



QuickBooks - MS CRM Sync

The current business system is such that the business managers were using two different applications - Quick Books as their accounting ERP for accounting details and Microsoft Dynamics CRM as their customer management tool. QuickBooks was integrated to Microsoft CRM application and the users were able to perform all accounting and customer relation management activities in the CRM application or vice versa.

BUSINESS CHALLENGE

- A tool to provide access for business managers to access customer information and accounting details related to the customers at one location.
- The use of two desperate systems for the customer related information and their accounting details consumed more time and effort and an increase in the sales cycle and accounting cycle.

SOLUTION

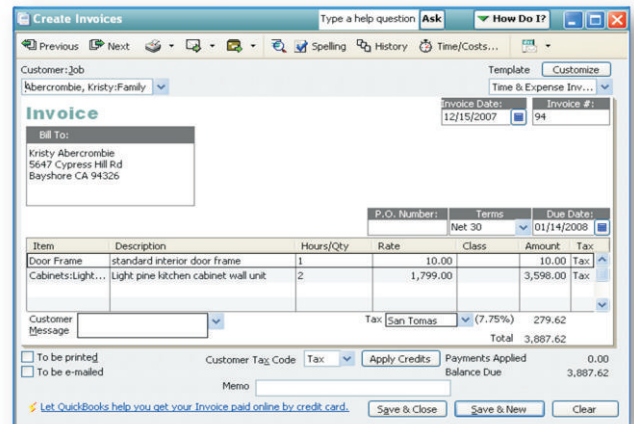
- The solution optimizes the operation efficiency and business process of their organization.
- View and create account details in MS CRM application related to a customer.
- View and create customer details in QuickBooks related to an account.
- Can create sales order in the QuickBooks application which can be viewed in MS CRM application and vice versa.
- Track and view the status of sales order in QuickBooks which is processed in MS CRM application.

SOLUTION OVERVIEW

To optimize the operational efficiency and for a quick turnaround in the business processes, ZSL proposed a solution to integrate

the accounting and customer management application.

ZSL integrated QuickBooks and Microsoft Dynamics CRM application customized to have either two ways or single way integration option depending on the business user needs defined according to the business user profiles.



TECHNOLOGY

- QuickBooks SDK
- Microsoft .Net Windows Application
- ASP.Net web services
- MS-CRM Web services

BENEFITS

- Simple configuration process with very less time and effort involved.
- Business users find it very easy as they have to work only on one application, with the other being updated automatically.
- Optimized employee productivity with quick turnaround in sales and accounting cycle saving 60% of time.