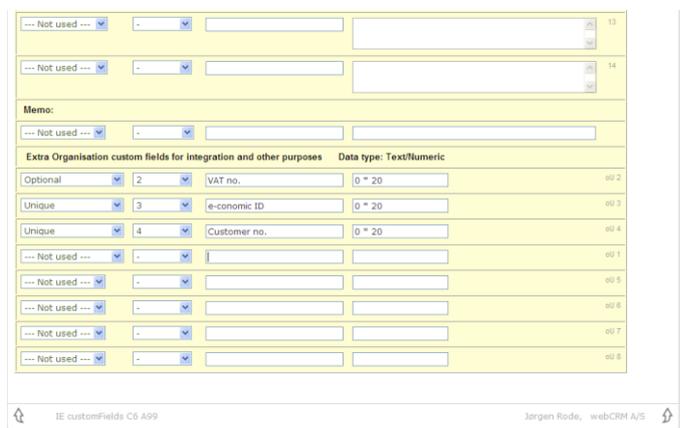## ERP INTEGRATION - e-conomic
Version 3.0 December 2010

The purpose of the ERP integration module is to enable organisations in webCRM to be integrated with debtors in e-conomic.

Note: ERP-integration is also available for the so-called "person-version" (B2C). In this case the person name is used as debtor name – in addition a contact person is created using the same name.

Installation

1) You must activate the e-conomic API module. You do this from your e-conomic system by choosing the menu for Subscription/additional modules (in Danish: Tillægsmoduler) and act-vate the API module.

2) In the webCRM configuration menu select "Custom fields" and click "organisations" or what you may have renamed organisations to. Select any one of the top 4 Extra Organisation Custom fields (in the bottom of the screen), name it e-conomic ID or whatever you prefer, choose field type as "unique" and click OK.

This field is used to hold the unique debtor number from e-conomic for each debtor. In that way e-conomic and webCRM have a mutual reference to all debtors.

3) From the menu "Configuration/ Integration" you select ERP integration. NB: Select ERP-integration 'economic' (and not the multi-company option) and click 'save'. Then you fill out the screen as shown to the left with the agreement no., user ID and password that you have for your e-conomic system.

Once you have done above and logged out an in you will note a small e-conomic logo, next time you edit an organisation.
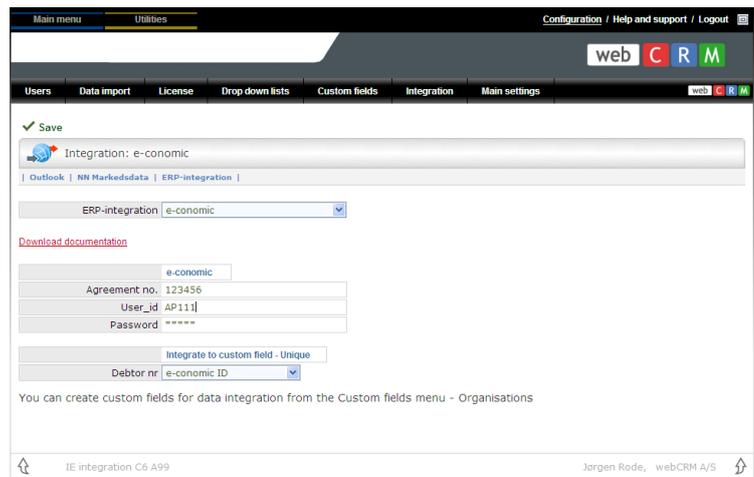
The e-conomic icon in webCRM

When you view an organisation in webCRM you will notice the e-conomic icon in the headline of each organisation.

Note the e-conomic ID data field created in the configuration menu (see above). You can name the field as you please, and you can choose to hide it if you wish to do so (under "custom fields").
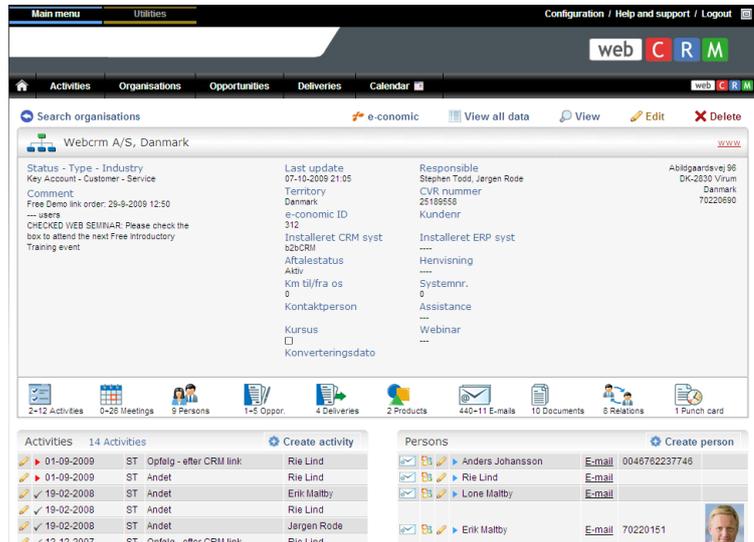

Initial and periodically replication of debtors to organisations.

webCRM access level as manager or higher is required for this function as default. You may change this for the access rights level you are using under "main settings -> access levels".

Click the e-conomic icon from any organisation, and then click: * Update webCRM with all debtors from e-conomic.

This will copy data for all debtors from e-conomic to webCRM and update the e-conomic ID field in webCRM with the unique debtor number from e-conomic.
If the debtor name is not found in the

webCRM organisations a new organisation will automatically be created in webCRM.
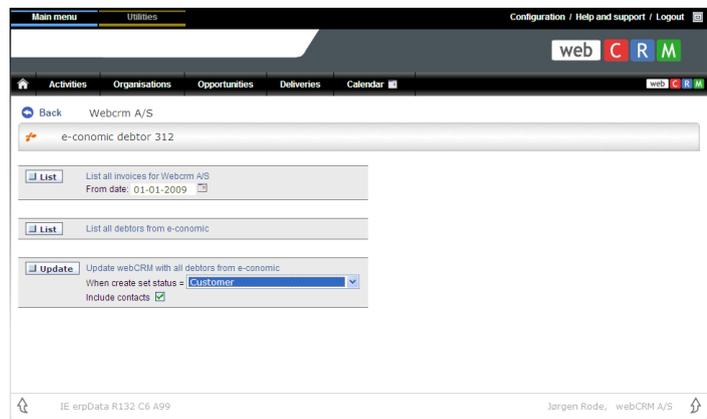
From e-conomic the debtor name, address, postal code, city and country is copied. If you check the "include contacts" checkbox all contact persons for the debtor will also be created/updated (name, telephone, e-mail, and comments)

You can choose which status that will be assigned to created organisations.

We recommend you periodically update webCRM with all debtors from e-conomic in order to ensure that data are identical in the 2 systems.

e-conomic

Creating a new debtor in e-conomic.

When you click the e-conomic icon from an organisation in webCRM and the organisation does not exist as a debtor in e-conomic you will se this screen.

You can now click:
Create <organisation> as debtor in e-conomic. Before doing so you can select the appropriate VAT-code for the debtor. You can also enter a specific debtor number. If you omit specifying a debtor number the system will automatically increment the highest debtor number in e-conomic by one and use this number as the new debtor's number.
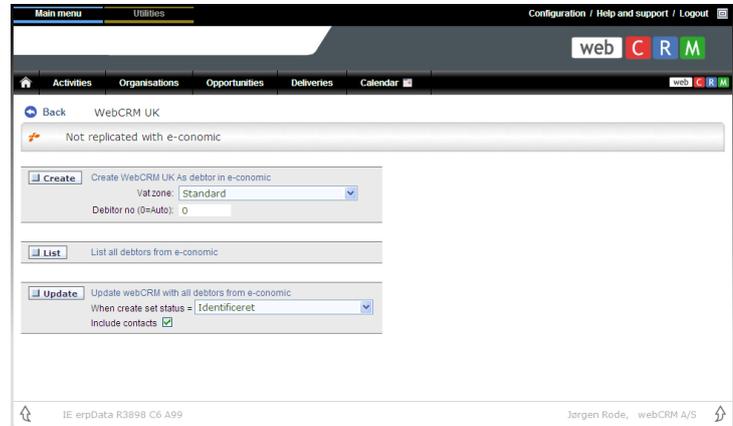
Viewing invoices

When you click the e-conomic icon from an organisation in webCRM and the organisation exists as a debtor in e-conomic you will se this screen (the same as above).
You can now click to view all invoices for the debtor from a specific date until today.
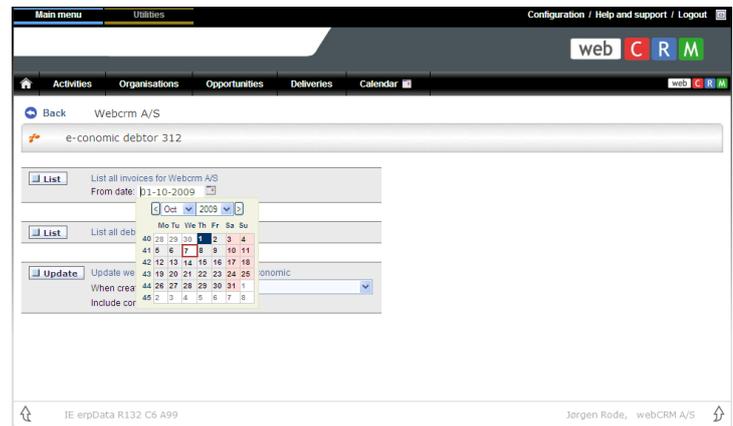
Other functions

When you click the e-conomic icon from any organisation in webCRM you will always have the possibility to click "List all debtors from e-conomic". Doing so will display a list of all debt-ors in e-conomic sorted by name. The name of the contact persons for each debtor will also be displayed.

Response time

webCRM communicates with e-conomic on-line and the response time is dependant on the login response time from e-conomic and on the nature
of the request. It may take several seconds to complete a request.

Prices and prerequisites

The integration is free of charge as long as you hold licenses from e-conomic and webCRM
Besides the subscription to e-conomic's ERP package you must also subscribe to their API facility. This is currently free of charge. There is no requirement on the number of licensees and users for the e-conomic's ERP package.

The is no additional license cost for the e-conomic integration.

e-conomic

Advanced Integration – Multi Companies

If you wish to integrate to more e-conomic systems from the same webCRM system this is possible by selecting "e-conomic multi company" in the Configuration/Integration menu. It is possible to integrate with up to 8 e-conomics systems (companies)

Important: The multi-company option will automatically assign debtor numbers in e-conomic when debtors are created. The debtor number will be composed of the Company number and a 6 digit Organisation ID in webCRM. Example: 3000132

In this way the same Organisation in webCRM will have the same debtor number in the e-conomic systems except for the first digit (= the company number)

Due to this method debtors in e-conomic cannot automatically be created/updated in webCRM (contrary to the single-company integration)

In the e-conomic integration screen (click the e-conomic icon from the main Organisation view) you can select (pick list) which company you currently wish to integrate with. In this example C-comp is selected.

You can see which e-conomic companies the Organisation is already replicated with and you can chose to create a new debtor for the companies not already replicated. When you create a debtor all not resigned persons are created as contact persons for the debtor in e-conomic.

You can update replicated debtors. This is useful when address and telephone data is updated in webCRM. Contact persons are not replicated during update.

You can only list debtors from one company at a time.

In the e-conomic integration screen (click the e-conomic icon in the main Organisation view) you can select (pick list) which company you currently wish to integrate with. In this example A-comp is selected.

If the selected company is already replicated you can list all invoices for this company. You can only list debtors from one company at a time.

The economic-field in webCRM

The integration custom field for the e-conomic integration does not hold the debtor number as it does in the single-company integration. Instead it holds the company numbers that have been replicated with e-conomic.

In the above example the field value will is: "12" since company 1 and 2 are replicated.

If company 1, 2 and 4 were replicated the value would be: 124.