Microsoft Dynamics 365/CRM Online to QuickBooks Desktop Integration v2

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Overview

DBSync for Microsoft Dynamics 365/CRM Online & QuickBooks Desktop Integration is easy to use the application. It integrates Microsoft Dynamics 365/CRM Accounts, Products, Opportunity, Sales Order, Invoice with QuickBooks Customers, Items, Job, Sales Order & Invoice. 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 update enables its customers to enjoy all the product updates and features that come with every new release. The MS Dynamics CRM Online to QuickBooks Desktop 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 Desktop is shown in the table below.

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

Permissions

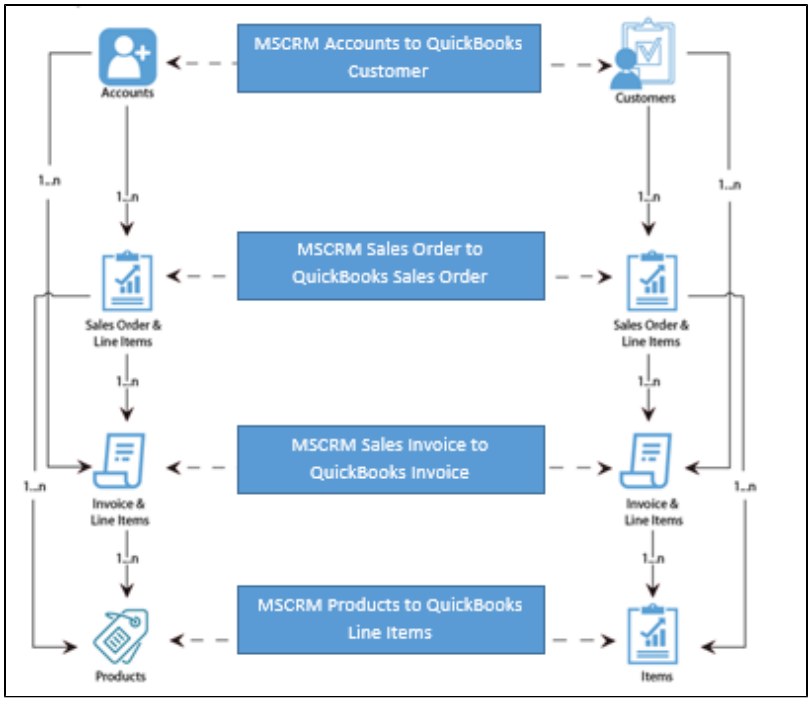
The following are the list of permission required for a user to connect with DBSync Application:

- 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 Desktop is shown in the image below.

Data Flow between MSCRM and QuickBooks Desktop



Pre-requisite for integration

- Integration from Microsoft Dynamics 365/CRM to QuickBooks Invoice/Sales Order is invoked if the Generate object field in Microsoft Dynamics 365/CRM Invoice/Sales Order is selected as Invoice/Sales Order respectively.
- It is mandatory that Microsoft Dynamics 365/CRM Invoice/Sales Order (to be integrated with QuickBooks Invoice/Sales Order) is associated with the respective Microsoft Dynamics 365/CRM Account. It must 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 **Microsoft Azure Appsource.** Click here to access the solution package to try it on Microsoft Appsource platform.

1. Go to the **Microsoft Appsource** and login with Username and Password to install the **DBSync App** for QuickBooks and Microsoft Dynamics 365/CRM Integration.
2. After the login, type in DBSync **QuickBooks and Microsoft Dynamics 365/CRM Integration app** in the **search box tab** and press enter.
3. On the same page, you will find the **QuickBooks and Microsoft Dynamics 365/CRM integration app**.
4. Click on the box named QuickBooks and Microsoft Dynamics 365/CRM Integration. Here, you will find a **free trial option and save later button.**
5. Once you click on the **free trial button,** it will redirect you to the DBSync page of **QuickBooks and Microsoft Dynamics 365/CRM Integration.**
6. **You will see the Overview and review details of QuickBooks and Microsoft Dynamics 365/CRM integration app.**
7. On the right side, you will see the **data flow diagrams** and **webinars** for product knowledge.
8. Click on the **free trial button and accept the terms and conditions** to start with the **Installation app** of QuickBooks and Microsoft Dynamics 365/CRM Integration.
9. After successful installation, click on **"https://login.microsoftonline.com/" and then on Dynamics 365** to go to the apps page.
10. Click on the app. This will redirect you to the launch page to run the application. After clicking on the **launch button**, you will be redirected to the Dynamics 365 connector page.
11. Follow the **DBSync setup** details below to run the application.

DBSync Setup

1. Login into www.mydbsync.com and click on ***Customer Login***.
2. Enter your DBSync ***User Name*** and ***Password*** and click on Login.
3. Once logged in, click on the **"My Home"** tab from the menu. Then, click on the ***Launch*** button.
4. Click on the Project **MSCRM Online to QuickBooks.** Then, click on the **Connectors** button on the left panel.
5. You will see connectors for **MSCRM** & **QuickBooks**.
6. Click on Microsoft Dynamics 365/CRM Connector. Enter your Microsoft Dynamics 365/CRM ***global administrator Username*** and ***Pass***

word. 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. For example, Microsoft Dynamics 365/CRM Soap URL : **https:// (https://**)<<server_name>/.**

7. In the above example, your server_name should be prefixed in place of the default value.
8. Scroll down to the bottom of the section and click on the ***Validate Connection*** button to validate your Microsoft Dynamics 365/CRM credentials & click **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.

QuickBooks Desktop Setup:

1. Login into www.mydbsync.com. Click on ***Customer Login***.
2. Enter your DBSync ***User Name*** and ***Password*** and click on Login.
3. Once logged in, click on the **"My Home"** tab from the menu and click on the ***Launch*** button.
4. Click on the Project **MSCRM Online to QuickBooks.** Then, click on the **Connectors** button on the left panel.
5. You will see connectors **MSCRM** & **QuickBooks**.
6. Click on ***QuickBooks*** connector. Enter the full path to your QuickBooks file on your desktop into **QuickBooks File**. Select the appropriate **QuickBooks Version** and enter the required **Process Name**. Click **Save**.
7. **Note:** QuickBooks must be accessed as an Admin and should be in single-user mode. You can retrieve the full path/location of your QuickBooks file by pressing '**F2**' key on your keyboard on the QuickBooks 'Home' page.
8. Click on **Download Web Connector** to download the .qwc file. Open this downloaded file with QuickBooks Web Connector.
9. Click OK on the Authorization screen.
10. Select the option '*Yes, always; allow access even if QuickBooks is not running*' and click continue.
11. Click **Done** to confirm Access.
12. Web connector will be launched with the selected integration Project. Select the integration Project and enter the DBSync password and finally click on "**Update Selected**" to run the integration.
13. **Note:** Any changes performed in the mapping window will change the Project file and very likely will affect the data flow and integration as well.
14. This completes the configuration of your DBSync profile with your Microsoft Dynamics 365/CRM Online instance and QuickBooks desktop.

Profile Setup

Microsoft Dynamics 365/CRM

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