mConnect Integration Tool for Integrating Connectwise with Dynamics GP



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Are you running Connectwise and Dynamics GP but struggling with how to get the two systems to work together without a lot of manual entry? Did you know that mConnect, formerly known as DynamicsConnect, enables real-time two-way customizable integrations between your Connectwise system and Dynamics GP? In today's blog post we are going to cover a few of our most popular integrations between Connectwise and Dynamics GP.

CUSTOMERS/VENDORS: Most of our mConnect customers are integrating customers and vendors from Connectwise into Dynamics GP. The integration is setup to pull over any new customers and/or vendors as well as any changes that are made to an existing customer or vendor in Connectwise. For example, if you had a customer add a new phone number or address you would enter that information into Connectwise and the integration would automatically take that new address and phone number and update Dynamics GP. The integration is fully customizable so you can decide what types of customers and vendors you want to integrate into Dynamics GP, how often you want it to integrate as well as what fields you want to update. For example, maybe you don't want prospects coming into Dynamics GP or maybe you want customers that are marked on hold in Connectwise to also be marked on hold in Dynamics GP, any of this is easy to do using the mConnect integration.

SALES INVOICES: Our sales invoice integration is also very popular with our customers. We offer you the option of bringing in sales invoices from Connectwise into Dynamics GP as a Receivables Transaction (Transaction Entry) or as a Sales Invoice (Sales Transaction Entry). We also eliminate the need for any type of batch processing in Connectwise. Our integration has been used to bring in deferral invoices into GP as well as credit memo's and returns. Once we import an invoice into GP we then have the ability to write back to CW so that if you can easily see that the invoice successfully integrated without having to check both systems. Again because this is a customizable integration you can customize it to fit your company's needs.

PURCHASE ORDERS/PURCHASE RECEIPTS: You can integrate purchase orders and receipts into Dynamics GP as well. We have even customized integrations for customers to allow them to not only enter the purchase order and the purchase receipt but to also create the vendor invoice in GP using the integration. This process alleviates a lot of manual entry for our customers.

EXPENSE REPORTS: Like sales invoices, you have options on where you want your employee expense reports to come into Dynamics GP. Some customers have them come over as a journal entry and others have them come in as a purchase receipt so they can create a payable transaction in GP.

INVENTORY TRANSACTIONS: We have the ability to import inventory transactions into Dynamics GP from Connectwise as well. We have some customers who keep inventory in both systems and need to make sure that both systems are in sync. Our integration allows them to put inventory receipts, shipments, transfers, picks, etc in both systems. This integration is able to work with serialized items as well as non-serialized items.

CASH RECEIPTS: As an invoice is paid in full inside of Dynamics GP we can then write back that information into Connectwise to show that the invoice is paid in full. This eliminates the need to constantly check both systems to see if an invoice is paid in full.

With mConnect, our goal is to make your life easier by creating integrations that you can customize to fit your company's needs. If you would like additional information about mConnect please contact Massey Consulting at 877-875-3577.