Grazitti Interactive®
Marketing for Digital Natives

Integrated Zuora and FinancialForce Using Boomi

HIGHLIGHTS

Successfully Integrated Zuora and FinancialForce

Improved Billing Management in Zuora

Accurate Mapping for Error-Free Invoices

Provided the Development and UAT Support

THE CUSTOMER

A US-based leading provider of intelligent solutions to transforming the way people and systems work together. The customer offers IT solutions that help companies use data to transform the way they manage their facilities and assets. With their presence across the US and UK, the customer serves more than 10,000 customers in a wide range of industries in more than 150 countries around the world.

THE CONTEXT

The customer was using Intacct for creating product billings and the invoices were managed in Salesforce. There was Salesforce and Intacct integration in place. Also, they had the FinancialForce managed package installed in their Salesforce system for the time-tracking of their professional services and their invoices were also managed in Salesforce. But Salesforce was not flexible enough for managing their billing requirements and operations. So, they decided to move to Zuora as it offers out-of-the-box invoice capabilities that otherwise would have to be developed via customization in Salesforce.

THE OBJECTIVE

After the customer moved to Zuora for managing billings and invoices, they used the standard Zuora connector to integrate **Zuora** and **Intacct.** But there was no such connector for integrating Zuora and FinancialForce. So, they wanted a solution to integrate Zuora and FinancialForce while keeping the integration with Intacct as-is. Also, the customer wanted assistance with configuring certain workflows in Zuora and enabling certain outside-the-box Zuora functionalities.

THE SOLUTION

Our technology experts first assessed the existing system and integrations that were in place. After the assessment was completed, there were certain challenges involved in the process on the Zuora side including:

- API-level challenges like Records can't be backdated once they are created in Zuora.
- Inability to reduce the subscription billing plans as it was in Salesforce.
- Template issues while integrating both the tools

So, we adopted a staged approach to integrating Zuora and FinancialForce.

STAGE 1

In the first stage, we configured certain workflows in Zuora. The following are the configurations we did in their Zuora system:

- We contacted the Zuora team and got the **Individual Usage**—an outside-the-box feature—enabled in their Zuora system. This allowed the customer to charge users per their usage.
- To fix the records backdating issue, we developed a workflow to increase one month in subscription if the subscription is getting expired within the current month.
- We also developed certain workflows within their Zuora system in categories like **Subscription, Usage**, and **Charges** per the requirements shared by the customer.

STAGE 2

The second stage was the integration stage. Since the customer was using Dell Boomi for their existing Salesforce and Intacct integration, we recommended them to go with Boomi for Zuora and FinancialForce integration as well since it is reconfigurable.

So, we used Dell Boomi to set up the integration between Zuora and Salesforce and we set up the mapping between different FinancialForce objects and Zuora categories like:

- **'Project'** was synced to **'Subscription'.**
- **'Billing Event'** was synced to **'Usage'.**
- **'Budget'** was synced to **'Charges'**

Once the mapping of fields was defined and developed, the integration was set up. Apart from the aforementioned, we also provided support to their Zuora Admins with the development and also handled their UAT requests.

After the integration was set up, the system went under a stringent QA to ascertain if things were working smoothly. Once approved by the QA team, the system was handed over to the customer.

THE OUTCOME

The configuration managed by our experts helped the customer better manage and optimize their Zuora system. With the integrations and accurate data mapping, there were no discrepancies in billings and invoices, and the customer was able to effectively manage invoices in Zuora.