

## Hilltops IT Enhances Reporting Capabilities for Trisource Exhibits with Seamless QuoteWerks and QuickBooks Integration

**Brighton, United Kingdom – March 2025** – Hilltops IT Consultancy Services is proud to announce the successful implementation of a custom integration solution for Trisource Exhibits, significantly enhancing their reporting capabilities and operational efficiency. This project underscores Hilltops IT's commitment to delivering tailored solutions that meet the unique needs of their clients.

### Client Overview

Trisource Exhibits, a leading company in the exhibitions and events industry, sought to improve their data management and reporting processes by integrating their existing QuoteWerks and QuickBooks systems.

### Project Objectives

The primary goal was to develop integration utilities that would:

- Import data from QuoteWerks and QuickBooks into a separate reporting database.
- Generate detailed commission reports for projects.
- Automate data refresh processes to ensure up-to-date reporting.

### Key Achievements

- **Seamless Integration:** We developed powerful integration tools that enabled real-time product updates from SugarCRM to QuoteWerks and allowed easy import of customer and equipment details.
- **Automated Calculations:** We created a user-friendly wizard to guide Service Sales representatives through contract pricing, reducing the time to generate quotes by 50%.
- **Enhanced Accuracy:** Our automated calculations eliminated errors, ensuring consistent pricing across various contracts and regions.

### Solution Design

Hilltops IT designed a comprehensive solution comprising several key components:

- **QuoteWerks Integration Utility:** Extracts data from QuoteWerks and refreshes it overnight.
- **QuickBooks Integration Utility:** Pulls data from QuickBooks and refreshes it overnight.
- **Commission Reconciliation Form Report:** Automatically refreshes data based on QuoteWerks document number(s) and provides detailed reporting.

### Implementation and Results

The implementation process involved initial setup, customization, rigorous testing, and deployment. The solution delivered by Hilltops IT resulted in:

- Enhanced reporting capabilities with detailed, up-to-date commission reports.
- Improved efficiency through automated data refreshes, reducing manual data entry and minimizing errors.
- Flexibility to modify settings and generate additional reports as needed.

## Testimonials

**Dave Damalas, VP of Service & Operations at Trisource Exhibits**, commented "The integration solution provided by Hilltops IT has transformed our reporting capabilities. The automated data refreshes and detailed commission reports have significantly improved our operational efficiency."

**Kate Foulkes, Accounting Manager at Trisource Exhibits**, commented "You have no idea how much time and brain space this will save, not to mention eliminating human error with all those entries. This case study is a great way to showcase this amazing product!"

**Stephen Siggs, Director of Hilltops IT Consultancy Services**, commented, "We are thrilled to have partnered with Trisource Exhibits on this project. Our integration solution has not only streamlined their reporting processes but also provided them with the flexibility to adapt to future needs. This project exemplifies our dedication to delivering customized solutions that drive operational efficiency and business growth."

## About Hilltops IT Consultancy Services

Hilltops IT Consultancy Services is a leading provider of business software solutions, specializing in QuoteWerks and custom software development, system integration, plus providing training, consulting and support services. With a focus on delivering tailored solutions, Hilltops IT helps businesses enhance their operational efficiency and achieve their strategic goals.

## Contact Information

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TRISOURCE Exhibits GRAPHICS ▶ SERVICES ▶ DIGITAL MARKETING			COMMISSION RECONCILIATION FORM		MARKETING CONSULTANT JK	
					SHOW NAME THE BIG WIDGET SHOW	
					SHOW DATE 4/4/2025	
					INITIAL REC COMPLETE 5/5/2025	
					DATE COMM PAID 6/6/2025	
CLIENT	ABC Widgets Inc					
INVOICE #	46881P (07/11/24), 46881FR (10/10/24)					
VENDOR	INV.#	AMOUNT	\$47,711.61	NET BILLING (FROM INVOICE TAX & FRT.)	PROJECT MANAGER(S)	
Vendor A	2024-2264098	\$2,602.93			I/D	\$0.00
Vendor B	19563000	\$146.64	\$21,302.89	WHOLESALE TOTAL	TSE RENT	\$224.88
Vendor C	90736352	\$7,087.01			XS > 75K	\$0.00
Vendor H	5148	\$64.78	\$26,408.72	GROSS PROFIT	TOTAL	\$224.88
		\$9,901.36			PM1	\$224.88
					PM2	\$0.00
TRISOURCE RENTAL		\$11,244.03		COMMISSION RATE: 12% BASE + 2% RENTAL		
ART PREP @ \$75/HR		\$0.00				
DESIGN @ \$90/HR		\$157.50	\$3,393.93	SALES COMMISSION DUE	INV.#	COST
DEMO or PREVIEW (8%)		\$0.00			46881P	\$47,711.61
				ACTUAL GROSS PROFIT %	TOTAL	\$47,711.61
WHOLESALE TOTAL		\$21,302.89				
			\$8,279.65	FREIGHT BILLED		
			\$8,279.65	FREIGHT COST W/MARK UP	INV.#	COST
Vendor B / 19563000	ABC Widgets Inc 46881P	\$146.64			46881FR	\$279.65
Vendor C / 90736352	Vendor C 90736352	\$7,087.01			46881P	\$8,000.00
Vendor E / 8-583-28053	ABC Widgets Inc 46881P	\$3,104.00	\$0.00	FREIGHT PROFIT <LOSS>	TOTAL	\$8,279.65
Vendor E / 8-589-51746	ABC Widgets Inc 46881P	\$140.55				
Vendor G / CLE312503	ABC Widgets Inc 46881P	\$2,198.75	\$0.00	FREIGHT COMMISSION DUE		
Vendor G / CLE312503R	ABC Widgets Inc 46881P	\$2,198.75				
			\$3,393.93	SALES COMMISSION DUE		
FREIGHT COST		\$6,209.74				
ADD MARKUP, DIV BY 75%		\$8,279.65	\$3,618.81	TOTAL COMMISSION DUE		
TOTAL		\$8,279.65	\$0.00	CREATE REFUND/CREDIT TO CUSTOMER IF >\$300		