



# Pervasive DataSynch™ On-Demand for QuickBooks® Online and Salesforce CRM™

Speed your business results with seamless, cost-effective integration when you need it – *right now*

*Pervasive DataSynch On-Demand has provided us with an easy-to-use system that quickly processes new and existing customer sales orders. Information is entered once and flows automatically through the company, eliminating duplicate order data. For every account, we save 30-60 minutes of double entry and correcting mistakes.*

– Mark Morris, President, ClosedWon, LLC

## PERVASIVE DATASYNCH ON-DEMAND OFFERS A RAPID, TURNKEY APPROACH TO INTEGRATE QUICKBOOKS ONLINE AND SALESFORCE CRM WITH SEVERAL COMPELLING BENEFITS OVER TRADITIONAL SOFTWARE PURCHASES

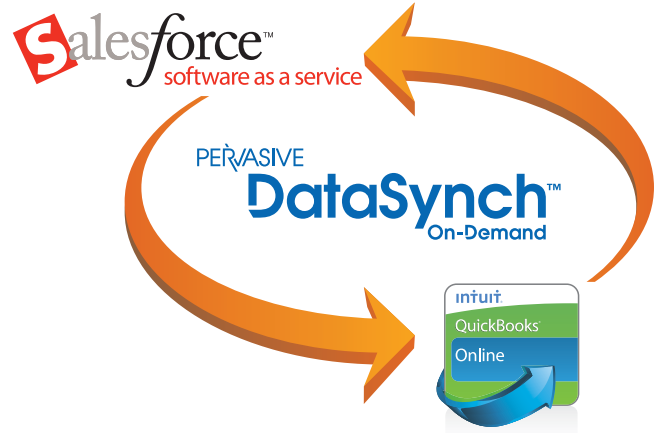
- \$ Ease of Use** – No software to learn or maintain—conveniently accessed through the applications already in use with “point-and-click” functionality.
- \$ Visibility** – 360° view into every aspect of the customer life cycle from initial lead through revenue transactions.
- \$ Benefits of Expensive Enterprise Software at a Fraction of the Cost** – Affordable integration licensed as a pay-as-you-go model with a low monthly fee. All that’s needed is a browser and an Internet connection.
- \$ Rapid Implementation and Effortless Upgrades** – “Out-of-the-box” solution enables you to go live and start realizing value in hours, not weeks. Automatically benefit from deployments of new versions.
- \$ Mobile, Live Data** – Delivered as a Web service, the solution provides flexibility – it’s available on the road, from home, or any place you can access the Internet.
- \$ Scalable and Secure** – Leveraging the best technologies in the market coupled with Pervasive DataCloud® ensures that our services remain secure and available.
- \$ Eliminate Duplicate Data Entry and Increase Productivity** – Automatic data synchronization keeps customer and vendor information current in both Salesforce and QuickBooks Online to eliminate duplicate data entry and save time.
- \$ Enhance Customer Experience** – Rely on current, reliable and comprehensive information from a single source, instead of accessing disparate systems to make business decisions with confidence.



## FEATURES

✓ Multiple bi-directional integration points:

- Salesforce Accounts ↔ QuickBooks Online Customers
- Salesforce Won Opportunities ↔ QuickBooks Online Invoices
- Salesforce Products ← QuickBooks Online Inventory Items



- ✓ Works seamlessly behind the scenes on a preset schedule, or you can push selected objects to automatically exchange data between applications using demand-and event-driven data requests.
- ✓ **Easily Create Contacts** – Create and edit Contacts in Salesforce CRM and link them to corresponding records in QuickBooks – or vice versa. Create a customer/vendor in QuickBooks from a current Salesforce CRM Contact, or import existing customers/vendors into Salesforce CRM from QuickBooks.
- ✓ **Create Estimates and Invoices** – Quickly create a QuickBooks estimate while in Salesforce CRM and have the ability to convert it to an invoice. You’ll see both the estimate and invoice in the accounts receivable summary.
- ✓ **View Customer Summary** – View open balances, credit lines, past due balances, sales, and other transactions in the Customer Summary tab.



### About Pervasive DataSolutions™

Pervasive DataSolutions deliver simple, powerful integration with just a few clicks. Leveraging more than 20 years of integration experience, Pervasive DataSynch provides automated synchronization between on-line or on-premises software including Salesforce, QuickBooks, and Microsoft Dynamics CRM. With affordable subscription pricing, Pervasive DataSolutions enhance value, business efficiency, and the competitive edge.

### For more information

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