



# InoLink

## Bi-Directional Integration Between QuickBooks and Dynamics 365 CE



[crm@inogic.com](mailto:crm@inogic.com)



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

- MICROSOFT DYNAMICS CRM 2016 AND ABOVE

## DEPLOYMENTS

- ONLINE
- On-Premises

## INTUIT QuickBooks SUPPORTED VERSIONS

- QuickBooks ONLINE
- QuickBooks Desktop

## COUNTRIES

- USA
- CANADA
- UK
- Australia



# Account Sync

The image displays two overlapping software interfaces. The background interface is Microsoft Dynamics 365, showing the 'InoLink - QuickBooks' integration page for the 'Alpine Ski House' account. The left sidebar contains navigation options like Home, Recent, Pinned, Dashboard, InoLink Dashboard, Customer, Accounts, Contacts, Collateral, Transactions, Payments, and Sales Transactions. The main content area shows 'ACCOUNT INFORMATION' for 'Alpine Ski House' with fields for Account Name, Phone (555-0157), Fax (124567), Website (http://www.alpineskihouse.com/), Parent Account, Ticker Symbol, and Relationship Type. A 'Timeline' section is also visible.

The foreground interface is the QuickBooks 'InoLink Demo\_US' window, showing the 'Alpine Ski House' customer profile. The top right shows a balance of \$5,050.20 OPEN and another of \$5,050.20 OVERDUE. The main section displays customer details under the 'Customer Details' tab, including 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. An 'Attachments' section at the bottom indicates a maximum size of 20MB.

# Product Sync

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

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

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

intuit quickbooks | InoLink Demo\_US

Dashboard Receipts NEW Expenses Sales Workers Reports Taxes Accounting Apps

Alpine Ski House Edit New transaction

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

Add notes

Transaction List Customer Details

Batch actions Filter

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

**intuit quickbooks** InoLink Demo\_US

**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

Taxable subtotal: California 8% 128.00  
Discount percent: \$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!](#)

Email: [crm@inogic.com](mailto:crm@inogic.com)



[crm@inogic.com](mailto:crm@inogic.com)

