

FORTNOX INTEGRATION



Contents

This document describes the integration between webCRM and Fortnox. The primary purpose of the initial version of the integration is to avoid double data entry. Currently the integration is not available for our B2C (business-to-consumer) systems.

The integration requires webCRM's PLUS or ENTERPRISE licenses and a Fortnox account with an integration license.

Specification

The data synchronization between the systems is two ways. When data is updated in one system, the data will be updated in the other system as well. The synchronization runs at six minutes intervals for each system and is triggered by new updates in data.

Customers

Organisations in webCRM that have a value in the Type field (that you have specified to control synch to Fortnox) will be created or updated in Fortnox. If you create or update an organisation that do not have a correct Type-value, it will not be sent to Fortnox. Standard values in Type field for Fortnox synch are, for example, "Customer" and "Private Customer". Customers that are updated in Fortnox will automatically be created in webCRM. You will have to create custom fields in webCRM to receive data from Fortnox that do not have a standard field in webCRM.

The following customer data are synchronized between the systems:

- Name
- Invoice adress
- Phonenumber
- Website
- Fax
- Type of customer (buisness or private person)
- Customer number
- Visiting address
- Terms of payment
- Currency
- VAT number

When you start the integration, it is possible to batch import customers to the respective systems.

It is possible to choose if webCRM or Fortnox should control customer number. If webCRM controls it you have to manually enter a customer number in webCRM. If Fortnox controls it a customer number will be automatically assigned.

Articles

The Article register is maintained in Fortnox and automatically synched to webCRM. Data that is sent to webCRM are:

- Item id
- Item name
- Cost price
- List price

Invoices and Orders

You can choose, as a general setting for the integration, if a webCRM Delivery should be synched as an Order or Invoice to Fortnox. The synchronization runs in both directions, so if you update either a delivery in webCRM or an order/invoice in Fortnox, the update will also take effect in the other system (booked invoices are excepted).

If an invoice is created from the start in Fortnox, it will be synched to webCRM as a delivery with status “completed”.

The following data is synched between webCRM deliveries and Fortnox orders/invoices (quotation/item lines are always synched):

Order:

- Order number (only from Fortnox)
- Order date
- Delivery Date
- Invoice number (only from Fortnox)
- Invoice date (only from Fortnox)
- Invoice booked

Invoice

- Invoice number (only from Fortnox)
- Invoice date (only from Fortnox)
- Invoice booked

NOTE! The company must be labeled with the correct Type (see above under “Customers”) in webCRM, otherwise, Deliveries and Orders/Invoices will not be synched between webCRM and Fortnox.

If you have any questions, please contact your local webCRM support.

Sincerely,
webCRM

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