InoLink Cloud: QuickBooks Integration with Dynamics 365/CRM
Aim:

InoLink is a cloud-based solution aimed at syncing data between Dynamics 365/CRM and single or multiple QuickBooks to provide a 360 degrees view of customer to the sales team.

Target Users:

All organizations that would like to keep their QuickBooks and Dynamics 365/CRM systems in sync and provide customer history details to the Sales staff without the need to give them access to Accounting system.

Features:

- Batch processing through configurable polling times from QuickBooks to Dynamics CRM.
- Real time processing of synchronization from Dynamics CRM to QuickBooks.
- Support the integration of data between Dynamics CRM and single or multiple QuickBooks.
- Two-way sync of Account/Contact data to QuickBooks Customers and vice-versa
- Two-way sync of Products and Prices to/from QuickBooks and Dynamics 365/CRM
- Link existing Accounts/Contacts/Products in Dynamics 365/CRM and QuickBooks to avoid data duplication
- Ability to promote Quote, Order, and Invoice one-time from Dynamics 365/CRM to QuickBooks.
- Complete Accounting Transaction history of all transaction types and their latest updates available within Dynamics 365/CRM.
- Ability to bring over Customer Aging details.
- Sales tax calculation in Dynamics 365/CRM for Quotes, Orders and Invoice.
- Accounting Dashboards in CRM includes Recent Transactions, Top Customers and Pending Invoices etc.
- Accounting fields can be secured through Field Level Security
- Seamless integration within native Dynamics 365/CRM entities and forms.
- Ability to access the solution via web, mobile and Tablet as well.

InoLink Settings to configure Dynamics CRM with single or multiple QuickBooks

With the help of InoLink Settings screen users no more need to rely on the windows application and easily configure both the systems.

Using this screen, the user can configure the Dynamics CRM and single or multiple QuickBooks, also enable the required features and services that needs for syncing data between both the systems.

Two-way Sync of Customer and Product Information between Dynamics 365/CRM and QuickBooks:

Ability to configure two way sync of data for customers and products between Dynamics 365/CRM and QuickBooks to ensure key data is always
Synced and accurate in both systems.

Product Sync includes bringing over inventory details like onhand quantities from QuickBooks to Dynamics 365/CRM.
**Customer Accounting View:**

You can now view the customer balances and aging details from within Dynamics 365/CRM.

**QuickBooks Transaction History:**

Complete transaction history view with drill-down detailed view right within Dynamics 365/CRM.

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Ref. Number</th>
<th>Date</th>
<th>Open Balance</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>INVOICE</td>
<td>1/3/2017</td>
<td>$0.00</td>
<td>$750.00</td>
<td></td>
</tr>
<tr>
<td>QUOTE</td>
<td>1/3/2017</td>
<td>$0.00</td>
<td>$750.00</td>
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<tr>
<td>INVOICE</td>
<td>1/3/2017</td>
<td>$0.00</td>
<td>$300.00</td>
<td></td>
</tr>
<tr>
<td>CREDIT MEMO</td>
<td>1/3/2017</td>
<td>$0.00</td>
<td>$300.00</td>
<td></td>
</tr>
</tbody>
</table>

QuickBooks side you can see the same view on the customer card present in QuickBooks.
Promote Quote, Order and Invoice to QuickBooks:

You can promote Quote, Order and Invoice from Dynamics 365/CRM to QuickBooks. This includes the ability to calculate Tax for transactions within Dynamics 365/CRM.

Dashboard Support:

InoLink includes QuickBooks dashboard which include charts like Invoice payment status, Top Accounts by sales, Account Balances, Sales comparison, recent payments and grids like Customer who owe money and Recent Transactions.

Contact Us

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