

7 brilliant ways to build profits with QuickBooks Online and Microsoft Dynamics CRM



Light up your customer relationships with the xRM Quickbooks Integration for Microsoft Dynamics CRM. Connect your customer data, putting the power of information in the hands of employees no matter where they work.

1. Deliver better service with shared customer data

When sales and service staff can see customer order history in Microsoft Dynamics CRM, they can answer questions fast and solve problems on the first call.

74%

of SMBs chose cloud for improved business agility



2. Reduce data entry to improve productivity

Seamless integration between QuickBooks Online and Microsoft Dynamics CRM means customer data, quotes, invoices, and more are entered once and synchronized across the systems.

3. Deliver better insight with dashboards

Dashboards that combine financial information with other customer data give employees in sales, marketing and operations more insight into trends, patterns and exceptions.



4. Accelerate collections for better cash flow

When service reps complete work orders before leaving the customer's location, invoices can go out immediately. With insight to outstanding invoices, sales people in the field can remind customers and resolve issues.

Cash flow increases by

6.7%

annually when invoices go out 2 days sooner



5. Use workflows to improve processes

Automating workflows through Microsoft Dynamics CRM drives consistent processes and allows employees to focus on exceptions. Process-driven sales methods ensure proper reviews from quote to close.

6. Support sales and service in the field

With a single, unified experience on their mobile device, sales and service workers can answer customer questions about inventory and service schedules without calling back to the office. Empowered employees build stronger customer relationships.

55%

of SMBs support a mobile workforce



80%

of email marketers send the same content to all subscribers

7. Personalize marketing

Use what you know about your customers—from their last purchase to their interests—to fine-tune communications. Match promotions to customer history, connecting through the channel they prefer, including email, social media or person-to-person.

Sources: Forrsights Software Survey, Forrester, Q4 2013, AMI, Worldwide SMB Trends and Transformation, 2014, Experian, April 2012



Make your customer relationships brilliant with xRM Quickbooks Integration for Microsoft Dynamics CRM

Visit www.xrm.com/Microsoft-Dynamics-CRM-tools/quickbooks-integration.aspx

Or contact us at activations@xrm.com or 949-385-4046

www.xRM.com