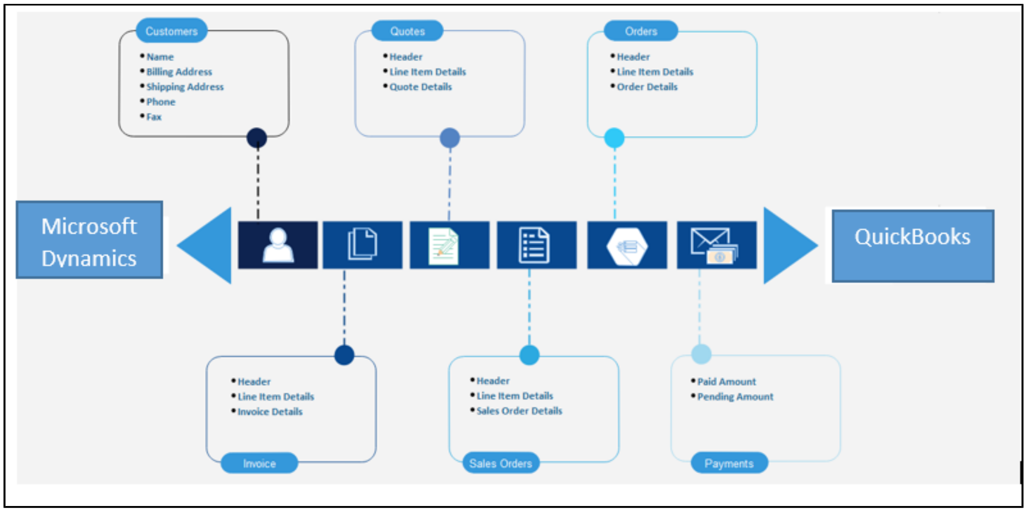
# Microsoft Dynamics CRM - QuickBooks JumpStart Package

## Overview

DBSync for Microsoft Dynamics CRM & QuickBooks Integration is an easy to use application. It integrates Microsoft CRM Accounts, Products, Opportunity, Orders, Invoice with QuickBooks Customers, Items, Job, Sales Order & Invoice.

DBSync provides Bi-directional sync with a pre-built field-to-field mapping along with the flexibility to develop complex and dynamic mappings. DBSync's automatic online update enables its customers to enjoy all the product updates and features that come with every new release.

## Data Flow




### The steps below will allow users to setup DBSync integration between Microsoft CRM and QuickBooks.

### General Steps:

1. Go to **www.mydbsync.com** and click on **Customer Login.**
2. Login to DBSync using the provided Username and Password.
3. Once logged in, users will be able to see the landing page. Click on the **"Development Studio"** button located on the **top right** side of the page.
4. The next page is a working environment for all DBSync Projects, Processes, and Workflows.
5. From the list of **"Projects"**, click on the required project to work with.
6. Once in the Project list, users will be able to see the Processes available under the selected project.
7. Click on the **"Connectors"** from the **Left Menu** and configure the Microsoft CRM connector using your Microsoft Account credentials. Click Save once its Authenticated.
8. Once authenticated, click on the available Process by clicking on the "**Processes**" link in the Left Menu.
9. On the processes page, users will see all the available **"Workflows"** for data integration.

## Workflows:

1. **Accounts to Customer**: This workflow will be unidirectional. It will integrate data from Microsoft CRM to QuickBooks. Microsoft CRM Accounts will be integrated as QuickBooks Customers.
   **Steps:**
   - Switch ON the **Accounts to Customer** workflow. Click on the Edit button placed alongside the workflow.
   - On the Edit screen, the Trigger section allows users to Query data from Source (Microsoft CRM) and the Rule section allows users to configure the mappings for the target System (QuickBooks).
   - Once the mapping is finished, click on Save Workflow located on the Top Right side of the page.

2. **Quote to Estimate:** This workflow will be unidirectional. It integrates data from Microsoft CRM to QuickBooks. Microsoft CRM Quotes

and Quotes Line Items will be integrated as Estimates and Line items in QuickBooks.

   a. This Workflow also allows users to configure Rules to create Customers and Products in the same integration transaction.
      **Steps:**
      - Switch ON the **Quotes to Estimate** workflow and click on the Edit button placed alongside the workflow.
      - On the Edit screen, the Trigger section allows users to Query data from Source (Microsoft CRM) and the Rule section allows users to configure the mappings for the target System (QuickBooks).
      - Once the mapping is finished, click on Save Workflow located on the Top Right side of the page.

3. **Order to Sales Order (QuickBooksD):** This data flow will be unidirectional. It integrates data from Microsoft CRM to QuickBooks. Microsoft CRM Orders and Order Line items will be integrated as Sales Order and Sales Order Line Items in QuickBooks.

   a. This Workflow also allows users to configure Rules to create Customers and Products in the same integration transaction.
      **Steps:**
      - Switch ON the **Order to Sales Order** workflow and click on the Edit button placed alongside the workflow.
      - On the Edit screen, the Trigger section allows users to Query data from Source (Microsoft CRM) and the Rule section allows users to configure the mappings for the target System (QuickBooks).
      - Click on SAVE WORKFLOW located on the TOP RIGHT side of the page, once the mappings are finished.

4. **Microsoft CRM Invoice to QuickBooks Invoice:** This workflow will be unidirectional. It integrates data from Microsoft CRM to QuickBooks. Microsoft CRM Invoice and Invoice Line items will be integrated as Invoice and Invoice Line Items in QuickBooks.

   a. This Workflow also allows users to configure Rules to create Customers and Products in the same integration transaction.
      **Steps:**
      - Switch ON the **Microsoft CRM Invoice to QuickBooks Invoice** workflow and click on the Edit button placed alongside the workflow.
      - On the Edit screen, the Trigger section will allow users to Query data from Source (Microsoft CRM) and the Rule section allows users to configure the mappings for the target System (QuickBooks).
      - Once the mapping is finished, click on Save Workflow located on the Top Right side of the page.

5. **QuickBooks Payments to Microsoft CRM Invoice:** This workflow will be unidirectional. It integrates data from QuickBooks to Microsoft CRM. QuickBooks Payments applied against the Invoice will be integrated as Microsoft CRM Invoices/ Invoice Payments.

   a. This Workflow also allows users to configure Rules to create Customers and Products in the same integration transaction.
      **Steps:**
      - Switch ON the **QuickBooks Payments to Microsoft CRM Invoice** workflow and click on the Edit button placed alongside the workflow.
      - On the Edit screen, the Trigger section will allow users to Query data from Source (Microsoft CRM) and the Rule section allows users to configure the mappings for the target System (QuickBooks).
      - Once the mapping is finished, click on Save Workflow located on the Top Right side of the page.

6. **QuickBooks Items to Microsoft CRM Products (Types = Inventory, Service, Non-Inventory):** This workflow will be unidirectional. It integrates data from QuickBooks to Microsoft CRM. QuickBooks Items will be integrated as Microsoft CRM Products as a flat structure.

   **Steps:**
   - Switch ON the **QuickBooks Items to Microsoft CRM Products** workflow process and click on the Edit button placed alongside the workflow.
   - On the Edit screen, the Trigger section will allow users to Query data from Source (Microsoft CRM) and the Rule section allows users to configure the mappings for the target System (QuickBooks).
   - Once the mapping is finished, click on Save Workflow located on the Top Right side of the page.

## Running the Sync

- **QuickBooks Online:** Integration can be initiated using a **“RUN NOW”** button located alongside each workflow in DBSync or can be scheduled in DBSync Scheduler.
- **QuickBooks Desktop:** Integration can be initiated or scheduled using QuickBooks Web connector.