



**ConvergeSol**  
Solutions Focused On Your Business

# Case Study

## QuickBooks Integrated Reporting System



[www.convergesolution.com](http://www.convergesolution.com)

CONVERGESOL INC



# ABOUT CONVERGESOL



- 12+**  
No. of Years in Business
- 70+**  
No. of Team Members
- 100%**  
Project Success Ratio
- 7+**  
Years of Avg. Relationship Tenure



### Industries We Serve

- Financial Services
- Insurance
- Real-estate
- e-Commerce
- Manufacturing
- Healthcare
- Non-profits
- e-Learning

# BUSINESS PROBLEM



The client utilizes QuickBooks Desktop for **financial tracking** and is generally content. However, they face challenges generating reports, particularly those displaying average customer payment durations.

They also wanted to switch to an online version, ensuring access to financial data from anywhere.

- The business owner lacks the expertise and resources to customize reports or develop an online platform.
- They have been unable to find a suitable partner who can create, manage, and provide ongoing support for the platform.
- The development process for an online platform is lengthy and complex.
- The business owner is struggling with the lengthy learning curve and is seeking a partner with expertise in **API Integration for QuickBooks Online**.



# OUR SOLUTION

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- ConvergeSol helped the client to **build an Online QuickBooks Integrated Reporting System**.
- The Functionality of the platform gives the Admin to access and download the invoice reports as well as create reports, such as
  - **Transaction report**: This report shows all transactions that have occurred in your QuickBooks account. You can filter these reports by date, type, and other criteria.
  - **Average Pay Day report**: This report shows all the invoices created in your QuickBooks and Pending, with the average day to pay.
  - **Balance sheet reports**: This report shows your balance sheet, which summarizes your assets, liabilities, and equity. This information can be used to track your financial health and identify areas where you need to make changes.
- We seamlessly transitioned coding and software engineering duties to our team, including requirements gathering, design, coding, deployment, support, and enhancements.
- The project utilizes Agile methodology with JIRA for project management. We completed critical functionalities promptly and implemented using technology .NET Core 6, SQL Server, QuickBooks.



# **BUSINESS BENEFITS**

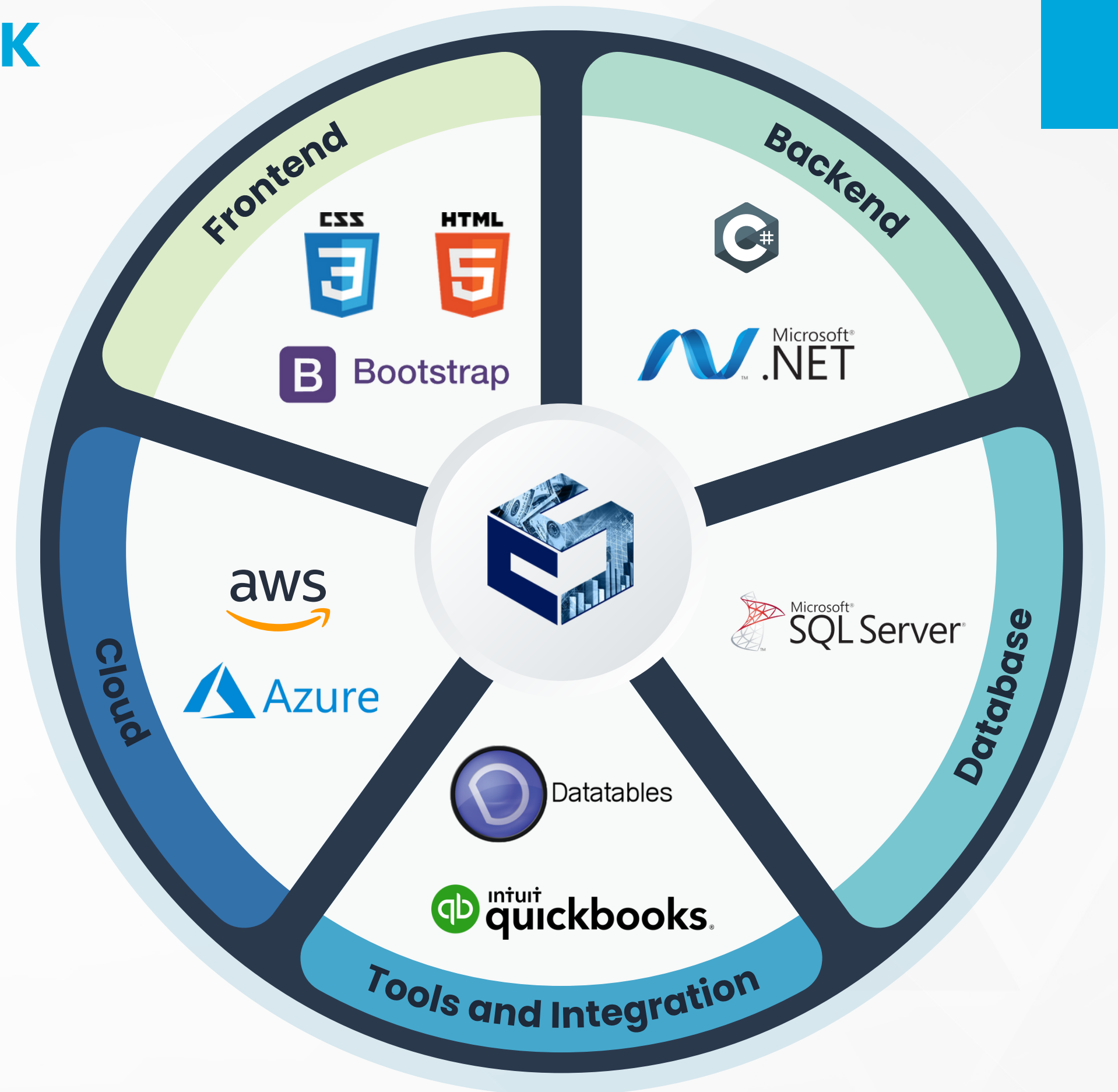
Our QuickBooks reporting solution has empowered the Client to track their business finances and effectively make well-informed decisions.

- **Gain Insight**
  - QuickBooks Reporting System provides comprehensive financial data, enabling Client to gain insights and improve efficiency, profitability, and customer service in their business.
- **Improved decision-making**
  - By offering enhanced visibility into financial matters, our solution empowered clients to make informed business decisions, including resource allocation and pricing strategies.
- **Save Money**
  - Our solution offered a cost-effective approach for implementing and maintaining the QuickBooks reporting platform, resulting in monetary savings. Additionally, we enabled clients to reduce IT costs through our user-friendly and easily manageable cloud-based solution.
- Our successful partnership fulfilled immediate needs and laid a solid foundation for their platform's long-term growth and development.



# PROJECT TECHNOLOGY STACK

- Selecting the right technology stack for a project is a critical decision that can significantly impact the project's success.
- We have taken several factors into account while making our technology stack selection for project implementation:
  - Scalability
  - Performance
  - Security
  - Cost
  - Third-party Integrations
  - Time-to-Market







Today Date: 07-06-2023

Client Information

Sonnenschein Family Store  
Billing Address

Russ Sonnenschein, Sonnenschein Family Store, 5647 Cypress Hill Ave., Middlefield, CA 94303

Shipping Address

5647 Cypress Hill Ave., Middlefield, CA, 94303

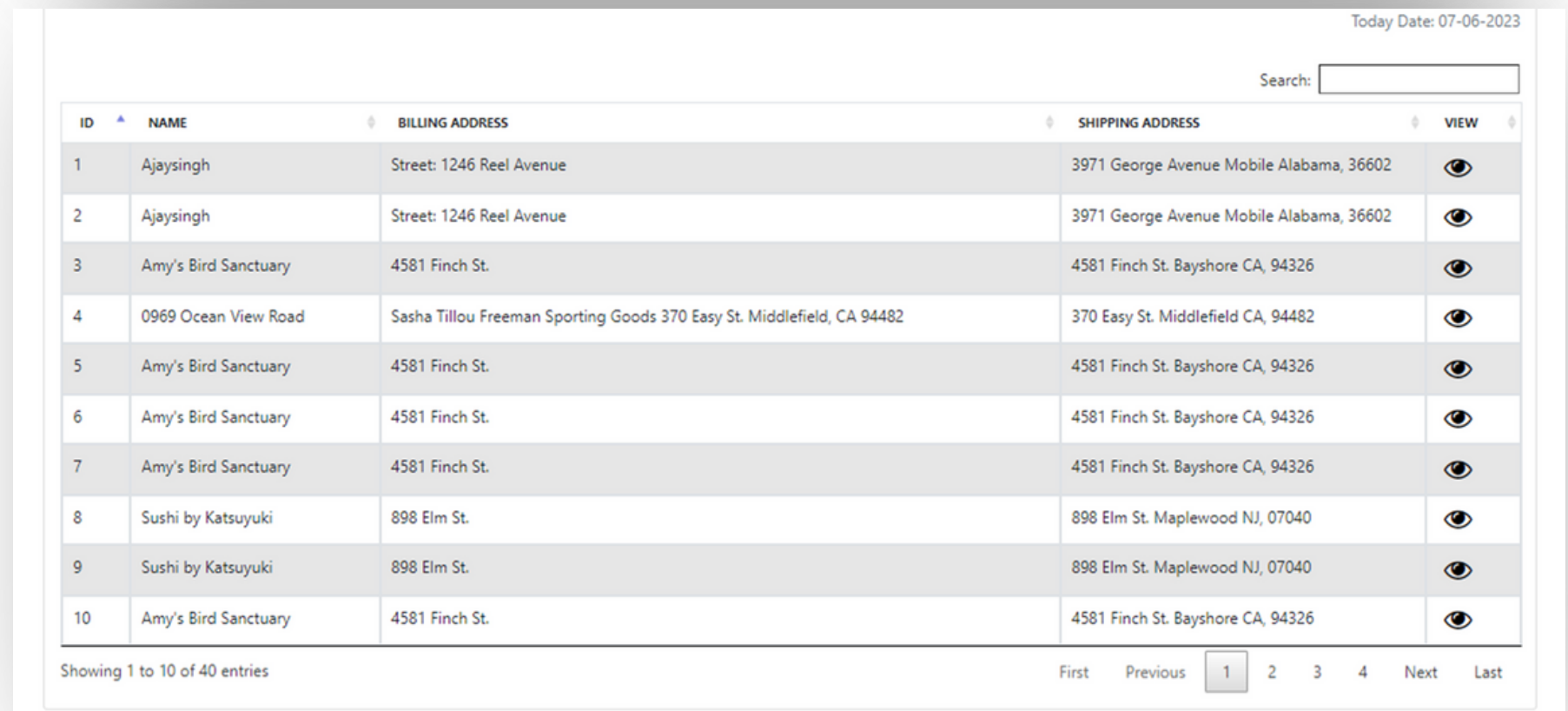
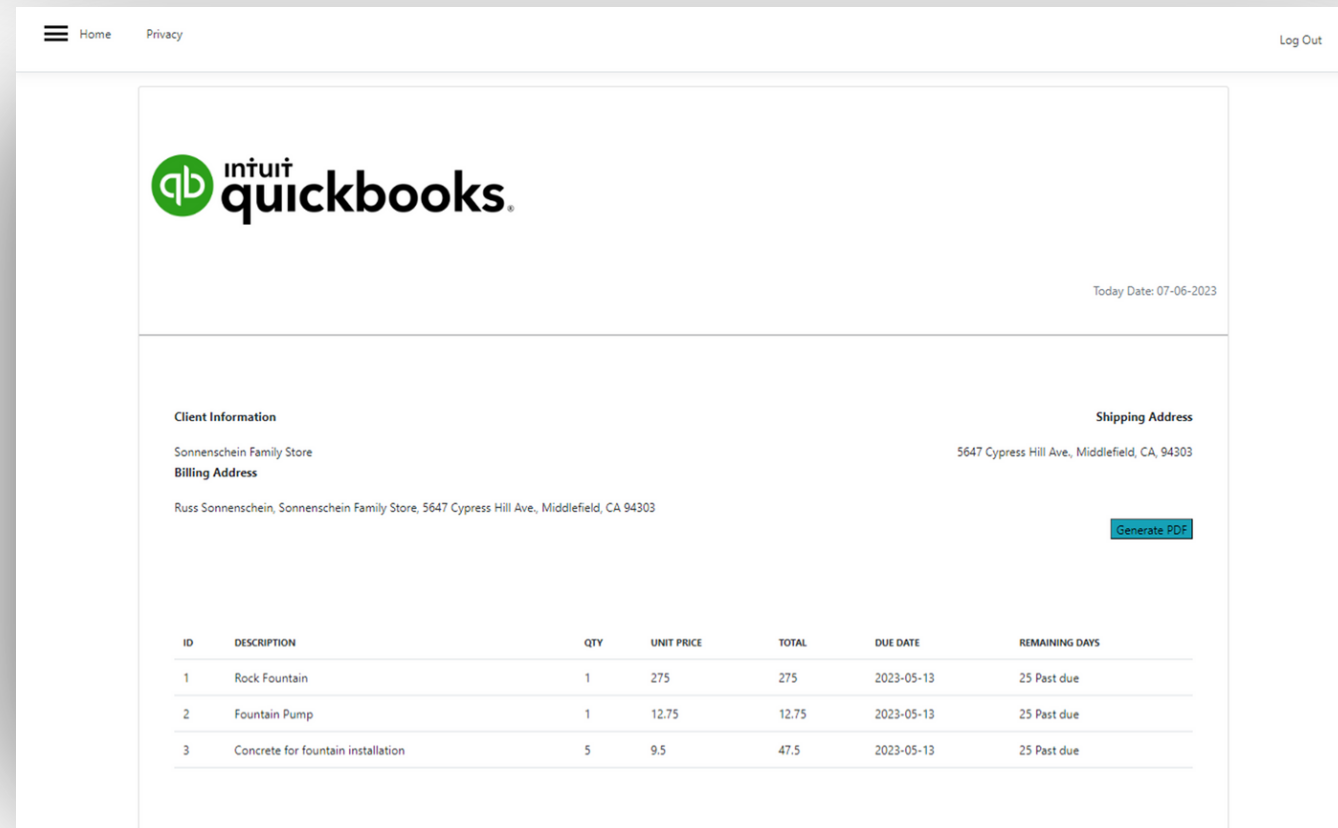
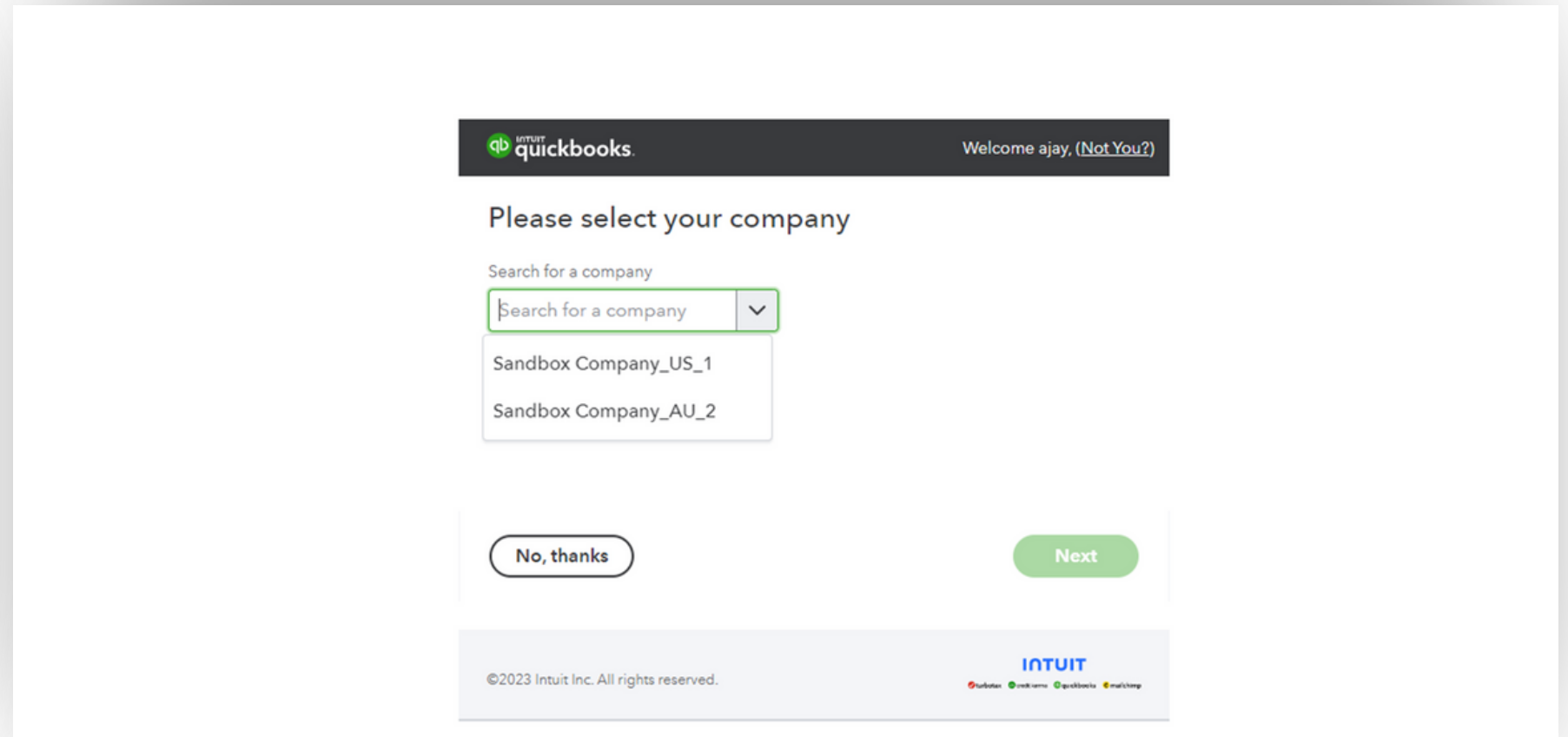
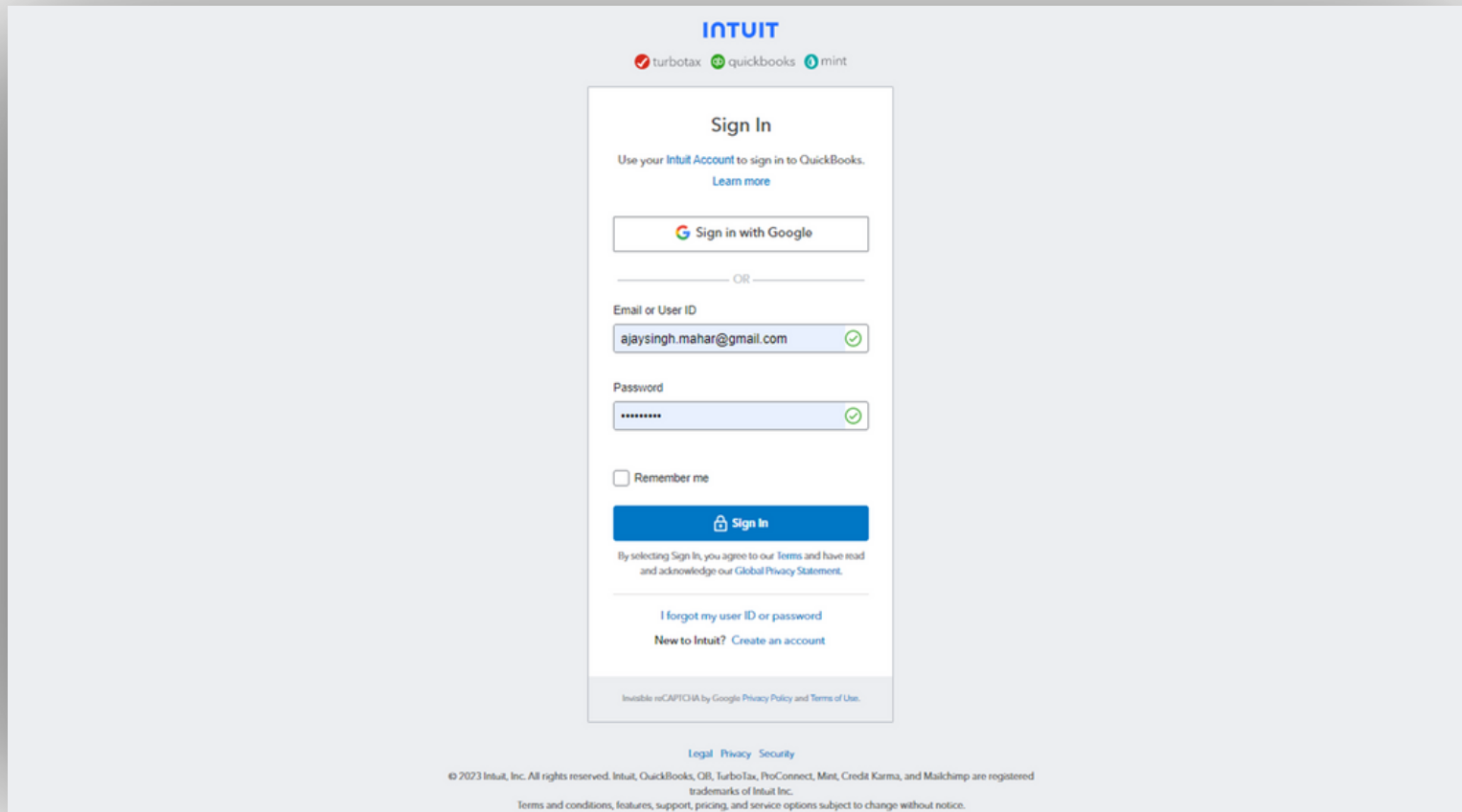
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ID	DESCRIPTION	QTY	UNIT PRICE	TOTAL	DUE DATE	REMAINING DAYS
1	Rock Fountain	1	275	275	2023-05-13	25 Past due
2	Fountain Pump	1	12.75	12.75	2023-05-13	25 Past due
3	Concrete for fountain installation	5	9.5	47.5	2023-05-13	25 Past due

# SAMPLE PROJECT SCREENSHOTS

Take a Look







# OUR DEVELOPMENT PROCESS

The Software Development Life Cycle (SDLC) is a well-established framework utilized in project management.

It encompasses the various stages involved in the development of an information system, starting from the initial feasibility study and extending to the maintenance of the completed application.

## DISCOVERY

- In Depth Analysis
- Understanding Your Business
- Feasibility of Project



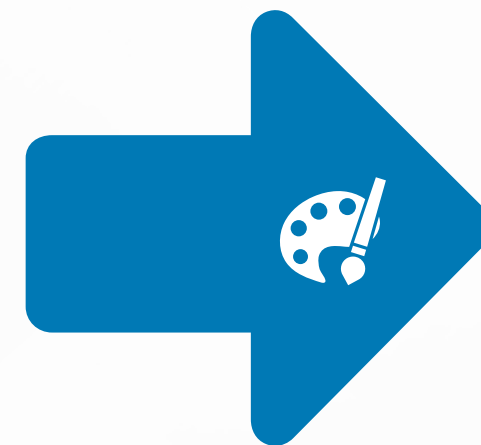
## DESIGN

- Wireframe
- Web/Mobile
- Application Visuals
- Application Workflow



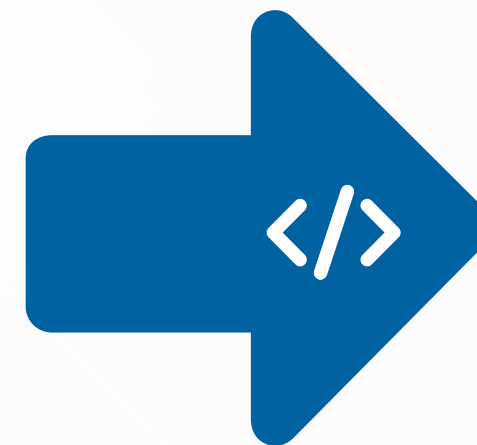
## PROJECT SPECIFICATION

- Requirement Understanding
- Finalize Scope
- Estimation
- Development Technologies



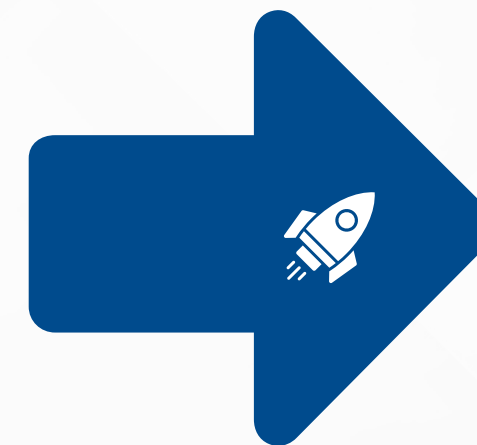
## DEVELOPMENT & TESTING

- Project Planning
- Code Implementation
- Integration with 3rd Party
- Manual Testing
- Bug Fixing



## UAT & LAUNCH

- User Acceptance
- Testing
- Launch

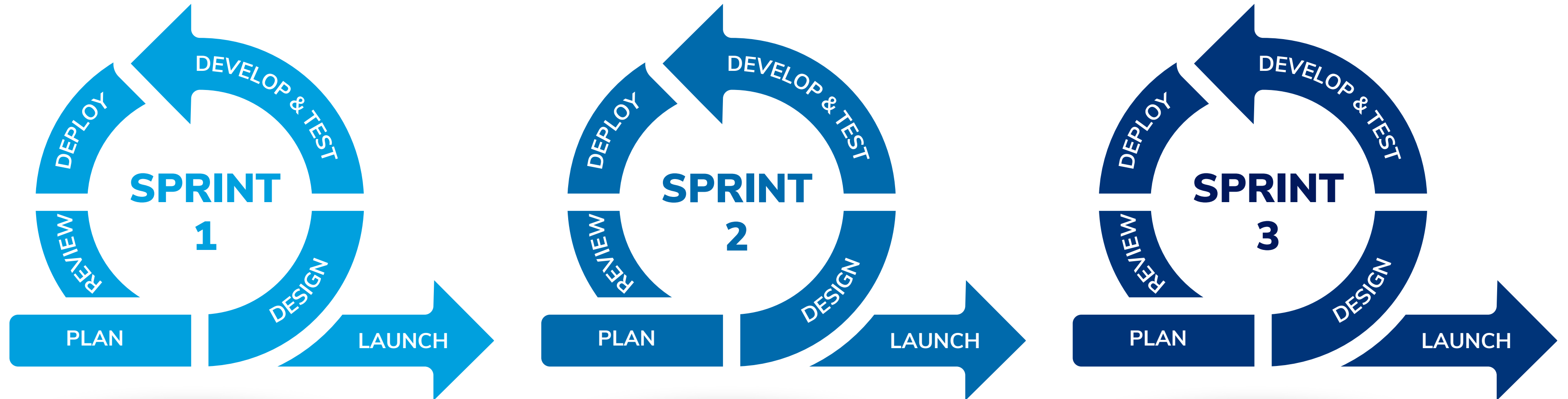


## ONGOING SUPPORT

- New Features
- Version Updates
- Server Management
- Backup



# OUR AGILE DEVELOPMENT PROCESS

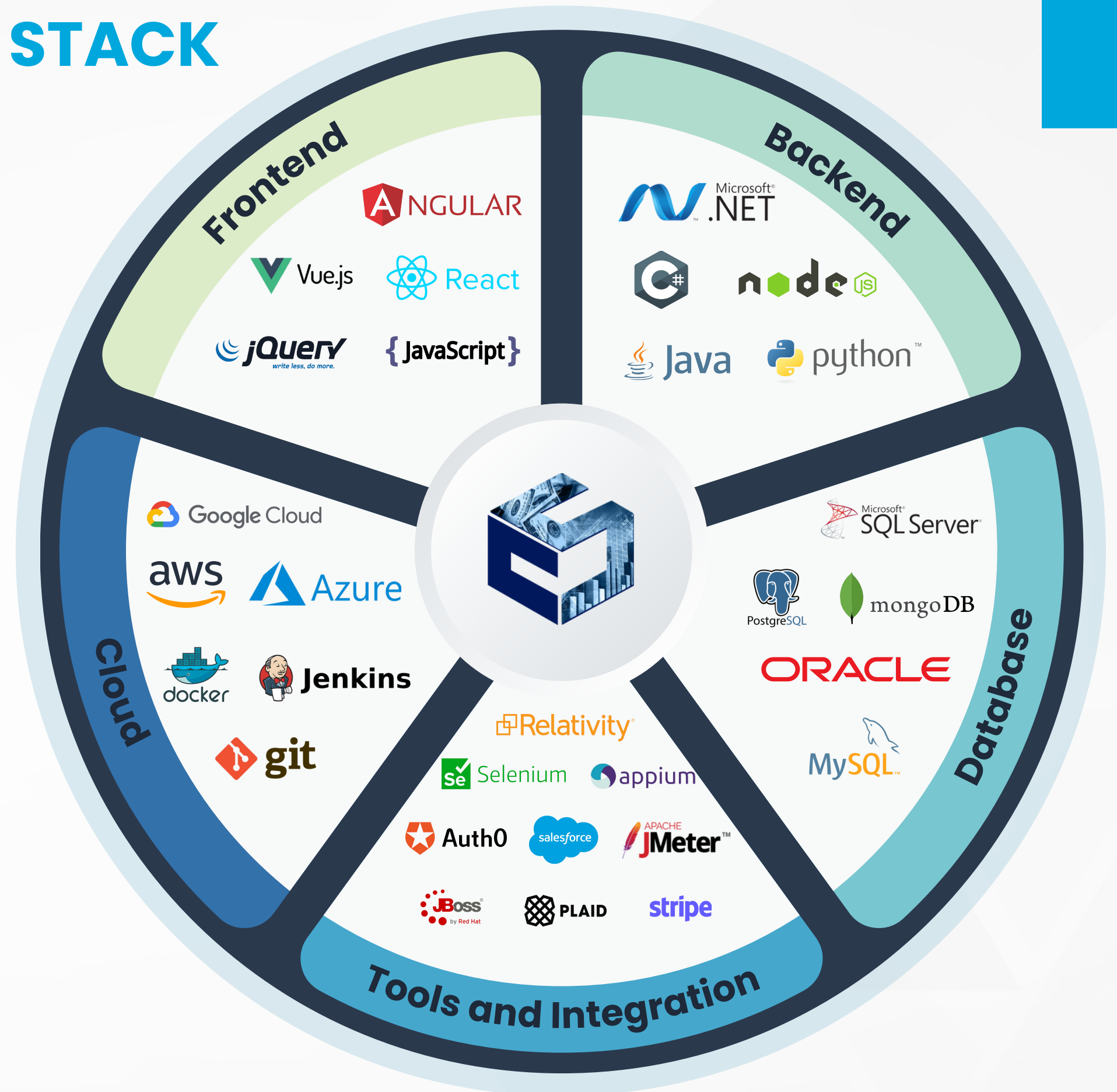


Agile methodology is a project management framework that prioritizes adaptability, collaboration, and iterative development. It emphasizes delivering value to customers through frequent releases, continuous feedback, and self-organizing teams. Agile promotes flexibility, transparency, and the ability to respond quickly to changes in requirements or market conditions.



# CONVERGESOL TECHNOLOGY STACK

- At ConvergeSol, we leverage a cutting-edge technology stack to deliver innovative solutions that meet the unique needs of our clients.
- Our partnerships with leading software providers like Microsoft, Salesforce, Amazon, and Relativity allow us to create best-in-class solutions that solve real business problems.
- Here's a glimpse into our key technology experience across the entire software development lifecycle:
  - Frontend technologies
  - Backend technologies
  - Infrastructure and DevOps
  - Tools & Integrations





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# EMBARK ON YOUR JOURNEY WITH US

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