



AMERICAN PHILANTHROPIC

STRENGTHENING CIVIL SOCIETY

Commercient Assists American Philanthropic With Helping Nonprofits

SYNC Integrates QuickBooks Online and Salesforce



Policy, Advocacy,
&
Ideas



Education



Grantmaking
Foundations



Faith



Health & Human
Services



Arts & Culture

COMPANY PROFILE



AMERICAN
PHILANTHROPIC
STRENGTHENING CIVIL SOCIETY

American Philanthropic offers assistance to nonprofits, with offices based in Pennsylvania, Illinois, and Arizona. Their services to 501(c)3 and similar companies, include leadership and management help, strategy and assessment, direct mail, assistance for grantmaking foundations, and more. **They help with Education; Health and Human Services; Faith-Based Organization; Grantmaking Foundations; Policy, Advocacy and Ideas; and Arts and Culture.**

LOCATION	<i>West Chester, PA, USA</i>
EMPLOYEES	<i>25-50</i>
INDUSTRY	<i>Nonprofit Assistance</i>
ERP & CRM	<i>QuickBooks Online and Salesforce</i>
CUSTOMER BUSINESS MODEL (B2B, B2C, or Both)	<i>B2B</i>
SOLUTION(S)	<i>Commercient SYNC, One-Way Sync</i>
GO LIVE DATE	<i>2017</i>

CHALLENGE	SOLUTIONS	RESULTS
American Philanthropic needed to update their DonorPerfect CRM system	Salesforce CRM implemented	Modernized their sales platform
Need to integrate data from QuickBooks Online to Salesforce. Doing it manually could take hours of work every 2 weeks	Commercient SYNC, the #1 data integration app, performed once a day	American Philanthropic can now see their QuickBooks Online data in Salesforce, including billing, invoices, payments, and more
Keep track of clients and employees' time working with them	SYNC connection pushes financial information, such as hours worked and billing, from ERP to Salesforce CRM	American Philanthropic has a full picture of tracking hours, invoices, and more, improving efficiency
Manage time worked and invoiced, monthly and annually	Commercient provides data from QuickBooks Online of the time working with each client, and associated invoice, all within Salesforce	Allows American Philanthropic to keep track of the value they provide for their clients every week

NOTES

- American Philanthropic uses **Salesforce, and QuickBooks Online to manage their accounting**. American Philanthropic has different contracts and accounts, and assign an employee to be in charge of specific accounts. They want to be able to track information on each account, such as the hours spent: How much is this account getting billed every month, over the whole year? They needed to pull that financial data from QuickBooks Online into Salesforce to become much more efficient with tracking hours, invoices, and more.
- Transferring that financial data from QuickBooks Online into Salesforce would be a monumental task, with Devon Ironside, Director of Operations, estimating it would take *5 to 6 hours every 2 weeks*. So they turned to Commercient, the #1 data integration platform, to help automate it, with a one-way sync, once per day. **They are now able to track the time it takes for an employee to perform services for an account, between their ERP and CRM, and the costs associated with it.**
- **By doing so, they can better manage the time and value delivered to their clients every week.**

RESULTS

- “Commercient proved to be the one to **successfully sync what portions of the invoices we needed, to the particular objects in Salesforce,**” said Devon Ironside, Director of Data Solutions at American Philanthropic. “It ended up working out well.”
- “[**After implementing SYNC**], it did have some major benefits,” said Ironside of being able to track both hours worked and hours billed. “It’s something we didn’t even really have a way to track before. And so to see [the clients, services, hours, invoicing, and more] all in one place, it’s helped the directors and managers determine the effectiveness of our engaging [and provide more valuable services to clients].”
- Devon Ironside estimated it could take several hours every 2 weeks to manually transfer the key financial data from QuickBooks Online to Salesforce, which his team needed to track. Their integration runs daily, and the information is available quickly. “I’d say it’s been a major coup to have the **Commercient SYNC app to get the information [to Salesforce quickly]**, and it seems to be working well, and it’s great.

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 65 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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