



## Office Accounting – Dynamics CRM Integration Link

### Aim:

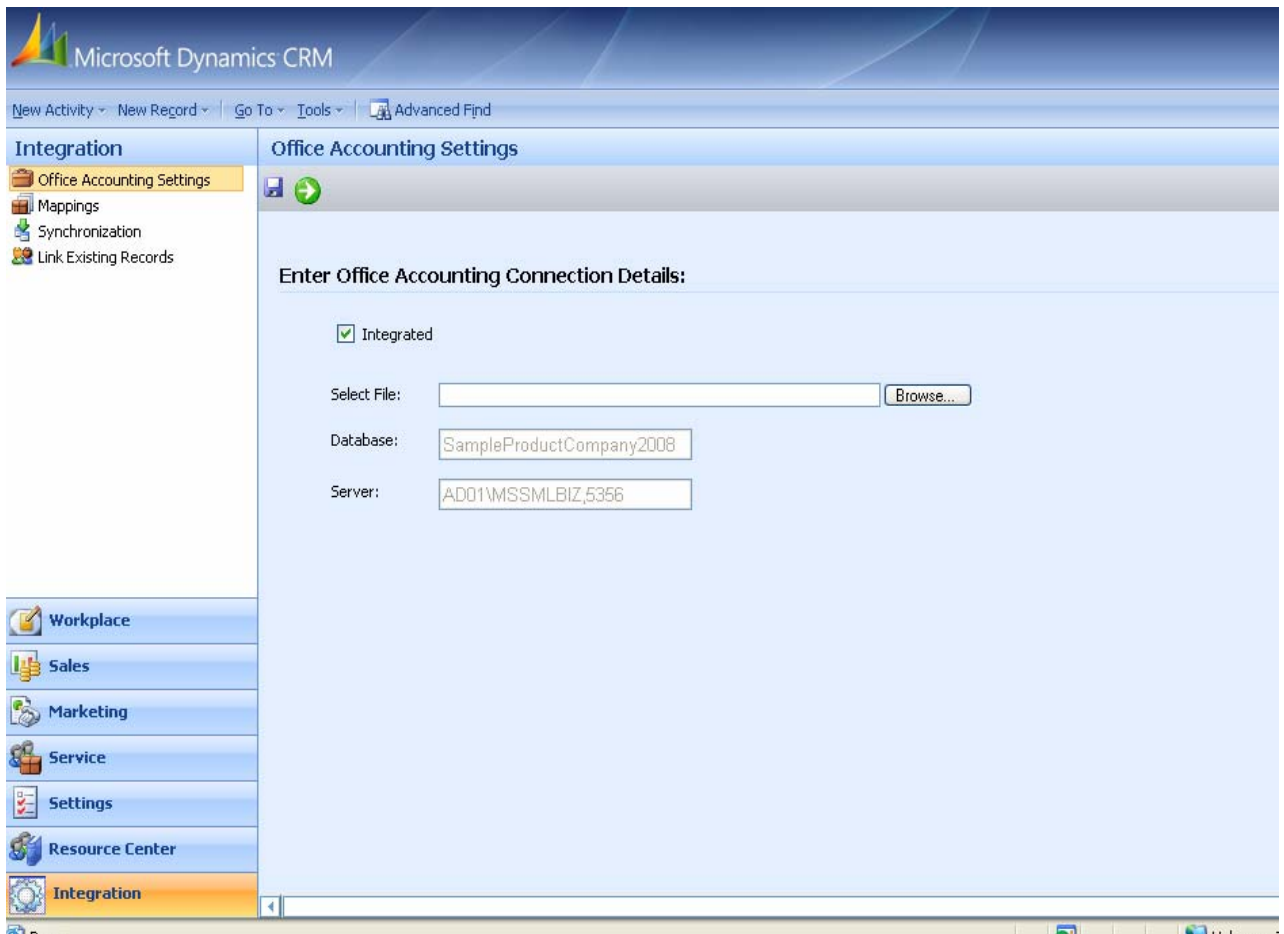
This utility allows the user to integrate data from Office Accounting to Dynamics CRM.

### Data that can be integrated:

- Customers in OA to Accounts in CRM
- Contacts in OA to Contacts in CRM
- Ability to view Customer financial details from within CRM.

### Working of the utility:

- 1) This is the office accounting settings page wherein you have to get connected to Office Accounting.



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### Mappings Page:

Map common attributes between the two applications.

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'New Activity', 'New Record', 'Go To', 'Tools', 'Advanced Find', and 'Help'. The user is logged in as 'Sam IKL' with 'INOGIC' as the organization. The left sidebar shows the 'Integration' section expanded, with 'Mappings' selected. The main content area is titled 'Mappings' and contains a table with columns for 'Users', 'Payment Terms', 'Price List', 'Shipping Methods', and 'Category'. The 'Users' column lists six names, each with a dropdown menu set to 'Sam IKL'.

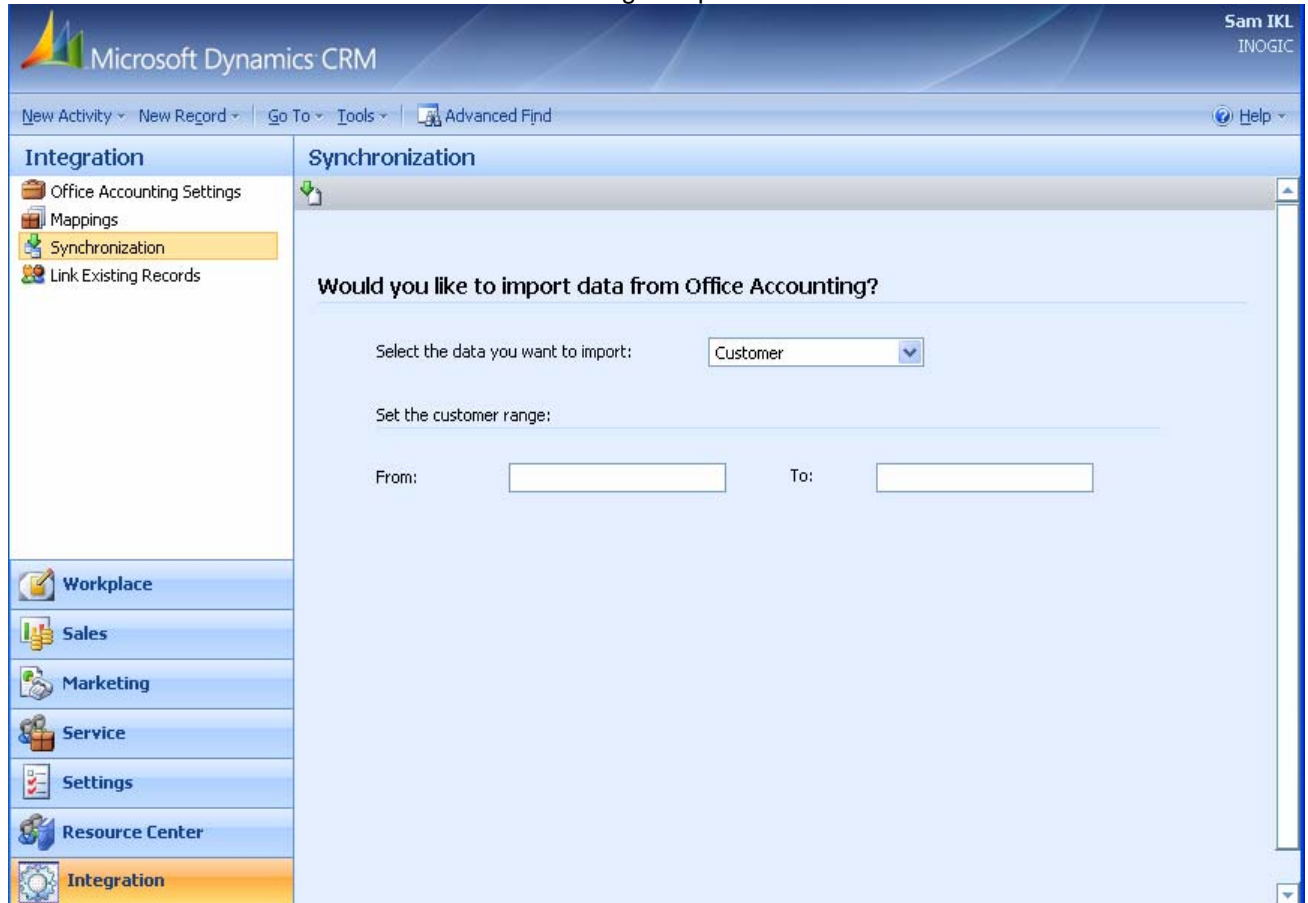
Users	Payment Terms	Price List	Shipping Methods	Category
Don Funk				
Angela Barbariol				
Brenda Diaz				
Jon Ganio				
Michael Emanuel				
Mike Danseglio				

## Office Accounting – Dynamics CRM Integration Link

### Synchronization Page:

This option helps you to import data from Office Accounting to Microsoft Dynamics CRM.

All the information of a customer in Office Accounting is imported in CRM.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes the Microsoft Dynamics CRM logo, the user name "Sam IKL", and the organization "INOLOGIC". Below the navigation bar are menu items: "New Activity", "New Record", "Go To", "Tools", "Advanced Find", and "Help".

The left sidebar contains the "Integration" section, which is expanded to show "Office Accounting Settings", "Mappings", "Synchronization" (highlighted), and "Link Existing Records". Below this are other sections: "Workplace", "Sales", "Marketing", "Service", "Settings", "Resource Center", and "Integration".

The main content area is titled "Synchronization" and displays a dialog box with the heading "Would you like to import data from Office Accounting?". The dialog contains the following fields:

- "Select the data you want to import:" with a dropdown menu set to "Customer".
- "Set the customer range:" with two input fields labeled "From:" and "To:".

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### Link Existing Records:

It has 3 options as shown below:

The screenshot shows the 'Link Existing Records' window in Microsoft Dynamics CRM. The left sidebar contains navigation options: Office Accounting Settings, Mappings, Synchronization, Link Existing Records, Workplace, Sales, Marketing, Service, Settings, Resource Center, and Integration. The main area has a 'Select Range' button and a 'Link Records' button. Below these are three radio button options:

- Only Link Records
- Link Records and update OA records with details from CRM
- Link Records and update CRM records with details from OA

Microsoft Dynamics CRM Accounts	Microsoft Office Accounting Customers
Abercrombie, Kristy	-- Select Office Accounting Customer --
AEROPUERTO LOGOÑONO	Fabrikam
AIMME (INSTITUTO TECNOLOGICO METALMECANI	Adventure Works
BANCOTEL	Alpine Ski House
Coho Sports	Coho Sports
COL. OFI DELINEANTES	COL. OFI DELINEANTES
COPHEL	-- Select Office Accounting Customer --

**a. Only Link Records:**

Here it will link OA Customer with CRM account and OA Contacts of OA account with CRM Contacts of that CRM account.

**b. Link Records and update OA records with details from CRM:**

Here, it will do the same as “Only Link Records” do and will update OA records with details from CRM account.

**c. Link Records and update CRM records with details from OA:**

Here, it will do the same that “Only Link Records” do and will update CRM records with details from OA customer.

## Office Accounting – Dynamics CRM Integration Link

### Link Products:

This will link CRM products with OA products.

The screenshot shows the Microsoft Dynamics CRM 'Link Products' interface. The browser title is 'Microsoft Dynamics CRM - Microsoft Internet Explorer'. The address bar shows 'http://ad01:5555/INOGIC/loader.aspx'. The user is logged in as 'Sam IKL INOGIC'. The left navigation pane shows 'Integration' selected, with sub-items like 'Office Accounting Settings', 'Mappings', 'Synchronization', 'Link Existing Records', and 'Link Products'. The main area is titled 'Link Products' and contains a table with two columns: 'Microsoft Dynamics CRM Products' and 'Microsoft Office Accounting Products'. The table has three rows: 'Carpentry (TM)', 'CRM Product 2', and 'CRM Product1'. The first row shows 'Carpentry (TM)' in both columns. The second and third rows show 'CRM Product 2' and 'CRM Product1' in the first column, and 'Select Office Accounting Product' in the second column. Red arrows point to the 'Select Range' icon and the 'Link CRM and OA Products' text.

Microsoft Dynamics CRM Products	Microsoft Office Accounting Products
Carpentry (TM)	Carpentry (TM)
CRM Product 2	-- Select Office Accounting Product --
CRM Product1	-- Select Office Accounting Product --

### CRM Invoice to OA:

The screenshot shows the Microsoft Dynamics CRM 'Invoice: Test Order' interface. The browser title is 'Invoice: Test Order - Windows Internet Explorer'. The address bar shows 'http://ad01:5555/INOGIC/loader.aspx'. The user is logged in as 'Sam IKL INOGIC'. The left navigation pane shows 'Details' selected, with sub-items like 'Information', 'Existing Products', 'Write-In Products', 'Other Contacts', 'Activities', 'History', and 'Workflows'. The main area is titled 'Invoice: Test Order' and contains a form with fields for 'Invoice ID', 'Name', 'Customer', 'Currency', 'Totals', and 'Prices Locked'. The 'Move to OA' button is highlighted. A 'Windows Internet Explorer' dialog box is open, displaying a success message: 'Invoice moved successfully to Office accounting.' with an 'OK' button.

Microsoft Dynamics CRM Products	Microsoft Office Accounting Products
Carpentry (TM)	Carpentry (TM)
CRM Product 2	-- Select Office Accounting Product --
CRM Product1	-- Select Office Accounting Product --

Here, CRM Invoice is moved to OA by clicking on "Move to OA" button and it can be seen in OA as shown below:

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Computer Solutions East, Inc. - 1250-PCRMQ5 - Invoice
\_ | # | X

File Edit View Actions Credit Data Help
Current Layout: Product

Save and Close Save and New Edit Create From Job costs Receive Payment Recurring...

### Invoice (Not Paid)

**Customer**

Customer name:

Contact name:

Job name:

**Billing address**

Bill to:

**Shipping address**

Ship to:

**Phone number**

Phone:

**Salesperson**

Salesperson:

**Terms**

Payment terms:

Shipping terms:

Shipping method:

Due date:  Delivery date:

9/18/2008 No: 1250-PCRMQ5

**Products and services**

Name	Description	Qty.	Unit Price	Discount	Line Total	Tax
Parts – Hardware \ Software	Cisco Service	2	\$275.00	0%	\$550.00	Taxable
<b>Subtotals:</b>					<b>\$0.00</b>	<b>\$550.00</b>

Memo:

Reference:

Add Links...

Tax group:

Price level:

Sales tax:

Total:

Payments:

Balance due:

## Office Accounting – Dynamics CRM Integration Link

### Office Accounting Details Page:

This page contains Office accounting data.

**Account: A Datum Corporation123**  
Information

Details: Information, More Addresses, Activities, History, Sub-Accounts, Contacts, Relationships, Financial History, Financial Summary, Workflows

Sales: Opportunities, Quotes, Orders, Invoices

Service: Cases, Contracts, ISV Service

Marketing: Marketing Lists, Campaigns

Status: Active

Office Accounting Data

Update Stop Tracking

Office Accounting Customer ID

Customer Id: 1

Office Accounting Customer Details

Tax Group: Redmond  
Credit Rating: AAA  
Preferred Payment Method: Check

Promoted Contacts

Contact Name	Title	Business Phone	Email Address	Primary Contact
Terry Adams	President	701 555-0143	tadams@example.com	<input checked="" type="checkbox"/>
New Unpromoted		701 555-0143		<input type="checkbox"/>

### Financial Summary Page:

Financial Summary button is placed in left navigation pane. A page is displayed as shown in the following screenshot.

**Account: A Datum Corporation**  
Financial Summary

Details: Information, More Addresses, Activities, History, Sub-Accounts, Contacts, Relationships, Financial History, Financial Summary, Workflows

Sales: Opportunities, Quotes, Orders, Invoices

Service: Cases, Contracts, ISV Service

Marketing: Marketing Lists, Campaigns, ISV Marketing

Balance Due

Current: 43,9500  
Overdue:  
1-30 days: 91,9900  
31-60 days: 0,0000  
61-90 days: 0,0000  
Over 90 days: 0,0000  
Total Balance: 48,0400

Sales Information

Month-to-date: 0,0000  
Year-to-date: \$10,0000  
Last Year: 0,0000  
Lifetime Sales: \$10,0000

Payment Information

Average days to pay: 0  
Average days to pay(YTD): 0

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### Financial History Page:

Financial History button is placed in left navigation pane. A page is displayed as shown in the following screenshot.

Date	Document No	Type	Job Name	Contact	Total Amount
01/30/2008	1090	Invoice		Terry Adams	408.0100
01/30/2008	1091	Invoice		Terry Adams	146.8900
01/30/2008	87	Customer Payment			500.0000
03/05/2008	88	Customer Payment			100.0000

### Features:

1. **Easy to use:** No cost associated with hiring a consultant to do the integration using this tool.
2. **Cost Efficient:** Avoid duplication of efforts and thereby increase the productivity of the organization.
3. **Extensible:** Can be customized for user specific requirements.

### Contact Inogic:

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