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# Salesforce for QuickBooks Improves Customer Relationship Management for Small Businesses

## Combines Financial and Customer Data to Provide Better Insights and Increase Sales

MOUNTAIN VIEW, Calif.--(BUSINESS WIRE)-- Today, [Intuit Inc.](#) (Nasdaq: INTU) unveiled Salesforce for QuickBooks, enabling small businesses to easily manage their customer relationships and close more deals. Salesforce for QuickBooks is the result of an alliance that Intuit and salesforce.com announced earlier in the year. The news comes as part of Intuit's [QuickBooks® 2012 product announcement](#), which offers customers new features that give better insights, provide more organization and save them time.

“By integrating these best in class products, millions of small businesses can now seamlessly connect their front office and back office, sharing relevant information across the business,” said Dan Wernikoff, senior vice president and general manager of Intuit's Financial Management Solutions division. “The combination of QuickBooks and Salesforce data provides a powerful, expanded view of business information that will help users turn leads into customers.”

Salesforce for QuickBooks is a robust offering that allows users to enter data just once and have it automatically sync between QuickBooks and Salesforce. Specific features let small businesses:

- **Get the full picture** - Give sales representatives a 360-degree view of customers with a look at current deals alongside up-to-date financial information
- **Identify real opportunities** - Close the gap between sales and marketing with the ability to track and cultivate leads from various online, offline and social media campaigns using dashboard reports to measure performance across channels
- **Eliminate extra effort** - Speed order processing and reduce double data entry by automatically creating a transaction in QuickBooks when a deal is closed in Salesforce
- **Understand the customer** - Pinpoint a customer's needs with insight into all interactions a customer has had with the company including a history of what the customer owns, what products they are interested in and a history of warranty claims or open issues

“Managing customer relationships is a key challenge for small businesses,” said Ron Huddleston, vice president, ISV Alliances, salesforce.com. “Salesforce for QuickBooks is a powerful CRM offering designed for the millions of QuickBooks customers looking to get a better and deeper understanding of the customer to help close deals.”

## Solving Customer Needs

Managing customer relationships is among the biggest challenges facing small businesses, but also one of the biggest opportunities. Intuit's annual survey of small business owners found that 54 percent of respondents reported a decline in customer base was their biggest challenge and 27 percent claimed that growing their businesses keeps them up at night. Salesforce for QuickBooks addresses these issues and helps small businesses grow.

"Saving time is crucial to running my business and Salesforce for QuickBooks allows me to do just that," said Richard Holtz of InfiniSys Electronic Architects. "It helps my team make decisions faster by providing insights into sales and accounting data all in one place. Additionally, we can automatically keep information up to date in both QuickBooks and Salesforce, which reduces the risk of manual errors and lets us focus on closing more deals."

Intuit and salesforce.com are also offering a way to experience the benefits of integration for companies that already have both QuickBooks and Salesforce. Salesforce Integration for QuickBooks combines data in the same way as Salesforce for QuickBooks does and was specially designed for existing customers of both products.

### **Pricing and Availability**

Salesforce for QuickBooks is available in a Group Edition and Professional Edition. These are compatible with QuickBooks Pro and Premier 2011 and 2012. The products also work with QuickBooks Online and QuickBooks Enterprise versions 11.0 and 12.0. Salesforce for QuickBooks is currently being offered at a limited-time promotional price of \$18 per user, per month for Group Edition and \$60 per user, per month for Professional Edition. For more information about the features in each, to sign up for a free trial or to purchase, visit [www.intuit.com/salesforce](http://www.intuit.com/salesforce) or call 888-591-6059.

For small businesses that already have both products, all that is needed is the Salesforce Integration for QuickBooks application. It is compatible with the above versions of QuickBooks as well as Group and Professional Editions of Salesforce. The application can be ordered by calling 888-591-6059 and costs \$20 per company, per month for Group Edition and \$40 per company, per month for Professional Edition.

### **Resources:**

- [Intuit Press Room](#)
- [Intuit on Twitter](#)
- [Intuit on Facebook](#)
- [Intuit Small Business Blog](#)
- [Salesforce.com Press Room](#)
- [Salesforce.com on Twitter](#)
- [Salesforce.com on Facebook](#)
- [Salesforce.com Blog](#)

### **About Intuit Inc.**

Intuit Inc. is a leading provider of business and financial management solutions for small and

mid-sized businesses; financial institutions, including banks and credit unions; consumers and accounting professionals. Its flagship products and services, including [QuickBooks®](#), [Quicken®](#) and [TurboTax®](#), simplify small business management and [payroll processing](#), personal finance, and tax preparation and filing. [ProSeries®](#) and [Lacerte®](#) are Intuit's leading tax preparation offerings for professional accountants. Intuit Financial Services helps banks and credit unions grow by providing on-demand solutions and services that make it easier for consumers and businesses to manage their money.

Founded in 1983, Intuit had annual revenue of \$3.9 billion in its fiscal year 2011. The company has approximately 8,000 employees with major offices in the United States, Canada, the United Kingdom, India and other locations. More information can be found at [www.intuit.com](http://www.intuit.com).

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