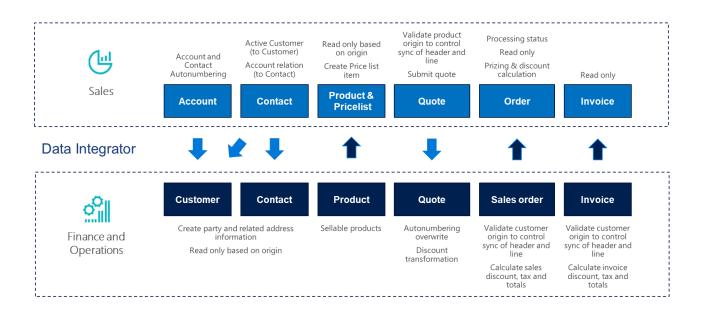# Prospect to cash solution for integration between Dynamics 365 for Sales and Dynamics 365 for Finance and Operations

Microsoft

The Prospect to cash solution provides direct synchronization across Dynamics 365 for Finance and Operations, Enterprise edition, and Dynamics 365 for Sales. The Prospect to cash templates that are available with the Data Integration feature enable the flow of data for accounts, contacts, products, sales quotations, sales orders, and sales invoices between Finance and Operations and Sales. While data is flowing between Finance and Operations and Sales, you can perform sales and marketing activities in Sales, and you can handle order fulfillment by using inventory management in Finance and Operations.

- Maintain **Accounts** in Dynamics 365 for Sales and sync them to Dynamics 365 for Finance and Operations as **Customers**.

- Maintain **Contacts** in Dynamics 365 for Sales and sync them to Dynamics 365 for Finance and Operations.

- Maintain **Products** in Dynamics 365 for Finance and Operations and sync them to Dynamics 365 for Sales.

- Create **Quotes** in Dynamics 365 for Sales and sync them to Dynamics 365 for Finance and Operations.

- Generate **Sales orders** in Dynamics 365 for Sales for existing products and sync them to Dynamics 365 for Finance and Operations.

- Generate, modify, and fulfill Sales orders in Dynamics 365 for Finance and Operations and sync changes to Dynamics 365 for Sales.

- Generate **Invoices** in Dynamics 365 for Finance and Operations and sync them to Dynamics 365 for Sales.

Easy access to data through the power of Dynamics 365 Common Data Service

The solution leverages the power of Azure Public Cloud and the combined data will be available via Dynamics 365 Common Data Service. This enables business users to access, visualize, share, and modify the unified Sales and Operations data through Power Apps, Power BI, or create workflow automations using Flow with pre-defined templates for various business processes. This also means that Power BI dashboard lets users gain better insight into the business process information across the two systems.

Fast implementation

Integration between different ERP systems have traditionally been known for their rigidity, complexity, and slow deployments and implementations. This release is changing the game in this area by providing prepackaged integration templates. The templates provide the out-of-the-box experience for prospect-to-cash scenarios including synchronization needed for sales processes with accounts, customers, contacts, products, of sales orders. In addition to this an intelligent and easy-to-use setup experience, it is optimized to quickly adjust integration settings for your data structure and business needs.

Enhanced systems and flexible setup

The integration comes with a rich solution to optimize the experience and allow for complex process flows between Dynamics 365 for Sales and Dynamics 365 for Finance and Operations. Dynamics 365 for Finance and Operations have been optimized to support integration with enhanced entities and Dynamics 365 for Sales is optimized with a solution.

Features in the Prospect to cash Dynamics 365 for Sales solution

Account

The Account Number field is available on the Account page. It has been made a natural and unique key in order to support the integration. The natural key feature of the Customer Relationship Management (CRM) solution might affect customers who already use the Account Number field, but who don't use unique Account Number values per account. Currently, the integration solution doesn't support this case.

When a new account is created, if an Account Number value doesn't already exist, it's automatically generated by using a number sequence. The value consists of ACC, followed by an increasing number sequence and then a suffix of six characters. Here is an example: ACC-01000-BVRCPS

When the integration solution for Sales is applied, an upgrade script sets the Account Number field for existing accounts in Sales. If there are no Account Number values, the number sequence that was mentioned earlier is used.

Products

In Sales, a new Is Externally Maintained field has been added on products to indicate that a given product is maintained externally. By default, the value is set to Yes during an import to Sales. The following values are available:

Yes – The product originated from Finance and Operations and won't be editable in Sales.
No – The product was entered directly in Sales.
(Blank) – The product existed in Sales before the Prospect to cash solution was enabled.

The Is Externally Maintained field helps guarantee that only quotations and sales orders that have externally maintained products will be synchronized to Finance and Operations.

Externally maintained products are automatically added to the first valid price list that has the same currency. Price lists are organized alphabetically by name. The product sales price from Finance and Operations is used as the price on the price list. Therefore, there must be a price list in Sales for every product sales currency in Finance and Operations. The currency on the released sellable products is set to the accounting currency in the legal entity that the product is exported from.

Contacts

A new Is Active Customer field has been added to the contact. This field is used to differentiate contacts that have sales activity and contacts that don't have sales activity. Is Active Customer is set to Yes only for contacts that have related quotations, orders, or invoices. Only those contacts are synchronized to Finance and Operations as customers.

A new IsCompanyAnAccount field has been added to the contact. This field indicates whether a contact is linked to a company (parent account/contact) of the Account type. This information is used to identify contacts that should be synchronized to Finance and Operations as contacts.

A new Contact Number field has been added to the contact to help guarantee a natural and unique key for the integration. When a new contact is created, a Contact Number value is automatically generated by using a number sequence. The value consists of CON, followed by an increasing number sequence and then a suffix of six characters. Here is an example: CON-01000-BVRCPS

When the integration solution for Sales is applied, an upgrade script sets the Contact Number field for existing contacts by using the number sequence that was mentioned earlier. The upgrade script also sets the Is Active Customer field to Yes for any contacts that have sales activity.

Quote (Sales to Ops)

The Has Externally Maintained Products Only field has been added to the Quote entity to consistently track whether the sales quotation consists entirely of externally maintained products. If a sales quotation has only externally maintained products, the products are maintained in Finance and Operations. This behavior helps guarantee that you don't try to synchronize sales quotation lines that have products that are unknown to Finance and Operations.

All quote products on the sales quotation are updated with the Has Externally Maintained Products Only information from the sales quotation header. This information is found in the Quote Has Externally Maintained Products Only field on the QuoteDetails entity.

A discount can be added to the quote product and will be synchronized to Finance and Operations. The Discount, Charges, and Tax fields on the header are controlled by a setup in Finance and Operations. Currently, this setup doesn't support integration mapping. In the current design, the Price, Discount, Charge, and Tax fields are maintained and handled in Finance and Operations.

In Sales, the solution makes the following fields read-only, because the values aren't synchronized to Finance and Operations:
- Read-only fields on the sales quotation header: Discount %, Discount, and Freight Amount
- Read-only fields on quote products: Tax

Sales order

New fields have been added to the Order entity and appear on the page:

- **Is Maintained Externally** – Set this option to **Yes** when the order is coming from Finance and Operations.

- **Processing status** – This field shows the processing status of the order in Finance and Operations. The following values are available:
    - **Draft** – The initial status when an order is created in Sales. In Sales, only orders with this processing status can be edited.
    - **Active** – The status after the order is activated in Sales by using the **Activate** button.
    - **Confirmed**
    - **Packing Slip**
    - **Invoiced**
    - **Picked**
    - **Partially Picked**
    - **Partially Packed**
    - **Shipped**
    - **Partially Shipped**
    - **Partially Invoiced**
    - **Cancelled**

The **Has Externally Maintained Products Only** setting is used during order activation to consistently track whether a sales order consists entirely of externally maintained products. If a sales order consists entirely of externally maintained products, the products are maintained in Finance and Operations. This setting helps guarantee that you don't activate and try to synchronize sales order lines that have products that are unknown to Finance and Operations.

The **Create Invoice**, **Cancel Order**, **Recalculate**, **Get Products**, and **Lookup Address** buttons on the **Sales order** page are hidden for externally maintained orders, because invoices will be created in Finance and Operations and synchronized to Sales. These orders can't be edited, because sales order information will be synchronized from Finance and Operations after activation.

The sales order status will remain **Active** to help guarantee that changes from Finance and Operations can flow to the sales order in Sales. To control this behavior, set the default **Statecode [Status]** value to **Active** in the Data integration project.

Invoice

- An **Invoice number** field has been added to the **Invoice** entity and appears on the page.
- The **Create invoice** button on the **Sales order** page is hidden, because invoices will be created in Finance and Operations and synchronized to Sales. The **Invoice** page can't be edited, because invoices will be synchronized from Finance and Operations.
- The **Sales order status** value is automatically changed to **Invoiced** when the related invoice from Finance and Operations has been synchronized to Sales. Additionally, the owner of the sales order that the invoice was created from is assigned as the owner of the invoice. Therefore, the owner of the sales order can view the invoice.

Additional information

For more information about the Prospect to cash integration see the documentation: https://docs.microsoft.com/en-us/dynamics365/unified-operations/supply-chain/sales-marketing/prospect-to-cash