



IPM LINK SAGE 300 CONSTRUCTION

WHAT DOES IPM LINK DO?

IPM is designed to operate as a standalone Project Management solution within Microsoft Dynamics CRM® with the ability to be integrated with leading Accounting /ERP systems. IPM Link facilitates the exchange of critical data between IPM and the accounting system in order to provide quicker and more convenient access to information whilst staying within the same environment.

KEEP YOUR ACCOUNTING SYSTEM BUT UPGRADE YOUR PROJECT MANAGEMENT

With IPM Link you don't need to go through the process of changing or upgrading your accounting or ERP system in order to have IPM Project Management installed and integrated. This means less time and money is spent on the implementation and quicker software adoption by the staff.

IPM LINK SYNCHRONISATION DETAILS

SAGE 300 CONSTRUCTION AND REAL ESTATE

SYNC DETAILS

IPM/CRM Component	Synchronisation details	Sage 300 CRE Component
Accounts identified as Customers	2 way Sync	Customers
Accounts identified as Vendors	2 way Sync	Vendors
Contacts	1 Way Sync from 300 CRE	Address Book
Jobs	1 Way Sync from 300 CRE	Jobs
Tasks	1 Way Sync from 300 CRE	Job Cost Codes
Cost types	1 Way Sync from 300 CRE	Job Categories
Job Budget Detail	N/A	
Resource Groups	N/A	
Resources	1 Way Sync from Timberline	Equipment Cost and Payroll
Purchase Orders	1 Way Sync to 300 CRE	Job Cost Commitments using an Import Macro
Subcontracts	1 Way Sync to 300 CRE	Job Cost Commitments using an Import Macro
Subcontract Change Orders	1 Way Sync to 300 CRE	Job Cost Commitments using an Import Macro
Products with UOM and Price	1 Way Sync to IPM	PO or IV Items
Timesheet Entries	1 Way Sync to 300 CRE	Equipment Cost and Payroll using an Import Macro
Progress Billing Invoices	1 Way Sync to AR	AR Invoices using an Import Macro



IPM LINK

SAGE TIMBERLINE OFFICE SYNC DETAILS

IPM/CRM Component	Synchronisation details	Sage Timberline Office Component
Accounts identified as Customers	2 way Sync	Customers
Accounts identified as Vendors	2 way Sync	Vendors
Contacts	1 Way Sync from Timberline	Address Book
Jobs	1 Way Sync from Timberline	Jobs
Tasks	1 Way Sync from Timberline	Job Cost Codes
Cost types	1 Way Sync from Timberline	Job Categories
Job Budget Detail	N/A	
Resource Groups	N/A	
Resources	1 Way Sync from Timberline	Equipment Cost and Payroll
Purchase Orders	1 Way Sync to STO	Job Cost Commitments using an Import Macro
Subcontracts	1 Way Sync to STO	Job Cost Commitments using an Import Macro
Subcontract Change Orders	1 Way Sync to STO	Job Cost Commitments using an Import Macro
Products with UOM and Price	1 Way Sync to IPM	PO or IV Items
Timesheet Entries	1 Way Sync to STO	Equipment Cost and Payroll using an Import Macro

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