Integration with e-conomic/ Reviso

Get the best start…

This is a complete guide to setting up the integration between TimeLog Project and e-conomic/ Reviso as well as transferring customers, contacts, employee and invoice data.

In 2015 the e-conomic brand split into two brands. e-conomic (countries in Scandinavia) and Reviso (countries outside Scandinavia). This guide applies for the integration with both e-conomic and Reviso, as the configuration is the same.

Get off to a good start with the integration to e-conomic/ Reviso

5. edition
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1 Introduction

The integration between TimeLog Project and e-conomic/ Reviso consists of partial integrations that provide seamless cooperation between the two systems:

1. Automatic transfer of customers from TimeLog Project to e-conomic/ Reviso
2. Automatic transfer of contacts from TimeLog Project to e-conomic/ Reviso
3. Automatic transfer of employees from TimeLog Project to e-conomic/ Reviso
4. Automatic update of customer and contact information in e-conomic/ Reviso
5. Synchronisation of product numbers between TimeLog Project and e-conomic/ Reviso
6. Automatic transfer of invoices from TimeLog Project to e-conomic/ Reviso
7. Invoice balancing between TimeLog Project and e-conomic/ Reviso

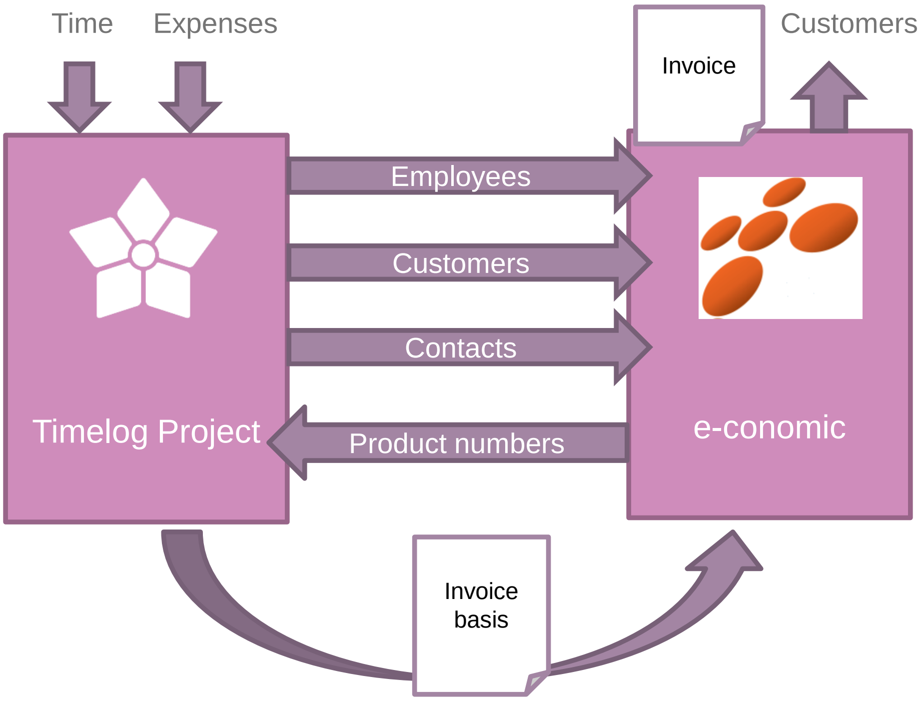
The classic way to integrate time tracking systems with financial systems is to transfer registered hours to the accounting system and create the invoices here. In this way, revenue and cost analyses are performed in the financial system – usually based on product numbers and financial accounts.

The interface between TimeLog Project and e-conomic/ Reviso is slightly different, as invoices are created in TimeLog Project before transferring the entire invoice including product lines to e-conomic/ Reviso. This offers a range of advantages:

1. TimeLog Project is more suited to drawing up invoices based on time data
2. Financial analyses can be carried out in TimeLog Project with every available dimension (employee, project type, project category, department, etc.)
3. Project managers can retrieve all information related to invoicing in TimeLog Project and therefore do not need to access e-conomic/ Reviso

Figure 1

The integration between TimeLog Project and e-conomic/ Reviso



2 Setup

The integration setup is carried out in TimeLog Project and consists of the following steps:

1. Establishing a connection between TimeLog Project and e-conomic/ Reviso
2. Definition of default values for payment terms, VAT zone, invoice template and debtor group
3. Linking of customer databases in TimeLog Project and e-conomic/ Reviso
4. Linking of product catalogues in TimeLog Project and e-conomic/ Reviso
5. Configureing product number routines in TimeLog Project

Only users with system administrator rights in TimeLog Project can configure the integration. Start by going to the System Administration and clicking **Standard Integrations** in the **Integration and API** group (Figure 2). Click **configureation and activation of integration** (Figure 3).

Figure 2

Standard integrations is located below **Integration and API** in the system administration

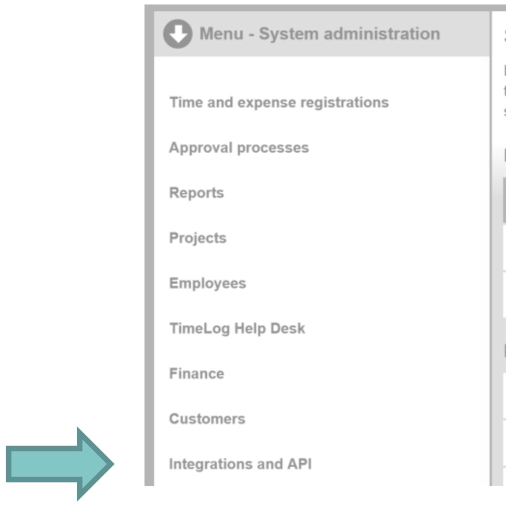


Figure 3

Standard integrations.

Please note! Ensure that all steps of the setup are carried out before using the integration. In particular, the lack of linked customer databases can lead to customer duplicates in e-conomic/ Reviso, which require a great deal of time to delete.

2.1 Connect to e-conomic/ Reviso

Next, fill in the **Your e-conomic/ Reviso login information** section (Figure 4). See the e-conomic/ Reviso agreement for agreement number, user ID and password. The user ID must be that of an employee with e-conomic/ Reviso system administrator rights.

Click **Connect**. This establishes a connection between TimeLog Project and e-conomic/ Reviso (may take up to 30 seconds). When the systems are connected, the **Connection indicator** turns green and reads **Established** (Figure 5).

Figure 4

Enter log-in information for e-conomic/ Reviso to connect

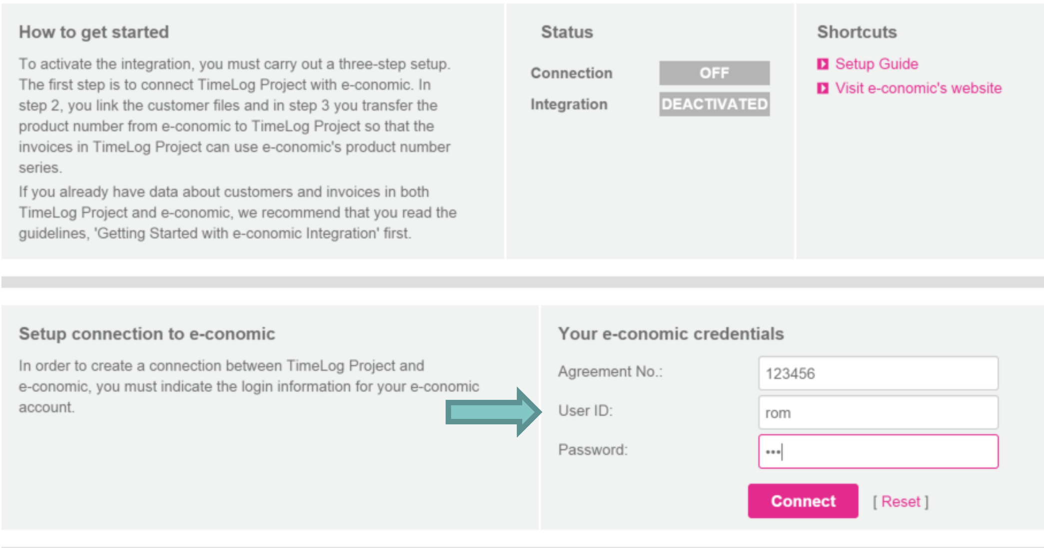


Figure 5

When the connection is established, the status indicator turns green.

Please note! If you cannot establish contact with your e-conomic/ Reviso system, you should check if the API is activated in your e-conomic/ Reviso. You can find it under settings -> subscription -> add-on modules.

2.2 Linking customer databases

To transfer invoices to e-conomic/ Reviso, the customer listed on the invoice must be available in e-conomic/ Reviso. When the integration is in use, the transfer of new customer data and updating of existing customer data is carried out automatically. Before the integration is in use, however, it is necessary to link the two customer databases.

The linking process depends on the status of the operational situation before the integration. Here are the most typical scenarios:

1. No customer data in e-conomic/ Reviso or TimeLog Project
2. Customer data in e-conomic/ Reviso, but none in TimeLog Project (new TimeLog customer)
3. Customer data in TimeLog Project, but none in e-conomic/ Reviso (new e-conomic/ Reviso customer)
4. Customer data in TimeLog Project and e-conomic/ Reviso

The four scenarios are detailed in the following.

TimeLog Project contains a wizard to a simple linking of customer databases in connection with using the integration.

Click **Link customers**. This opens a wizard for linking customers (Figure 6). The wizard divides e-conomic/ Reviso customers in three types:

One match
Customer pairs which are readily recognisable.

More matches
e-conomic/ Reviso customers with several matches in TimeLog Project.

No match
e-conomic/ Reviso customers with no matches in TimeLog Project.
Each type is detailed in a separate tab (Figure 7).

Please note! To transfer customers from TimeLog Project to e-conomic/ Reviso and link customer pairs, the customer number in TimeLog Project must only consist of numbers. e-conomic/ Reviso does not accept special characters in customer numbers.

Figure 6

Linking customer databases

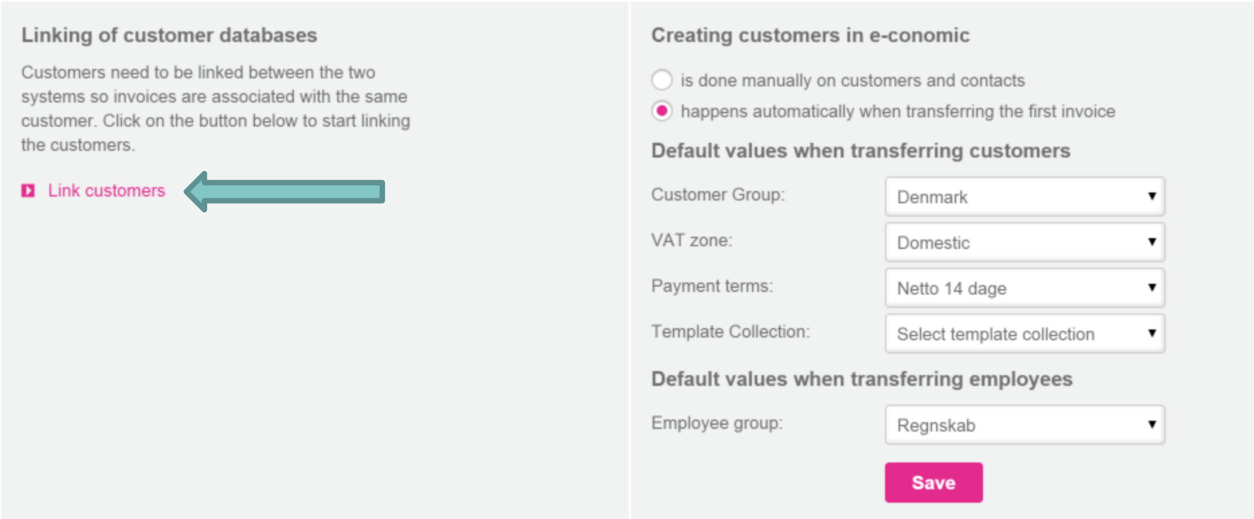
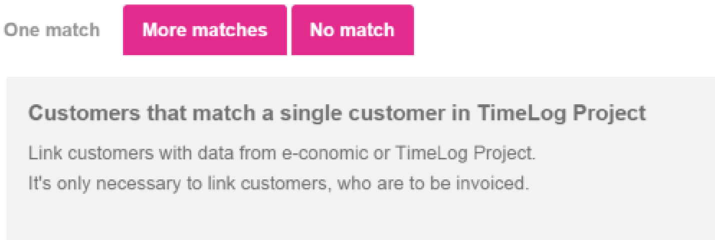


Figure 7

The **Link customers** wizard



2.2.1 Scenario 1

No customer data in e-conomic/ Reviso or TimeLog Project.

In this case, linking customer databases is not necessary, so you can skip this step. Customers will be created continuously in e-conomic/ Reviso, by linking with the TimeLog Project customer database or in connection with invoicing. Go to 2.3 How and when to create customers in e-conomic/ Reviso.

2.2.2 Scenario 2

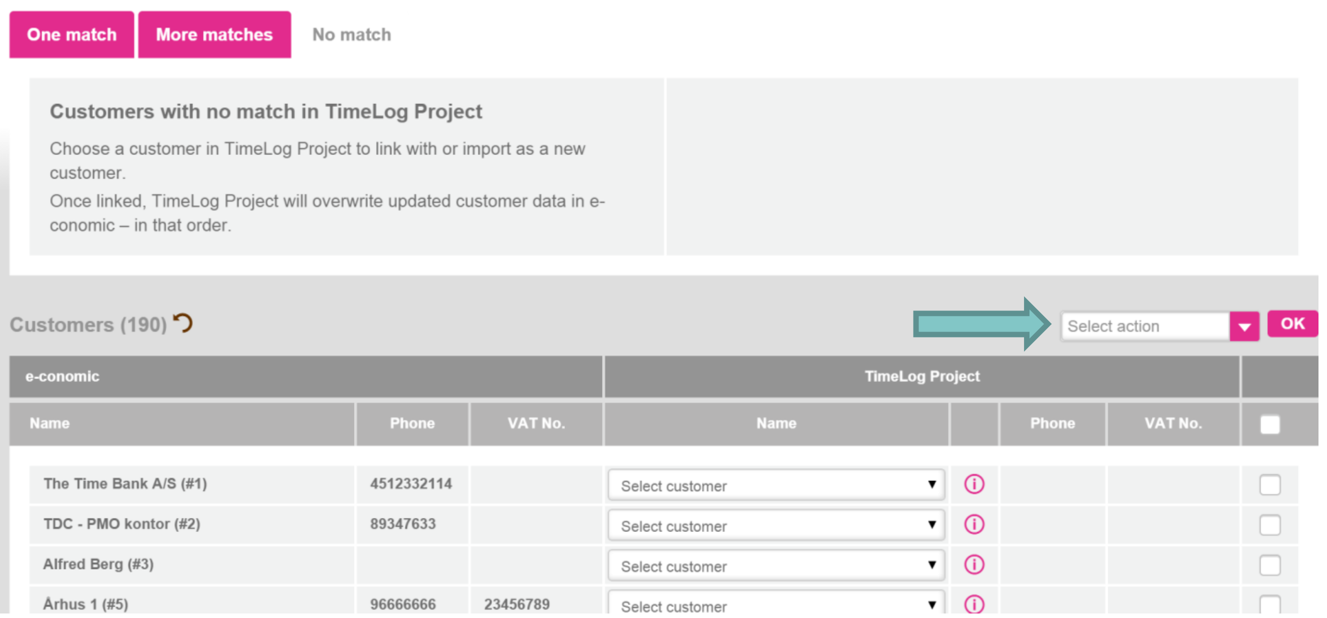
Customer data in e-conomic/ Reviso, but none in TimeLog Project.

Begin by transferring the relevant e-conomic/ Reviso customers to TimeLog Project. The **One match** and **More matches** suggestions tabs will be empty, so you can skip them. All e-conomic/ Reviso customers are shown in the **No match**. Select the clients you wish to create in TimeLog Project and select **Import as a new customer** in TimeLog Project. Click OK.

The customers are now created in TimeLog Project and linked to their matches in the e-conomic/ Reviso customer database.

Figure 8

Linking customers in the **No match** tab



2.2.3 Scenario 3

Customer data in TimeLog Project, but none in e-conomic/ Reviso.

In this case, linking customer databases is not necessary, so you can skip this step. Customers will be created continuously in e-conomic/ Reviso, by linking with the TimeLog Project customer database or in connection with invoicing. Go to 2.3 How and when to create customers in e-conomic/ Reviso.

2.2.4 Scenario 4

Customer data in TimeLog Project and e-conomic/ Reviso.

This is the most time consuming as you need to link the customers manually. Luckily, the wizard helps finding customers that matches.

The wizard looks for similarities in:

- Central business reg. no. / VAT no.
- Phone number
- Company name

Based hereon, the wizard will divide the e-conomic/ Reviso customer database into the before mentioned three types:

One match

Customer pairs which are readily recognisable.

Multiple matches

e-conomic/ Reviso customers with several matches in TimeLog Project.

No match

e-conomic/ Reviso customers with no matches in TimeLog Project.

Step 1: One match

The **One match** tab shows you a list of customer pairs for which the wizard has found a single match between TimeLog Project and e-conomic/ Reviso (Figure 9).

Before pairing the customer pairs, it is important to review the suggestions to avoid erroneous customer pairs. If the suggestion in TimeLog Project is incorrect, you can select a different customer from the drop-down menu or skip the row entirely.

For each correct customer pair, tick the check box to the far right in the row.
Once all customer pairs to be linked have been selected, select one of the following actions in the **Select Action** drop-down menu:

Transfer and use e-conomic/ Reviso data
This action links customer pairs, overwriting customer data in TimeLog Project with those of e-conomic/ Reviso. Fields left empty in e-conomic/ Reviso will not be transferred.

Transfer and use TimeLog Project data
This action links customer pairs, overwriting customer data in e-conomic/ Reviso with those of TimeLog Project. Fields left empty in TimeLog Project will not be transferred.

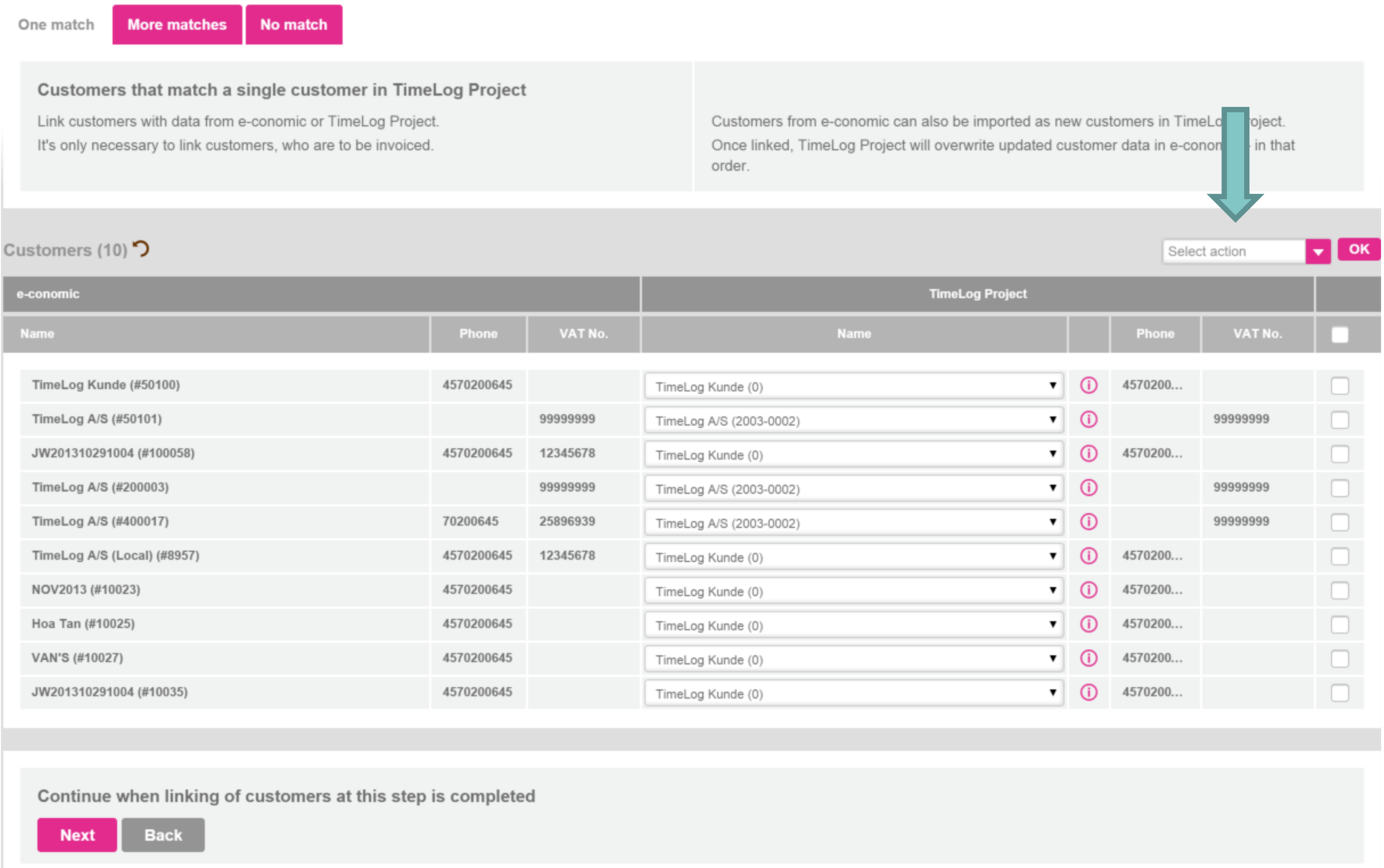
Import as a new customer in TimeLog Project
This action creates a new customer in TimeLog Project based on e-conomic/ Reviso data.
Click **OK**.

Click **Next** to proceed to the next step.

You have to empty enough room in the basic text for it.

Figure 9

Linking customers in the **One match** tab


One match | More matches | No match

Customers that match a single customer in TimeLog Project

Link customers with data from e-conomic or TimeLog Project.
It's only necessary to link customers, who are to be invoiced.

Customers from e-conomic can also be imported as new customers in TimeLog Project.
Once linked, TimeLog Project will overwrite updated customer data in e-conomic in that order.

Customers (10)

Select action | OK

e-conomic			TimeLog Project				
Name	Phone	VAT No.	Name		Phone	VAT No.	
TimeLog Kunde (#50100)	4570200645		TimeLog Kunde (0)	ⓘ	4570200...		☐
TimeLog A/S (#50101)		99999999	TimeLog A/S (2003-0002)	ⓘ		99999999	☐
JW201310291004 (#100058)	4570200645	12345678	TimeLog Kunde (0)	ⓘ	4570200...		☐
TimeLog A/S (#200003)		99999999	TimeLog A/S (2003-0002)	ⓘ		99999999	☐
TimeLog A/S (#400017)	70200645	25896939	TimeLog A/S (2003-0002)	ⓘ		99999999	☐
TimeLog A/S (Local) (#8957)	4570200645	12345678	TimeLog Kunde (0)	ⓘ	4570200...		☐
NOV2013 (#10023)	4570200645		TimeLog Kunde (0)	ⓘ	4570200...		☐
Hoa Tan (#10025)	4570200645		TimeLog Kunde (0)	ⓘ	4570200...		☐
VAN'S (#10027)	4570200645		TimeLog Kunde (0)	ⓘ	4570200...		☐
JW201310291004 (#10035)	4570200645		TimeLog Kunde (0)	ⓘ	4570200...		☐

Continue when linking of customers at this step is completed

Next | Back

Please note! If am incorrect customer pair is created, you can always remove the link on the customer card in the TimeLog Project customer database.

Step 2: More matches

The **More matches** tab shows a list of e-conomic/ Reviso customers for which the wizard has found multiple matching customers in TimeLog Project. This may occur if several TimeLog Project customers have the same central business reg. no., telephone number, etc., as an e-conomic/ Reviso customer (Figure 10).

Therefore, you need to consider which of the matching customers you want to pair with the customer in e-conomic/ Reviso. The drop-down menu under the **Select a customer** with matching data group includes the TimeLog Project customers which match the e-conomic/ Reviso customer. If none of these are correct, you can select one of the other customers from the **Select another customer** group.

For each correct customer pair, tick the check box to the far right in the row.

Once all customer pairs to be linked have been selected, select one of the following actions in the **Select Action** drop-down menu:

Transfer and use e-conomic/ Reviso data
This action links customer pairs, overwriting customer data in TimeLog Project with those of e-conomic/ Reviso. Fields left empty in e-conomic/ Reviso will not be transferred.

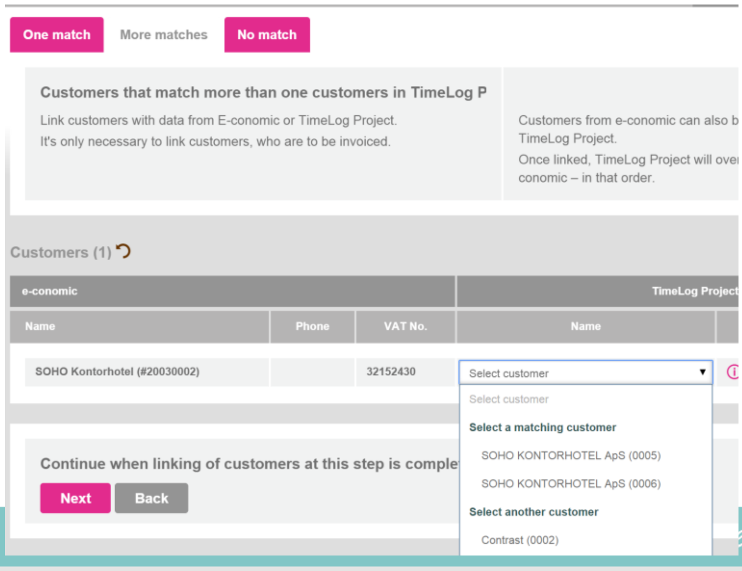
Transfer and use TimeLog Project data
This action links customer pairs, overwriting customer data in e-conomic/ Reviso with those of TimeLog Project. Fields left empty in TimeLog Project will not be transferred.

Import as a new customer in TimeLog Project
This action creates a new customer in TimeLog Project based on e-conomic/ Reviso data.
Click **OK**.

Click **Next** to proceed to the next step.

Figure 10

Linking customers in the **More matches** tab



Step 3: No match

The **No match** tab includes a list of e-conomic/ Reviso customers with no matching TimeLog Project customers (Figure 11).

Next, select the customers you wish to create in TimeLog Project and select one of the following actions in the **Select Action** drop-down menu.

Transfer and use e-conomic/ Reviso data

This action links customer pairs, overwriting customer data in TimeLog Project with those of e-conomic/ Reviso. Fields left empty in e-conomic/ Reviso will not be transferred.

Import as a new customer in TimeLog Project

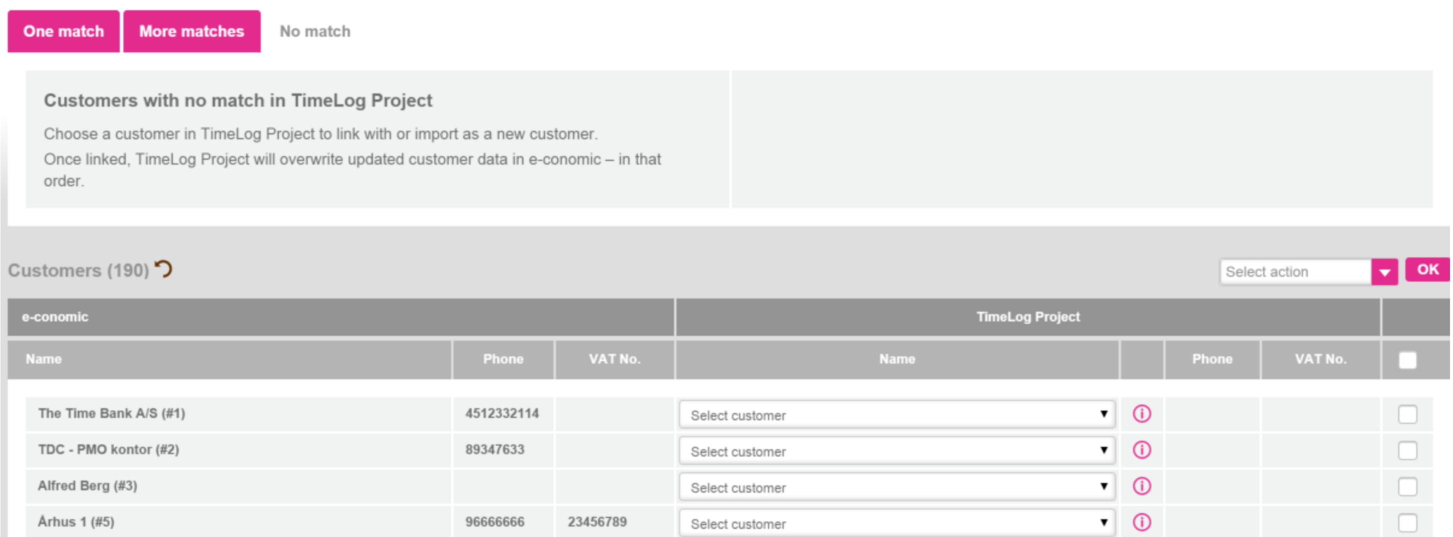
This action creates a new customer in TimeLog Project based on e-conomic/ Reviso data.

Click **OK**.

Click **Close**. This process creates the customers in TimeLog Project and links all customer pairs.

Figure 11

Linking customers in the **No match** tab



2.3 How and when to create customers in e-conomic/ Reviso

With e-conomic/ Reviso being the company's financial system, managing how and when to create customers in the software is key.

Typically, you will prefer to create customers in e-conomic/ Reviso in two scenarios: when transferring an invoice to a new customer and when using TimeLog Project to transfer a customer from the database.

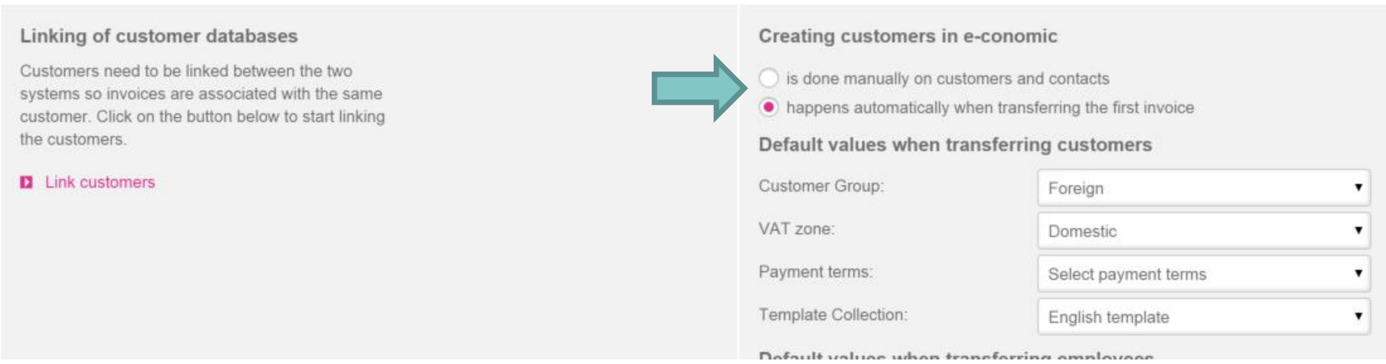
However, when using the integration for the first time, creating customers in e-conomic/ Reviso only may be the best solution if requested from within the customer database, while automatic creation in connection with transferring invoices is not desirable.

In the e-conomic/ Reviso integration setup, TimeLog Project can be configureed to employ one of the following principles:

- Customers are created manually from customers and contacts
- Customers are created automatically upon transferring the first invoice. Additionally, customers can be created manually from customers and contacts

Figure 12

Creating customers in e-conomic/ Reviso



2.4 Default values for transferring customers

When customers are created in e-conomic/ Reviso, a string of values need to be filled out in e-conomic/ Reviso. In the current integration implementation, it is not possible to set all values for each customer so, for the moment, the following four values are set in TimeLog Project centrally:

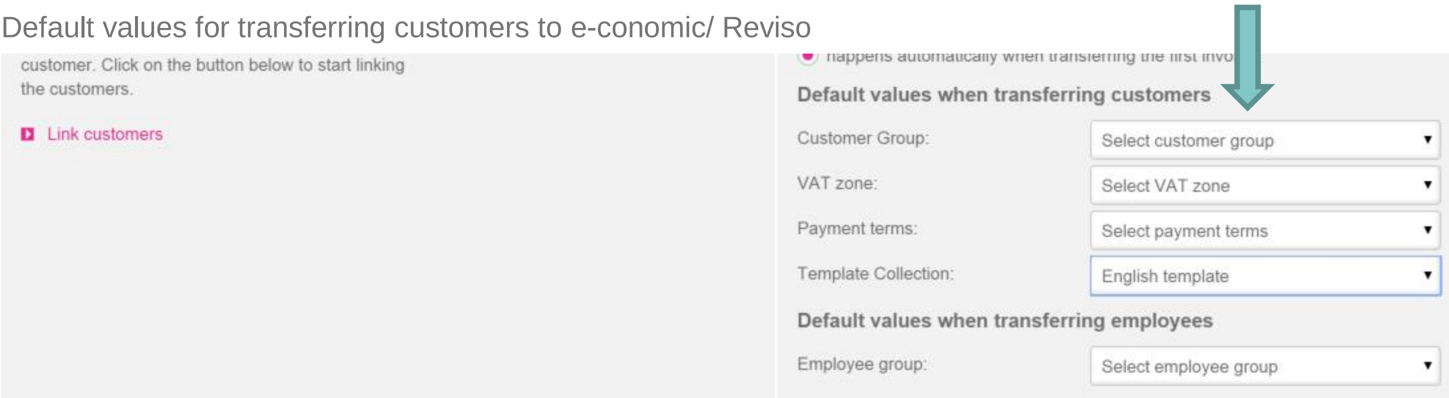
- Debtor group
- VAT code (VAT zone)
- Terms of payment
- Template collection

Subsequently, these values can be adjusted in e-conomic/ Reviso and will not be overwritten when customer data are updated automatically in TimeLog Project.

Please note! The values in the employee group drop-down menu are retrieved from e-conomic/ Reviso. To edit these values, go to e-conomic/ Reviso.

Figure 13

Default values for transferring customers to e-conomic/ Reviso



2.5 Default values for transferring employees

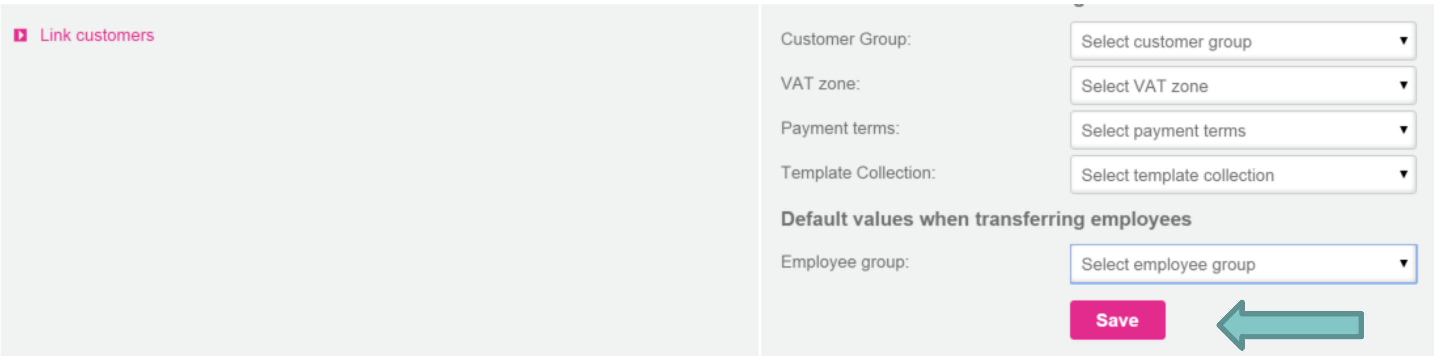
When transferring an invoice to e-conomic/ Reviso with an internal reference, TimeLog Project checks whether the employee has already been created from the customer. If not, an employee is created from the e-conomic/ Reviso employee directory.

However, employees in e-conomic/ Reviso must be assigned to a group of employees. The default group used for creating employees is selected in the **Default values for transferring employees section**.

You can change the employee group in e-conomic/ Reviso for employees created in TimeLog Project. Later updates will not overwrite this group.
Click **Save** when you have finished adjusting settings in this section.

Figure 14

Default values for transferring employees to e-conomic/ Reviso



2.6 Importing product numbers from e-conomic/ Reviso

An important aspect of the integration between TimeLog Project and e-conomic/ Reviso is the creation of a product number catalogue in TimeLog Project. e-conomic/ Reviso, and financial systems in general, requires that each invoice line includes a product number stating how to enter the invoice line into the accounts for purposes of VAT and revenue statistics.

The product number setup is carried out in TimeLog Project and consists of the following steps:

1. Importing product numbers from e-conomic/ Reviso
2. Configuring a product number principle for various TimeLog Project data types
3. Configuring default product numbers for various TimeLog Project data types

The integration may work despite the product number principle and default standard numbers not being completed. If this is the case, manually select a number for each invoice line when creating an invoice in TimeLog Project.

2.6.1 Importing product numbers from e-conomic/ Reviso

Begin by clicking on the **Import product numbers** link in the e-conomic/ Reviso integration setup (Figure 15).

A list of active part numbers in e-conomic/ Reviso is retrieved (Figure 16).

Select the product numbers on the list to be used in TimeLog Project. Select the **Activate action** and click **OK**.

The product numbers are now available in TimeLog Project.

Figure 15

Importing product numbers

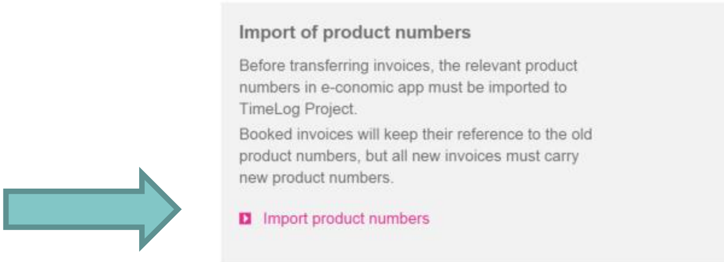
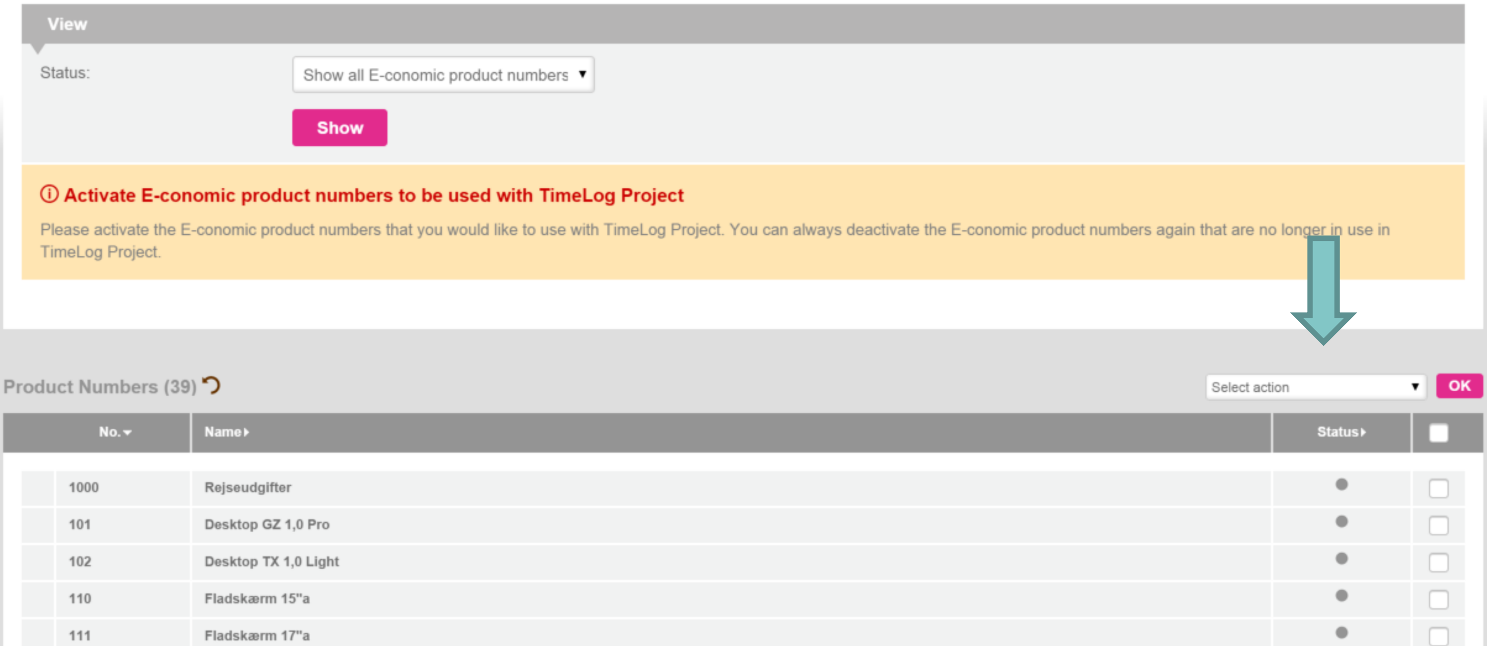


Figure 16

Enabling the product numbers feature



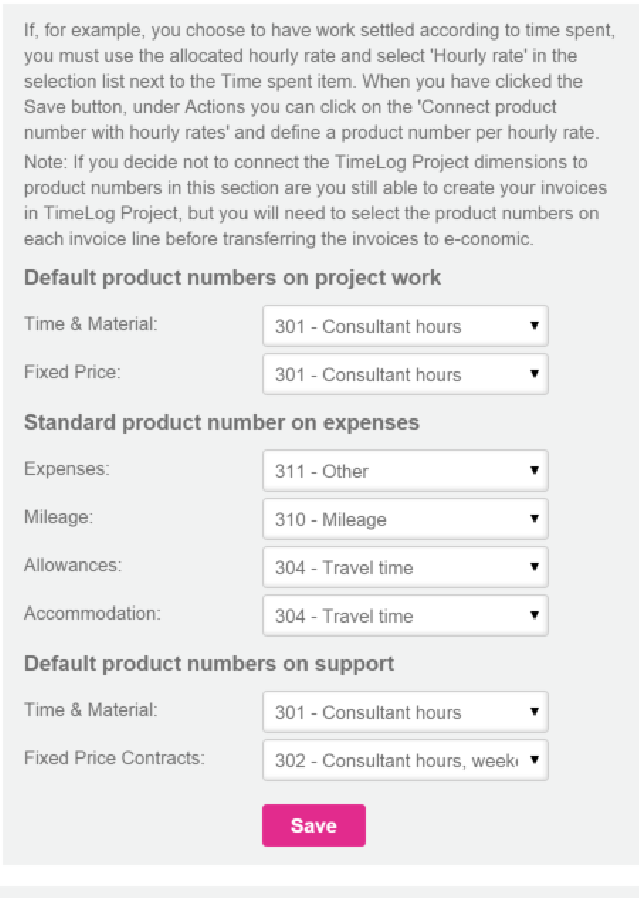
2.6.2 Configuring a product number principle for TimeLog Project data types

To expedite invoicing, you can configure TimeLog Project to suggest product numbers for invoice lines based on the data to be invoiced. For example, hourly rates in TimeLog Project might have independent product numbers in e-conomic/ Reviso, or the project type might determine which product number is used for a given invoice line. Both examples include suggestions which can be deselected during invoicing.

For each data type and settlement form in TimeLog Project, you can select a principle for default product numbers (Figure 17).

Figure 17

Selecting default product numbers for TimeLog Project data types



Project work based on time and material

Product numbers can be suggested based on:

- The hourly rate
- The task type
- The project type
- The project category
- A fixed product number for all time and material registrations

Project work at a fixed price

Product numbers can be suggested based on:

- The project type
- The project category.
- A fixed product number for all payments

Purchases/expenses

Product numbers can be suggested based on:

- The expense type of the purchase
- A fixed product number for all expenses

Mileage

Product numbers can be suggested based on:

- A fixed product number for all mileage registrations

Allowances

Product numbers can be suggested based on:

- A fixed product number for all allowance registrations

Accommodation

Product numbers can be suggested based on:

- A fixed product number for all accommodation registrations

Support based on time and material
Product numbers can be suggested based on:

- Hourly rate for support case
- Support type for support case
- A fixed product number for all support cases

Support: subscription or multiple case contract
Product numbers can be suggested based on:

- A fixed product number for all support contracts

Select default product numbers and click **Save**.

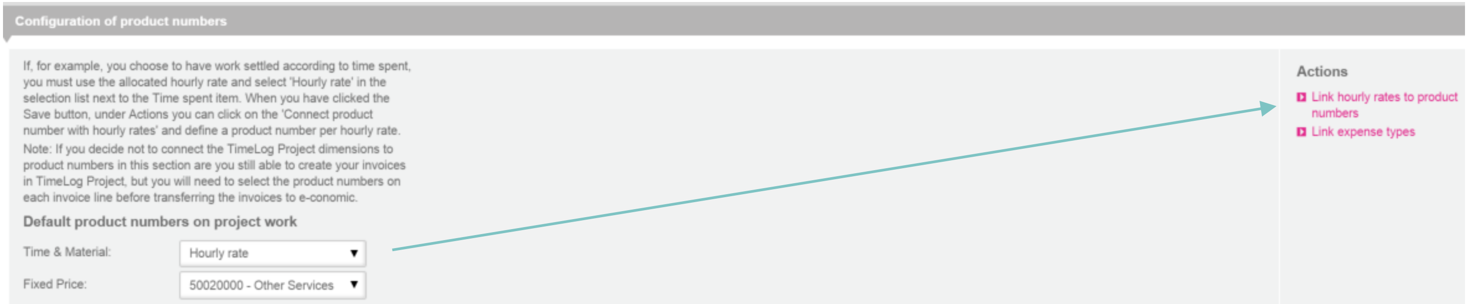
2.6.3 Configureing default product numbers for TimeLog Project data types

When you have selected the principles for your default product numbers, you can move on to selecting which product numbers should suggest which data. For example, if you have selected to suggest the product number for time and material project work in connection with hourly rates, you must now specify the default product number for each hourly rate in TimeLog Project.

Next, click the first Link [data type] to product numbers link in the **Actions section**. Please note that the options available depend on your choices in the previous section (Figure 18).

Figure 18

Setting the product number dimension for the TimeLog Project data types

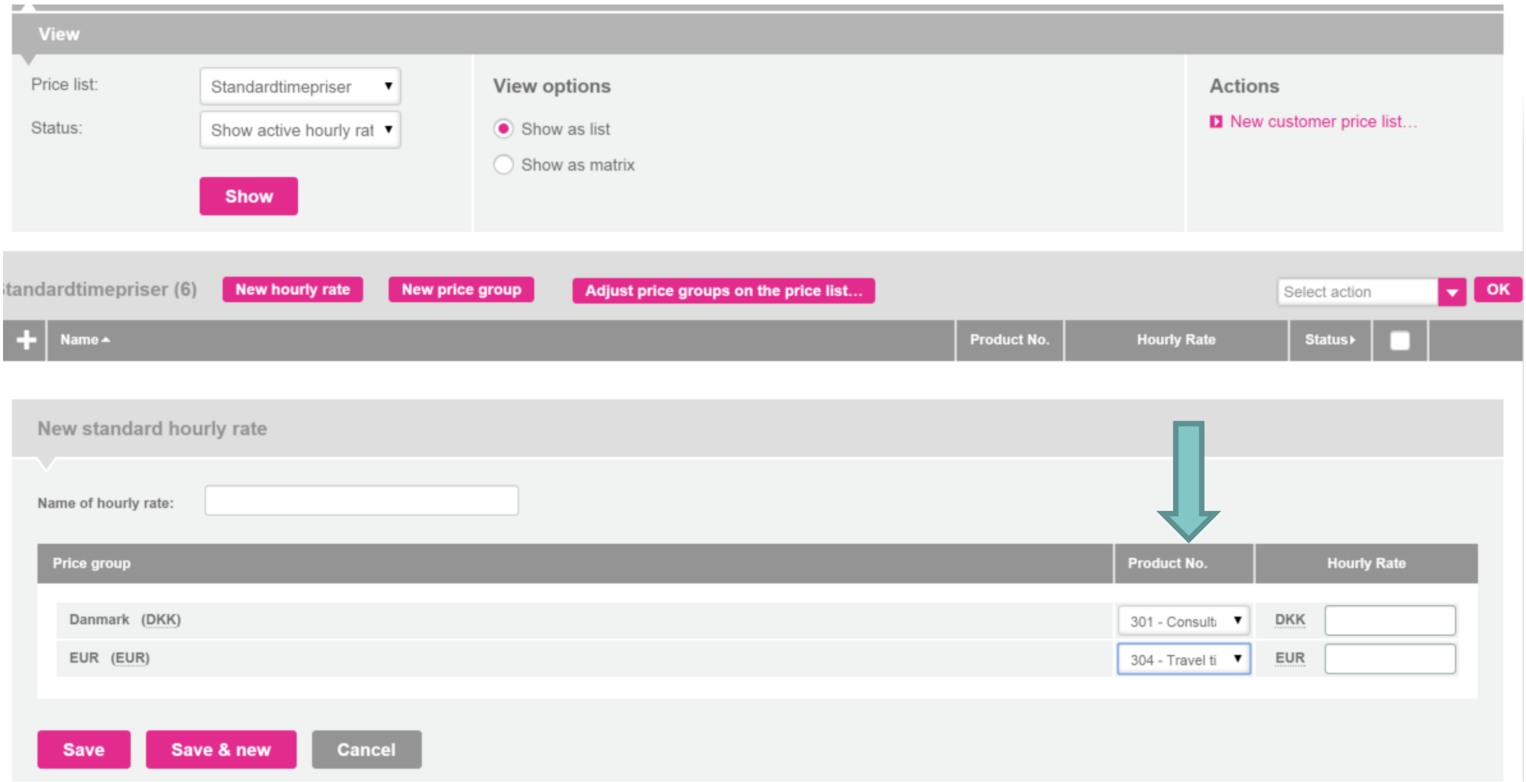


For example, click **Link hourly rates to product numbers**. In **Hourly Rates**, you will find the Product number column. Click on the name of an hourly rate, or click **Edit** and select a product number. The same product number can be used for multiple hourly rates. If you cannot select a single product number for an hourly rate, simply omit it and select a product number in connection with invoicing (Figure 19).

When you have finished configureing the product numbers of a data type, continue with the next data type until all product numbers are completed.

Figure 19

Linking product numbers to hourly rates



2.7 Confirming the integration setup

To conclude the setup of the e-conomic/ Reviso integration, you must confirm that all steps in the setup have been completed (Figure 20).

The confirmation acts as a check list to ensure that nothing is forgotten or overlooked. In particular, lacking configureations in linking customers may result in TimeLog Project creating customers in e-conomic/ Reviso which are already there. However, this only occurs if the customer number in TimeLog Project is not already found in e-conomic/ Reviso. If this is the case, the transfer will fail, stating that the customer number already exists.

Click **Activate integration** to complete the TimeLog Project/e-conomic/ Reviso integration. Confirm this by checking the status indicators – now both green – at the top of the integration setup view (Figure 21).

Enjoy!

Figure 20

Confirming the integration setup

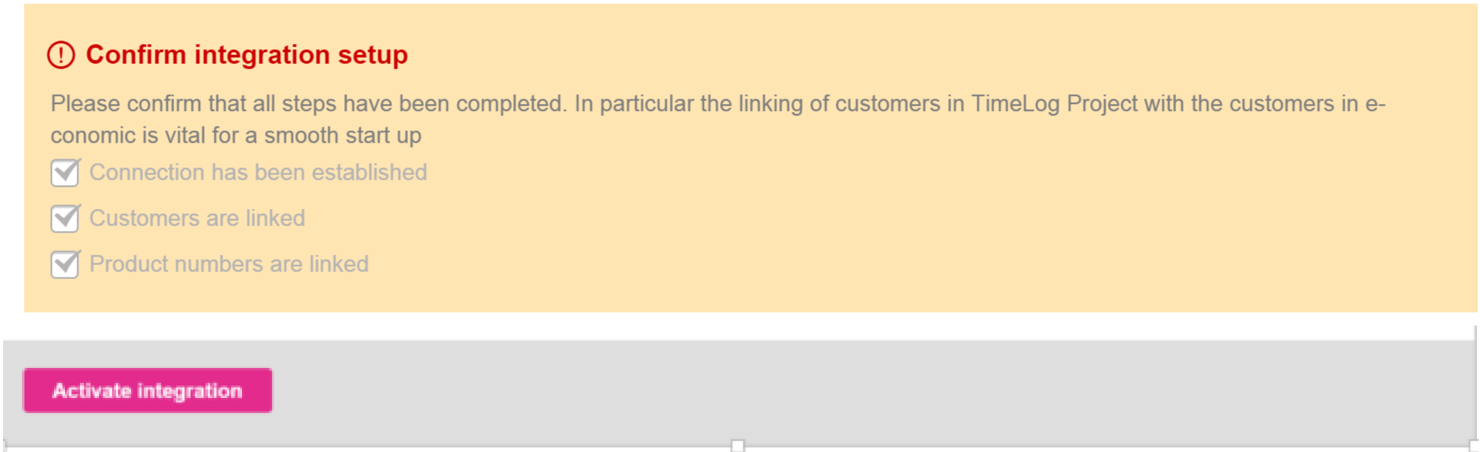
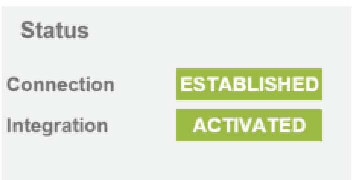


Figure 21

Connection and integration status



3 Using the integration

3.1 Transferring and updating customers automatically

A customer who has not yet been created in e-conomic/ Reviso can be transferred manually from their TimeLog Project customer card. In the integration setup, you can select to transfer the client to e-conomic/ Reviso automatically when transferring an invoice to this customer.

When the customer is transferred to e-conomic/ Reviso, a permanent link is created between the customer in TimeLog Project and in e-conomic/ Reviso. Subsequent corrections of customer data in TimeLog Project will result in the customer's data also being updated in e-conomic/ Reviso.

To transfer a customer and create a link to e-conomic/ Reviso, tick the **Link to e-conomic/ Reviso** check box and click **Refresh** (Figure 22).

You can always remove a link by ticking the **Remove link to e-conomic/ Reviso** check box and clicking **Refresh** (Figure 23).

Please note! If customer data are edited in e-conomic/ Reviso, the changes will be overwritten when the data are updated in TimeLog Project. Consequently, all changes should be made in TimeLog Project, after which they will be transferred to e-conomic/ Reviso automatically.

Figure 22

Transferring and linking customers

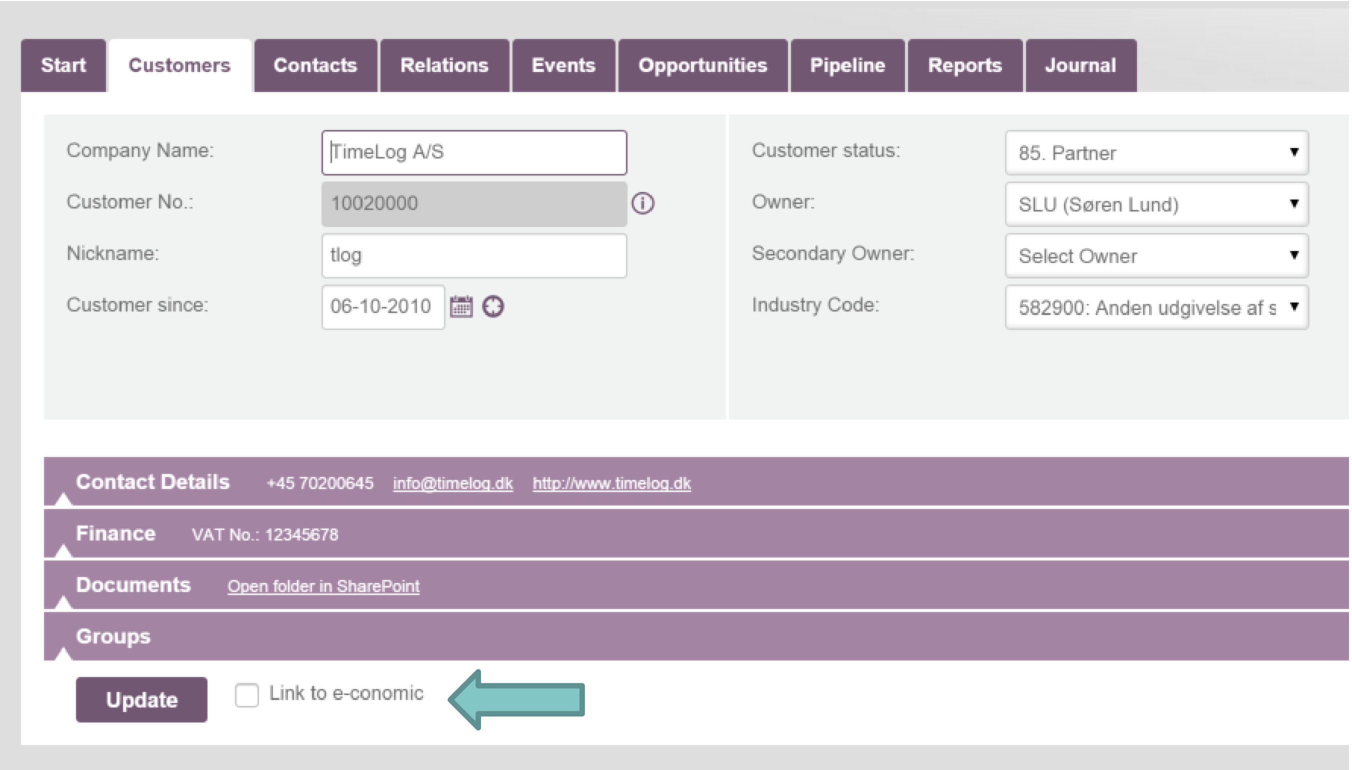


Figure 23

Removing the link between a customer in TimeLog Project and one in e-conomic/ Reviso

When a customer is created in e-conomic/ Reviso from TimeLog Project, not all data can be transferred from the customer card in TimeLog Project. The following e-conomic/ Reviso data are not transferred or updated from the customer card in TimeLog Project:

- Debtor group
- Terms of payment
- VAT code (VAT zone)
- Template collection

When a new customer is created in e-conomic/ Reviso from TimeLog Project, the default values for debtor group, terms of payment, VAT code and template collection from the integration setup are used (see **Default values for transferring customers**). You can edit these values in e-conomic/ Reviso later without them being overwritten when customer data are updated from TimeLog Project.

Appendix A shows a detailed overview of how customer data are linked in TimeLog Project and e-conomic/ Reviso.

3.2 Transferring and updating contacts automatically

A contact who has not yet been created in e-conomic/ Reviso, can be transferred manually from their contact card in TimeLog Project, but will also be transferred automatically if an invoice including that contact is used.

Create a link on the contact card in TimeLog Project by ticking the **Link to e-conomic/ Reviso** check box and clicking **Refresh** (Figure 24).

The first time data on the contact is transferred, a contact link between TimeLog Project and e-conomic/ Reviso is created. This link is based on the contact's first and last name. Subsequent changes in contact data in TimeLog Project are transferred instantly to e-conomic/ Reviso.

You can remove a link on the contact card in TimeLog Project by ticking the **Remove link to e-conomic/ Reviso** check box and clicking **Refresh** (Figure 25).

3.3 Transferring and updating employees automatically

When creating invoices in TimeLog Project you can specify an employee as an internal reference on the invoice. If the employee is not found in e-conomic/ Reviso under the same name, they are automatically created in the e-conomic/ Reviso employee directory.

The first time an employee is transferred, a link is created between that employee in TimeLog Project and in e-conomic/ Reviso. This link is based on the employee's first and last name. Subsequent changes in employee data in TimeLog Project are transferred instantly to e-conomic/ Reviso.

Please note! If contact data are edited in e-conomic/ Reviso, the changes will be overwritten when the data are updated in TimeLog Project. Consequently, all changes should be made in TimeLog Project, after which they will be transferred to e-conomic/ Reviso automatically.

3.4 Transferring invoices and credit notes

You can transfer an unlimited number of invoices and credit notes from TimeLog Project to e-conomic/ Reviso in one go.

Here is an example of a typical invoicing process:

1. The project manager/finance function builds an invoice using the TimeLog Project invoice template
2. For each product line, TimeLog Project suggests a product number based on the data in the line
3. If a line contains several product numbers, the user must choose the correct one, or split the product line into multiple lines
4. The Project Manager leaves the invoice in draft mode
5. The finance function approves the invoice and books it in TimeLog Project
6. The finance function transfers all remaining invoices to e-conomic/ Reviso, where they are created in draft mode and placed under the Current invoices menu item
7. If needed, the finance function adds additional product lines to the invoice in e-conomic/ Reviso
8. The finance function books and sends the invoice to the customer
9. The finance function balances transferred invoices under the **Transfer invoices to e-conomic/ Reviso** menu item in TimeLog Project

Please note! If customer data are edited in e-conomic/ Reviso, the changes will be overwritten when the data are updated in TimeLog Project. Consequently, all changes should be made in TimeLog Project, after which they will be transferred to e-conomic/ Reviso automatically.

Figure 24

Transferring and linking contacts

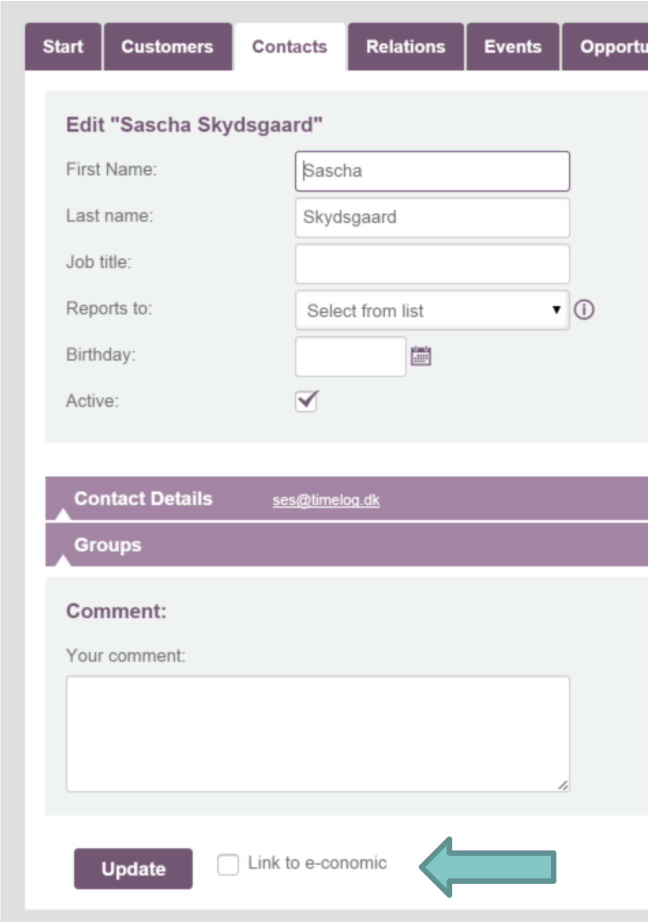
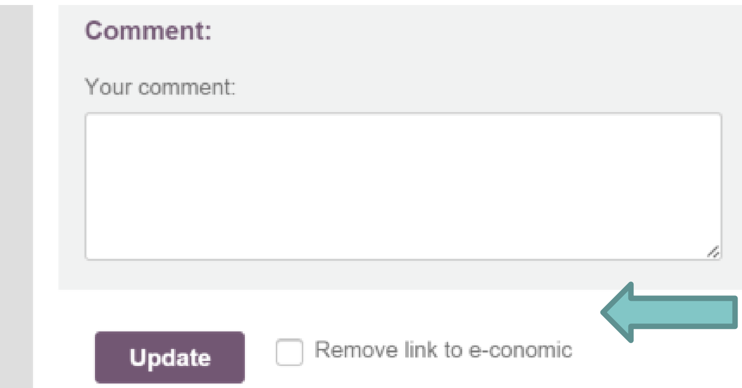


Figure 25

Removing the link between a contact in TimeLog Project and one in e-conomic/ Reviso



3.4.1 Creating an invoice

When the e-conomic/ Reviso integration is enabled, the invoices are created in TimeLog Project and transferred to an invoice draft list called Current invoices in e-conomic/ Reviso.

When creating an invoice line in TimeLog Project, you must specify a product number.

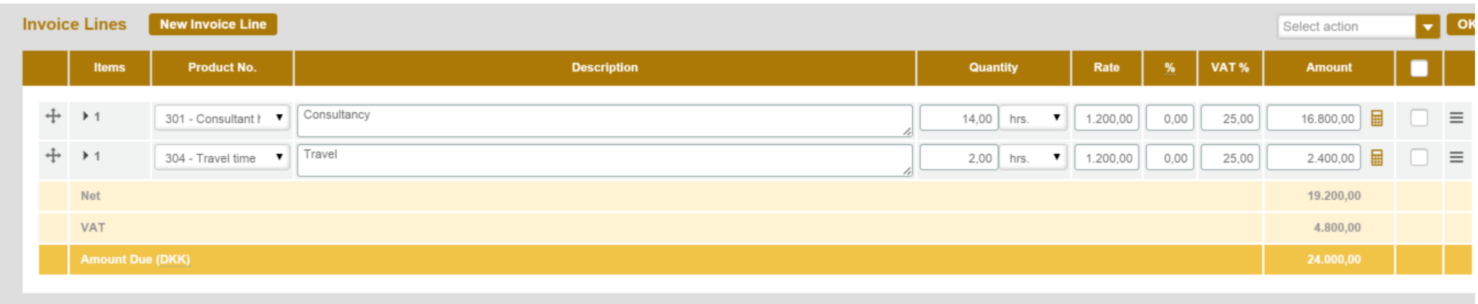
To make things easy for you, TimeLog Project offers a routine for suggesting product numbers based on data types. These product numbers can be suggested based on:

- Hourly rates
- Project types
- Project categories
- Task types
- Expense types
- Support types (with TimeLog Help Desk)
- Support contracts (with TimeLog Help Desk)

Or simply as a fixed product number for all items of a given type (work, expenses, etc.). This routine can be configured in the integration setup (see **Configuring default product numbers for TimeLog Project data types**).

Figure 26

Product numbers in invoice lines



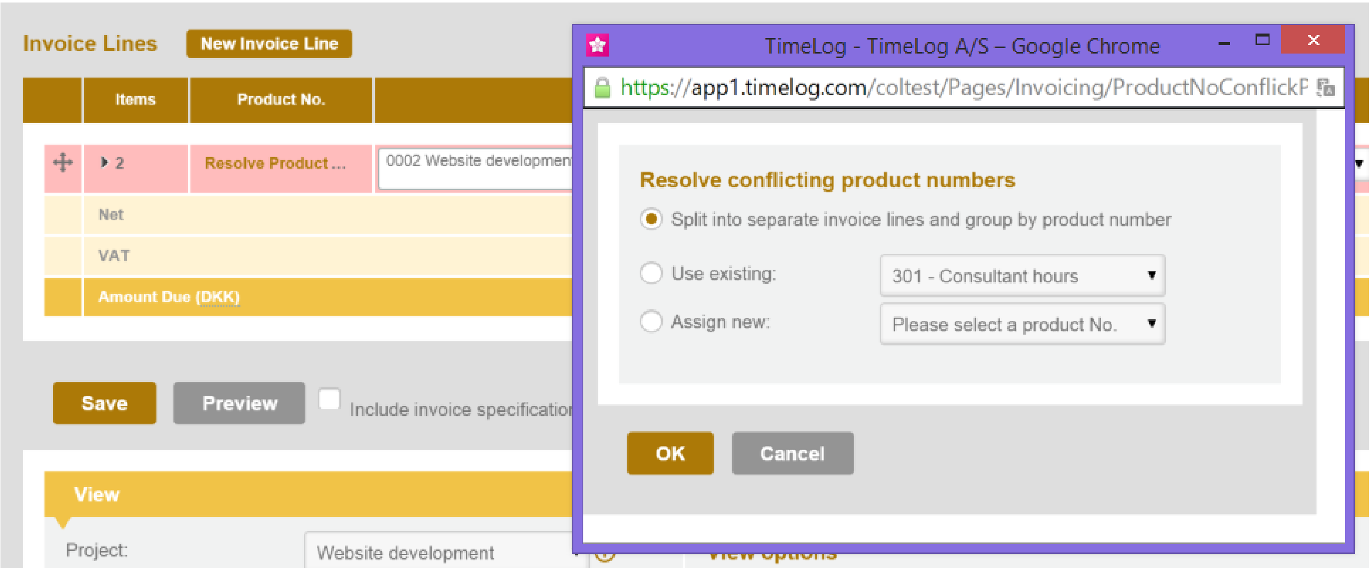
Invoice Lines | New Invoice Line | Select action | OK

Items	Product No.	Description	Quantity		Rate	%	VAT %	Amount
1	301 - Consultant h	Consultancy	14,00	hrs.	1.200,00	0,00	25,00	16.800,00
1	304 - Travel time	Travel	2,00	hrs.	1.200,00	0,00	25,00	2.400,00
Net								19.200,00
VAT								4.800,00
Amount Due (DKK)								24.000,00

If you attempt to collect data with different product numbers on a single invoice line, a conflict occurs, which the user will be prompted to resolve.

Figure 27

Conflict of product numbers on an aggregated invoice line



3.4.2 Transferring an invoice

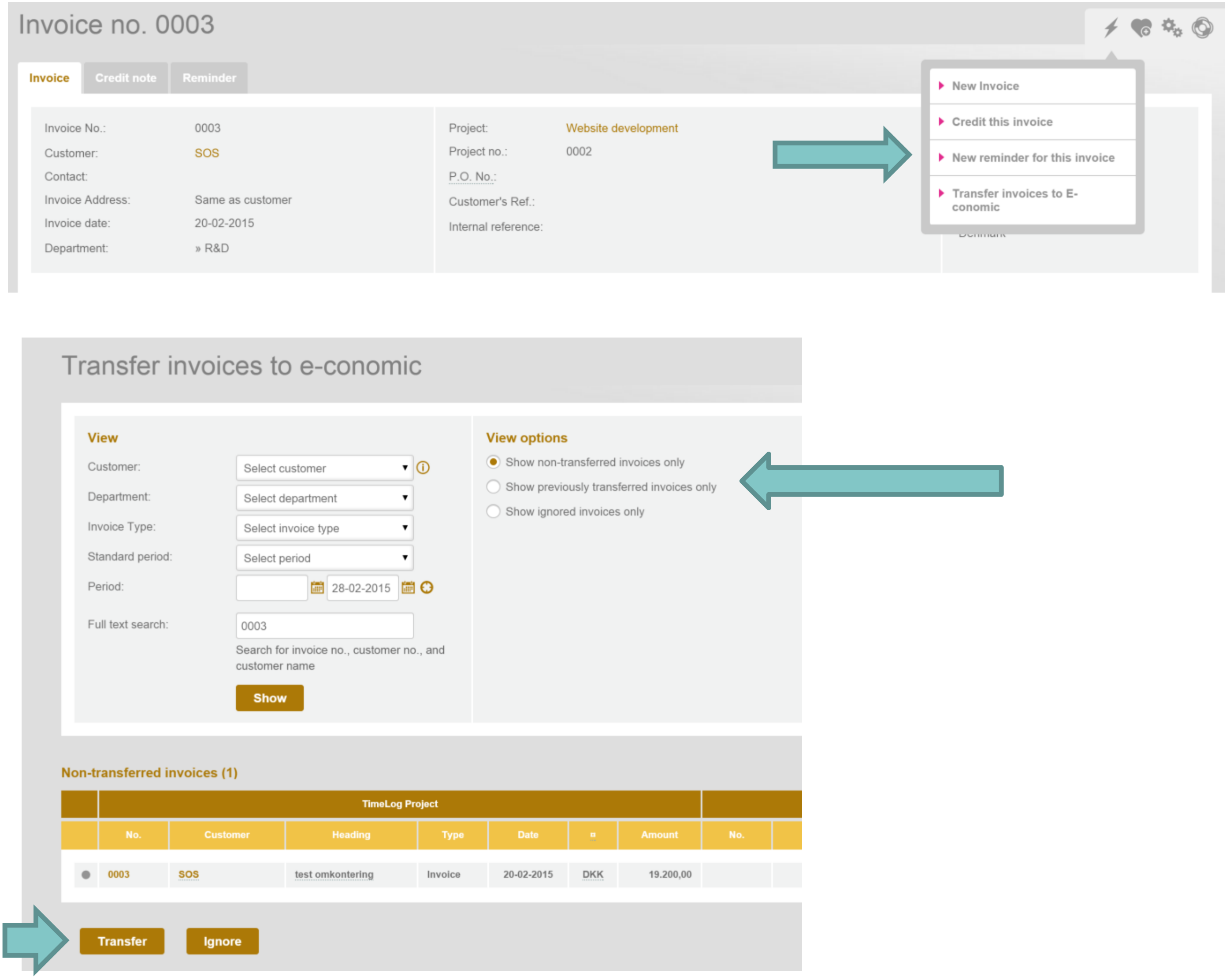
When an invoice is booked, you can transfer it to e-conomic/ Reviso, either individually during bookkeeping or collectively, e.g. during monthly invoicing.

To transfer the newly booked invoice, click the **Transfer invoices to e-conomic/ Reviso** shortcut (Figure 28). This opens the current invoice selected in advance (Figure 29). As the invoice is already selected, simply click **Transfer**.

Please note! View not previously transferred or previously transferred invoices. Use the latter if you need to transfer an already transferred invoice again. Monitor progress by sliding the radio button and clicking Show until the list below non-transferred invoices is empty.

Figure 28 and 29

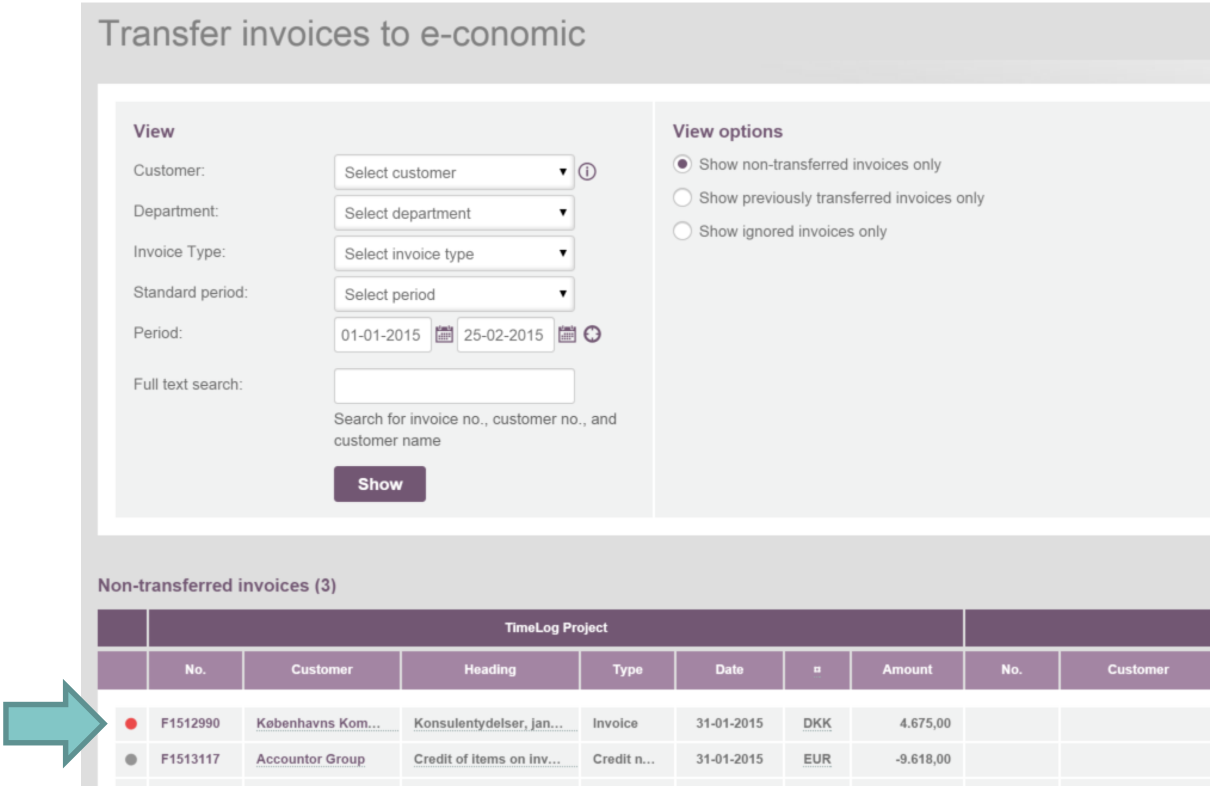
Transferring an invoice.

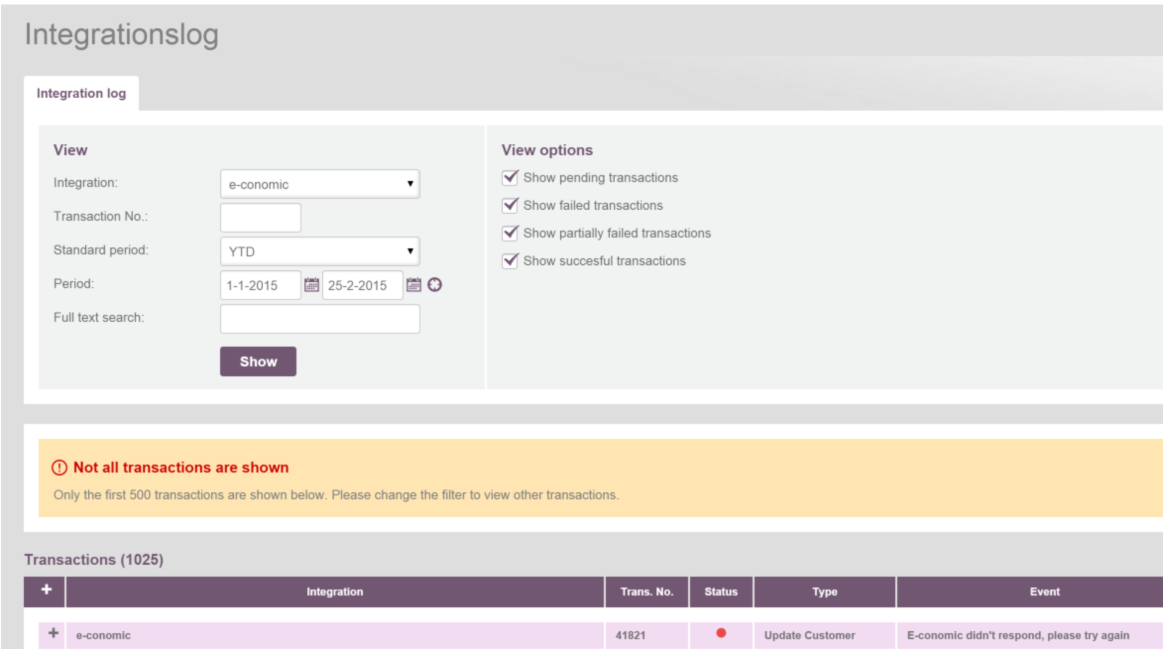


If a transfer fails, e.g. because a product number in TimeLog Project is not available in e-conomic/ Reviso, the invoice remains in the list of non-transferred invoices and is highlighted with a red background and a red indicator to the left. Click the indicator to open the integration log and identify the problem to take the proper measures (Figure 30).

Figure 30

Invoice transfer error



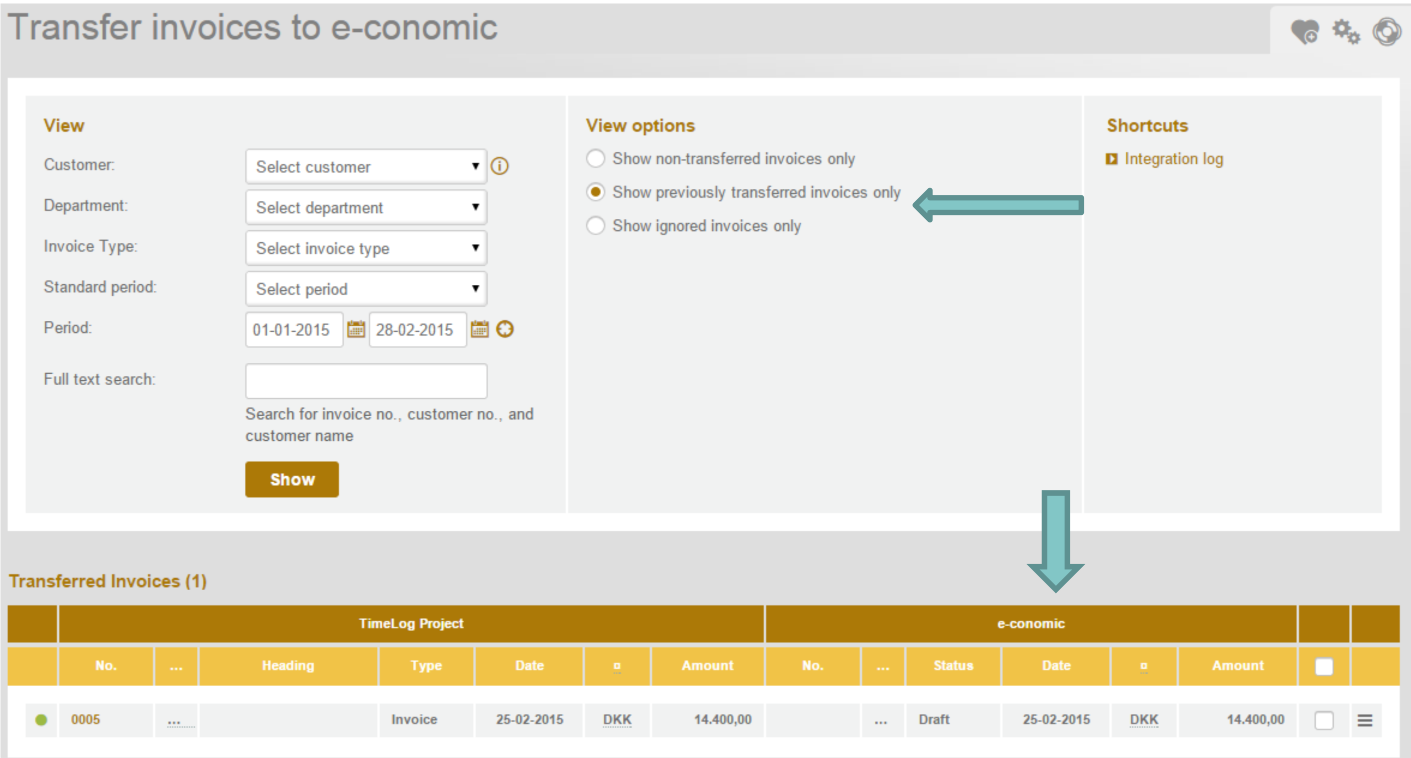


When the invoices are transferred to e-conomic/ Reviso, you can view all previously transferred invoices (Figure 31). All booked invoices in TimeLog Project within the selected view are shown to the left. On the right-hand side is the corresponding invoice in e-conomic/ Reviso. This makes it possible to balance the invoice amount, currency, status and invoice numbers.

This is also the view which makes it easy to locate the original invoice in TimeLog Project on which the e-conomic/ Reviso invoice is based.

If you have accidentally deleted an invoice in e-conomic/ Reviso, this is also where you re-transfer it from TimeLog Project.

Figure 31
Balancing invoices



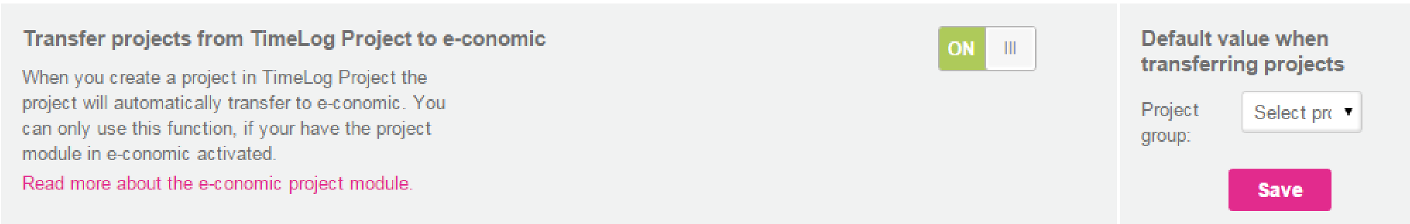
3.5 Transferring projects

It is possible to transfer projects from TimeLog Project to e-conomic/ Reviso. You can only use this functionality, if you have activated the **Projects** module in e-conomic/ Reviso.

When the functionality is activated in e-conomic/ Reviso, you go to the setup of the integraton in TimeLog Project (**System administration -> Integrations & API -> Standard integrations -> e-conomic/ Reviso**). Here, you choose a project group, which is used when transferring projects. It must be set up, as e-conomic/ Reviso demands it for creating a project.

Figure 32

Here, the project group used for transferring projects to e-conomic/ Reviso is chosen



Hereafter, the projects are automatically transferred from TimeLog Project to e-conomic/ Reviso, when a new project is created as usual or via QuickCreate in TimeLog Project.

If the project customer and/or contact person is nor created in e-conomic/ Reviso, they are automatically created if the setting is enabled in the integration configuration.

If not enabled and a customer or contact is not available, the project transfer will fail and a message saying that the customer/contact is unknown, and that the project is not transferred is shown. You may manually go to the customer card and the contact person in TimeLog Project and choose to transfer the customer and contact person. Hereafter, the project can be transferred.

Error messages are always visible in the report **Integration log**, which is found here **Reports -> Integration & Import/Export**.

If the project is updated, the data is immediately transferred to e-conomic/ Reviso. Please note that no project data is transferred from e-conomic/ Reviso to TimeLog Project.

Data that can be transferred to projects in e-conomic/ Reviso is:

- TimeLog Project project number: In e-conomic/ Reviso, it can only be numbers. If other characters are used in TimeLog Projects' project numbers, they are removed and the remaining numbers are used as project number in e-conomic/ Reviso.
- TimeLog Project project description: Is transferred to e-conomic/ Reviso's project description
- TimeLog Project project name: Is transferred to e-conomic/ Reviso's project name

Appendix A

Connections between customer data in TimeLog Project and e-conomic/ Reviso.

This figure shows how data in TimeLog Project correspond with data in e-conomic/ Reviso.