technical and payment information about CRM connector »

How it works

The CRM connector is powered by DBSync, a leading provider of software integration solutions. When you choose to add-on the CRM connector to your Enterprise Diamond subscription, a DBSync representative will handle the set-up. You'll decide how you want to map your fields and data. Then, you'll use Enterprise's robust user permissions to choose who can see what data.

CRM connector FAQs

Salesforce and QuickBooks

- **Do we need to have Salesforce for the CRM connector feature to work?**
  Yes. At this time the feature only supports Salesforce. Supported versions include Salesforce Professional, Enterprise and Unlimited.
- **What if we don't yet have Salesforce, but plan to get it in the future?**
  Once you have Salesforce, we can enable the feature. You can add the feature at any time if you already have QuickBooks Enterprise Diamond.
- **Where do I buy Salesforce?**
  You can purchase it here: www.salesforce.com
- **Does my Salesforce have to be reconfigured?**
  No.
- **Will we get billed or charged from Salesforce?**
  No. Under Salesforce's current partner developer terms, Salesforce does not charge a fee for this type of integration.
- **Who provides the CRM connection?**
  Intuit has partnered with DBSync for the CRM connection. They are a leading provider of data management, replication, and application integration for CRMs. DBSync enables users to easily link information between leading cloud and on-premise applications. They have been a Salesforce partner since 2007.
- **What charges can I expect?**
  This feature bills as a monthly subscription. There is also a one time setup charge.
- **Is there any special infrastructure needed?**
  There is no infrastructure or local installation needed. This feature runs from the cloud.
- **Who does the setup?**
  DBSync does the setup. You will work directly with them to determine what setup package meets your requirements.

Feature, Setup, Syncing and Controls

- **Can I choose what data to integrate between QuickBooks Enterprise Diamond and Salesforce?**
  Yes. During the setup process, you identify what information you want synced.
- **Does this feature support bi-and uni-directional sync?**
  Yes. This feature supports bi-directional and uni-directional integrations.
- **How frequently can the system perform a sync?**
  To ensure optimal performance, we recommend the data is synced no more than once every 15 minutes.
- **Can recurring invoices be synchronized from Salesforce to QuickBooks?**
  Yes, with additional customizations. The setup team can provide you with design and requirements.
- **I don't want my sales or customer service teams to have access to data unrelated to their needs or job function.**
  With user permissions, you control who has access to what data.
- **My business is unique and complex. Can we customize the integration to meet our needs?**
  Yes. You can customize the mappings to meet your business needs.
- **How long will it take to install and set up the CRM connector?**
  Installation of the CRM connector with DBSync takes anywhere from under an hour to a few days, depending on the complexity of your data, service availability, your schedule and other factors.
- **Does my organization need training for CRM connector?**
  DBSync provides training based on your needs. Training will be discussed during setup and included in one of the chosen setup packages.
- **How many company files does 1 CRM connector support?**
  The CRM connector supports many company files, but each subscription supports one file. The initial subscription will be purchased from Intuit but companies may purchase additional subscriptions directly from DBSync.