GLOBAL

G·L·O·W

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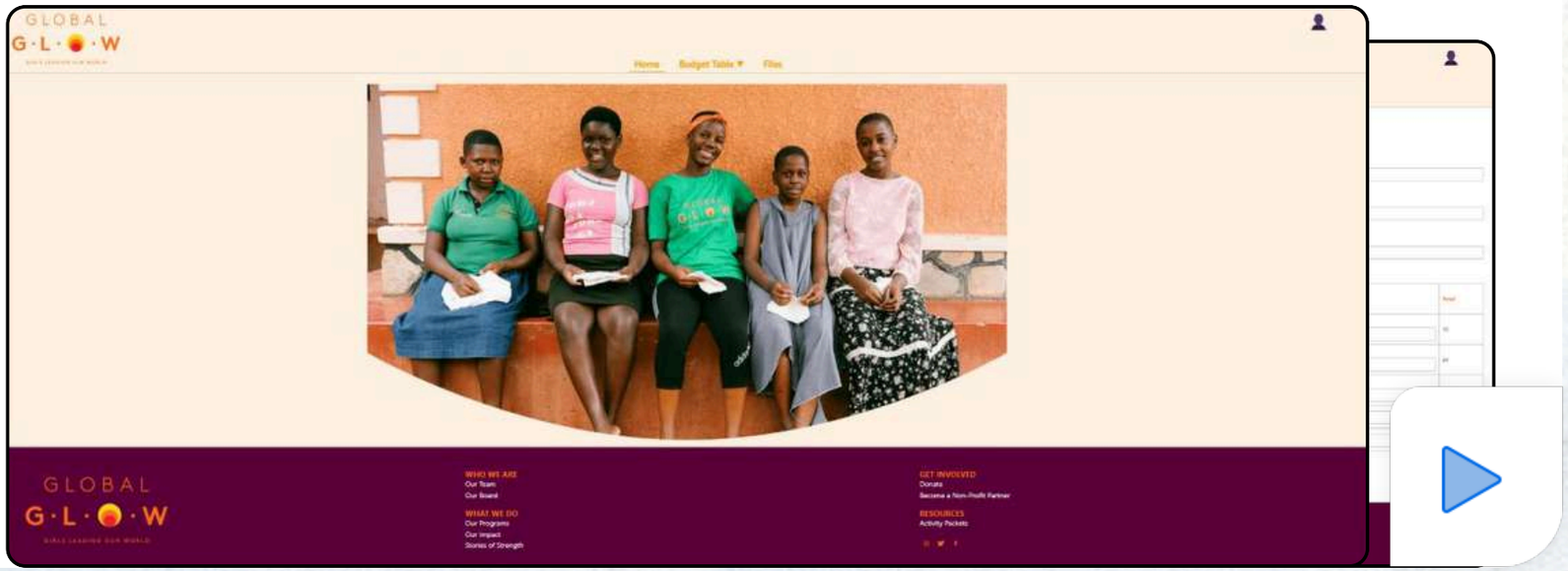


Quick Book to Salesforce Integration

Global G.L.O.W.

Non-profit

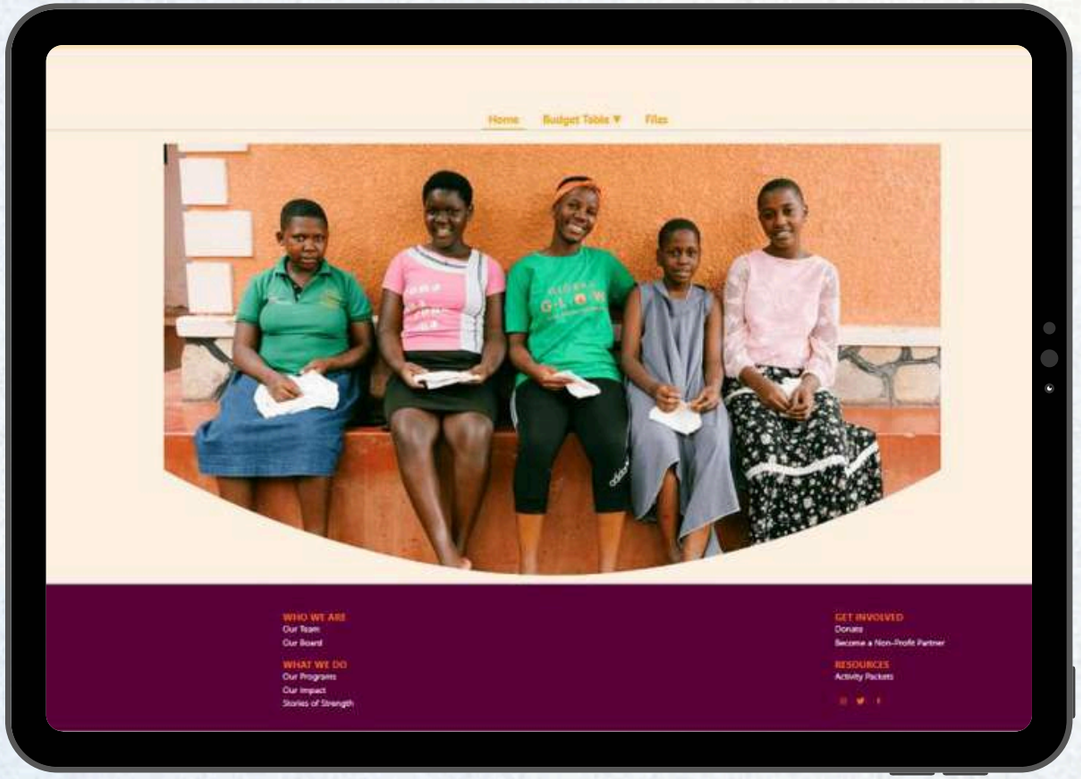
Makedian

Customer Background:

Global Girls Leading Our World (G.L.O.W.) is a highly respected 501(c)(3) nonprofit organization established in 2012. Their mission is to empower girls and women to become catalysts for positive global change. G.L.O.W. achieves this by establishing and managing GLOW Clubs across 30 countries. These clubs provide girls with safe spaces, mentorship, and girl-centered curriculums to foster their leadership and advocacy skills.

Challenges

- **Data Disparity:** G.L.O.W. relied on QuickBooks for transfers but lacked a system to track them in Salesforce. This created a data gap, hindering their ability to view all financial activities in one place.
- **Manual Data Entry:** Manually entering transfer data from QuickBooks into Salesforce was a time-consuming and error-prone process, reducing efficiency and staff productivity.
- **Inaccurate Reporting:** Inconsistent data between systems led to inaccurate financial reports. This made it difficult for G.L.O.W. to make informed decisions based on reliable data.
- **Limited Visibility:** Without real-time updates on transfers in Salesforce, G.L.O.W. lacked a comprehensive view of their cash flow, hindering financial planning and forecasting.



Solutions :

- **Real-time Notification with Webhooks:**

  Webhooks were strategically implemented within QuickBooks to trigger immediate notifications in Salesforce whenever a new transfer is initiated. This ensures that Salesforce receives real-time updates on all financial transfers, eliminating data latency and fostering a unified view of financial activities.

- **Custom REST Service Class for Streamlined Data Processing:**

  A custom REST service class was created within Salesforce to act as a dedicated endpoint for receiving notifications from QuickBooks webhooks. This class plays a critical role in processing the transfer data efficiently. It parses the notification content, extracts relevant details like transfer amount, source and destination accounts, and transaction date.

- **Automated Record Creation with DML:**

  Data Manipulation Language (DML) operations were utilized within the REST service class to automate the creation of corresponding transaction records in Salesforce for each transfer. This eliminates the need for manual data entry, significantly improving efficiency and reducing the risk of human error.

- **Stringent Account Name Matching for Accurate Association:**

  To ensure accurate record association, a meticulous account name matching logic was implemented. This logic compares the bank account names in both QuickBooks and Salesforce, ensuring that the newly created transaction record is linked to the appropriate recipient account. This minimizes data discrepancies and enhances the reliability of financial data in Salesforce.

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Solutions :

Robust Security Measures for Data Protection:

Recognizing the sensitivity of financial data, robust security measures were implemented throughout the integration process. This includes multi-factor authentication protocols, data encryption at rest and in transit, and role-based access controls (RBAC) to restrict access to sensitive information. These measures safeguard G.L.O.W.'s financial data and ensure compliance with relevant data privacy regulations.

Key Points:

- Utilize QuickBooks webhooks for triggering notifications upon transaction creation.
- Develop a Salesforce REST service class to receive notifications from QuickBooks via webhooks.
- Retrieve the transaction ID from the notification received in Salesforce.
- Make a GET callout to the QuickBooks Transfer Object API using the transaction ID to retrieve details of the created transfer record.
- Process the retrieved transfer record data to extract relevant information.
- Use DML operations within the callout class to create a transaction record in Salesforce related to the recipient account.
- Ensure accurate record matching by comparing the bank account names.
- Implement robust error-handling mechanisms to manage potential failures during integration.
- Maintain stringent security measures, including authentication and authorization, to safeguard sensitive data.
- Conduct thorough testing and monitoring of the integration to ensure functionality and reliability.

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Results:

The implementation of Experience Cloud has transformed the way NMSG interacts with its members, yielding significant improvements:

Real-time Visibility

by 100%

G.L.O.W. now has immediate insight into all financial transfers, eliminating the data gap that previously existed. This provides a comprehensive view of cash flow, allowing for better financial planning and resource allocation.

Reduced Manual Work

20 hrs per Month

By automating transaction record creation, the integration saved G.L.O.W. an estimated 20 hours per month in manual data entry. This allows finance staff to dedicate this time to more strategic tasks like financial analysis and reporting.

Improved Data Accuracy

by 99.5%

With the integration, G.L.O.W. achieved a remarkable accuracy rate of 99.5% in their financial data. The reduction in manual data entry minimized errors, ensuring that financial reports generated from Salesforce and QuickBooks are reliable and consistent.

Streamlined Audit ProcessTime reduced

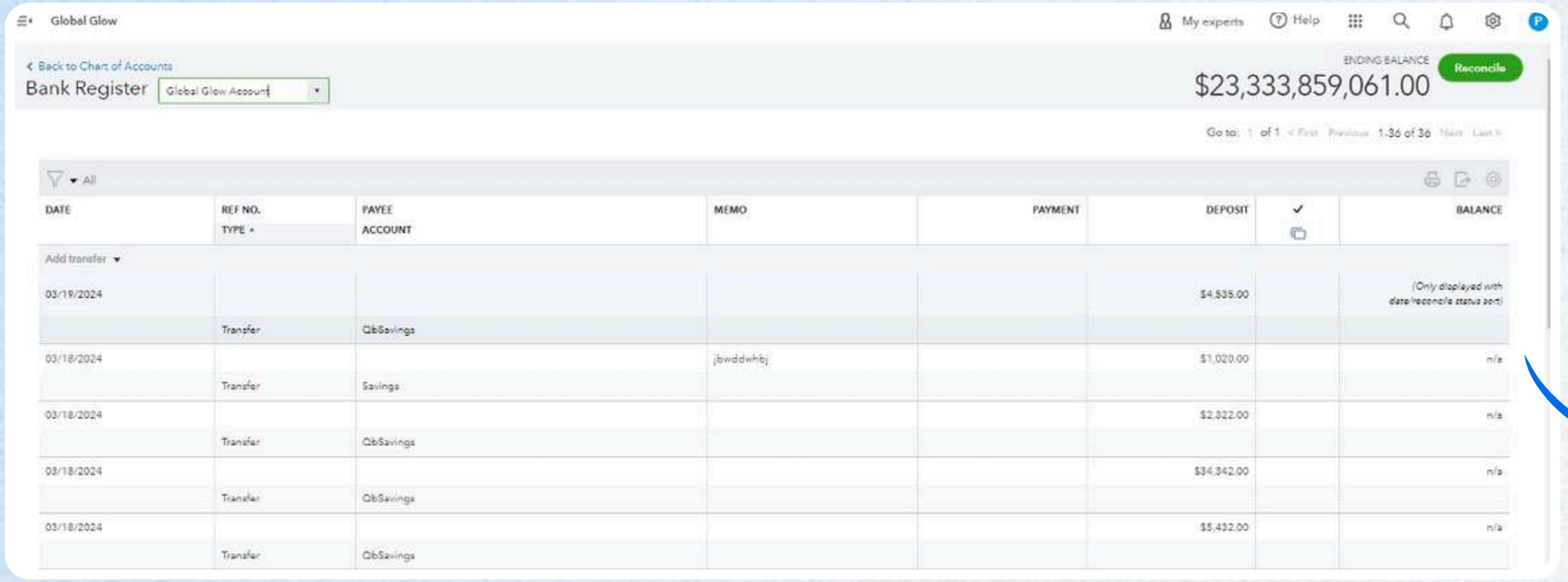
by 30%

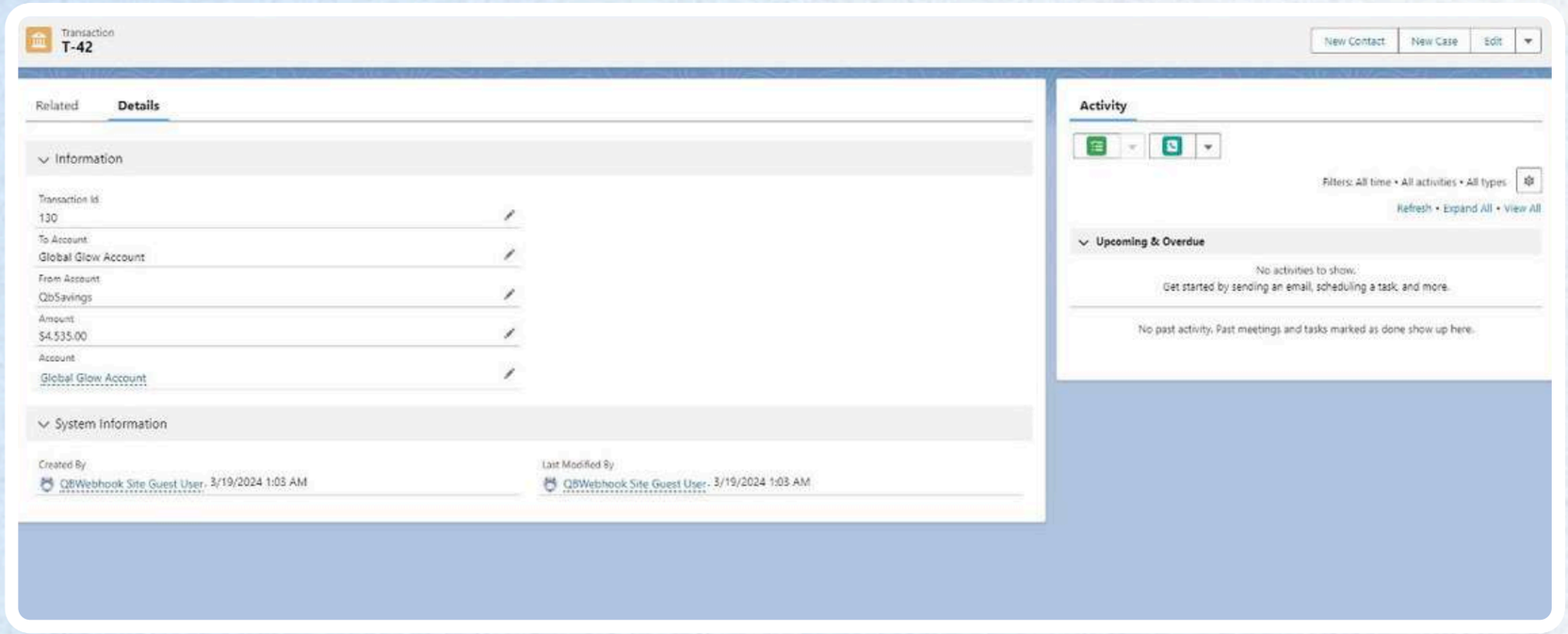
The integration streamlined the audit process for G.L.O.W. by providing a centralized repository of financial data within Salesforce. Auditors can now easily access and review transaction records, improving audit efficiency and compliance.

Increased Donor Confidence

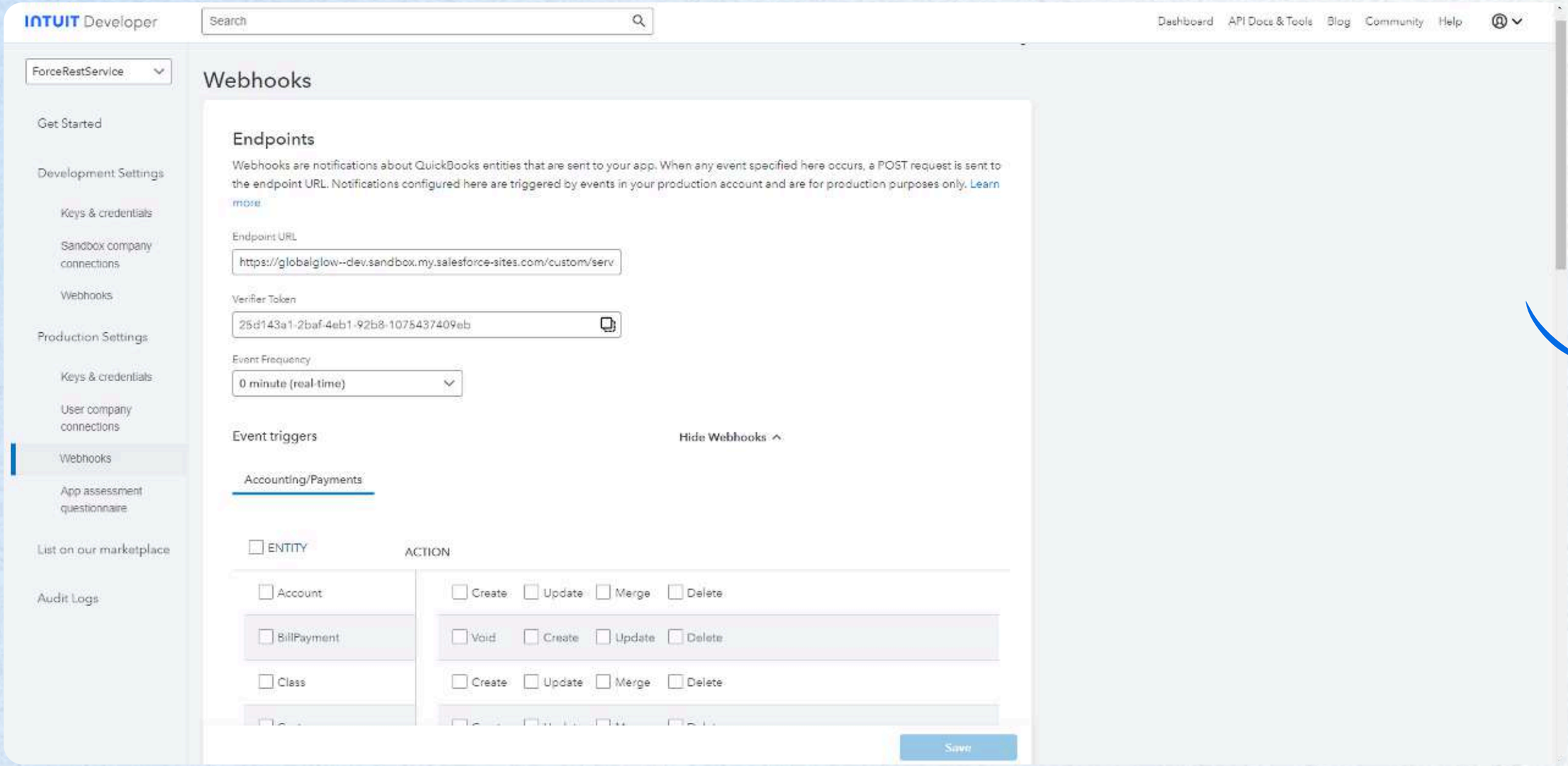
by 20%

The improved accuracy and transparency in financial reporting fostered greater trust and confidence among donors. Donors can now track their contributions more effectively and understand the direct impact of their support, leading to stronger donor relationships and increased funding opportunities.



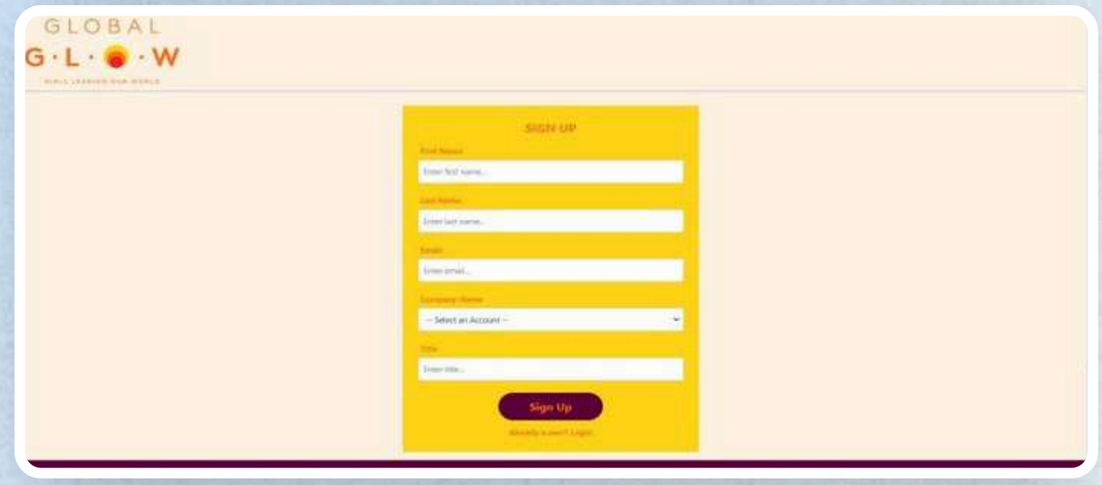


Project Snapshots

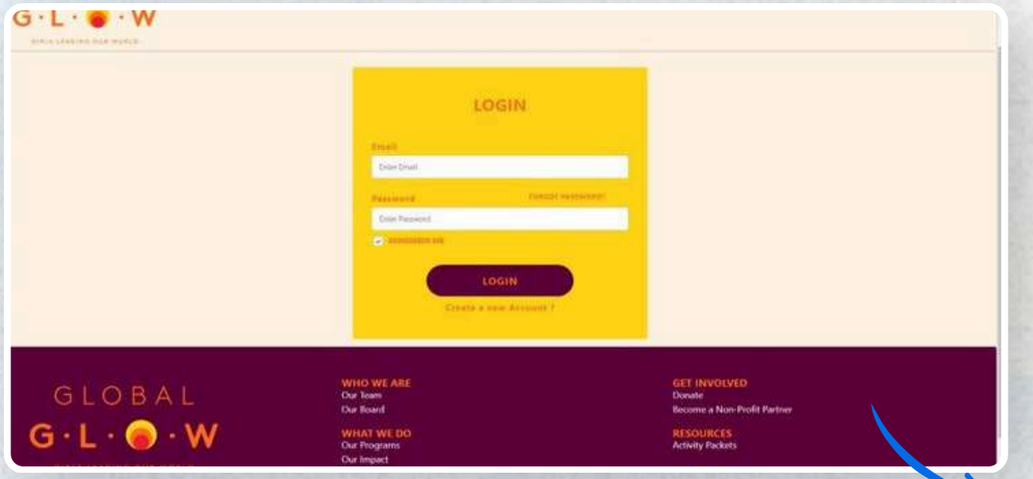


Project Snapshots

UI Development



Signup Page

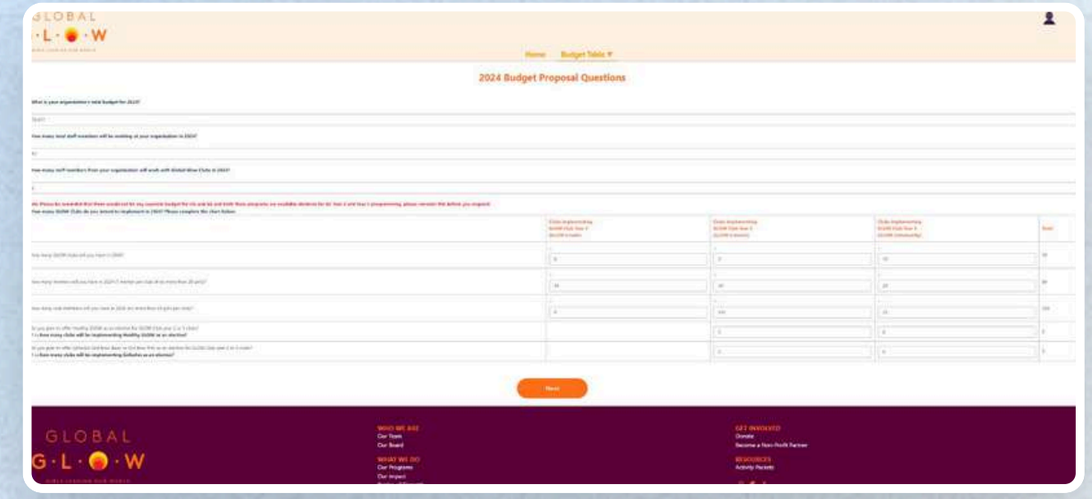


Login Page

Project Snapshots

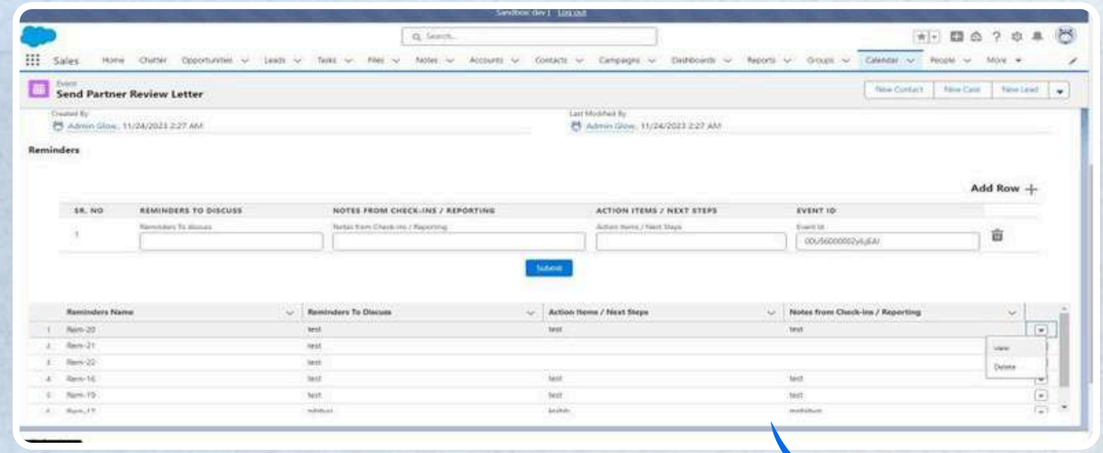
Home Page

Mentors Expense



Question Page

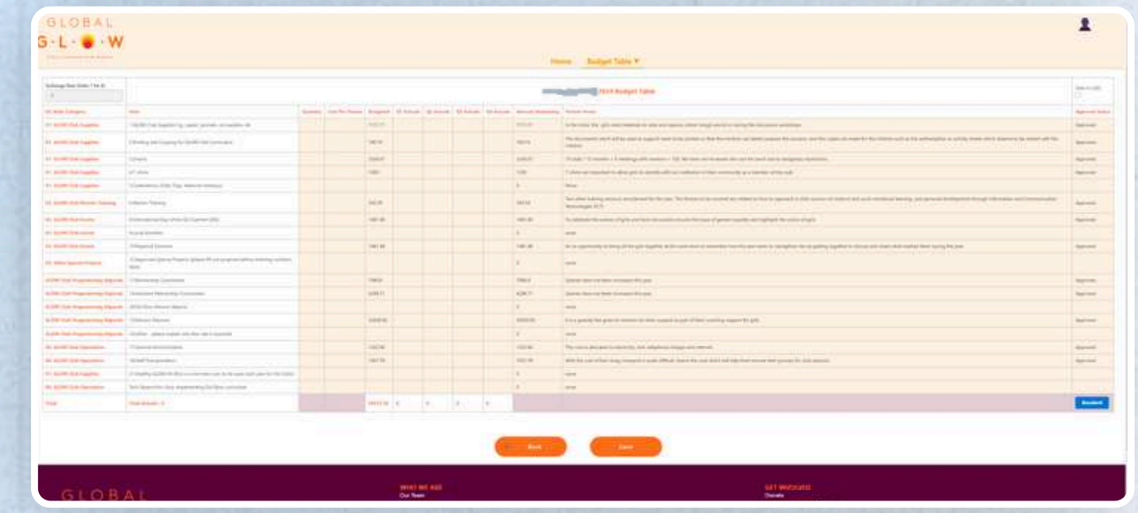
This is a question page in this page the partners will fill up the answer of the questions and this will create an blank opportunity with the partner name which logged into the portal and create the blank partner budget records related to that opportunity which will get updated in the next screen. So after filling the questions the user will click next .



Project Snapshots

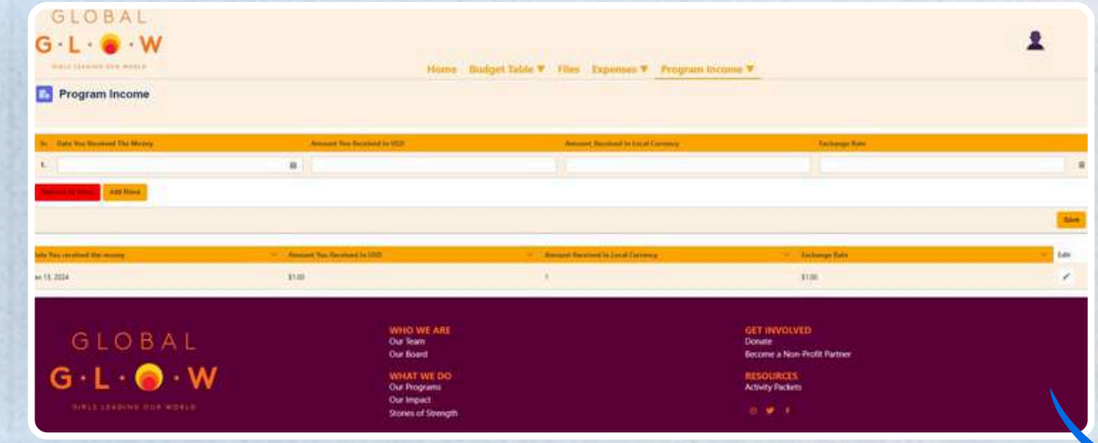
Custom component for reminder custom object

A custom component on event detail page which inserts reminder record in the database related to the event record from which the reminder is created on submit and also on clicking the submit button in input table the below data table will get refreshed automatically which have the functionality of inline editing, sorting, viewing and refreshing the record detail page and deleting the record.



Budget Table Page

Quarterly Budget entries and Approval Process for the same In the budget table Page.



Program Income

Project Snapshots

Let’s Connect

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