

Microsoft Dynamics 365/CRM On-Premise to QuickBooks Online Integration v2

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Overview

DBSync for Microsoft Dynamics 365/CRM On-Premise & QuickBooks Online Integration is easy to use application. It integrates Microsoft Dynamics 365/CRM Accounts, Products, Invoice with QuickBooks Customers, Items, Job & Invoice. DBSync is also useful in migrating historical QuickBooks data into Microsoft Dynamics 365/CRM On-Premise 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 update enables its customers to enjoy all the product updates and features that come with every new release.

Data Flow

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

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

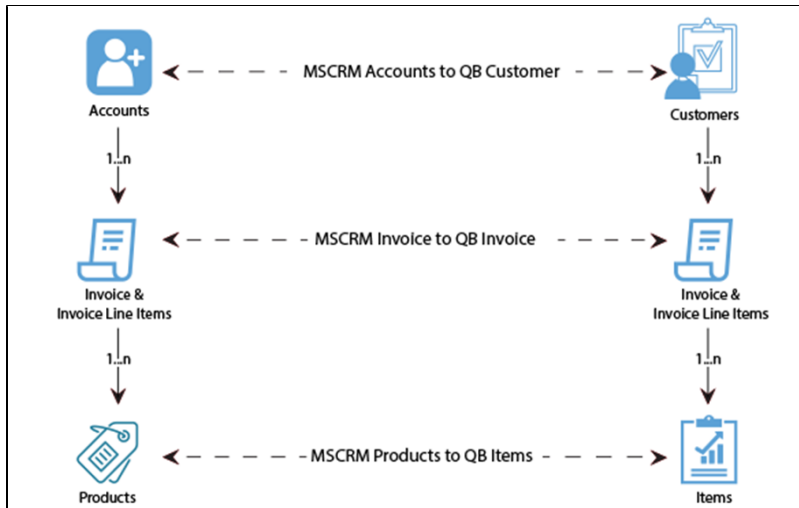
Permissions

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 On-Premise & QuickBooks Online is shown in the image below:



Pre-requisite for integration

- Integration from Microsoft Dynamics 365/CRM On-Premise to QuickBooks Online Invoice is invoked if the Generate field in Microsoft Dynamics 365/CRM On-Premise Invoice is selected as Invoice.
- It is mandatory that Microsoft Dynamics 365/CRM On-Premise Invoice (to be integrated with QuickBooks Online 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 On-Premise Setup

- Download the DBSync **Microsoft Dynamics 365/CRM -QuickBooks** solution package from the following URL - https://dbsync-template-library.s3.amazonaws.com/DBMSQuickBooks_3_0.zip.
- The downloaded solution packages will be in a **.ZIP** format.
- Upload solution package to your Microsoft Dynamics 365/CRM On-Premise instance by clicking **Settings > Customizations > Solutions > Import**.
- Once the Solution Packages are uploaded to your Microsoft Dynamics 365/CRM On-Premise 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 the successfully importing the solution packages, you will find a section called **"DBSync"** within Account, Contact, Opportunity, Invoice and Order objects with the custom fields that are essential for the Integration process.
- The Price List Item will include the List Price defined on the Product. If you only have one Price List in your system, the Price List Item will be linked to that Price List. If you have multiple Price Lists, the first Price List created in your system will be used.

Note:

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

Configure Microsoft Dynamics 365/CRM On-Premise for DBSync Integration

- Microsoft .NET Framework 4.5 should be installed. The following link can be referred for installation.
<http://www.microsoft.com/en-us/download/details.aspx?id=30653>.
- Windows Service Proxy for Microsoft Dynamics 365/CRM should be installed & the steps are available in the link below:
<http://help.mydbsync.com/docs/display/dbsync/MS+CRM+Service+Proxy>.

DBSync Setup

- Login into www.mydbsync.com and click on **Customer Login**.
- It is necessary to use the on-premise version of DBSync for the integration of Microsoft Dynamics 365/CRM On-Premise with QuickBooks. The link below can be referred to install an on-premise version of DBSync - <http://help.mydbsync.com/docs/display/dbsync/DBSync+On-Premise+Installation>. Enter your DBSync global **administrator username** 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 **Microsoft Dynamics 365/CRM Online to QuickBooks**. Then, click on the **Connectors** button on the left panel.
- You will see connectors **Microsoft Dynamics 365/CRM & QuickBooks**.

6. Click on MSCRM Connector. Enter your Microsoft Dynamics 365/CRM **global administrator username** and **password**. Scroll down to the bottom of the section and click on **Validate Connection** button to validate your Microsoft Dynamics 365/CRM credentials & click on **Save**.

QuickBooks Online Setup:

1. Login into www.mydbsync.com and click on **My Account** then click **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** and click **Connect To QuickBooks**.
7. Enter QuickBooks **User ID, Password** and click **Sign In**.
8. Once signed in, the page will be redirected to DBSync Connector page.
9. This completes the configuration of your DBSync profile with Microsoft Dynamics 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>>/