

QUICKBOOKS FOR SUGAR®

SugarCRM is the fastest growing CRM software package in the world. QuickBooks is the most popular accounting and ERP software package in the world. It only makes sense to integrate the software so that companies can use both packages together without missing out on features critical to streamlining operations and minimizing double work.

The Faye SugarCRM QuickBooks Integration addresses this. It allows the two software packages to “talk with each other” by synchronizing customers, inventory items, non-inventory items, and service items, invoice

and invoice and sales receipt history, and sales orders/estimates between SugarCRM and QuickBooks. The synchronization between the packages is set to run on a scheduler, typically every 10 minutes.

FUNCTIONALITY INCLUDES

- Two Way Sync between Sugar and Quickbooks.
- Syncs customers, inventory, invoice history, and sales orders.
- Enter quotes & sales orders into Sugar and have them appear in Quickbooks.
- Post invoices in Quickbooks and have them appear in Sugar (with line items).
- Add new accounts in Sugar and have them appear in Quickbooks.
- Update customer addresses in Quickbooks and have them appear in Sugar.
- Be able to see inventory items, standard prices and costs, and quantity on hand in Sugar.
- Syncing can occur on a scheduler and defaults to every 10 minutes.
- Custom mapping of custom fields
- Works with Quickbooks Pro, Premier, Enterprise and Online.
- Works with Sugar hosted in the cloud or Sugar on an in-house server.

FEATURES & BENEFITS

- Eliminates double entry of customers in both CRM and accounting.
- Updates CRM with critical invoice history information that can be used for marketing campaigns and salesperson inquiries.
- Provides access to product lists in CRM without having to manually key in items.
- Eliminates double entry of sales orders in both CRM and accounting.