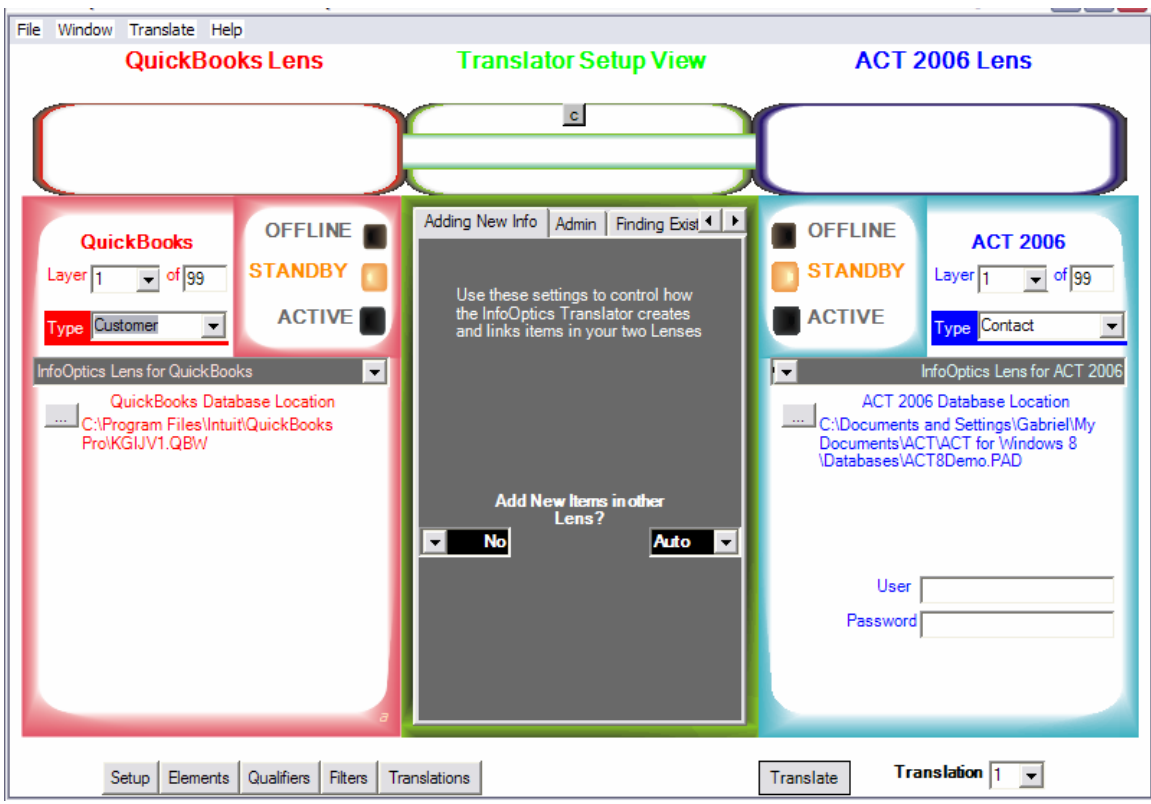


## Case Study Integration between ACTI 2006 and QuickBooks



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In today's economy, companies are focusing more and more on key business issues such as workplace efficiency, productivity, and employee best practices to generate higher revenues. While these initiatives are most definitely important, sometimes they put a huge strain on your "human resources" leaving employees feeling overworked and underappreciated.

Many companies today have been able to drive revenues through the automation of ongoing business processes and "bridging the gap" between disparate data sources. Such endeavors tend to produce the same desired result, increased efficiency, productivity, revenues and best of all employee morale.

For example, a client approached us with a most familiar problem that required a well thought out solution. This particular client is an oil and gas company, they find individuals to invest in ventures such as drilling and testing for oil wells. This customer uses ACT! 2006 Contact Relationship Manager to keep track of these investors and potential clients. At the time of an investment, the information would be given to the accounting department and the contact, and transactional data would be manually entered into the QuickBooks Accounting system. The problem that they were facing however was a loss in efficiency due to the amount of duplicate data entry required to keep these disparate data sources in sync with each other.

A representative of the company inquired with us regarding integrating their ACT! and QuickBooks data sources so that once a prospect's record in the ACT! database met a certain criteria that prospect would be automatically added into the QuickBooks database along with the deposit information. This would normally be an "out of the box" solution.

The challenge here was that our client's business process required that a separate QuickBooks Company file be used for each oil well they owned. The bottom line was that we needed to find a way to synchronize this client's master ACT! database with an ever growing number of QuickBooks company files.

A week or so after our first discussion of the customer's requirements, we had a working model of basically what they wanted done. Our engineering department worked hand in hand with our customers IT department to ensure that the solution that we were developing for them performed up to their exact requirements.

We used our proprietary software InfoOptics Universal Data Translator, along with the extensive data integration plan we developed, to drastically improve the way that they were currently handling this vital information. Before InfoOptics was implemented, our clients data flow was inefficient to say the least. The data integration plan that we developed and implemented for them greatly reduced the time spent on data entry providing more time for other "more important" business activities. Due to the fact that The client was ever evolving and testing for new oil well locations, they needed to be able to add new QuickBooks files and have them become part of the synchronization process every time a new joint venture was created. To accomplish this, we worked directly with their IT department, trained them on basic concepts and operations regarding InfoOptics UDT and of course, on how to continually add new QuickBooks files into the system. Upon completion of the training we wrote and provided them with an instruction manual walking them through each process involved in keeping their data integration plan evolving with the growth of the company.

The diagram below illustrates the data flow process that we developed for this particular client:

## Master ACT! Database

Notice that this prospect has interest in 2 Joint Ventures (oil wells)

Status	Opportunity Name	Stage	Probability of	Product Name	Total	Weighted Total	Priv.	Record Manager	Associated With
Open	Drilling end...	Initial..	10%	Joint/Venture1	\$20,000.00	\$2,000.00		Gabriel Michael	
Open	Completion	Initial..	10%	Joint Venture 2	\$30,500.00	\$3,050.00		Gabriel Michael	

When these opportunities are marked as Closed– Won the following action takes place

When **InfoOptics UDT** detects that a change has been made to the opportunity table for the specific contact it takes the appropriate action



Each QuickBooks file represents a different oil well or Joint Venture.

. There can be more than one joint venture related to each contact so, InfoOptics needs to determine which Opportunity goes with which QuickBooks File, and update the appropriate information.

To summarize the diagram shown above, let's say that John Doe is a possible new investor interested in two different joint ventures. He exists in the Master ACT! database and has the Ventures that he is interested in listed within the opportunity table associated with his contact record. When and if John decides to move forward and invest in any of the Ventures within his record, the status of that specific opportunity will be changed from Open, to Closed – Won.

As soon as the Status changes to Closed – Won, InfoOptics detects the change, looks at the Opportunity that has changed in ACT! and:

- decides which QuickBooks file that the specific opportunity is associated with
- determines whether or not this contact already exists in this particular QuickBooks file and takes the appropriate action:
  - Creates a new customer in QuickBooks or,
  - Links the contact information if it already exists
  - Creates a deposit inside the specific QuickBooks file according to the investment amount specified in the ACT! opportunity table.
- When ever a change is made in the Master ACT! database, that change will also be reflected in the corresponding QuickBooks File(s).

As you can see, we understood the customer's needs, used our knowledge to create a data integration plan accordingly, showed the customer a proof of concept, and then fully implemented the plan to meet the customer's exact requirements.

Finally, we made sure that the customer was trained to keep the system working on an evolutionary basis, providing them with documentation created specifically for them and their data integration system. When our consultant had concluded his final training session with the head of our customer's IT department, the customer representatives last words were, "Thank you so much, It was so nice to work with a group of people that were so professional, knowledgeable, and helpful. You and your team performed above and beyond our expectations and it has been greatly appreciated."

This is just one example of how Information Optics Corporation uses our human resources along with the state of the art technology that we have developed to improve efficiency, productivity, and employee morale in any business. If you think that your company could benefit from these same types of data integration and office automation solutions, please call IOC at (609)607- 0778 x1 or send inquiries via e-mail to [sales@infooptics.com](mailto:sales@infooptics.com). If you would like more information regarding what IOC can do for you, check out our website at [www.infooptics.com](http://www.infooptics.com) or simply call and speak with an IOC consultant.