

Microsoft Dynamics 365/CRM Online to QuickBooks Online Integration v2

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Overview

DBSync for Microsoft Dynamics 365/CRM Online & QuickBooks Online Integration is an easy to use application. It seamlessly integrates Microsoft Dynamics 365/CRM Accounts, Contacts, Products, Invoice and line items with QuickBooks Customers, Items, Invoice and line items. DBSync is also useful in migrating historical QuickBooks data into Microsoft Dynamics 365/CRM Online or vice versa. DBSync provides Bi-directional sync with a pre-built field-to-field mapping along with flexibility for more complex and dynamic mapping capability. DBSync's automatic online updates enable its customers to enjoy all the product updates and features that come with every new release. The Microsoft Dynamics 365/CRM Online to QuickBooks Online connector uses the OAuth protocol - making it highly secure and easy to use.

Data Flow

Data flow of Bi-directional integration between Microsoft Dynamics 365/CRM Online & QuickBooks Online is shown in the below table.

MSCRM Online		QuickBooks Online
Accounts/Contacts		Customer
Invoice and Line Items		Invoice and Invoice Line Items
Products		Items

Permissions

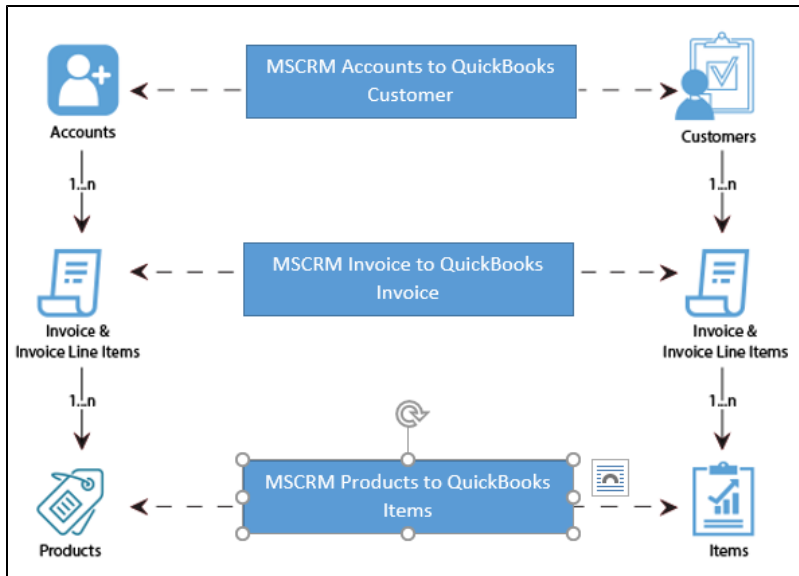
The following are the list of permission required for a user to connect with DBSync Application:

- Active user license for all the apps that would need integration such as Sales, Customer Service etc.
- The user has to be an Admin of their D365 Instance or a Global Admin with D365 license
- The user should have full read/write permissions to access the entities that will be connected to DBSync for integration

Process Map

Process Map of Bi-directional integration between Microsoft Dynamics 365/CRM Online & QuickBooks Online is shown in the image below:

Data flow between MSCRM and QuickBooks Online



Pre-requisite for integration

- Integration from Microsoft Dynamics 365/CRM to QuickBooks Invoice is invoked if the Generate object field in Microsoft Dynamics 365/CRM Invoice is selected as Invoice.
- It is mandatory that Microsoft Dynamics 365/CRM Invoice (to be integrated with QuickBooks Invoice) is associated with the respective Microsoft Dynamics 365/CRM Account. In addition to that, it should also have Products with Price List attached to it for DBSync to invoke integration.

Microsoft Dynamics 365/CRM Setup

Microsoft Dynamics 365/CRM -QuickBooks solution package can be downloaded from the **Microsoft Azure App source**. [Click here](#) to access the solution package to try it on the Microsoft App source platform.

Alternatively, for the Unmanaged installations, kindly follow the steps listed below for setting up Microsoft Dynamics 365/CRM & QuickBooks Integration through iPaaS:

- Download the DBSync **Microsoft Dynamics 365/CRM -QuickBooks** solution package from the following URL - https://dbsync-template-library.s3.amazonaws.com/DBMSQB_3_0.zip.
- The downloaded solution packages will be in a **.ZIP** format.
- Upload the zipped "**DBMSQB_X.zip**" solution package to your Microsoft Dynamics 365/CRM Online instance by clicking on **Settings > Customizations > Solutions > Import**.
- Browse for the location on your hard drive where "**DBMSQB_X.zip**" was downloaded and click on **Next**.
- Once the Solution Packages are uploaded to your Microsoft Dynamics 365/CRM Online instance, you should be able to see the same in the Solutions list as shown below. Click on **Publish All Customizations** button to commit all the changes done to your Microsoft Dynamics 365/CRM instance.
- After successfully importing the solution packages, you will find a section called "**DBSync**" within Account, Contact, Opportunity, Invoice and Order objects along with the custom fields that are essential for the Integration process.

Note:

Out-of-the box DBSync supports Products/Items in a flat, not hierarchical, structure. This is so because, Products in Microsoft Dynamics 365/CRM do not support a Hierarchical structure. Please look at our Knowledge base for steps in handling hierarchies in Items from QuickBooks.

DBSync Setup

- Login into www.mydbsync.com and click on **Customer Login**.
- Enter your DBSync **User Name** and **Password** and click on Login.
- Once logged in, click on "**My home**" tab from the menu. Then, click on the **Launch** button.
- Click on the Project **MSCRM Online to QuickBooks**. Then, click on the **Connectors** button on the left panel.
- You will see connectors **MSCRM & QuickBooks**.
- Click on Microsoft Dynamics 365/CRM Connector. Then, enter your Microsoft Dynamics 365/CRM **global administrator username** and **password**. Make sure you modify the "**MSCRM Soap URL**" according to the domain name provided to you by Microsoft at the time of registration for Microsoft Dynamics 365/CRM Online application. A sample example is shown. Microsoft Dynamics 365/CRM Soap URL : **https:// (https://**) <<server_name> /**
- In the above example, your server_name should be prefixed in place of the default value.
- Scroll down to the bottom of the section and click on the **Validate Connection** button to validate your Microsoft Dynamics

365/CRM credentials & click on **Save**.

9. If you are using it for the first time, click on the **Activate button**. A screen will appear. Enter your global **administrator username**, and accept the terms and conditions. You can now connect to your MS online account and see all your schemas.

QuickBooks Online Setup:

1. Login into www.mydbsync.com. Click on **My Account**. And then, click on **Customer Login**.
2. Enter your DBSync **User Name** and **Password** and click on Login.
3. Click on the **Development Studio**.
4. Click on the Project MSCRM Online to QuickBooks Online. Then, click on the **Connectors** button on the left panel.
5. You will see connectors MSCRM & QuickBooks Online.
6. In the Quick Setup tab, set the Environment as **Production/Developer Instance**. Then, click on **Connect To QuickBooks**.
7. Enter QuickBooks **User ID, Password** and click **Sign In**.
8. Once signed in, the page will be redirected to the DBSync Connector page.
9. This completes the configuration of your DBSync profile with Microsoft Dynamics 365/CRM Online instance and QuickBooks online.

Profile Setup

Microsoft Dynamics 365/CRM

Configuration	Instructions
Username	<<Username>>
Password	<<Password>>
MSCRM Port URL	https:// (https://**)<<server_name>>/