



InoLink

Bi-Directional Integration Between QuickBooks and Dynamics 365 CE



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Available on
Microsoft AppSource



Key Features

Bi-Directional

Two-way sync of Accounts, Contacts, Products, & Prices.

Transaction Sync

Ability to promote Quote/Order/ Invoice from Dynamics 365 CRM to QuickBooks.

Accounting History

Access complete transaction history and their updates right within Dynamics 365 CRM.

Account Balances

View customer open balances and aging details to help schedule follow-ups.

Tax Calculation

Perform Sales tax calculation in Dynamics 365 CRM for Quotes, Orders, and Invoices.

Reporting

Accounting Dashboards display accounting transaction updates.

Cloud-Based Solution

A Cloud-based solution that handles and seamlessly integrates the data within native Dynamics 365 CRM entities and forms.

Multi Company Sync

Support the integration of data between Dynamics CRM and single or multiple QuickBooks.

Real Time Sync

Real-time processing of synchronization from Dynamics CRM to QuickBooks.

Secured Accounting Fields: Accounting fields can be secured through Field Level Security

Device Compatible: Ability to access the solution via web, mobile and tablet as well

Available For

MICROSOFT DYNAMICS SUPPORTED VERSIONS

- DYNAMICS 365 8.2 and above
- POWER APPS

DEPLOYMENTS

- On-Premises
- Online

INTUIT QuickBooks SUPPORTED VERSIONS

- QuickBooks ONLINE
- QuickBooks Desktop

COUNTRIES

- USA
- Canada
- UK
- Australia

Account Sync

The screenshot displays the InoLink - QuickBooks interface, which is integrated into the Dynamics 365 environment. The top navigation bar shows the path: Dynamics 365 > InoLink - QuickBooks > InoLink - QB > Accounts > Alpine Ski House. The left sidebar contains a navigation menu with options like Home, Recent, Pinned, Dashboard, InoLink Dashboard, Customer, Accounts, Contacts, Collateral, Transactions, Payments, and Sales Transactions. The main content area is divided into two panels. The left panel, titled 'ACCOUNT INFORMATION', shows details for 'Alpine Ski House', including Account Name, Phone (555-0157), Fax (124567), Website (http://www.alpineskihouse.com/), Parent Account, Ticker Symbol, and Relationship Type. The right panel, titled 'Timeline', has a note entry field. The right sidebar shows a list of actions: Dashboard, Receipts, Expenses, Sales, Workers, Reports, Taxes, Accounting, and Apps. The main content area on the right is titled 'Alpine Ski House' and shows a summary of the account, including a balance of \$5,050.20 (OPEN) and a due amount of \$5,050.20 (OVERDUE). Below this, there are tabs for 'Transaction List' and 'Customer Details'. The 'Customer Details' tab is active, showing fields for Customer, Email, Phone, Mobile, Fax, Other, Website, Notes, Billing address, Shipping address, Terms, Payment method, Preferred delivery method, Customer type, Customer language, and Exemption details. The interface is clean and modern, with a dark header and a light background.

ACCOUNT INFORMATION

Account Name
Alpine Ski House

Phone
555-0157

Fax
124567

Website
http://www.alpineskihouse.com/

Parent Account

Ticker Symbol

Relationship Type

Timeline

Enter a note...

Alpine Ski House

Alpine Ski House | 2313 B Southampton Rd, Missoula, TX 58047

\$5,050.20
OPEN

\$5,050.20
OVERDUE

Customer Details

Customer: Alpine Ski House

Email: someone_h@example.com

Phone: 555-0157

Mobile: (520) 555-7887

Fax: 124567

Other

Website: <http://www.alpineskihouse.com/>

Notes: [Add notes](#)

Attachments: Maximum size: 20MB

Billing address: 2313 B Southampton Rd, Missoula, TX 58047

Shipping address: 7723 Firestone Drive, Redmond, WA 32147

Terms: Net 30

Payment method

Preferred delivery method: Print later

Customer type

Customer language

Exemption details

Product Sync

Dynamics 365 | InoLink - QuickBooks | InoLink - QB > Products > InoLink

PRODUCT
Product: InoLink

Status: Active

SUMMARY ACCOUNTING DETAILS PRODUCT PROPERTIES ADDITIONAL DETAILS Notes Related

Name	* InoLink
Product ID	* InoLink
Product Type	Sales Inventory
Parent	---
Valid From	---
Valid To	---
Description	InoLink

Unit Group	* Default Unit
Default Unit	* Primary Unit
Default Price List	* US Price List
Decimals Supported	* 2
Subject	---
List Price	\$1,500.00
Standard Cost	---
Current Cost	\$0.00

Product/Service information

Inventory

Name*
InoLink

SKU
InoLink is an integration tool

Category
Choose a category

Quantity on hand
Adjust: Quantity | Starting value 488

Reorder point
What's the reorder point? 10

Quantity on PO 0

Inventory asset account
Inventory Asset

Description
InoLink

Sales price/rate 1,500 Income account
Sales of Product Income

SHOW MORE

Save and close

Transaction History Sync

Dynamics 365 | InoLink - QuickBooks | InoLink - QB > Accounts > Alpine Ski House

Home Recent Pinned Dashboard InoLink Dashboard Customer Accounts Contacts Collateral Quotes Orders Invoices Products Transactions Payments Sales Transactions

Alpine Ski House

Summary Accounting Details Details Related

> 90 \$5,050.20

Last Transaction Date 10/10/2019

Transaction History

Transaction Type	Date	Ref Number
RECEIVE PAYMENTS	10/10/2019	7847
INVOICE	6/24/2019	1064
RECEIVE PAYMENTS	6/24/2019	1064
QUOTE	6/2/2019	1001
INVOICE	6/2/2019	1050

1 - 5 of 16 (0 selected)

Last Sync Date 10/11/2019 5:04 AM

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Dashboard Receipts NEW Expenses Sales Workers Reports Taxes Accounting Apps

Alpine Ski House | 2313 B Southampton Rd, Missoula, TX 58047

Edit New transaction

\$5,050.20 OPEN

\$5,050.20 OVERDUE

Transaction List Customer Details

Batch actions Filter

	DATE	TYPE	NO.	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
☐	10/11/2019	Payment	7847	10/11/2019	\$0.00	\$-350.00	Closed	
☐	06/25/2019	Invoice	1064	07/25/2019	\$0.00	\$11.88	Paid	Print
☐	06/25/2019	Payment	1064	06/25/2019	\$0.00	\$-11.88	Closed	
☐	06/03/2019	Estimate	1001	06/03/2019	\$0.00	\$1,662.00	Pending	Create invoice
☐	06/03/2019	Invoice	1050	07/03/2019	\$0.00	\$1,662.00	Paid	Print

Aging Sync

Dynamics 365 > **InoLink - QuickBooks** > **InoLink - QB** > **Accounts** > **Alpine Ski House**

Alpine Ski House

Summary **Accounting Details** Details Related

Link Status **Linked** Last Update

Failed Link Jobs

✓	Name	Link Status	Accounting Company
No data available.			

Sales Tax Details, Aging & Balance

Tax Code	California	Current	\$0.00	Open Balance	\$5,050.20
Is Taxable	Yes	<= 30	\$0.00	YTD Sales	\$3,701.00
		31 - 60	\$0.00	Till Date Sales	\$6,936.00
		61 - 90	\$0.00		
		> 90	\$5,050.20		
		Last Transaction Date	10/10/2019		

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A/R Aging Summary Report

< Back to report list

Report period: Custom as of 10/14/2019

Customize Save customization

Show non-zero or active only: Active rows/active columns

Aging method: Current Report date

Days per aging period: 30

Number of periods: 4

Run report

InoLink Demo_US

A/R AGING SUMMARY

As of October 14, 2019

	CURRENT	1 - 30	31 - 60	61 - 90	91 AND OVER	TOTAL
Adventure Works		1,782.00			2,602.60	\$4,384.60
Alpine Ski House					5,050.20	\$5,050.20
Amy's Bird Sanctuary					3,513.40	\$3,513.40

Quote/Order/Invoice Sync

Dynamics 365 | InoLink - QuickBooks | InoLink - QB > Quotes > Interested in InoLink - A&P

Home | Recent | Pinned | Dashboard | InoLink Dashboard | Customer | Accounts | Contacts | Collateral | Quotes | Orders | Invoices | Products | Transactions | Payments | Sales Transactions

QUOTE
Interested in InoLink - A&P
Read only

Total Amount: \$1,728.00 | Effective From: | Effective To: |

Summary | Accounting Details | Details | Related

Quote ID: * QUO-01011-C7X3B9
Revision ID: * 0
Name: * Interested in InoLink - ...
Currency: * US Dollar
Price List: * US Price List
Source Quote: ---
Cloned Quote: ---

SHIPPING INFORMATION
Shipping Method: Will Call
Payment Terms: Net 30
Freight Terms: No Charge

ADDRESSES

PRODUCTS

Product	Propose	Price	Quantity	Discount	Extended Amount	Suggest
InoLink L...	Not C...	\$200.00	1.00000	\$50.00	\$162.00	---
InoLink	Not C...	\$1,500.00	1.00000	\$50.00	\$1,566.00	---

Detail Amount: \$1,600.00
(-) Discount (%): ---
(-) Discount: ---
Pre-Freight Amount: \$1,600.00
(+) Freight Amount: ---
(+) Total Tax: \$128.00
Total Amount: \$1,728.00

Estimate #1006

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1		Write - In	InoLink Installation	1	200	200.00	✓
2		Line Discount	InoLink Installation	1	-50	-50.00	
3						Subtotal: \$150.00	
4		InoLink	InoLink	1	1,500	1,500.00	✓
5		Line Discount	InoLink	1	-50	-50.00	
6						Subtotal: \$1,450.00	
7							

Add lines | Clear all lines | Add subtotal

Subtotal: \$1,600.00

Message displayed on estimate
Interested in InoLink - A&P

Let QuickBooks calculate your sales tax

California 8% 128.00
Discount percent 0.00 \$0.00
Shipping
Total \$1,728.00
Estimate Total \$1,728.00

Message displayed on statement
If you convert an estimate into an invoice and send a statement, this will show up as the description for the invoice.

Next Steps

Learn more about [InoLink](#) today.

Get your free **InoLink** trial now from [Microsoft AppSource](#) or [our website!](#)

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