

**Case Study : Customer Data Synchronization among Sales Force, QuickBooks and Online Customer Portal applications.**

**The Client**

The client is a leading US based company in shipping business providing one stop shop for their customers transportation needs.

**The Business Need**

Following are some problems client is facing in their business in the current situation.

They are using an online customer portal as a customer facing application where customers come in and request for shipping quotes. As the customer activity happens, there is no way for the sales representative to immediately know that a customer is looking for a quote unless sales representative comes to the site and looks for these requests. Also embedded with in the customer requests are the possible leads for future business as either origination of the shipment or destination of the shipment could have other shipment needs which can be prospected by the client.

Invoicing customers and paying the carriers does not happen in a timely fashion at this point because accounting representatives need to look at the online portal for the completion of shipment delivery and manually create the necessary invoices and bill payments in QuickBooks.

Under the current situation, client is facing:

- o Loss of revenue when customer quote request is not immediately responded by sales representative.
- o Missing possible opportunities from quote requests.
- o Failing to raise an immediate invoice when customers shipping request is completed, there by delaying revenue realization.
- o Sales representatives will not have the visibility to see a delayed payment by the customer unless accountant informs them.



**The Solution**

Prabhavat Solutions team has analyzed the customer situation and provided them an implementation that resolves their situation. Prabhavat Solutions suggested the client to use Sales Force application as a central point for their sales representatives and use its rich features to manage the opportunities, leads and accounts. ActionBridge is used to integrate Sales Force with their existing

QuickBooks and Online Portal applications. As a result, when a customer visits the client’s online portal application and requests for a shipment quote, information automatically flows into Sales Force with in a minute and reminds sales representative where ever they are on their mobile. When a shipment is completed, it is immediately detected based on the updated status in online portal. An invoice and a vendor bill payment are automatically created in the QuickBooks minimizing the delays in revenue realization.

Through this implementation, following data integration activities are performed:

- o All the information about the accounts is kept up to date in Sales Force, QuickBooks and Customer Online Portal.
- o All the information about the carriers is kept up to date in Sales Force, QuickBooks and Customer Online Portal.
- o All possible leads and opportunities from Customer Online Portal are automatically propagated into Sales Force for sales representatives to immediately act on.
- o All the customer contact information is kept up to date in Sales Force and Customer Online Portal.
- o All the service issues raised into Online Portal are made visible to sales representatives in Sales Force.
- o Customer invoices and vendor bill payment requests are automatically created into QuickBooks as soon as shipment is completed.
- o Customer outstanding balances are automatically made visible to sales representatives in Sales Force.

**Benefits**

Client had realized numerous benefits with this systems integration implementation.

- o Increase in revenues due to prompt response from sales representatives for customer quote requests.
- o Increase in prospective leads.
- o Better management of opportunities.
- o Improved customer service.
- o Improved cash flow.

**Technologies**

- o Sales Force SDK
- o QuickBooks SDK
- o ActionBridge
- o Web Services
- o Microsoft Windows
- o Oracle

**About Prabhavat Solutions**

Prabhavat Solutions is a privately held company based out of Hyderabad, India specializing in providing services for various aspects of software product development working as an extended engineering team for product development companies. Since its inception in May 2008, Prabhavat Solutions team has worked with several customers for development, testing and maintenance of our customer software products. Founders have extensive experience building software products from ground-up and have been involved in bringing several software products to the market on multiple platforms and across several releases. Our team has strong expertise in building software systems using LAMP, Web 2.0, Mobile, SaaS, J2EE, .NET, AJAX, Resource Oriented Computing and NetKernel platforms. Our team has worked with all industry leading databases and data warehouse tools necessary for providing complete solutions to our customers. With a well defined development methodology and a strong focus on quality, Prabhavat has a history of successfully delivering quality solutions to all our clients on time and within budget.