



**Industry:**  
Software Provider

**DBSync Products:**  
Cloud Workflow :  
Salesforce & Quickbooks

**Website:**  
[www.prsoft.com](http://www.prsoft.com)



## PRSoft Enhances Efficiency and Reduces Lost Orders with Business Automation

*PRSoft, a premier provider of Accounting & Tax Software in Puerto Rico, sought DBSync's expertise to enhance their real-time information flow. By implementing DBSync for CRM-Accounting integration, we facilitated seamless updates of historical data from QuickBooks to Salesforce.com. This integration also automated the creation of estimates and invoices, streamlining PRSoft's business processes efficiently.*



### DBSync Inc

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## Challenges

- Unable to keep track of the orders during busy season hence loss of opportunities
- Manual creation of invoices and estimates.
- Unable to upload the historical information into QuickBooks
- Manual synchronization has to be triggered, hence the delay in data being updated.

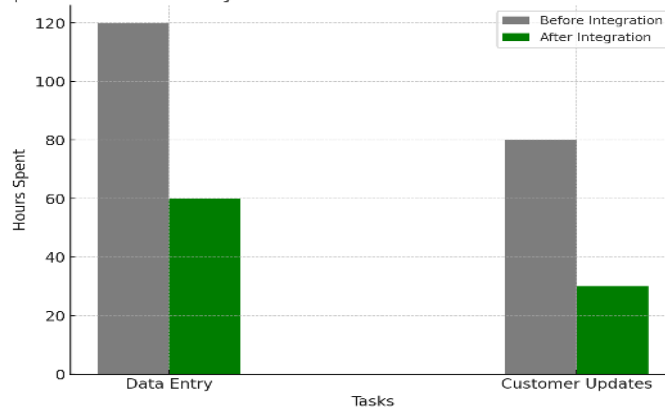
## Solutions

- **Automated Order Management and Invoicing:** The Salesforce to QuickBooks integration via DBsync Cloud Workflow automates order tracking and the creation of invoices and estimates, eliminating manual entry and reducing the chance of errors.
- **Real-Time Data Synchronization:** Ensures instant, automatic updates between Salesforce and QuickBooks, facilitating timely financial decisions without manual intervention.
- Greater transparency of opportunities and ongoing balance payments

## Improvements

- **Enhanced Operational Efficiency:** PR Soft's integration of Salesforce with QuickBooks has transformed their operational processes, reducing manual workload and improving data accuracy.
- **Scalable Growth:** The new system has resolved initial challenges and positioned PR Soft for future expansion, enhancing its ability to handle increased demands.
- **Peak Season Readiness:** The integration allows PR Soft to maximize opportunities and maintain efficiency even during their busiest seasons.

Operational Efficiency for Selected Tasks Before and After Integration



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