



SYNC Allows Salesforce to Be the Absolute Truth for Medworks Surgical

Commercient Integrates QuickBooks Desktop Enterprise & Salesforce Enterprise



Based in Richmond, Virginia, Medworks is a supplier of leading edge endoscopic technologies providing unsurpassed service and support. Since 2005, the company has been highly focused on urology, gynecology, and general surgery products and services. The company exclusively represents Richard Wolf Medical Instruments, Convergent Laser Technologies, Bard Endourology, and others. Medworks offers unmatched synergy and expertise to surgeons, hospitals, and outpatient surgery centers.

LOCATION	<i>Richmond, Virginia</i>
EMPLOYEES	<i>20+</i>
INDUSTRY	<i>Medical</i>
ERP & CRM	<i>QuickBooks Desktop Enterprise & Salesforce Enterprise</i>
CUSTOMER BUSINESS MODEL (B2B, B2C, or Both)	<i>B2B</i>
SOLUTION(S)	<i>Commercient SYNC</i>
GO LIVE DATE	<i>Fall 2019</i>

CHALLENGE	SOLUTIONS	RESULTS
<p>Replace apps and spreadsheets with a state-of-the-art CRM</p>	<p>Salesforce Enterprise, the top CRM in the world</p>	<p>Medworks Surgical improved managing opportunities, customers, etc.</p>
<p>QuickBooks Desktop Enterprise and Salesforce data remained siloed</p>	<p>Commercient SYNC, the #1 data integration platform for sales</p>	<p>They can access ERP directly in CRM, giving them a full view of sales, customers, and marketing</p>
<p>Data created in CRM needs to be SYNC'd to ERP</p>	<p>Commercient QuickBooks to Salesforce SYNC data integration</p>	<p>New accounts, orders, and invoices created in CRM are SYNC'd to ERP, saving the company time</p>

NOTES

- **Medworks Surgical is a supplier of leading edge endoscopic technologies, and provides unsurpassed service and support. They utilize QuickBooks Desktop Enterprise for their operations and finance.**
- They were using a variety of apps and Excel spreadsheets, but implemented **Salesforce Enterprise to improve the management of opportunities, customers, and much more.**
- **“Salesforce helps with reports on what quotas are being met and how the health of each territory is doing”** said Rachael Jarrells, Executive Assistant to the President at Medworks Surgical. **“With ERP integration, our leadership will be able to work on next year's planning.”**
- To achieve their QuickBooks and Salesforce data integration goal, they turned to **Commercient SYNC, the #1 data integration platform for sales.** This gives the company a **360-degree view of sales, customers, and marketing.**

RESULTS

- The team at Medworks Surgical are able to **access QuickBooks Desktop Enterprise data directly in Salesforce, thanks to SYNC**. This includes **customer information, sales order history, invoicing, multi ship addresses, serial numbers, and much more**.
- **“SYNC allows Salesforce to be the absolute truth for us,”** explained Rachael Jarrells. **“Commerciant really listened to our needs, explained fully what they were doing every step of the way. If there were any problems, they worked with us to quickly resolve it.”**
- In the future, Commerciant will implement a SYNC from Salesforce Enterprise to QuickBooks. **New accounts, sales orders, and invoices created in CRM are integrated to ERP, saving time and helps avoid double data entry and errors.**

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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