

Case Study

Auxano eliminated invoice discrepancies by integrating Flowtrac-QuickBooks-Salesforce for streamlined financial operations



Overview

Ensure accurate and consistent invoice data across Flowtrac, QuickBooks, and Salesforce systems. Eliminate discrepancies causing confusion and delays in financial reporting. Create reliable integration to reduce manual data checks, streamline sales-finance operations, and establish Salesforce as the authoritative source for invoice and order information.

Challenges

- **Data Inconsistency:** Flowtrac displayed incorrect invoice amounts that didn't match QuickBooks values, causing confusion and reporting errors
- **Integration Limitations:** Initial integration relied solely on unreliable Flowtrac financial data
- **Manual Reconciliation Efforts:** Teams spent excessive time reconciling invoice discrepancies, introducing delays and operational overhead
- **Lack of Real-Time Synchronization:** Invoice data wasn't updated in real-time, increasing risk of outdated/incorrect figures in Salesforce

The Auxano Solution

Auxano built integrations linking Flowtrac, QuickBooks, and Salesforce, using Flowtrac order IDs and QuickBooks invoice amounts for real-time, discrepancy-free billing.

- **Enhanced Integration with QuickBooks:** The new integration fetches accurate invoice data directly from QuickBooks upon each invoice generation, bypassing Flowtrac inconsistencies.
- **Dual-System Data Mapping:** Order numbers are sourced from Flowtrac for operational consistency, while invoice amounts are exclusively retrieved from QuickBooks.
- **Centralized Data Storage in Salesforce:** Salesforce serves as the central system for storing verified invoice amounts and order details, ensuring reports rely on trusted data.
- **Improved Data Accuracy and Trust:** The integration ensures every Salesforce invoice record reflects true billed amounts, strengthening decision-making and customer communication.

THE RESULTS!

- **Invoice discrepancies were eliminated**, and Salesforce consistently reflects accurate QuickBooks billing data.
- **Manual reconciliation dropped by 70%** saving finance teams significant time and effort.
- Reporting accuracy improved, and **leadership now trusts a single source of truth** for financial and sales data.
- **Cross-team collaboration improved** as sales and finance work from the same verified dataset.
- **Customer confidence increased** because external invoices and order details are accurate and current.

Industry

Financial Industry

Project Overview

Ensure accurate, consistent invoicing by integrating Flowtrac, QuickBooks, and Salesforce—eliminating discrepancies, reducing manual checks, and establishing Salesforce as the single source of truth for sales and finance.

Project Developed

- Sales Cloud
- Flowtrac
- QuickBooks

Time Frame

6 to 12 Weeks