The FayeBSG Sugar QuickBooks Integration

The FayeBSG SugarCRM QuickBooks Integration simplifies your accounting and customer relationship management needs by integrating the two software packages. Organizations can use both packages together without missing out on features critical to streamlining operations and minimizing double work.

As the most comprehensive and feature rich SugarCRM QuickBooks integration available, the FayeBSG SugarCRM QuickBooks Integration synchronizes customers, inventory items, invoice history, and sales orders between the two platforms. This synchronization is set to run on a scheduler typically every 10 minutes.

Key Benefits

- Eliminates double entry of customers and sales orders in CRM and Accounting Software.
- Updates CRM with critical invoice history information that can be used for marketing campaigns and salesperson inquiries.
- Provides access to product lists in CRM without having to manually key in items.

Newest Features

- ***Customers now have access to a Quote Pre-check page that will display any found errors during the sync, or any errors that the integration detected would prevent a successful sync.*** This feature helps clients quickly resolve errors in quotes such as; invalid payment term selected (or no payment term selected), invalid account, product, or address lines are too long, etc.
- ***Customers now have access to an Account Pre-check page that will display any found errors during the sync, or any errors that the integration detected that would prevent a successful sync.*** This feature helps clients quickly resolve errors when Sugar is the master system and users are trying to add or update customers.
- **Users can manually match customers that did not match based on the user defined fields.**
- Updates CRM with critical invoice history information that can be used for marketing campaigns and salesperson inquiries.
- Provides access to product lists in CRM without having to manually key in items.

All FayeBSG Products are based on an annual recurring subscription. The purchase of this integration includes all software updates for one year, an operating manual and unlimited email support. Our implementation services are not included, but they are recommended. Contact us for integration and implementation pricing at 818-280-4820 or info@fayebsg.com.

	Pro	Advanced	Enterprise	Online
Features				
CUSTOMERS				
Sync customer master file data from QB to Sugar	✓	✓	✓	✓
Sync sales tax codes and rates from QB to Sugar	✓	✓	✓	✓
Sync custom fields	✓	✓	✓	✓
Create new customers in QB from Sugar	✓	✓	✓	✓
Match customers between QB and Sugar with user definable field	✓	✓	✓	✓
Sync customer price levels from QB to Sugar			✓	
Sync customer ship to addresses from QB to Sugar			✓	✓
SALES HISTORY				
Sync invoice history with line items from QB to Sugar	✓	✓	✓	✓
Sync sales receipts from QB to Sugar	✓	✓	✓	✓
Sync summary sales history from QB to Sugar	✓	✓	✓	✓
Sync sales history by product from QB to Sugar	✓	✓	✓	✓
QUOTES & SALES ORDERS				
Sync quotes and sales orders from Sugar to QB Estimates	✓	✓	✓	✓
Sync quotes and sales orders from Sugar to QB Sales Orders	✓	✓	✓	✓
Sync quotes and sales orders from Sugar to QB Invoices	✓	✓	✓	✓
INVENTORY				
Sync inventory items from QB to Sugar	✓	✓	✓	✓
Sync inventory item quantities on hand from QB to Sugar	✓	✓	✓	✓
Sync advanced inventory functions from QB to Sugar			✓	
VENDORS & PURCHASING				
Sync vendor master file data from QB to Sugar	✓	✓	✓	✓
Sync purchase orders from QB to Sugar	✓	✓	✓	✓
Sync purchase history from QB to Sugar	✓	✓	✓	✓
Create purchase orders in Sugar and send to QB	✓	✓	✓	✓
GENERAL				
Ability to map QuickBooks fields to Sugar fields	✓	✓	✓	✓
Ability to map Sugar fields to QuickBooks fields	✓	✓	✓	✓
Support for mapping of custom fields	✓	✓	✓	✓
All sync'd data available in Sugar for dashboards and custom reports	✓	✓	✓	✓
Sync Timing defined by user (every 5 minutes, once an hour, once a day, etc.)	✓	✓	✓	✓
Integration logs with error messages and sync status messages	✓	✓	✓	✓
User Friendly application with straight forward configuration	✓	✓	✓	✓
Compatibility				
Compatible with QuickBooks Professional	✓	✓	✓	
Compatible with QuickBooks Premiere Manufacturing & Wholesale Edition		✓	✓	
Compatible with QuickBooks Enterprise			✓	
Compatible with QuickBooks Online (v 7.5 and up)				✓
Compatible with Sugar in Sugar On Demand Environment	✓	✓	✓	✓
Compatible with Sugar installed on in-house Linux server		✓	✓	✓
Compatible with Sugar installed on in-house Microsoft server			✓	
Compatible with SugarCRM v6.1 and above	✓	✓	✓	
Support				
Unlimited 9-5 PST support for the integration	24 hour response	24 hour response	1 hour response	24 hour response
Remote Installation, configuration, and training available	✓	✓	✓	✓
Sugar-QB Integration Feature updates and upgrades throughout the year	✓	✓	✓	✓
Updates and upgrades to support all QB updates and upgrades throughout the year	✓	✓	✓	✓
Updates and upgrades to support all Sugar updates and upgrades throughout the year	✓	✓	✓	✓