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Case Study

California, USA-Based IT and Device Management Company Gets Solutions in Salesforce and QuickBooks

About Client

Our client offers an automated device management solution that handles device setup, intelligence, patching and security for Company's devices. It seamlessly integrates with G Suite and Office 365, enabling effortless deployment, patching, management, and security of your devices over the internet. Founded by former IT and security leaders from Dropbox and Fandom, our client combines unmatched security engineering and IT expertise to revolutionize the way Macs are managed.

About QuickBooks

One Tool, Many Uses – QuickBooks is a leading accounting platform that provides a user-friendly format for tracking your revenue and expenses, creating and sending invoices and automates bookkeeping.

The Problem

Numerous multinational companies utilize our client's service for device automation. Consequently, it has become increasingly challenging for the client's accounting and sales teams to manage these companies' accounts, sales cycles, and billing cycles. Their sales and accounting departments previously relied on various application tools to manage accounts, generate invoices, process and analyse data, and offer a reliable payment gateway. This resulted in significant data discrepancies and inefficient manual labour hours.

The Solution

With the entirety of the business on the <u>Salesforce cloud implementation</u>, analysing, sharing, and organizing data becomes more straightforward. By integrating Stripe and QuickBooks with Salesforce, Our Client can monitor sales, generate and dispatch invoices, view and manage transactions, and send payment links—all from within Salesforce. Most importantly, Our Customer can gauge the performance of your business at any given moment. The incorporation of Stripe and QuickBooks into <u>Salesforce streamlines</u> <u>operations</u> and transforms your data into actionable insights.

The Features

- Access robust invoicing and accounting features with ease.
- The accounting software and CRM seamlessly collaborate, sharing data between sales and accounting, such as customer details, sales orders, expenses, and invoices.
- Enhance business's intelligence and profitability
- Leverage the company's accounting data and analytics to foster growth.
- Simplify comprehension with a seamless experience for sales receipts, refunds, and fees.

• Gain comprehensive insight into your business operations, identifying areas for improvement. Manage finances, monitor expenses, generate a variety of financial reports, produce receipts and invoices, and derive insights for better forecasting.

Result:

- This integration simplifies bookkeeping, making it user-friendly without the need for accounting or finance expertise.
- The enhanced transparency among sales, accounts, and payments has doubled the efficiency of invoice dispatch.
- It eradicates discrepancies between finalized accounts and accounts awaiting payment.
- The system crafts tailored workflows connecting payments, accounting, and Salesforce.
- It eradicates data redundancy entirely, enhances productivity by 90%, and delivers deeper insights for improved forecasting.
- Gain a comprehensive view of your business, highlighting its current performance and areas for enhancement.
- Two-way synchronization between QuickBooks, Stripe, and Salesforce accelerates the sales cycle by 60%, enhancing the efficiency of both sales and finance teams and eliminating hours spent on manual data migration.