



SYNC Streamlined Quoting, Invoicing, & Improved Forecasting

Commercient SYNC Integrates
QuickBooks Desktop Enterprise & HubSpot CRM

“Our sales team doesn't have to ask to see an invoice report, an accruals report, or whatever they need, because the QuickBooks data is being SYNC'd into HubSpot CRM.”


“If we didn't have Commercient to bring QuickBooks and HubSpot CRM together, our sales team wouldn't have access to invoicing, sales history, and other accounting data.”

CHALLENGES	SOLUTIONS	RESULTS
Leverage a state-of-the-art CRM	HubSpot CRM, a leading CRM solution	SVB Wood Floors has modernized their processes, and gained vital business intelligence
Data between QuickBooks Desktop Enterprise and HubSpot was siloed	Commerciant SYNC, the #1 data integration platform for sales	The team can access QuickBooks data directly in HubSpot CRM, including customers, products, estimates, etc.
Implement a data integration from CRM to ERP	Commerciant's Phase 2 SYNC	Data created in HubSpot CRM is SYNC'd to QuickBooks, helping to avoid double data entry


Detailed Info and Quantitative Results




“Our sales team doesn’t have to ask to see an invoice report or accruals report or whatever they need, because the QuickBooks data is being SYNC’d into HubSpot CRM,” said Ryan Christopher, General Manager at SVB Wood Floors.



The team at SVB Wood Floors uses **QuickBooks Desktop Enterprise** for their accounting and operations, and leveraged **HubSpot CRM and Marketing** to modernize and streamline their sales and marketing processes.



“**HubSpot CRM gives us business intelligence**, showing us what our closing percentage is, where our business is coming from,” said Christopher, “what our lead sources are, what are the sales reps’ performances compared to goals, how to spend marketing dollars.”



SVB needed access to QuickBook data in HubSpot CRM, and **chose Commercient SYNC based on a recommendation from HubSpot, to connect their ERP and CRM data.**

Detailed Info and Quantitative Results



SVB Wood Floors can view QuickBooks data in HubSpot CRM with Commercient SYNC, such as QB Customers -> HubSpot Companies, QB Products -> HubSpot Products, QB Invoices -> HubSpot Deals, QB Estimates -> HubSpot Deals, QB Account Ownership -> HubSpot Company Ownership, QB Pricebooks -> HubSpot Products, Contact Management Contacts -> Contacts SO.

“We’re able to **look at historical data on particular accounts, and see what they have spent year over year, and then build that into HubSpot CRM,**” said Ryan Christopher. “We can actually do an **accurate forecast, and see where our sales goals should be, for example.**”

Additionally, Commercient provides a Phase 2 CRM to ERP SYNC, saving time. This data includes QB Pricebooks -> HubSpot Products HubSpot Companies -> QB Customers HubSpot Deals -> QB Estimates HubSpot Contacts -> QB Contacts HubSpot Products-> QB Products.

“B2B quotes are built in QuickBooks, but **consumer quotes are created in HubSpot,**” explained Christopher. “And we need to have that **information automatically SYNC’d to QuickBooks, which helps us avoid double data entry.**”

Company Profile

SVB Wood Floors, Inc. has been a family-owned and operated business since 2003, with experience in hardwood floor installation, refinishing and restoration. They serve Homeowners, Interior designers, Remodelers, Architects, Builders, Residential and commercial clientele throughout the Kansas City area. It is SVB's attention to detail and their unwavering effort to keep up with the latest technology in the industry that sets them apart from the competition. They provide only the highest quality hardwood flooring services.

LOCATION

Grandview, Missouri

EMPLOYEES

20+

INDUSTRY

Construction & Flooring

Customer Business Model (B2B, B2C, or Both)

B2B & B2C

SOLUTION(S)

Commercient SYNC

ERP & CRM

QuickBooks Desktop Enterprise & HubSpot CRM

GO LIVE DATE

2022

ABOUT COMMERCIENT



Commercient SYNC makes ERP and CRM data integration simple, quick, and efficient. Over the years we've helped companies of all sizes integrate their ERP data with their CRM system, helping businesses become more efficient.

Our SYNC integration has grown to over 110 systems, including Sage, QuickBooks, Acumatica, Epicor, SAP, SYSPRO and many others. With our ERP and CRM integrations, your data is synced to both systems in real time without the need for manual data entry, or the risk of human errors.

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