



**InoLink: QuickBooks Integration With Dynamics 365/CRM**

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**Aim:**

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InoLink is an integration tool aimed at syncing data between Dynamics 365/CRM and QuickBooks to provide a 360 degrees view of customer to the sales team.

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**Target Users:**

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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.

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**Features:**

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- ✓ Batch processing through configurable polling times.
- ✓ 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/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 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.
- ✓ Data sync details along with the polling intervals can be easily configured.

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



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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.

The screenshot shows the 'ACCOUNT : INFORMATION' section in Dynamics 365 CRM. The account name is 'Freeman Sporting Goods'. The primary contact is Kirby Freeman. The credit limit is set to '--'. The preferred method of contact is 'Any'. The annual revenue is also set to '--'. The company name is 'Freeman Sporting Goods', the primary contact is 'Kirby Freeman', and the email address is 'Sporting\_goods@intuit.com'. The address is 'Bill To' for 'Freeman Sporting Goods' at '370 Easy St.'. The status is 'Active'.

Field	Value
Primary Contact	Kirby Freeman
Credit Limit	--
Preferred Method of Contact	Any
Annual Revenue	--
Name of Company *	Freeman Sporting Goods
Primary Contact	Kirby Freeman
Account Number	--
Parent Account	--
E-mail	Sporting_goods@intuit.com
Address Type	Bill To
Address Name	Freeman Sporting Goods
Street 1	370 Easy St.
Street 2	--
Status	Active

Product Sync includes bringing over Inventory details like Onhand quantities from QuickBooks to Dynamics 365/CRM.

**Freeman Sporting Goods**  

Freeman Sporting Goods | Freeman Sporting Goods Kirby Freeman 370 Easy S

[Add notes](#)

Transaction List | **Customer Details**

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Customer	Freeman Sporting Goods
Email	<a href="mailto:Sporting_goods@intuit.com">Sporting_goods@intuit.com</a>
Phone	(650) 555-0987
Mobile	(973) 555-8849
Fax	(520) 555-7894

PRODUCT : INFORMATION ▾

## Product: Pump

**General**

ID *	Pump
Name *	Pump
Subject	--
Unit Group *	 Business User (sample)
Default Unit *	Administrative User (sample)
Currency	US Dollar

**Costs**

Default Price List +	CRM Service USA (sample)
Decimals Supported *	2

**Customer Accounting View:**

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

ACCOUNT : INFORMATION ▾

## Freeman Sporting Goods

Primary Contact: Kirby Freeman  
 Preferred Method of Contact: Any  
 Credit Limit: --  
 Annual Revenue: --

**Aging**

Current	\$477.50		
<=30	\$4.00	31 - 60	\$81.00

**QuickBooks Transaction History:**

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

ACCOUNT : INFORMATION ▾

## Freeman Sporting Goods

**Transaction History**

Type	Ref Number	Date ↓	Amount
STATEMENT CHARGE	100	1/13/2017	\$100.00
INVOICE	104	1/6/2017	\$663.00
INVOICE	105	12/2/2016	\$120.00
INVOICE	102	11/22/2016	\$938.40

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**Promote Quotes/ Invoices to QuickBooks:**

You can promote Quotes and Invoices from Dynamics 365/CRM to QuickBooks. This includes the ability to calculate Tax for transactions within Dynamics 365/CRM.

INVOICE ▾

## Invoice For Barnett Design

Total Amount: \$213.00

**Summary**

Invoice ID: INV-01005-V8L6L2  
 Name: Invoice For Barnett Design  
 Currency: US Dollar  
 Price List: CRM Service USA (sample)  
 Prices Locked: No

Product Name	Unit	Price Per Unit	Quantity	Discount	Extended Amc
Light Bulbs		\$2.00	50.000	\$0.00	\$100.00
Sprinkler Pipe		\$4.00	10.000	\$0.00	\$40.00
Fountain Pump		\$15.00	5.000	\$2.00	\$73.00

**SHIPPING DATES**

Date Delivered: 1/16/2017  
 Due Date: 1/16/2017

**SHIPPING INFORMATION**

Shipping Method: Airborne

Detail Amount	\$213.00
(-) Discount (%)	--
(-) Discount	--
Pre-Freight Amount	\$213.00

Invoice

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1		Write-In	Light Bulbs	50	2	100.00	
2		Pump	Fountain Pump	5	15	75.00	✓
3		Line Discount		1	-2	-2.00	
						Subtotal: \$173.00	
5		Sprinkler Pipes	Sprinkler Pipes	10	4	40.00	✓
						Subtotal	\$213.00

Message displayed on invoice: Invoice For Barnett Design

Statement memo:

Discount percent: \$0.00

Shipping: \$0.00

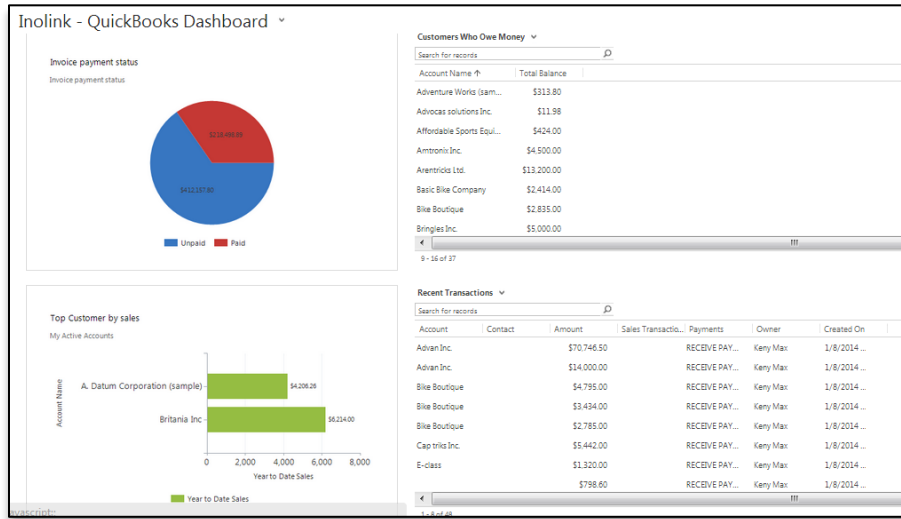
Total: \$213.00

Deposit: \$0.00

Balance due: \$213.00

**Dashboard Support:**

InoLink includes QuickBooks dashboard which include charts like Invoice payment status, Top customers by sales and grids like Customer who owe money and Recent Transactions.



**Contact Us**

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