

MHS Automated Invoicing Project

By:

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Introduction

Business Sponsor: Mountain Heritage Systems (MHS Technologies)

About MHS Technologies:

- Founded in 1979 by George Ware
- Specializes in Network, Fire & Security, Electrical, and Whole Home Smart Solutions
- Partners include Honeywell/Resideo, Sony, SnapAV/ADI, Crestron, Control4, Lutron, and Kohler
- Contact: [REDACTED]@mhstechnologies.com



Project Manager
Isaac Krueger



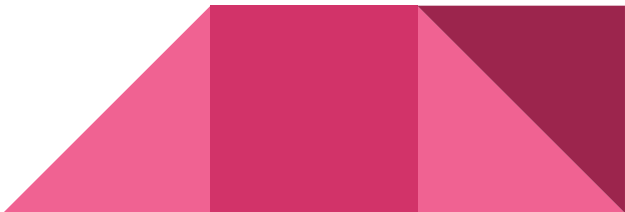
Administrator
Brian Smith



Administrator
Keegan Walker



Administrator
Nick Baumler

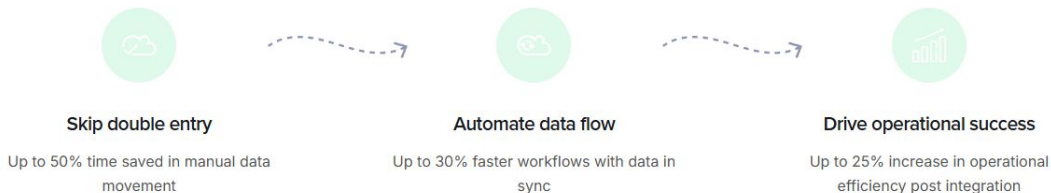


Business Problem

Issue: Disjointed work order and invoice systems between Salesforce and QuickBooks

Lack of integration leads to:

- Manual data entry
- Data inconsistencies
- Inefficient workflows



Client's Goal: Achieve seamless integration to enhance operational efficiency and data accuracy

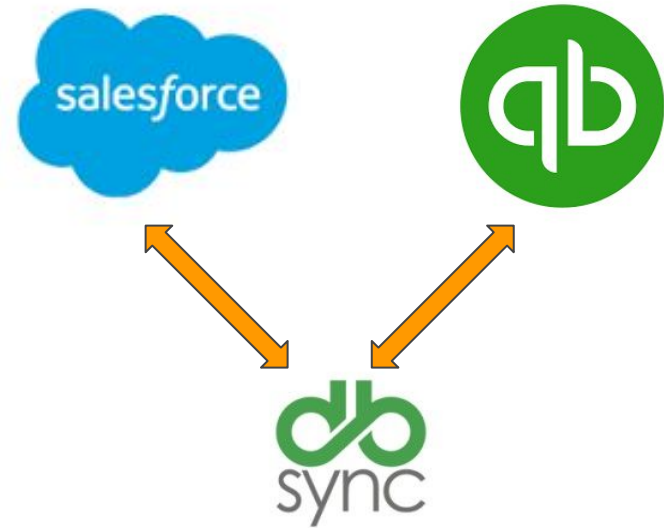
Our Solution

Integration Approach:

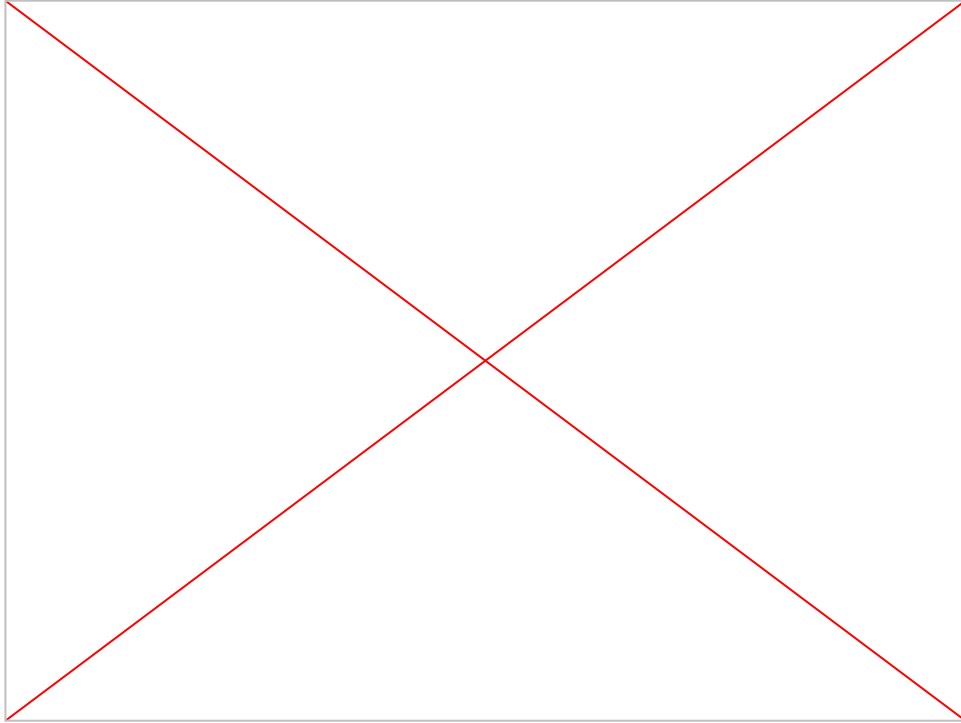
- Utilized DBSync to connect Salesforce and QuickBooks
- Automated invoicing
- Eliminated double data entry

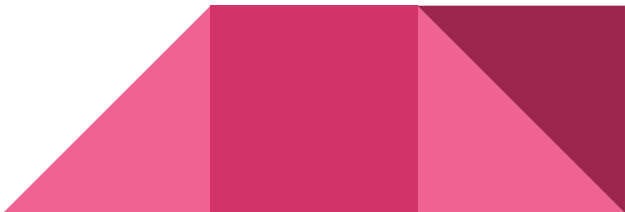
Key Features:

- Real-time data synchronization
- Enhanced user interfaces in Salesforce
- Streamlined quote-to-cash process

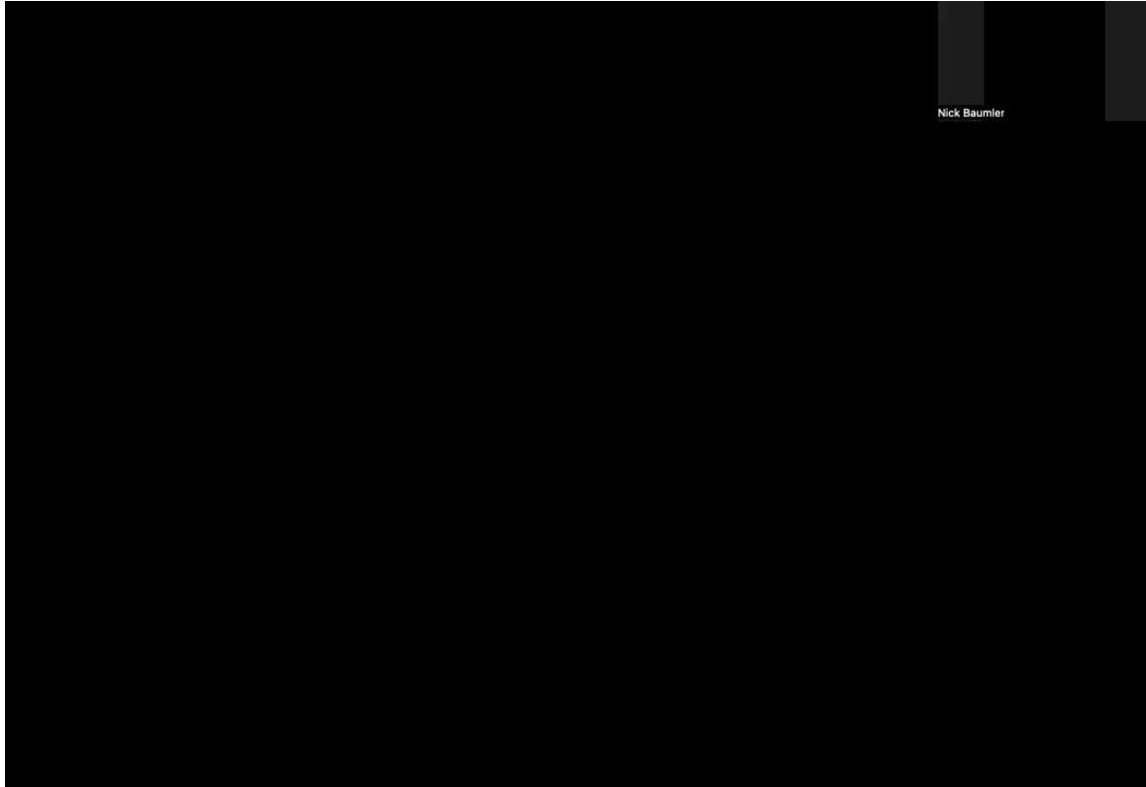


Salesforce to Quickbooks: Invoices



[illegible]

Quickbooks Payment to Salesforce Payment



Implementation

- Going forward Missy will mark invoices paid as well as create them in SF
- Past Invoices will not be bidirectional
- Josh is bringing in a 3rd party in the future to continue the work



Benefits Gained

Streamlined Invoice Workflow

- faster processing, less confusion, no duplicate entry

Better Data Accuracy




- real-time updates, fewer user errors, reduced rework

Time and Cost Savings

- less manual work, fewer corrections

Improved User Experience

- fewer clicks, clearer layouts

 Invoice Payment Final Project Demo	
Related	Details
Invoice Payment Name	Final Project Demo
Invoice ⓘ	00016154-6
QB Amount Due	\$2,850.97
QB Balance	\$1,850.97
Description ⓘ	
Payment Date ⓘ	5/2/2025
Payment Amount ⓘ	\$1,000.00
Amount Due	
▼ DBSync	
Quickbooks Id	11558476
Created By	 Keegan Walker , 4/21/2025 10:02 PM
Last Modified By	 Keegan Walker , 4/21/2025 10:02 PM

What We Learned

Helped us learn to put skills we've learned from the CIS department into practice

We had to use -

Database Querying

ETL's / Integration tools

VM's and VPN remote access to MHS's network

Greater understanding of Salesforce & DBSync Querying

- Understand real world businesses practices
- Professional communication with a client
- Understand invoicing and item management

