

SIMPLIFY SALESFORCE AND QUICKBOOKS INTEGRATION: Salesforce.com to GreatPlains Bidirectional

Requirements:

Salesforce Adapter
GreatPlains Adapter

Provider:

DBSync

Provide synchronization between Microsoft Dynamics GreatPlains to Salesforce. Data Integration from GreatPlains to Salesforce is performed using DBSync where it is defined as a process under a profile.

Salesforce

- Accounts and Contacts as
- Products as
- Opportunity as

GreatPlains

Customer
Items
Receivables Transactions ,
SOP Transactions

KEY BENEFITS

- Seamless transfer.
- Ability to implement automated workflows
- Reduced turn-around time.

Use case

- DBSync for Salesforce.com & GreatPlains provides an easy to use application to synchronize Accounts, Contacts, Products and Opportunities to GreatPlains Customer, Products and Transactions .
- The application provides a pre-built field map along with a flexible advance mapping capability and configuration capability. The application also has an automatic online update so you never have to manually upgrade your application.

Process Map

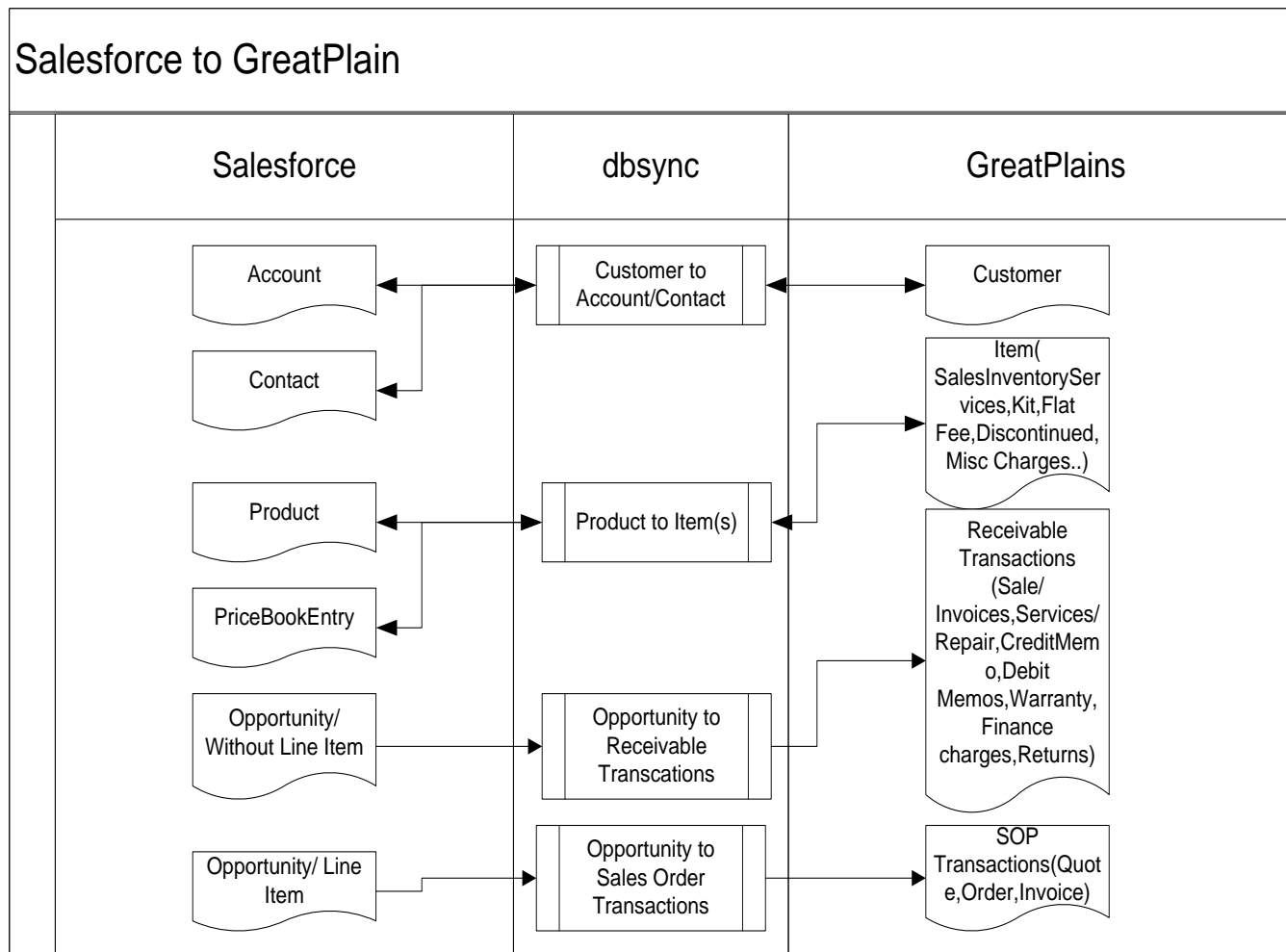
Salesforce to GreatPlains.

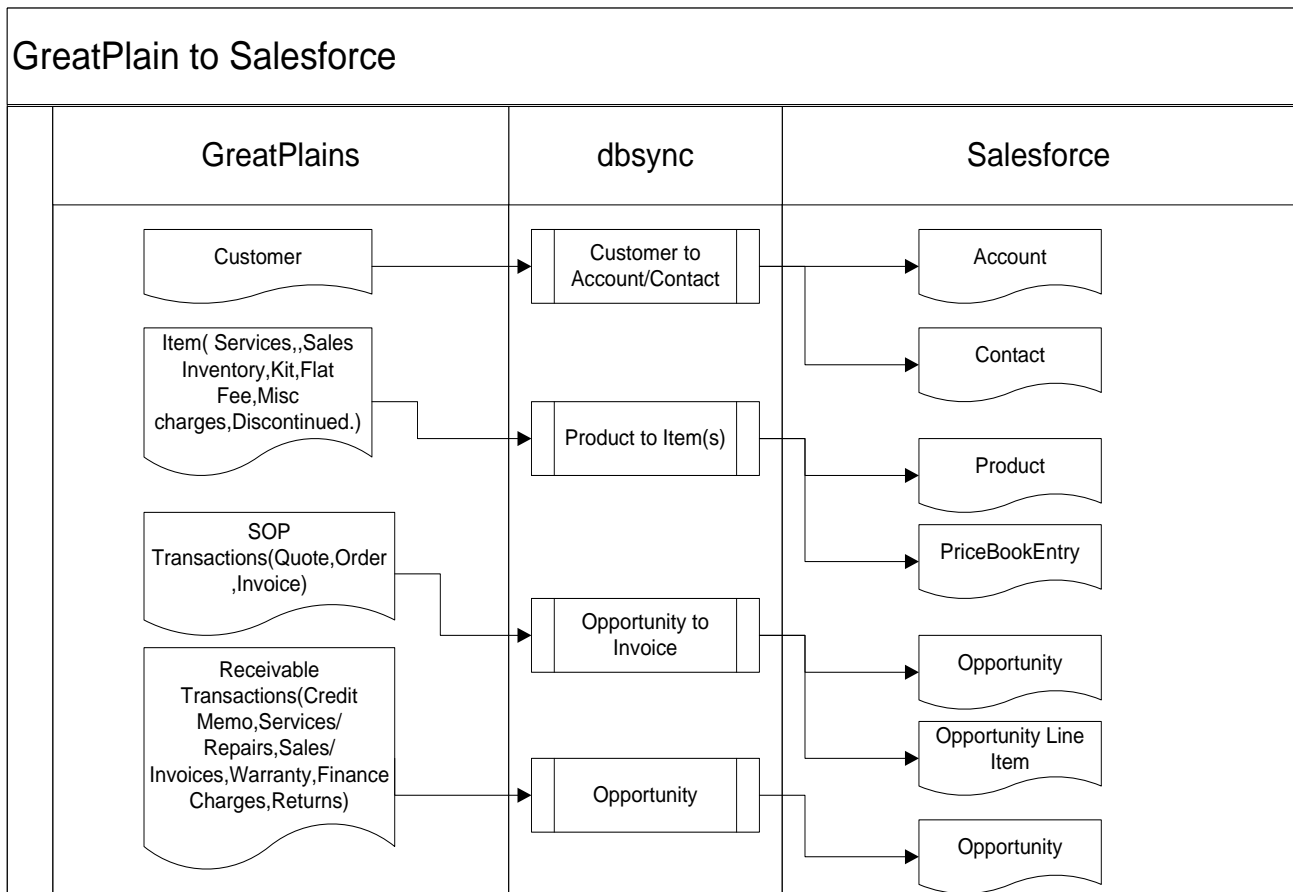
Salesforce	GreatPlains
Account	Customer
Opportunity(Without Opportunity Line Item)	Receivable Transactions(Sales/Invoices, services/Repairs, CreditMemo)
Opportunity/Opportunity Line Item	SOP Transactions(Quote/Order/Invoice)
Product/PriceBook	Sales Inventory/ Services/Discontinued/Kit/Flat Fee/Disc Charges

GreatPlains to Salesforce

GreatPlains	Salesforce.com
Customer	Accounts
Customer	Contacts
SalesInventory	Products
Services	Products
Flat Fee	Products
Discontinued	Products
Kit	Products
Misc Charges	Products
Receivable Transaction(Without Line Item)	Opportunity
SOP Transactions(With Line Item)	Opportunity/LinItem

Business Process Flow

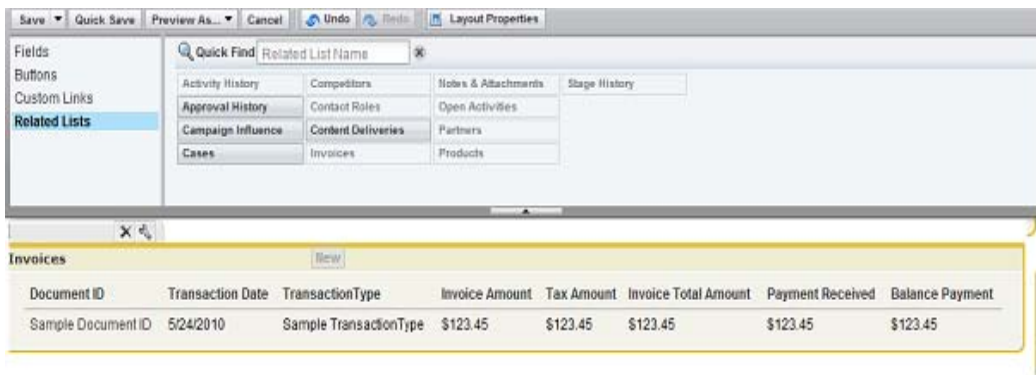




Installation

Salesforce

1. Get the following App from AppExchange .
<https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t9000000094vw&crc=1>
2. It asks for username and password of the Salesforce.com instance where you would like to install DBSync GreatPlains Integration. The username and password should have the administrative privileges to install.
3. Next you should see the contents of the package in your Salesforce.com instance. Click on Next and then click on Install and then Click on **“Deploy Now”** button.
4. Go to setup → Build → **‘Custom Objects’** menu to see whether **“Invoice”** object has **“deployed”** status. If not, click edit adjacent Invoice object, check on **“Deployed”**, and Save.
5. Go to setup → Customize → **Account** → **‘Page Layout’** menu to add the **“GPCustomerID”** field on the page layout. Save the Account ‘page layout.’
- 6.
7. Go to setup → Customize → **Contact** → **‘Page Layout’** menu to add the **“GPContactID”**, **“UniqueContactID”** field on the page layout. Save the Contact ‘page layout.’
8. Go to setup → Customize → **Opportunity** → **‘Page Layout’** menu to move **“DOC ID”**, **“Doc Number”**, **“GPTransaction”**, **“ GPTransactionID”**, **“ TransactionType”**, **“ Primary Contact”** on the Page Layout.
9. Move **Invoices** from the **Opportunity Related List** to the page layout. Go to setup → Customize → **Opportunity** → **‘Page Layout’** .Click on Invoices in the Related List Section and hit **“edit properties”** button. Select columns as Invoices, Invoice number, Total Invoice Amount, Payments, Balance, Days Outstanding, and Transaction Date. See the picture below for the column sequence:



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Save the opportunity 'page layout'.

10. Go to Setup → Customize → **Product** → '**Page Layout**' to move 'GPProductID, 'Location Code, 'Product Type' and 'Unit Of Measurement', 'PriceLevel', 'Class ID' and 'Currency ID' field to the Product layout.

At this point, you have successfully completed your Salesforce.com instance setup.

GreatPlains Setup

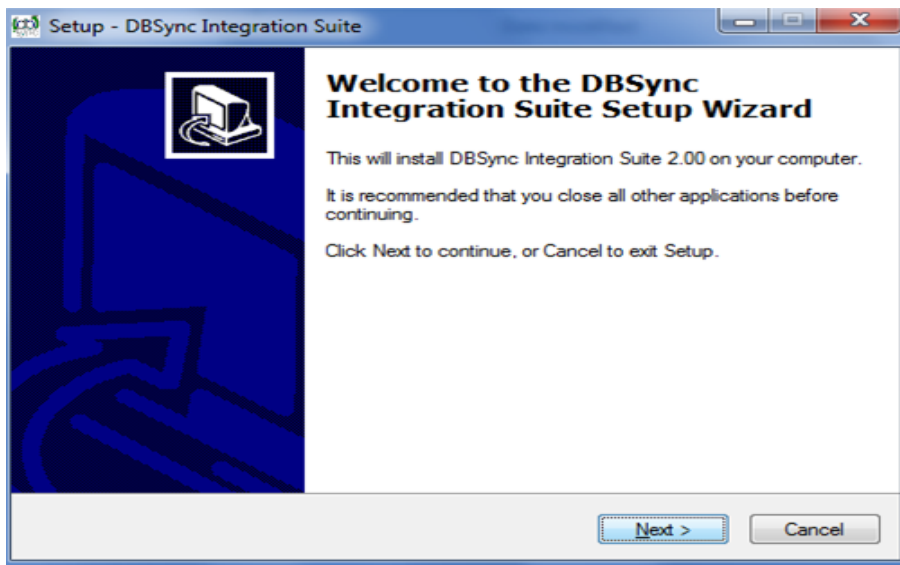
1. Install and setup Microsoft Dynamics GP 10.0
2. Install and setup SQL Server Management Studio.
3. Install and setup eConnect SDK.

DbSync Installation and Setup

1. Download the DBSync exe file from the link of your email from DBSync Team and Install it.

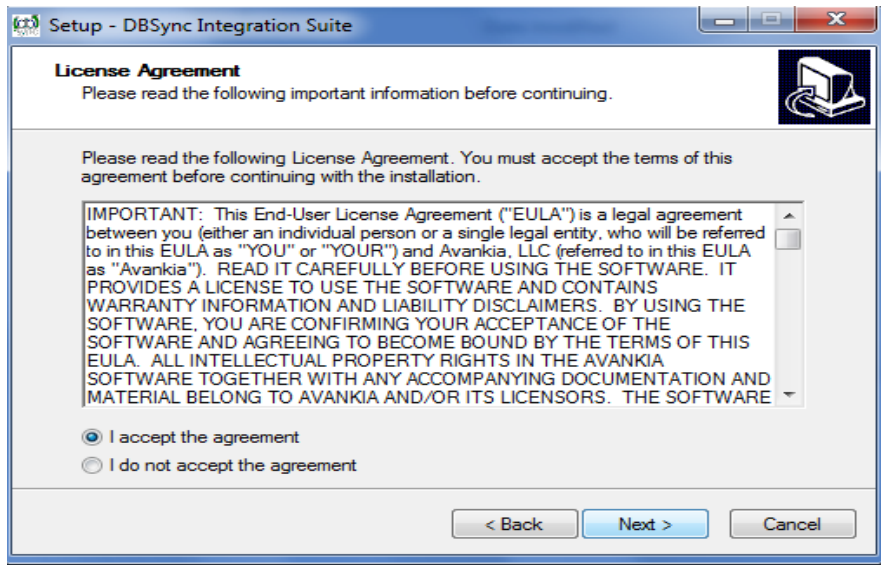
Installation steps:

a.Run the Setup wizard

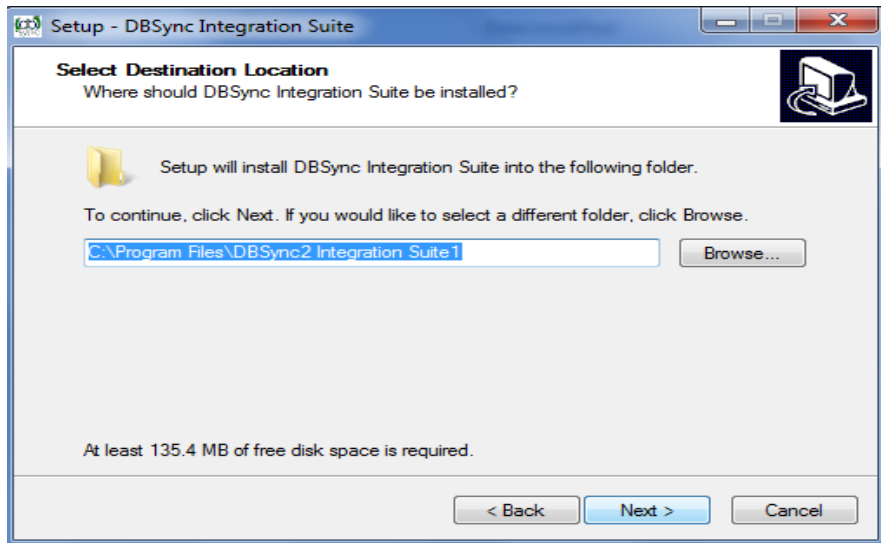


b.Click on Next and select I accept the agreement.

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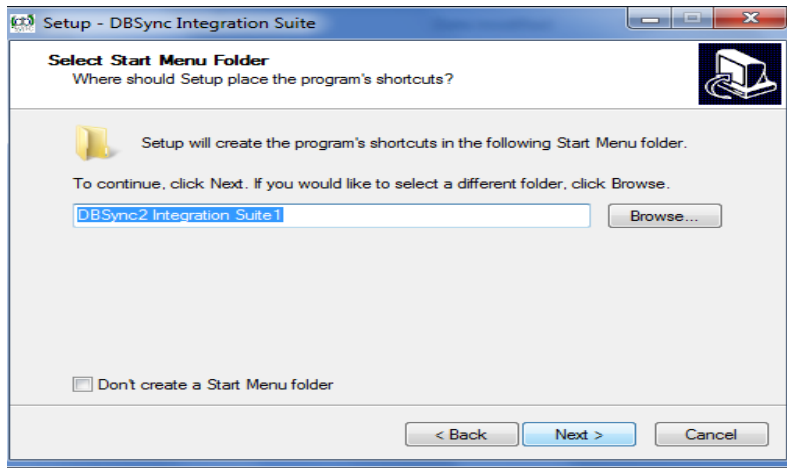


c. Click on Next and Enter Destination Location.

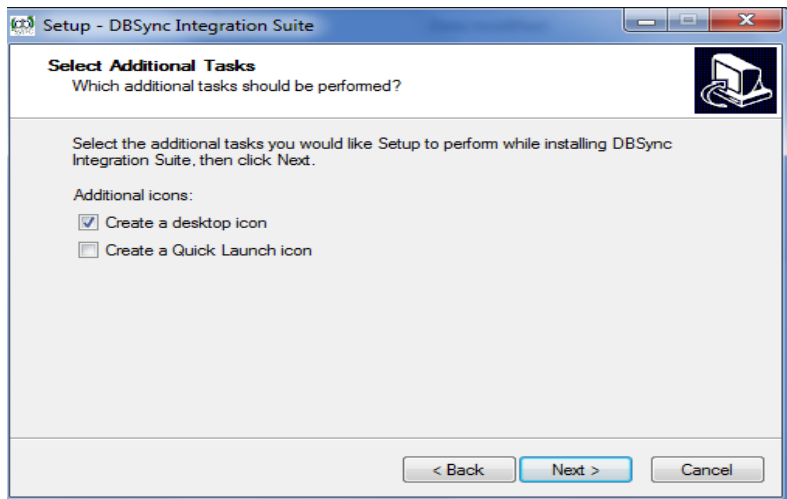


d. Select Start menu Folder.

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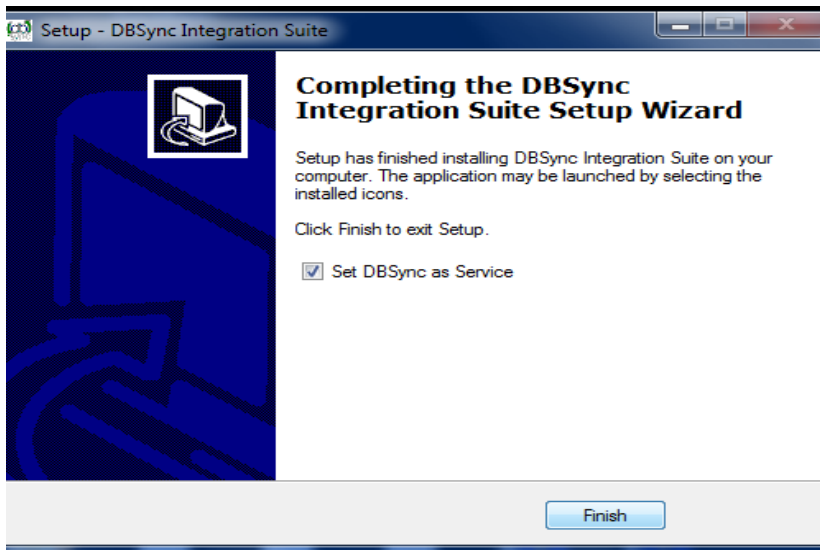
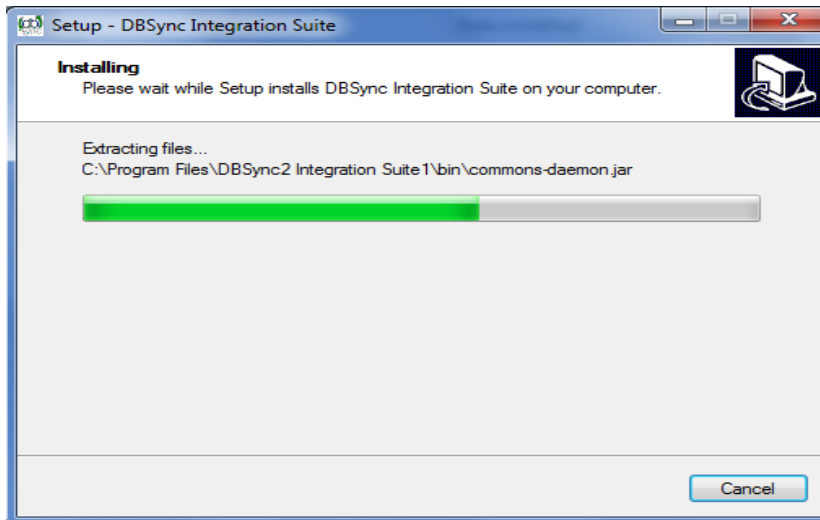
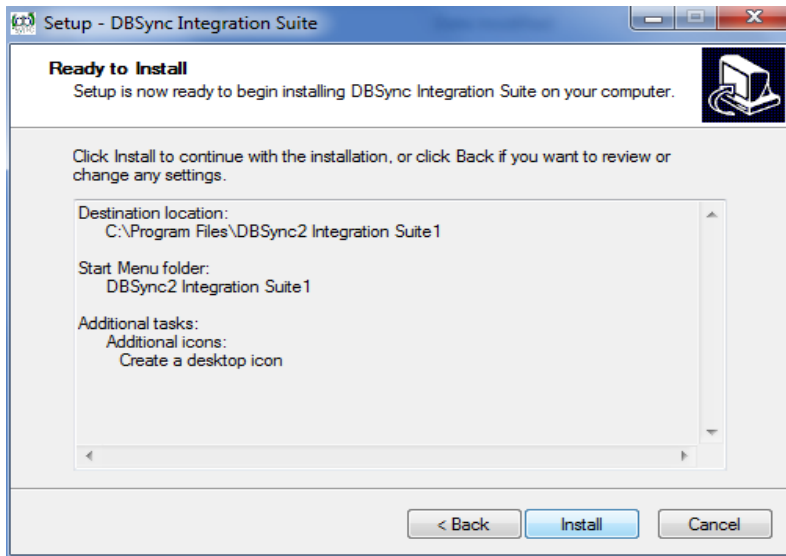


e. Set Additional task.



f. Click on Install.

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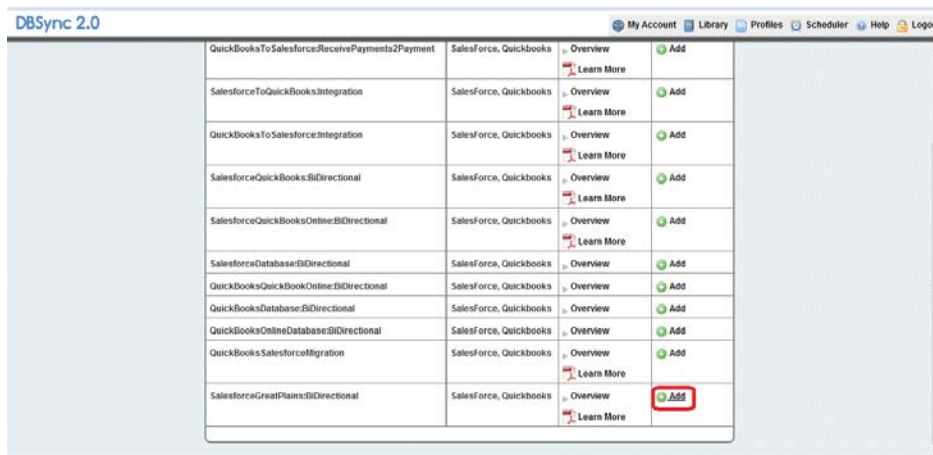


Click on Finish

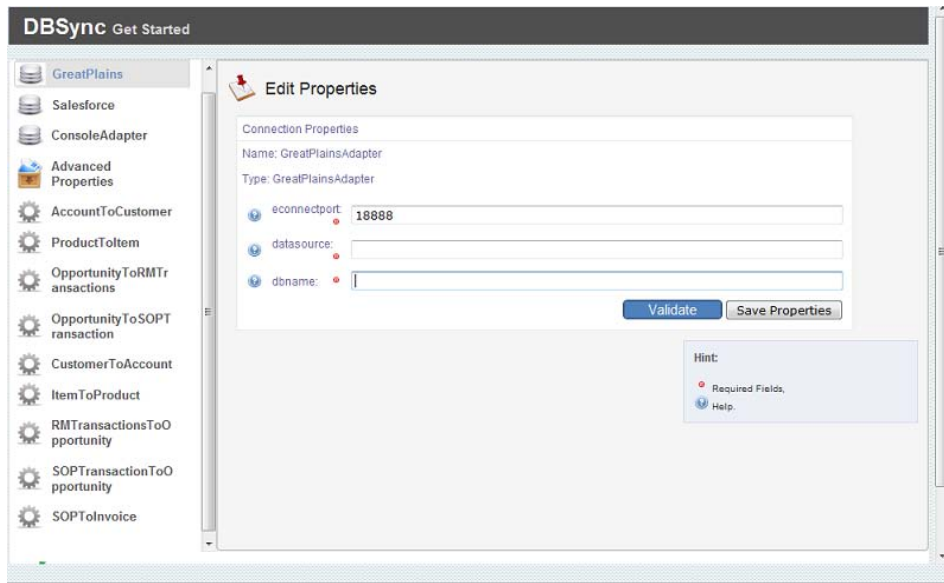
At this point, you have successfully completed your Dbsync Installation on your Desktop. If you have selected the option 'Set DBSync as Service', then DBSync would be running as a Windows Service in the background. If you have not opted to select this, then you can start DBSync from your Start Up → Program Files → DBSync Integration Suite.

Dbsync Configuration

1. Login into dbsync by following the <http://localhost:8080/dbsync2/login.m> in your internet browser. You can provide the username and password which is been provided to you.
2. Go to Library Section and add the template SalesforceGreatPlains:BiDirectional.



3. Enter eConnectport (Default: 18888), Datasource, Dbname and click on save properties.



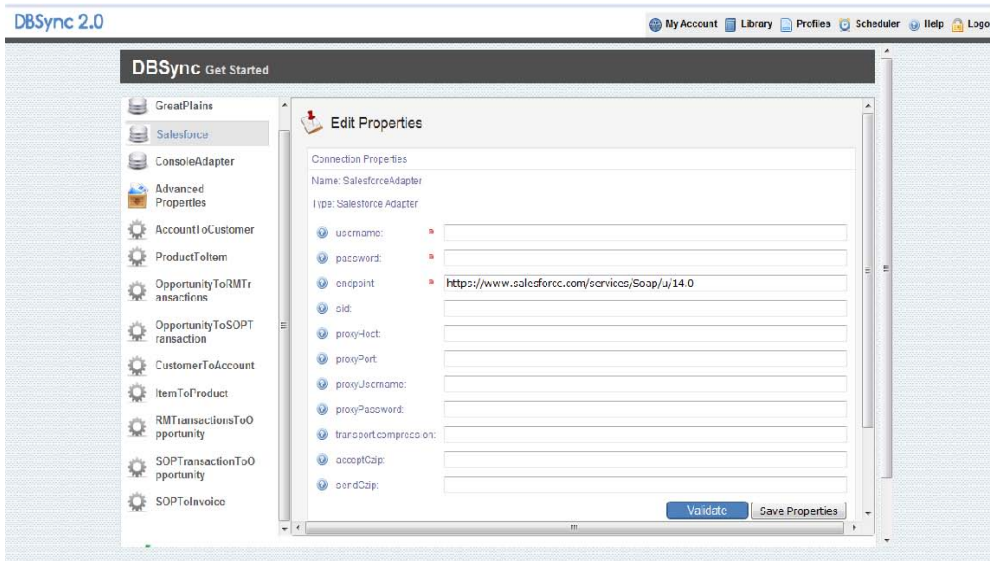
Examples:

Datasource : DESKTOPUSERNAME\MSSQLSERVER2008

Dbname : <<Your GreatPlains Company Database name. >>

3. Click on Validate to check whether the connection properties are valid or not.

4. Click on Continue and Enter Username and password. Make sure you enter your Salesforce Security Token at the end of the password.



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5. Click on save properties .After this click on validate to check wether the connection properties are valid or not.

DBSync LLC

750 Old Hickory Blvd.
Bldg 2, Suite 150
Brentwood TN 37027
U.S.A

Email

sales@avankia.com

Phone/Fax

1-877-739-2818

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