

Copy-Paste-Import from Excel® to Microsoft Dynamics®

COPY



PASTE



IMPORT



**INFINIA
INTEGRATOR**

 **Sikich**®

Integrator promotion

- Stay around to the end of today's presentation to learn your special promotion offer. **Everyone wins!**



Infinia Integrator GL Dynamics NAV

- Infinia Integrator gives users the ability to **Copy-Paste-Import** transactions from Microsoft Excel to Dynamics NAV, with **color coded on-screen data validation**
- Eliminates wasting time manually re-entering transactions in Dynamics NAV that originate in other systems or are originated in Microsoft Excel
- Eliminates looking through integration error logs when import errors exist
- Eliminates calling IT for help (users can fix their own errors)
- Improves productivity and accuracy throughout your organization
- There are no complex integrations to define or maintain, no mapping, no setup, just an easy and simple Copy-Paste-Import and your data is immediately ready for Microsoft Dynamics NAV



Examples of how customers are using the Integrator

- **Single GL journal entry**– journal entry to record weekly payroll from outside payroll system
- **Multiple GL journal entries**– list of many monthly journal entry adjustments and allocations at month-end with one copy-paste-import, sets up separate journal entries for each

GL Details

- Utilizes NAV Web Services
 - .Net application written in C#
 - NAV 2009
 - In CfMD testing for NAV 2013 and NAV 2015 (when ready)
- Unlimited number of Dimensions are supported
- Supports import by user with no dimensions, and default dimensions are automatically applied
- Multiple General Journal documents can be imported in a single operation



GL Validations

- Verifies dollar amount is a valid format
- Verifies GL account is setup in NAV
- Verifies GL account is enabled for direct entry
- Verifies GL account is not blocked
- Verifies posting date format
- Verifies posting date is open based on user setup, if not present then posting date based on GL setup
- Verifies document is in balance
- Verifies document number length
- Verifies dimension code
 - Verifies dimension code value
 - Verifies dimension code is not blocked
 - Verifies dimension code value is not blocked
 - Verifies dimension Value Type (only allow Standard and Begin-Total are allowed)
 - Verifies if dimension is Mandatory (with and without a default)
 - Verifies if "Same-Code" required
 - Verifies blocked dimension combinations
 - Verifies limited dimension combinations
 - Verifies blocked dimension value combinations

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Demo

Integrator promotion

- Email sales@infiniatech.com to receive a QR code for a 25% discount off your Integrator purchase valid through December 31, 2014.
- Mention **NAVUG webinar** in your email.



Visit Sikich at NAVUG Summit

October 14-17, 2014



- **Expo booth #1043**
- Sessions:
 - **Cash Management and Bank Reconciliation in Microsoft Dynamics NAV**, presenter Julie Lee, Friday October 17th 8am
 - **My Favorite Mod**, presenter Ron Skalski, Wednesday October 15th 2:15pm
 - **Ask the Experts: Best Practices for Development**, presenter Ron Skalski, Thursday October 16th, 10:45am
 - **BI for Your Role Centers**, presenter Ron Skalski, Friday October 17th, 1:00pm
 - **Business Intelligence for Dynamics NAV – Transforming Data into Actionable Information**, presenter Matt Pluster, Wednesday October 15th 3:45pm



Contact Us

- Sales questions, registration keys, and demos:
 - **sales@infinitech.com**
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 - **support@infinitech.com**
- Enhancement Renewals:
 - **renewals@infinitech.com**

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