Connector for Business Central and Dynamics CRM

Technical User Guide

Version 3.0.0.8

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Overview

Bond Consulting Services' BC-CRM is a connector that integrates Microsoft's Dynamics 365 Business Central (BC) and Dynamics 365 CRM Sales. This document is a user guide that provides the details for the mappings between both systems. The connector primarily uses direct API communication to provide real-time, seamless syncing of data between the systems.

Main Mappings

There are several entities that are implemented, and the sync direction can be BC to CRM, CRM to BC, or bidirectional. Records will be directly synced from one system to the other without any middle tier/staging area. Syncing will be done from CRM to BC when a record is saved or confirmed. In BC, records are synced to CRM when a page is exited, by a secondary job running in the background, or manually initiated by the user. The connector integrates the following entities:

Standard CRM (Dynamics 365 Sales) Entities

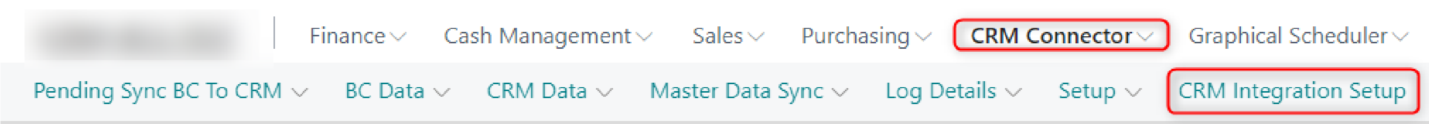
No.	BC Entity	CRM Entity	Direction	Comments
1	Config. Template	Configuration Template (Custom Entity)	BC to CRM	
2	Contact	Contact	Bidirectional	
3	Country/Region	Country/Region (Custom Entity)	BC to CRM	
4	Currency	Currency	BC to CRM	
5	Customer	Account	Bidirectional	
6	Customer Ledger Entry	Customer Ledger Entry (Custom Entity)	BC to CRM	Only open entries are synced
7	Dimension	Dimension Detail (Custom Entity)	BC to CRM	
8	Location	Location (Custom Entity)	BC to CRM	
9	Inventory	Inventory (Custom Entity)	BC to CRM	
10	Item	Product	Bidirectional	
11	Payment Terms	Payment Terms (Custom Entity)	BC to CRM	
12	Posted Sales Invoice	Invoice	BC to CRM	
13	Resource	Product	BC to CRM	
14	Salesperson	Owner	Manual	
15	Sales Order	Order	CRM to BC	
16	Sales Quote	Quote	CRM to BC	
17	Shipping Agent	Shipping Agent (Custom Entity)	BC to CRM	

18	Ship to Address	Ship to Address (Custom Entity)	CRM to BC
19	Shipment Method	Shipment Method (Custom Entity)	BC to CRM
20	Tax Area	Tax Area (Custom Entity)	BC to CRM
21	Unit of Measure	Unit of Measure	BC to CRM

Note: The "Custom Entity" reference indicates that an entity was created specifically to provide corresponding fields in the other system to facilitate a sync of related data.

CRM Integration Setup

Locate the CRM Integration setup under the CRM Connector menu option.



The connector uses the Dataverse connection in Business Central which has to be configured. This setup is usually done by an implementation team. The setup includes the technical aspects which establishes a secure connection between CRM and Business Central. The settings on the CRM integration Setup page should be configured before trying to sync data.

The fields from integration setup page are explained in the table below:

No.	Field Name	Purpose
1	Enable CRM Integration	This Boolean flag enables the integration. If the connector is installed, and this flag is not enabled, there will be no synchronization between the two systems.
2	CRM Sales Order No. Series	This is a Look up field which shows the master of no. series. If selected, the system will use the number from the selected series to create new sales order in BC from CRM. This can be helpful in cases where the user wants to keep sales orders from CRM separate from those created directly in BC.
3	CRM Sales Quote No.	This is a Look up field which shows the master of no. series. If selected, the system will use the number from the selected series to create new sales quote in BC from CRM. This can be helpful in cases if the user wants to keep sales quotes from CRM separate from those created directly in BC.
4	Do Not Allow to Modify the Sales Order	If the Boolean is enabled, the system will not allow the modification of the integration field values for orders created from CRM. The system will lock the values in those fields in the sales header & sales line which are included in integration. The user will still be

		able to modify the values of other fields which are not included in integration. E.g., A user will not be able to change the order date, but can update the dimensions. In the sales order line, the user will not be able to add any new line or delete any line flowing from CRM but, the user will be able to add a new line with type "Comment".
5	Do Not Allow to Modify the Sales Quote	If the Boolean is enabled the system will not allow the modification of the integration field values for quotes created from CRM. The system will lock the values in those fields in quote header & quote line which are included in integration. The user will still be able to modify the values of other fields which are not included in integration. E.g., A user will not be able to change the document date, but can update the dimensions. In sales quote line, the user will not be able to add any new line or delete any line flowing from CRM but, the user will be able to add a new line with type "Comment".
6	Keep Sales Order No. same as CRM	If the Boolean is enabled, then the Sales Order No. from CRM will become the Sales Order No. in BC. If it is disabled, then the system will use the standard setup.
7	Keep Sales Quote No. same as CRM	If the Boolean is enabled, then the Sales Quote No. from CRM will become the Sales Quote No. in BC. If it is disabled, then the system will use the standard setup.
8	Audience	Business Central API URL
9	Tenant	Tenant Id of client
10	Client ID	App registration client id
11	Secret	Secret value from App registration setup
12	Global CRM URL	URL of CRM will be defined here to identify CRM environment for the integration.
13	Default Unit Group	This specifies the default unit group GUID to use while creating a new product record in CRM from BC. User will need to create a one-time record in CRM.
14	Default Unit	This specifies the default unit GUID to use while creating a new Unit under Unit Group in CRM from BC.
15	Default Price List	This specifies the default price list to use while creating a new product record in CRM from BC. User will need to create a one-time record in CRM. During Product creation in CRM, the system will also create a record using the Default Price List in Price List Items entity with ZERO Amount.
16	Auto Synchronize Posted Invoice CRM	If this Boolean is enabled, then all the posted sales invoices from BC will be synced (if all the validations are passed) to new sales invoices in CRM.

17	Auto Post Sales Invoice in BC	If this Boolean is enabled, the system will automatically post invoices flowing from CRM to BC. Otherwise, the invoice will be created and left open.
18	Map all Item Units of Measure from Active Price List	If this Boolean is enabled, all Units of measure from the Active Sales price list will be synced to CRM instead of just the default unit and price. The filters for the price list are: Status: Active; Source Type: All Customers; Asset Type: Item
19	Is Field Service Installed	This option is enabled if Field Service add-on is installed, and the Field Service Mappings are needed.

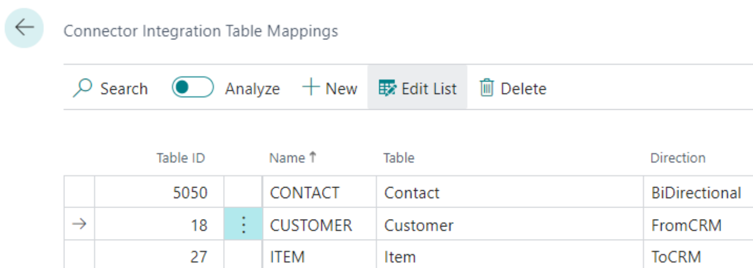
There are various functions given in the ribbon which are explained in below table:

No.	Function Name	Purpose
1	Create Web Services	This function will be called once during the implementation to generate new web services to establish the link between entities of CRM and BC.
2	Create Job Queue Entries	The connector transactions are primarily driven by real-time event triggers. The historical jobs are created and optional jobs below will run in the background as a secondary process in case there is a failure to sync data with the event trigger. This function will be called once during the implementation to generate new job queue which will periodically trigger the various flow. There are five job queues generated by this function: 1. BC to CRM Data Sync – This job queue will automatically push the master data generated in BC to CRM 2. BC to CRM CLE Data Sync – This will push the customer ledger entries generated in BC to CRM 3. CRM to BC Sales Quote create– This will create a new sales quote in BC from sales quote of CRM 4. CRM to BC Sales Order Create – This will create a new sales order in BC from sales order of CRM 5. BC to CRM Inventory Data Sync – This will push the location wise on hand inventory to CRM. Once these job queues are created using the function, the user must define their recurrence. Ideally the suggested recurrence time for each job queue is as below: 1. BC to CRM Data sync – Every 3 mins.

		2. BC to CRM CLE Data Sync – Once every night 3. BC to CRM Inventory Data Sync – Once every night
3	Get Default UOM GUIDs	This function will be called to fill Default UOM GUID for the record which is created in CRM by user.
4	Get Default List price GUIDs	This function will be called to fill Default Price List GUID for the record which is created in CRM by user.

Connector Integration Table Mappings

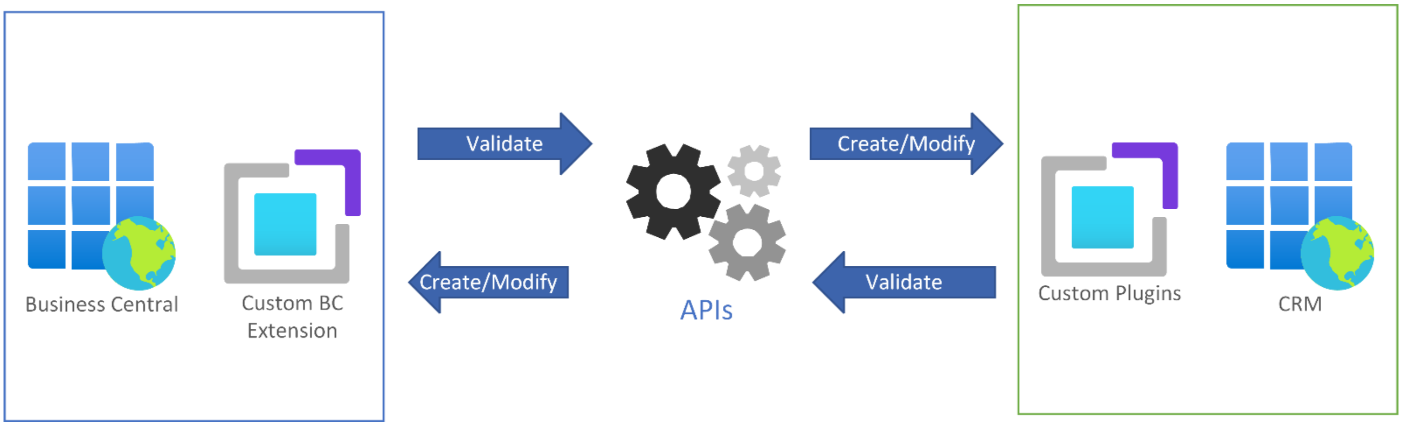
The Connector integration table mappings determine the flow of mappings for the connector. Mappings can be set to BiDirectional, FromCRM, or ToCRM. The supported direction for the mappings is outlined in the Main Mappings Section.



General Flow & Architecture

The solution has been developed to follow a general flow & architecture to synchronize the data between the two systems.

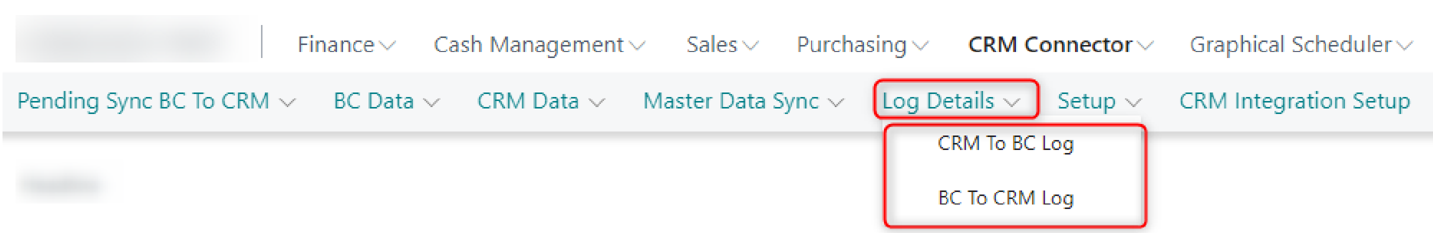
The general flow uses a custom plugin and extension in CRM and BC and communicates using APIs.



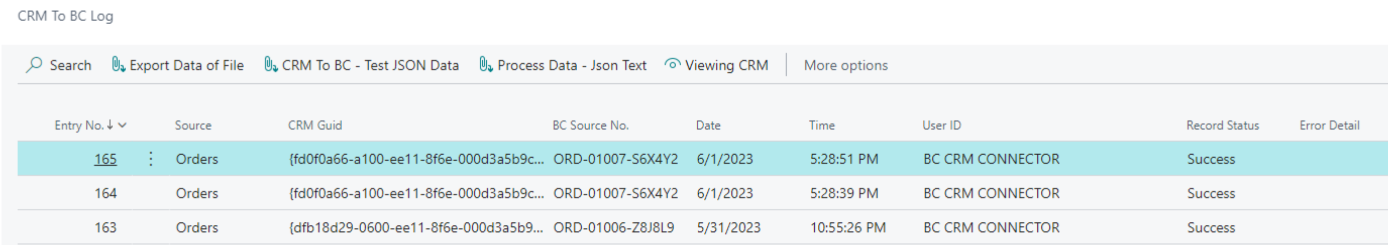
Log Tables

There are two main log tables which store data created or modified for entities in the integration. They are:

1. BC to CRM Log – Logs data synced from BC to CRM
2. CRM to BC Log – Logs data synced from CRM to BC



The CRM to BC log shows data that flows from CRM to BC. The source shows the mapping entity, and the Record Status indicates whether the transaction was successful or whether it failed. CRM entities that are mapped also contain a log status and date. The Export Data of File function downloads a file with the data that was received from CRM. The Test JSON Data and Process Data – JSON Text functions are primarily used if there was a failure, and a user wants to try to resync or troubleshoot the issue.

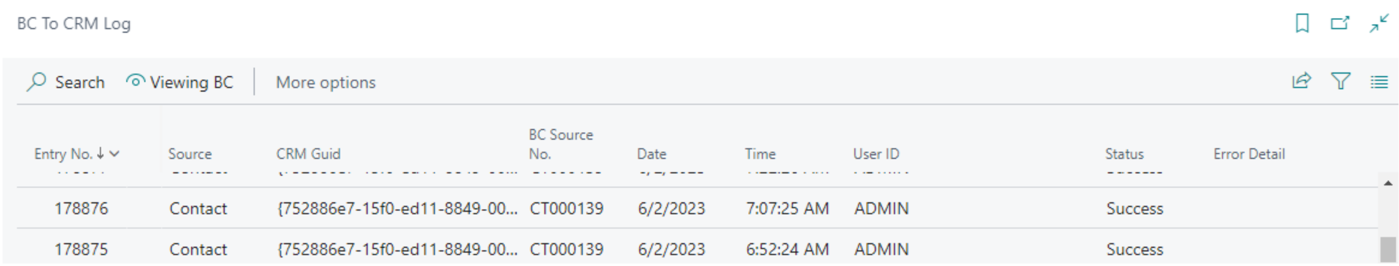


CRM To BC Log

Search | Export Data of File | CRM To BC - Test JSON Data | Process Data - Json Text | Viewing CRM | More options

Entry No.	Source	CRM Guid	BC Source No.	Date	Time	User ID	Record Status	Error Detail
165	Orders	{fd0f0a66-a100-ee11-8f6e-000d3a5b9c...	ORD-01007-S6X4Y2	6/1/2023	5:28:51 PM	BC CRM CONNECTOR	Success	
164	Orders	{fd0f0a66-a100-ee11-8f6e-000d3a5b9c...	ORD-01007-S6X4Y2	6/1/2023	5:28:39 PM	BC CRM CONNECTOR	Success	
163	Orders	{dfb18d29-0600-ee11-8f6e-000d3a5b9...	ORD-01006-Z8J8L9	5/31/2023	10:55:26 PM	BC CRM CONNECTOR	Success	

The BC to CRM log records transactions that are normally synced once a user exits a form that they working on. A job runs in the background as a secondary measure to sync the record if it was not synced on exit the form.



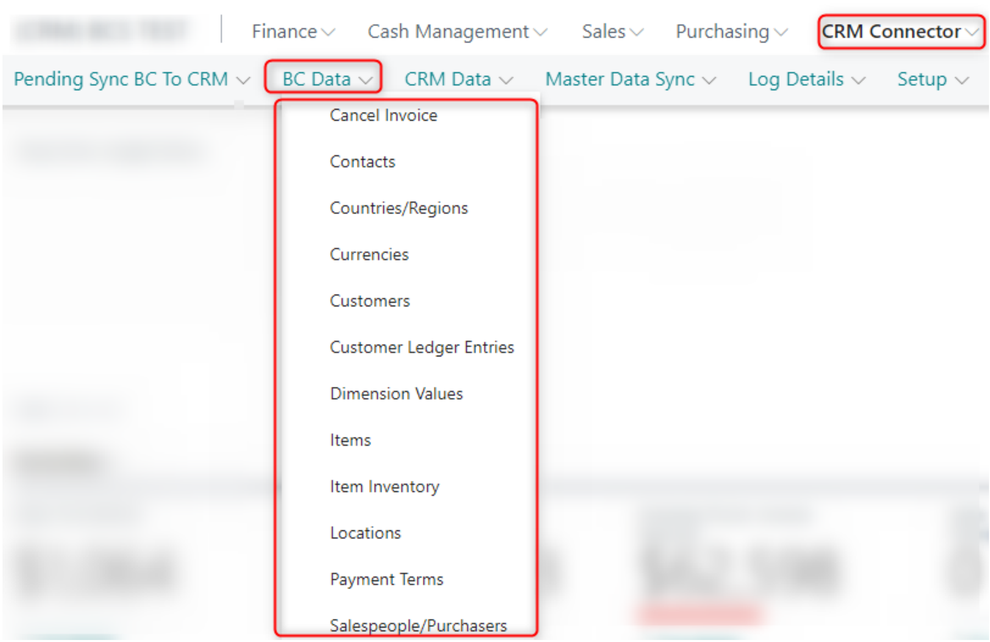
BC To CRM Log

Search | Viewing BC | More options

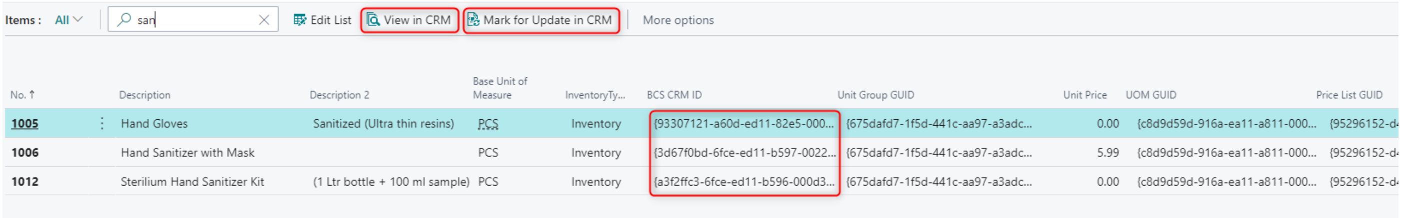
Entry No.	Source	CRM Guid	BC Source No.	Date	Time	User ID	Status	Error Detail
178876	Contact	{752886e7-15f0-ed11-8849-00...	CT000139	6/2/2023	7:07:25 AM	ADMIN	Success	
178875	Contact	{752886e7-15f0-ed11-8849-00...	CT000139	6/2/2023	6:52:24 AM	ADMIN	Success	

BC Data

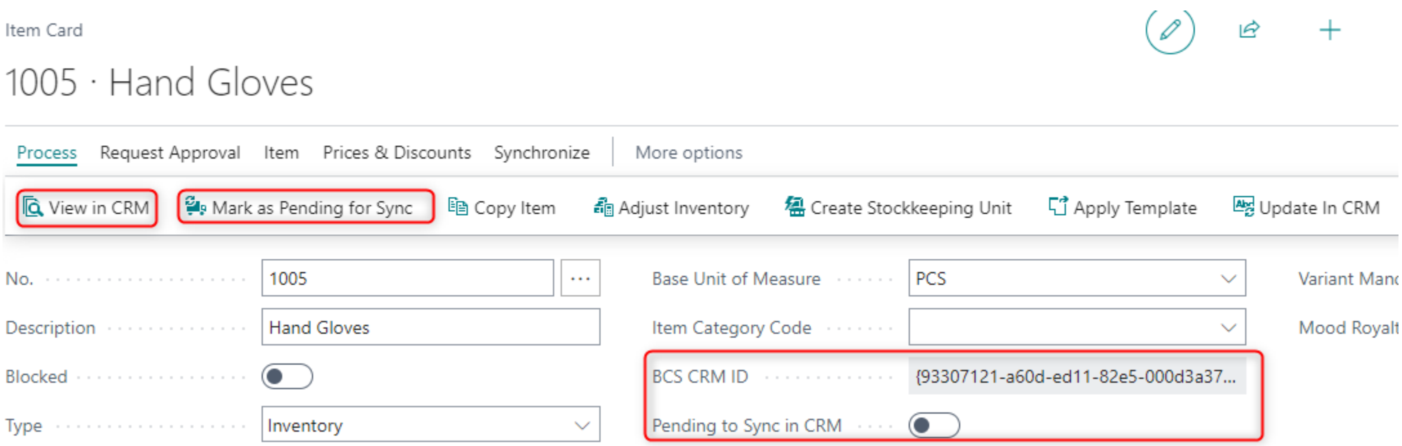
New pages with limited fields have been created to view master data. These pages can be seen under BC Data.



These pages will also serve the purpose of allowing the user to navigate to related CRM record. For example, if you refer to the page of Items under BC data, it will show all the items which are synchronized with CRM with their GUID and the function from ribbon will navigate to record in CRM. Users can mark a record for updating.

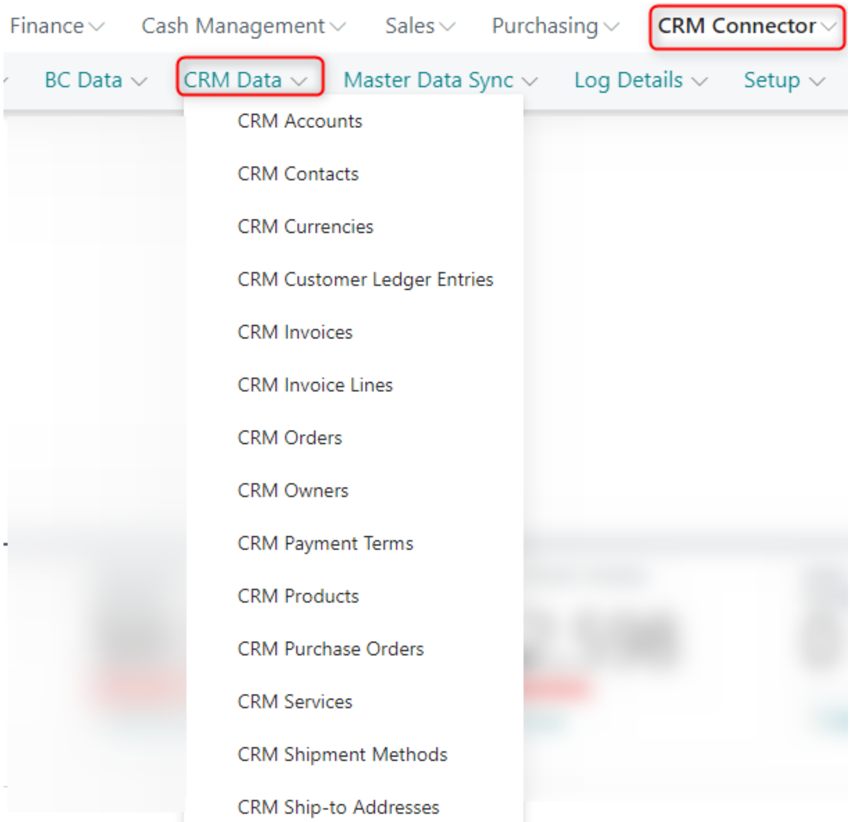


The View in CRM functionality & BCS CRM ID of the related record from CRM is available on each page that is shown under BC Data, and on all BC pages that are integrated between the two systems.



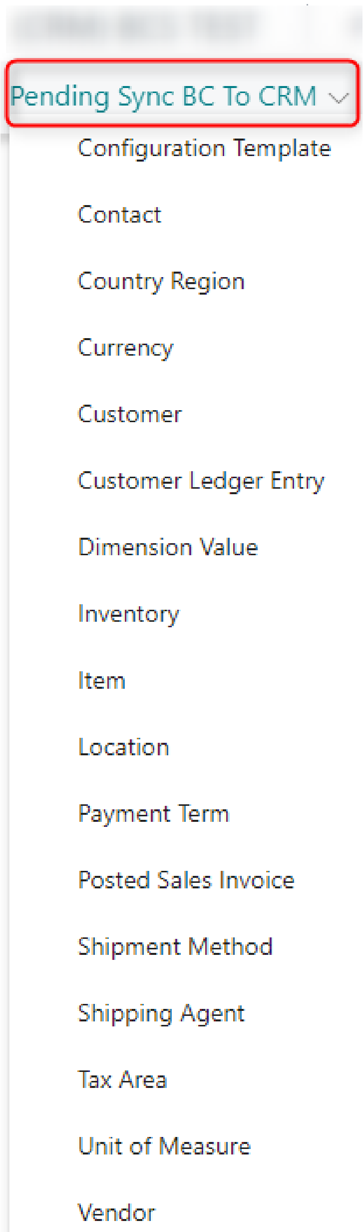
CRM Data

CRM data shows all the records of all the entities flowing from CRM to BC. Custom pages give the user a live view of the CRM data without leaving Business Central.

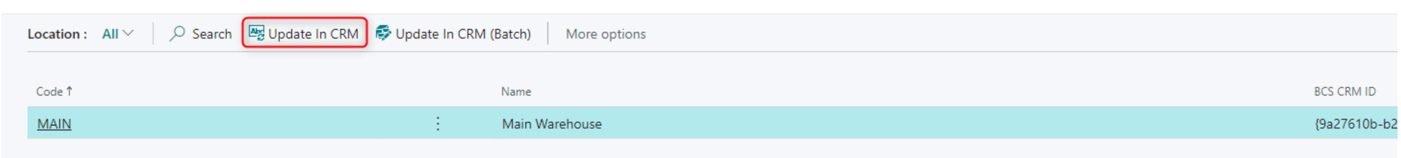


Pending Sync BC to CRM

Pending Sync BC to CRM contains the mappings of the records which are modified/created in BC to be pushed to CRM with the Pending Sync status flag set to true. Data is synced when the user exits a page that has a mapping to CRM or by a job which runs in the background.

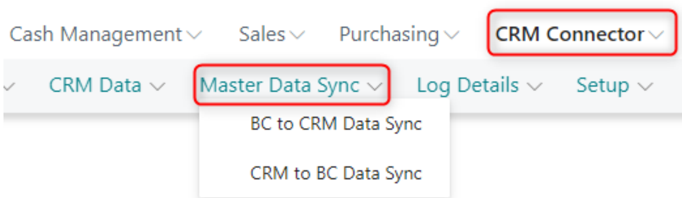


Users can also manually sync a single item or update in batch.



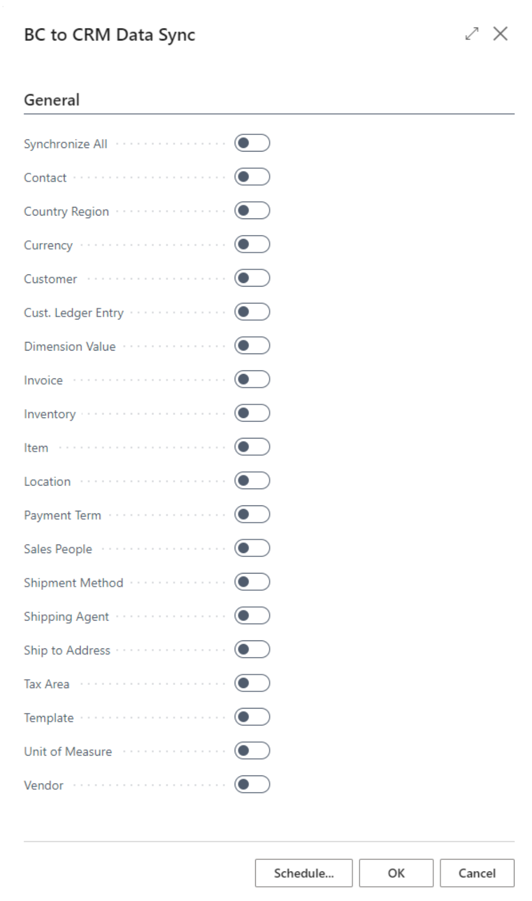
Map Master Data

Master data syncing is usually done on the initial setup. Master records are synced from BC to CRM and from CRM to BC.



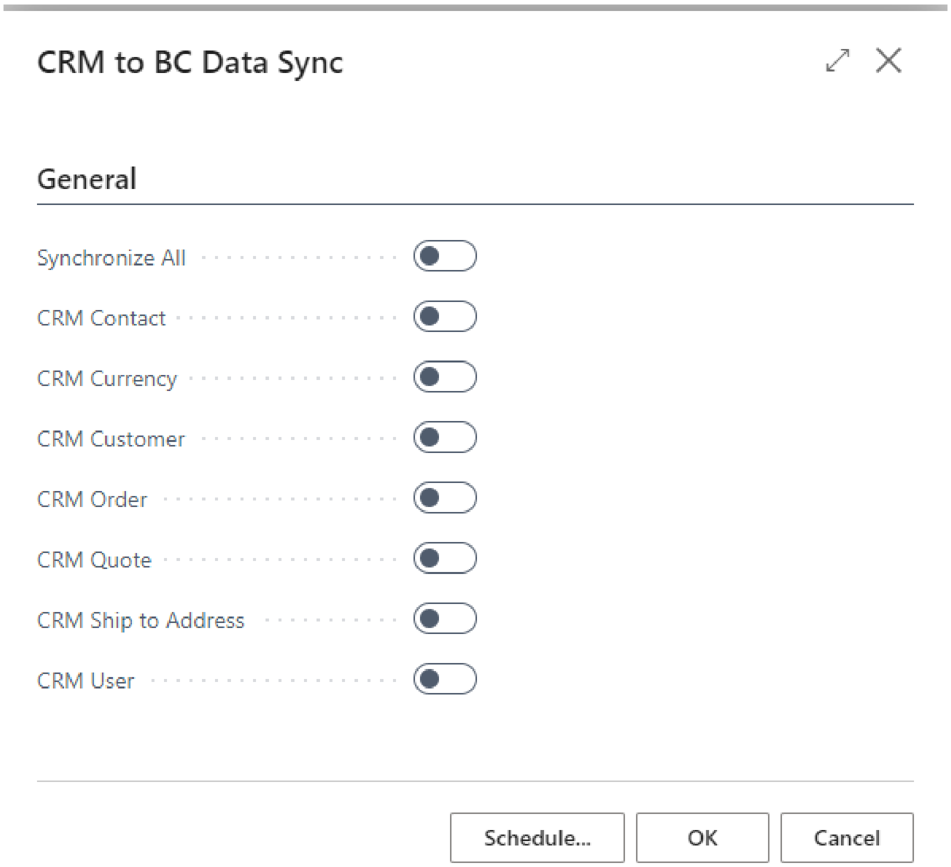
BC to CRM Data Sync

Users have the flexibility of choosing the master data points to sync in a batch. For example, if the user only wants to run the batch job for payment terms, then the toggle should only be enabled for payment terms. To sync all the mappings, the Synchronize All toggle should be enabled.



CRM to BC Data Sync

CRM to BC Data Sync shows the entities for CRM that can be synced for all records.



The batch jobs map does the following:

Salespersons

Salesperson are managed separately in each system. After running the sync for this mapping, the records will be linked based on their email address. There is also a setting in the Connector Integration that can be turned on to Auto create a CRM owner as a BC salesperson if the record is on a customer, contact, sales order, or sales quote.

Currency

Currencies need to be managed individually in both systems. After running the sync for this mapping, the records will be linked based on their Code.

Customers

During the implementation, there may be cases where both systems might have records of customers. By running this batch job, the connector will match the customers based on their name and link them.

Data Mappings

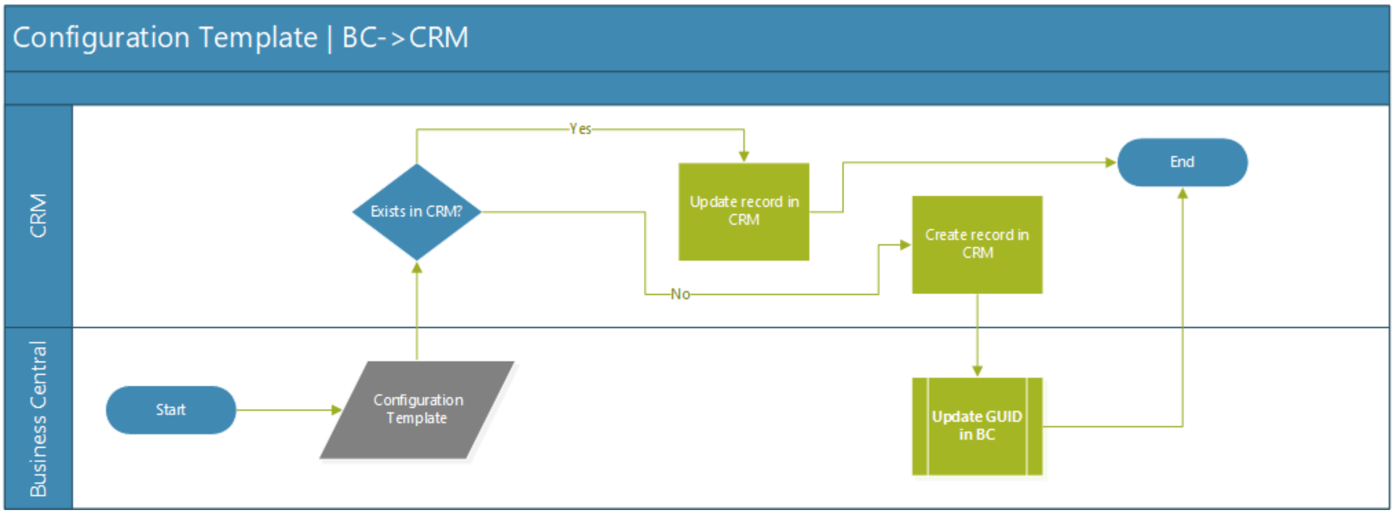
The following outlines the entities supported by the connector.

Configuration Template

A new master entity has been created in CRM to capture the data pushed from BC.

A configuration template created in BC is pushed to CRM and the associated GUID will be synced back to BC.

The flow is shown below:



The field mappings are shown below:

Config. Template (8618) (Business Central)	**CRM Field**	**Remarks**
Code		
Description	Description	
BCS CRM ID	GUID	

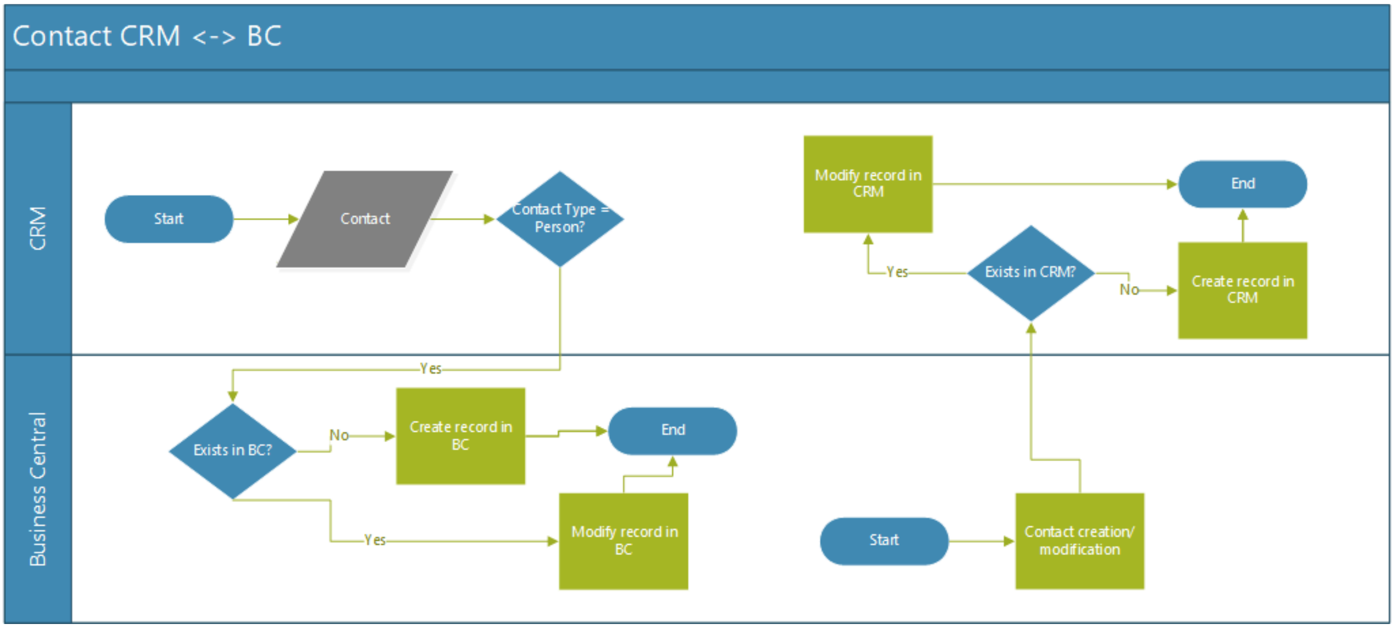
Contact

Contacts have a bidirectional flow which allows data to flow from CRM to BC or from BC to CRM.

Business Central has a built-in function to create contacts of Type Company for every new customer record.

The flow only integrates contacts which has a Type of Person. The flow direction is set in the Connector integration mapping table.

The flow is shown below:



The field mappings are shown below:

CRM Field	Contact (5050) (Business Central)	Remarks
Contact ID	BCS CRM ID	A new field developed in BC to store CRM ID (GUID)
Account ID	Company No	Company ID is the parent Company Contact under which a contact is created in CRM.
Company Name	Name	
Salutation	Salutation	
First Name	First Name	
Middle Name	Middle Name	
Last Name	Surname	
Job Title	Job Title	
Business Phone	Phone No.	
Home Phone	Home Phone	

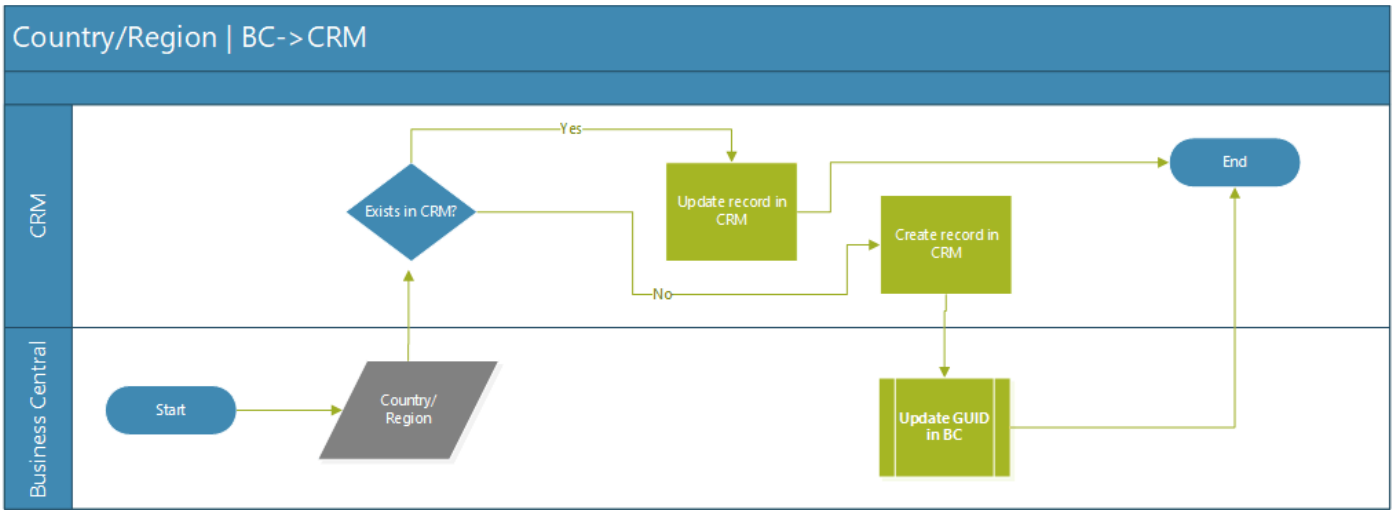
Mobile Phone	Mobile Phone No.	
Fax	Fax No.	
Email	Email	
Address 1: Street 1	Address, Address 2	Validation is applied in CRM to not have more than 100 characters in Street. Text from Street field will flow to Address in BC
Address 1: Street 2	Address, Address 2	Text of 50 characters from Address 1: Street 2 field will flow to Address 2 in BC.
Address 1: Street 3	Address, Address 2	Street 3 will not flow to BC
Address 1: City	City	
Address 1: state	State	
Address 1: Zip/ Postal Code	Zip Code	
Country/ Region	Country/ Region Code	A new field named Country/ Region is developed in CRM, which will be lookup of Country/ Region master.

Country/Region

A new master entity has been created in CRM to capture the data pushed from BC.

A Country/Region created in BC will be pushed to CRM and the GUID will be synced back in BC.

The flow is shown below:



The field mappings are shown below:

Country/Region (9) (Business Central)	CRM Field	Remarks
Code		
Description	Description	
BCS CRM ID	GUID	

Currency

The master of currencies will be maintained separately in both systems. They will be coupled based on their Code.

In Business Central, creating a base currency code or defining this in the setup is not necessary, the base currency will be created in CRM and will be a part of the setup in CRM.

During a transaction sync from CRM to BC like Quote/Order, the system will ignore the currency code if it is the base currency, and vice-versa during the sync from BC to CRM for Sales Invoice. If the currency code is blank in the BC document, the system will use the base currency for this transaction in CRM.

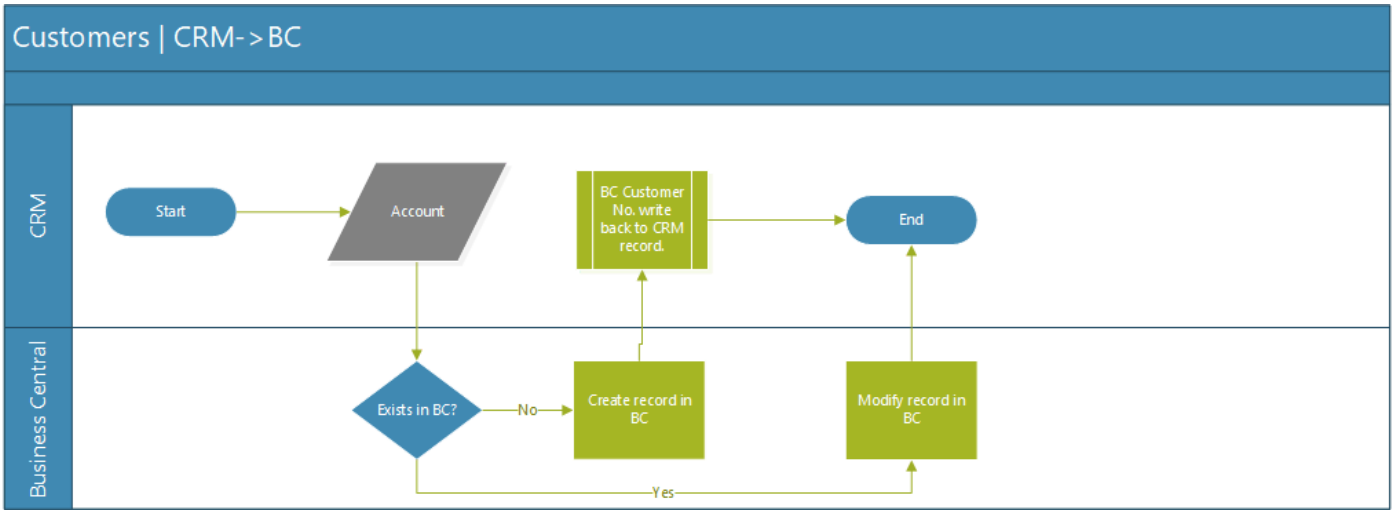
Customer

The customer mapping can be synced in either direction.

Typically, customers are created in CRM and synced to Business Central.

The template code selected in CRM will be used to set some default values for fields like Gen. Business Posting Group, Customer Posting Group etc.

The CRM flow is shown below:



The field mappings are shown below:

CRM Field	Customer (18) (Business Central)	Remarks
Account ID	BCS CRM ID	As the account ID is the GUID in CRM, the values of this field will be like {137526d2-3f72-ea11-a811-000d3a3be299}
Bill to Customer	Bill to Customer No.	
BC Customer No.	No.	When a customer is created in BC, the number generated in BC will flow back to CRM.

Account Name	Name, Name 2	In CRM, a validation is applied which will not allow the users to add more than 200 characters in Name.
Fax	Fax	
Phone	Phone	
Email	Email	
Website	Home Page	
Tax Registration No.	Tax Registration No.	A new field named Tax Registration No is developed in CRM.
Address 1: Street 1	Address	Validation has been applied in CRM to not have more than 100 characters in Address 1: Street 1. Text from Address 1: Street 1 field data flows to Address in BC.
Address 1: Street 2	Address 2	Text of 50 characters from Address 1: Street 2 field will flow to Address 2 in BC.
Address 1: Street 3	Address, Address 2	Address 1: Street 3 will not flow to BC.
Address 1: City	City	
Address 1: Zip/ Postal Code	Zip Code	
Address 1: state	State	
Country/ Region	Country/Region Code	A new field named Country/Region is developed in CRM, which will be the lookup of Country/ Region master.
Template code	Template Code	1. A new field showing look up of configuration templates is developed in CRM on Accounts.

		2. The template code will be created in BC and flow to CRM. Based on the selection in CRM, BC will apply that template code against that record, and will flow the default values defined in that template code.
Shipment Method Code	Shipment Method Code	A new field showing the look up of Shipment Methods is developed in CRM on Accounts. The shipment method code will be created in BC and flow to CRM.
Shipping Agent Code	Shipping Agent Code	A new field showing the look up of Shipping Agents is developed in CRM on Accounts. The shipping agent will be created in BC and flow to CRM.
Payment Terms Code	Payments Term Code	A new field showing look up of Payment Terms is developed in CRM on Accounts. The Payment Terms will be created in BC and flow to CRM.
Tax Area Code	Tax Area Code	A new field showing look up of Tax Area is developed in CRM on Accounts. The Tax Area will be created in BC and flow to CRM. Mapping can be from FS Tax Code table if enabled.
Global Dimension 1	Global Dimension 1	
Global Dimension 2	Global Dimension 2	

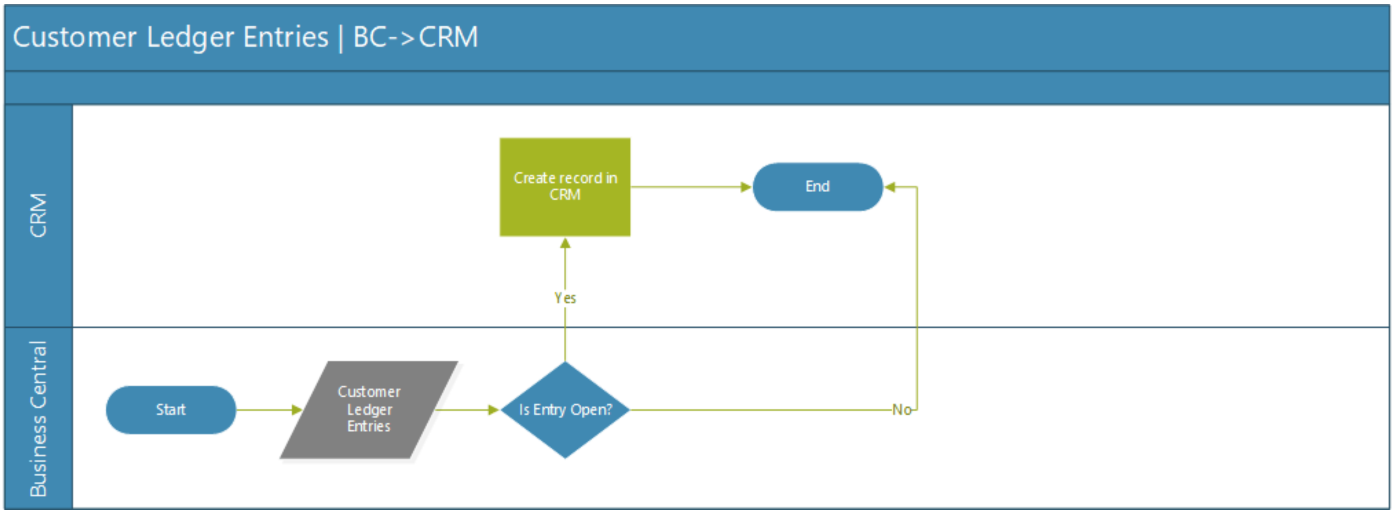
Shortcut Dimension 3	Shortcut Dimension 3	
Tax Liable	Tax Liable	
Primary Contact	Primary Contact No.	
Credit Limit	Credit Limit	

Customer Ledger Entry

A new table is created in CRM to store the open customer ledger entries from BC. The job queue named “Synchronize CLE from BC to CRM” will run to delete all the existing lines from CRM and update them with the new one from BC.

This entity is linked with the Account entity and the related records are shown in a sub grid under the Account master.

The flow is shown below:



The field mappings are shown below:

Customer Ledger Entry (21) **(Business Central)**	**CRM Field**	
Document Type	Document Type	
Document No.	Document No.	
Posting Date	Posting Date	
Customer No.	Customer No.	
Invoice Amount	Invoice Amount	
Remaining Amount	Remaining Amount	
Remaining Amount Other Currencies	Remaining Amount Other Currencies	
Currency Code	Currency Code	

Due Date	Due Date	
Description	Description	
BC Entry No	BC Entry No	
BC Customer No.	BC Customer No.	

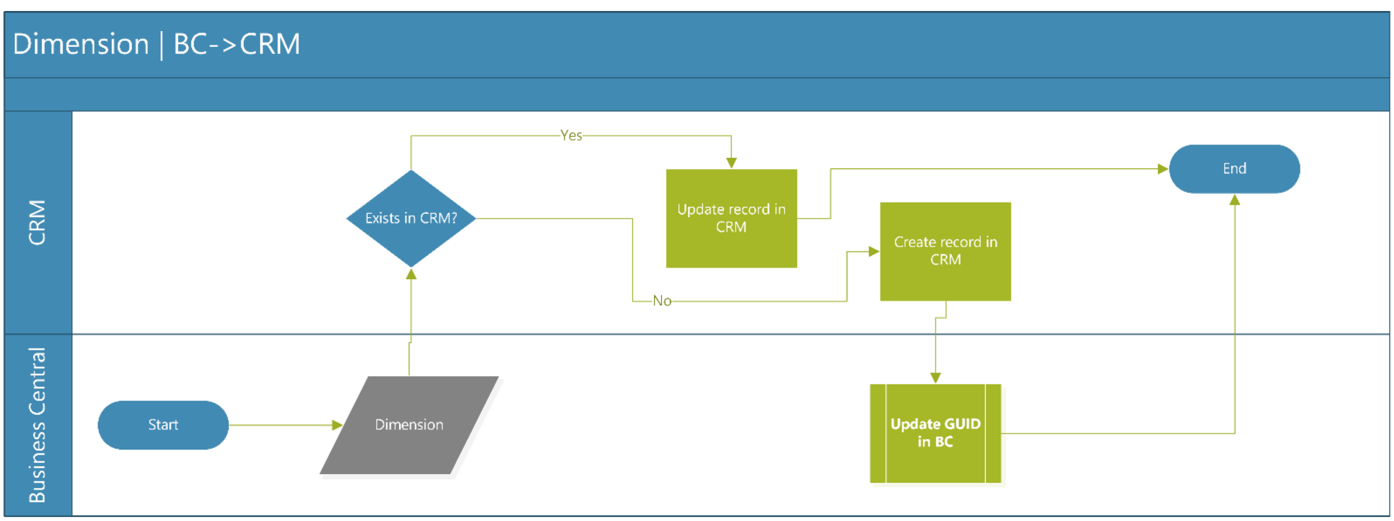
A new field named “Balance” is provided on the Account entity in CRM to show the outstanding of customers from Customer Ledger Entry.

Dimension

A new master entity has been created in CRM to capture the data pushed from BC.

A dimension value created in BC is pushed to CRM and the GUID generated in CRM is synced back to BC.

The flow is shown below:



The field mappings are shown below:

Dimension (349) (Business Central)	CRM Field	Remarks
Code	Dimension Code	

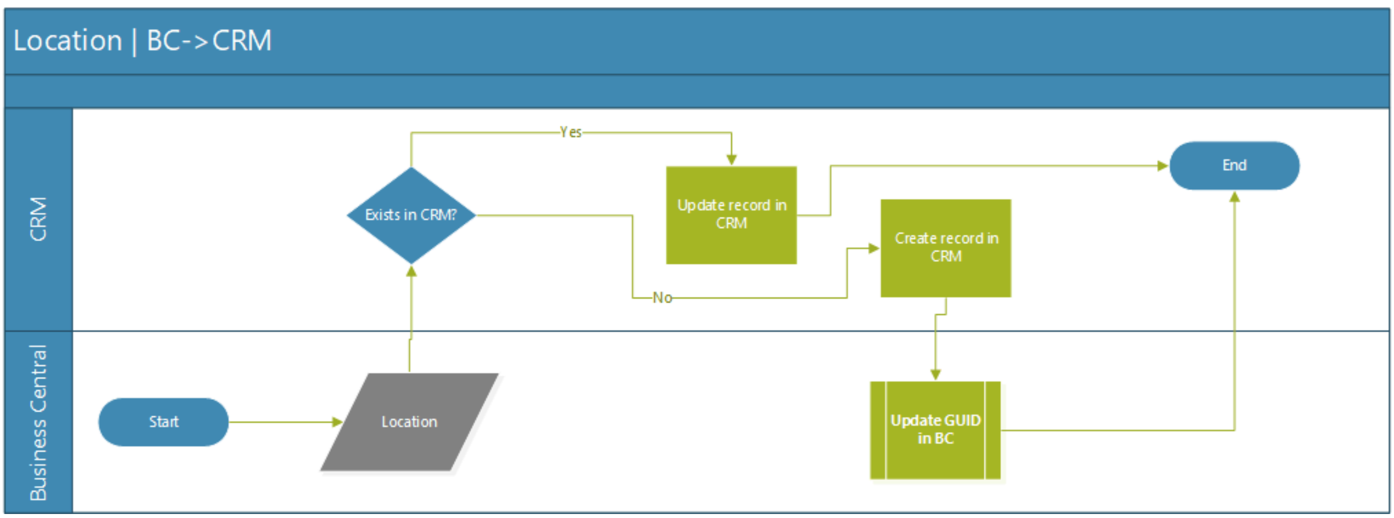
	Dimension Type	Choice field that maps to dimensions 1,2, and 3 in BC
Dimension Name	Dimension Value	
BCS CRM ID	GUID	

Location

A new master entity has been created in CRM to capture the data pushed from BC.

Location created in BC is pushed to CRM and the GUID generated is synced back to BC.

The flow is shown below:



The field mappings are shown below:

Location (14) (Business Central)	**CRM Field**	**Remarks**
Code		
Description	Description	
BCS CRM ID	GUID	

Inventory

A new table is created in CRM to locate on hand available inventory. The job queue named "Inventory BC To CRM" will run to delete all the existing lines from CRM and update them with the new ones from BC.

This entity is linked with Product entity and the related record is shown in sub grid under Product Master.

If the location code is not found for inventory, then the inventory count will be shown in the blank location.

A cumulative sum of the inventory of all the locations is shown in field named "Inventory" in CRM.

The field mappings are shown below:

Inventory Update (84352) (Business Central)	**CRM Field**	**Remarks**
Item No	Product	Based on Guid
Location Code	Location	
Inventory	Quantity	

Item

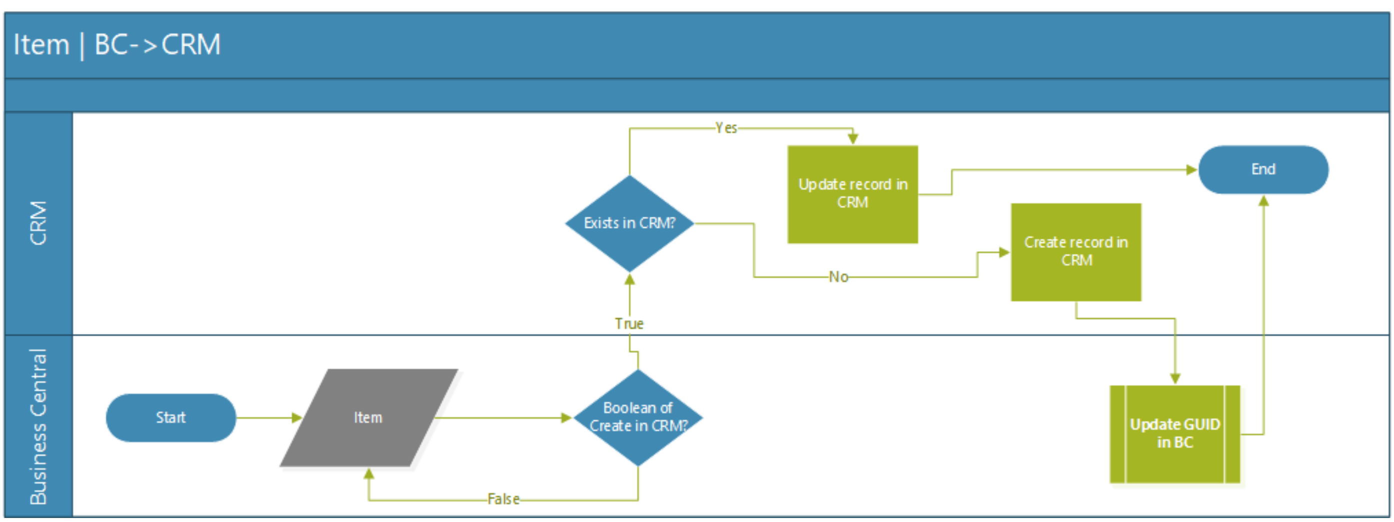
Items will be created in BC and synced to CRM or products can be created in CRM and synced to BC.

The GUID of the product from CRM is synced back in BC.

If the Type on item is Non-Inventory or Service, then those will be synchronized in CRM without any further validation.

If the Type is Inventory, then a Boolean named "Create in CRM" provided on Inventory Posting Group in BC must be selected to flow them to CRM.

The flow is shown below:



The field mappings are shown below:

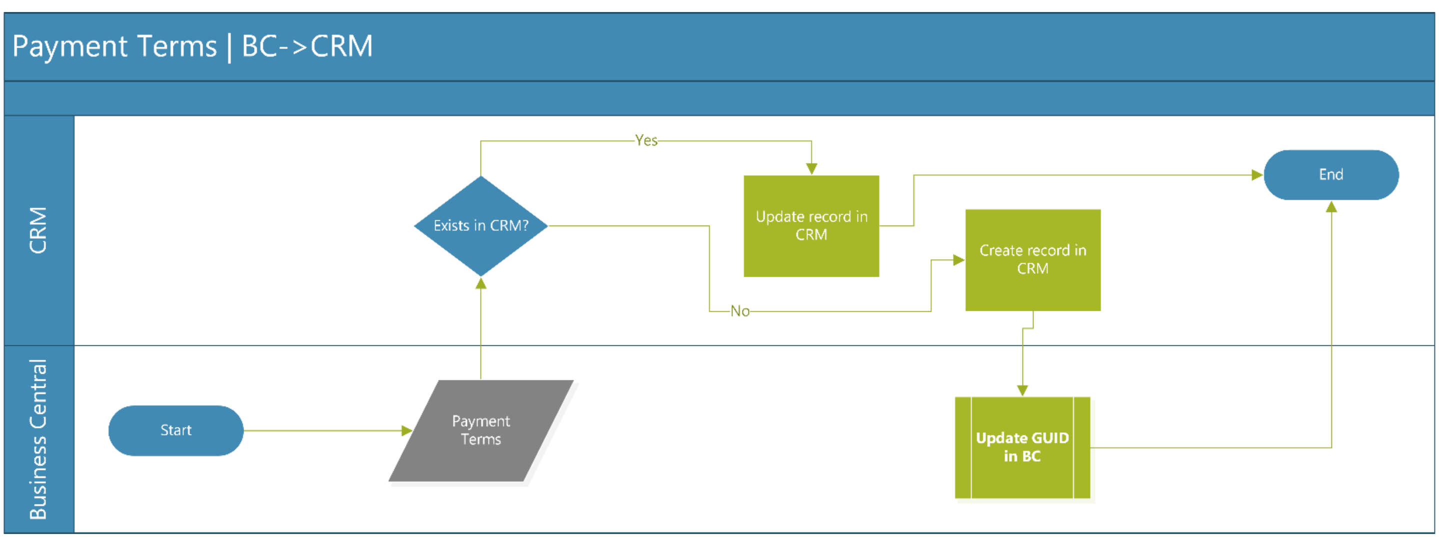
Item (27) (Business Central)	CRM Field	Remarks
No.		
Description 1	Product Name	
Description 2	Product Name	
Base Unit of measure	Default Unit	
BCS CRM ID	GUID	

Payment Terms

A new master entity has been created in CRM to capture the data pushed from BC.

Payment terms created in BC is synced to CRM and the CRM GUID is updated in BC.

The flow is shown below:



The field mappings are shown below:

Payment Terms (3) **(Business Central)**	**CRM Field**	**Remarks**
Code	Code	
Description	Name	
BCS CRM ID	GUID	

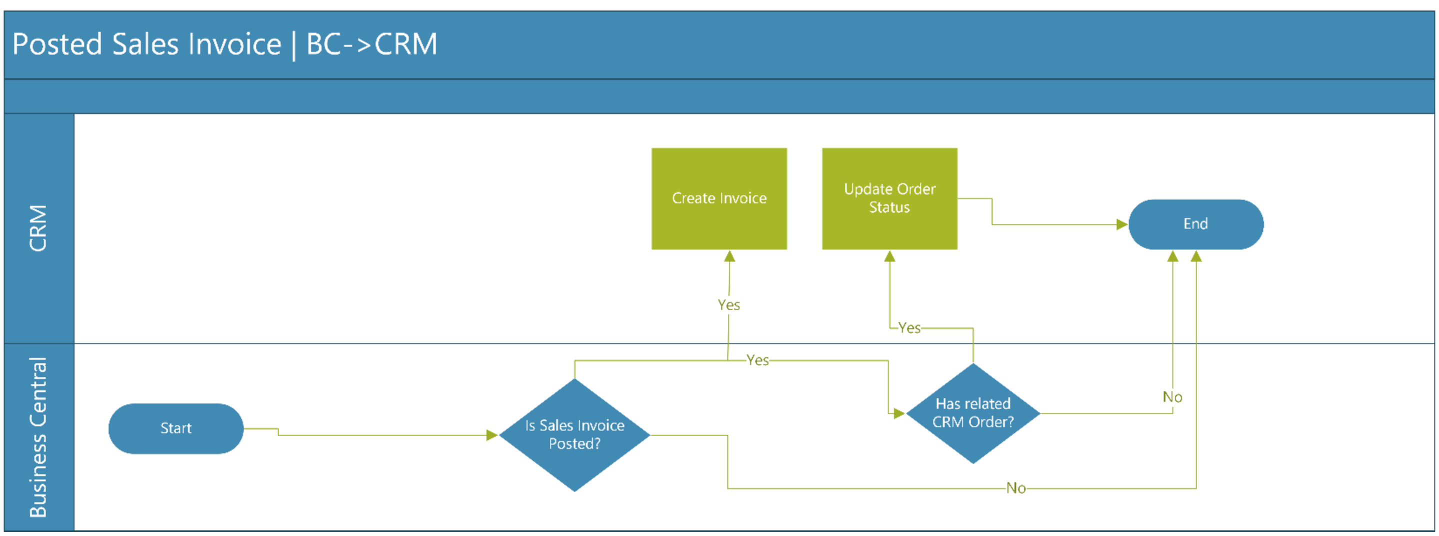
Posted Sales Invoice

Posted sales invoices from BC will be synced from BC to CRM.

Whenever a Posted Sales Invoice is created in BC, the system will check for the CRM Order related to that Invoice. If that value is found in the Sales Order entity, the system will update the status of that Order as Invoiced.

If that Invoice is canceled or corrected, then the corresponding Invoice in CRM will have its status updated as Canceled.

The flow is shown below:



The field mappings are shown below:

Sales Invoice Header **(112)**	**CRM Field**	**Remarks**

(Business Central)		
No.	Invoice No.	
Customer No.	Account	Based on GUID
Name		
Name 2		
Address		
Address 2		
Document Date	Document Date	
Posting Date	Posting Date	
Salesperson Code	Owner	
Payment Terms Code	Payment Terms	
Shipment Method Code	Shipment method	
Shipping Agent	Shipping Agent	
Due Date	Due Date	
	Tax Amount	
Amount to Customer	Detail Amount	
Location Code	Location Code	
Ship to Code	Ship to Code	
Tax Area Code	Tax Area Code	
Global Dimension 1	Global Dimension 1	
Global Dimension 2	Global Dimension 2	

Sales Invoice Line (113) (Business Central)	CRM Field	Remarks
Document No		Same as the one found in header
Item No.	Product ID	Based on GUID
Description 1	Product Name	
Description 2	Product Name	
Quantity	Quantity	
UOM	Units	
Unit Price	Price Per Unit	
Line Discount Amount	Discount	
Line Amount Excl. of Tax	Extended Amount	

Salesperson

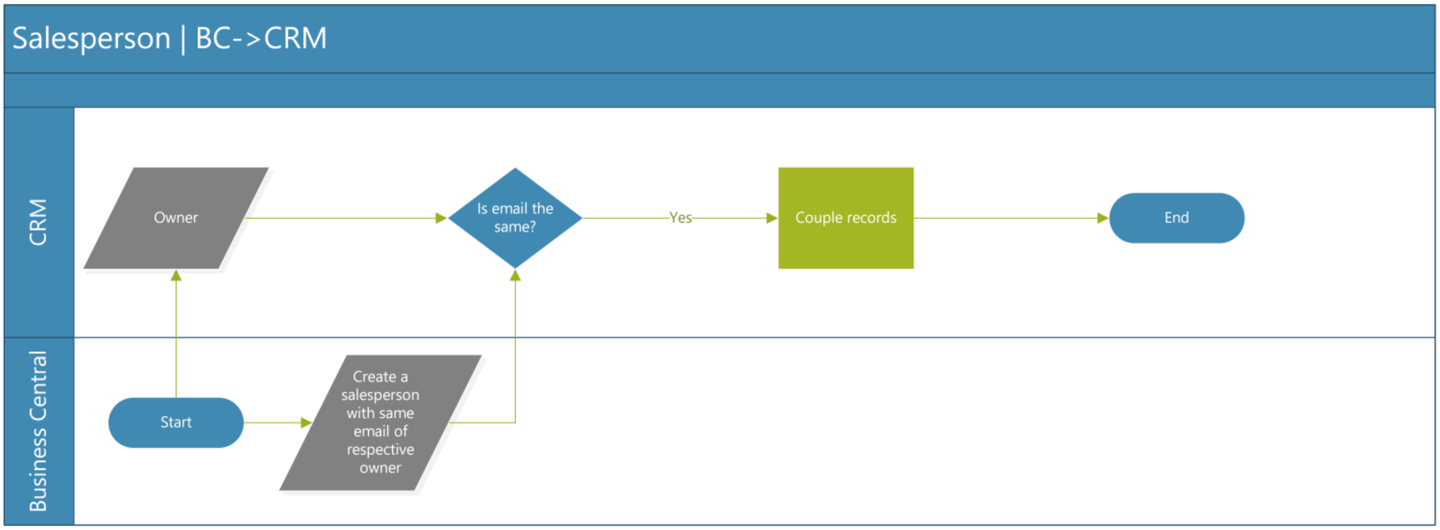
Users which are identified as Owners in CRM that are coupled with the salesperson of Business Central.

In BC, the Salespeople table also stores purchaser codes and, a record in this master must have a code (PK) in BC.

The salesperson master must be created manually in BC with the same email as the email selected on the respective owner in CRM or using the auto-create option in the connector settings.

Coupling this data point is done by choosing Salesperson under Map Data.

The flow is shown below:



Sales Order

Sales orders are synced from CRM to BC. Only sales orders which have the state code as Active and status as Confirmed in CRM will be synced to BC.

Whenever a new sales order is to be created in BC from CRM, BC will check for the CRM quote ID in BC. If that value is found in sales quote table of BC, the system will archive the quote and before creating the new sales order.

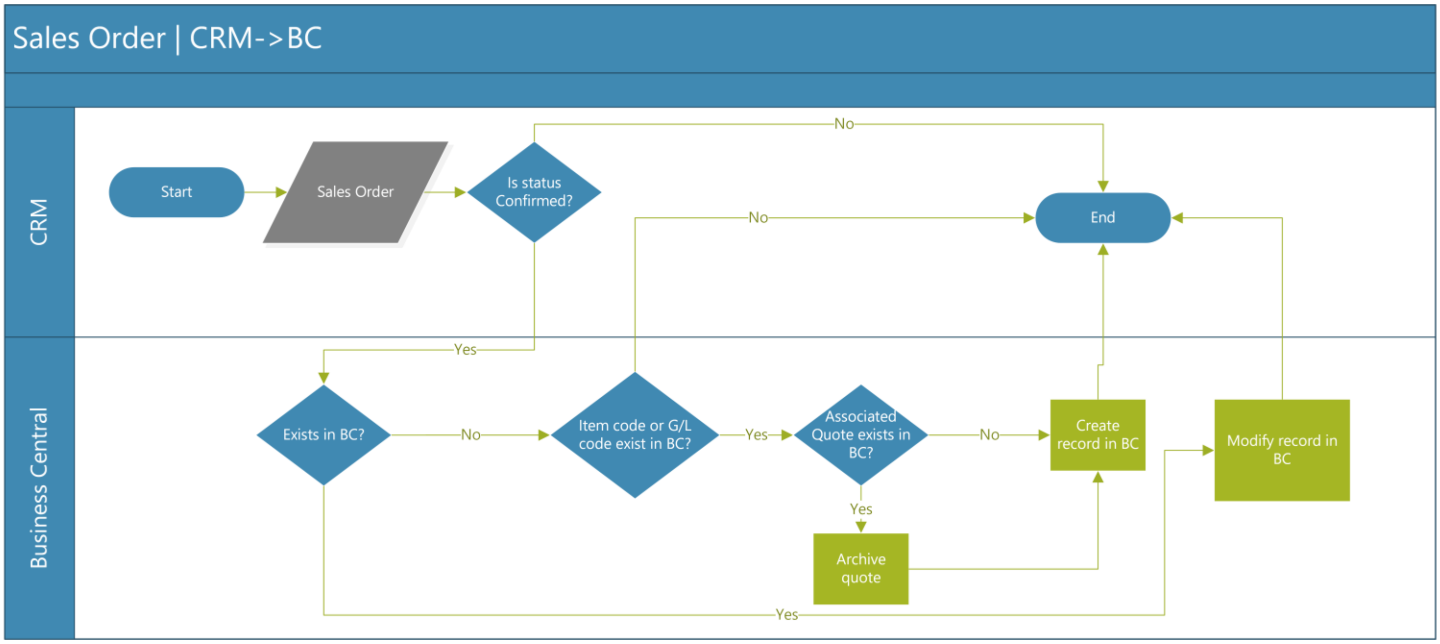
If the Boolean 'Do not Allow to modify the Sales Order" in CRM Integration Setup is set to True then the user will not be able to modify or delete any details flowing from CRM. They will, however, be able to add a new line with type Comment and amend any field which is not flowing from CRM.

If the Boolean 'Keep the Sales Order No same as CRM" in CRM Integration Setup is set to True, then a new document of sales order in BC will be created with the same document number as the one found in CRM.

Calculation of tax and other validation checks (if any) will happen in BC

If the description is added in order line, it will flow to the description in sales order line for that item.

The flow is shown below:



The field mappings are shown below:

CRM Field	Sales Order Header (36) (Business Central)	Remarks
Order ID	No, Your reference	
Sales Quote ID	Quote No.	
Account ID	Customer No.	Based on GUID of Account found on Order.
Order Date	Order Date	A new Order date field developed in CRM.
Order Date	Document Date	A new Order date field developed in CRM.
Order Date	Posting Date	A new Order date field developed in CRM.
Owner	Salesperson Code	

Payment Terms	Payment Terms Code	A new field is developed in CRM, which will be the lookup of Payment Terms.
Shipment Method	Shipment Method code	A new field is developed in CRM, which will be the lookup of Shipment Method.
Shipping Agent	Shipping Agent	A new field is developed in CRM, which will be the lookup of Shipping Agent.
Requested Delivery	Requested Delivery Date	
Location Code	Location Code	A new field is developed in CRM, which will be lookup of Location.
Ship to Code	Ship to Code	A new field is developed in CRM, which will be lookup of Ship to Address.
Description	Work Description	
CRM Field	**Sales Order Line (37) (Business Central)**	**Remarks**
	Type	Type will be Item if the Product ID is found in Line
Product ID	Item No.	Based on GUID of Items in CRM
	Description 1	If there is no value in Description in sales order line in CRM, then the Product Name will be the description in the Sales Order line in BC. If the description is found (in case user wants to modify the name) then the same will flow to BC.
	Description 2	If there is no value in Description in sales order line in CRM, then the Product Name will be the description in the Sales Order line in BC. If the description is found (in case user wants to modify the name) then same will flow to BC.

Quantity	Quantity	
Units	UOM	
Price per Unit	Unit Price	
Discount	Line Discount Amount	
Extended Amount	Line Amount Excl. of Tax	Line Amount Excl. of Tax will be calculated by standard system based on Quantity, Unit price and Line Discount.
Global Dimension 1	Global Dimension 1	
Global Dimension 2	Global Dimension 2	
Shortcut Dimension 3	Shortcut Dimension 3	

Sales Quote

The Sales Quote/Revised Sales Quote is synced from CRM to BC.

Only sales quotes with the status set to Active in CRM will be synced.

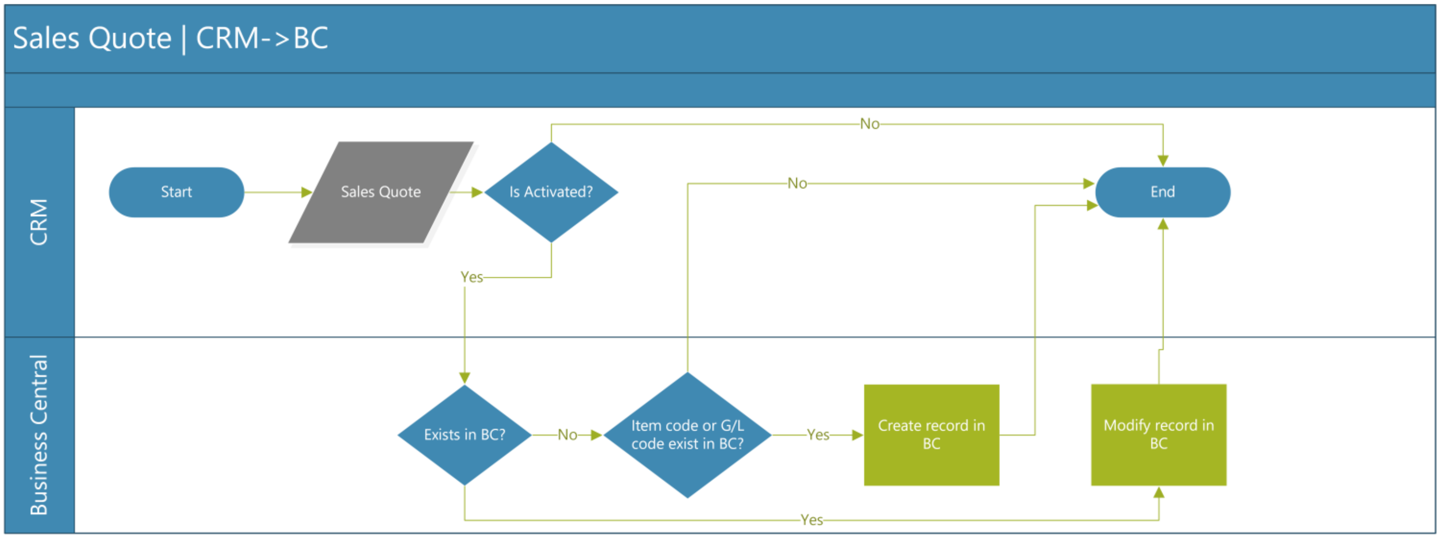
If the Boolean 'Do Not Allow to Modify the Sales Quote" in CRM Integration Setup is set to True, then the user will not be able to modify or delete any details flowing from CRM. They will, however, be able to add a new line with type Comment and amend any field which is not flowing from CRM.

If the Boolean 'Keep the Sales Quote Not same as CRM" in CRM Integration Setup is set to True, then a new document of sales quote in BC will be created with same document number as the one found in CRM.

Calculation of tax and other validation checks (if any) will happen in BC only.

If the description is added in the quote line, it will flow in description in the Sales Quote line for that item.

The flow is shown below:



The field mappings are shown below:

CRM Field	**Sales Quote Header (36) (Business Central)**	**Remarks**
Quote ID	No, Your Reference	
Account	Customer No.	Based on GUID of Account on Sales Quote.
	Name	
	Name 2	
	Address	
	Address 2	
Quote Date	Document Date	A new field is developed in CRM to capture the quote date.
Quote Date	Posting Date	A new field is developed in CRM to capture the quote date.
Owner	Salesperson Code	

Payment Terms	Payment Terms Code	A new field is developed in CRM, which will be lookup of Payment Terms.
Revision ID	No. of Archived Version	
Currency	Currency Code	
Requested Delivery date	Requested Delivery date	
Shipment Method	Shipment method	A new field is developed in CRM, which will be lookup of Shipment Method.
Shipping Agent	Shipping Agent	A new field is developed in CRM, which will be lookup of Shipping Agent.
Location Code	Location Code	A new field is developed in CRM, which will be lookup of Location.
Ship to Code	Ship to Code	A new field is developed in CRM, which will be lookup of Ship to Address.
Description	Work Description	
CRM Field	**Sales Quote Line (37)** **(Business Central)**	**Remarks**
	Type	Type will be Item if the Product ID is found in Line In case of write in items, it will be G/L Account.
Product ID	Item No.	Based on GUID of Products in CRM.
	Description 1	If there is no value in Description in the Sales Quote line in CRM, then the Product name will be the description in Sales quote line in BC. If the

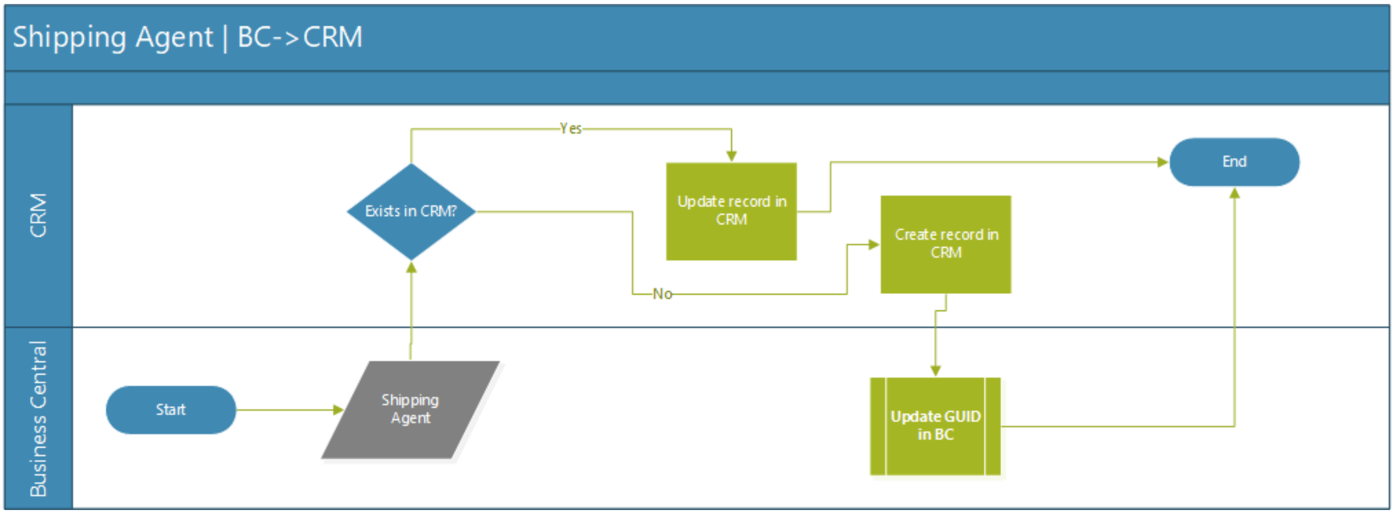
		description is found (in case user wants to modify the name) then it will flow to BC.
	Description 2	If there is no value in Description in the Sales Quote line in CRM, then the Item name will be the description in Sales Quote line in BC. If the description is found (in case user wants to modify the name) then it will flow to BC.
Quantity	Quantity	
Unit	UOM	
Price per Unit	Unit Price	
Discount	Line Discount Amount	
Extended Amount		Line amount of Excl. of Tax will be calculated by standard system based on Quantity, Unit price and Line Discount
Global Dimension 1	Global Dimension 1	
Global Dimension 2	Global Dimension 2	
Shortcut Dimension 3	Shortcut Dimension 3	

Shipping Agent

A new master entity has been created in CRM to capture the data pushed from BC.

Shipment agent created in BC is pushed to CRM and the GUID generated is synced back to BC.

The flow is shown below:



The field mappings are shown below:

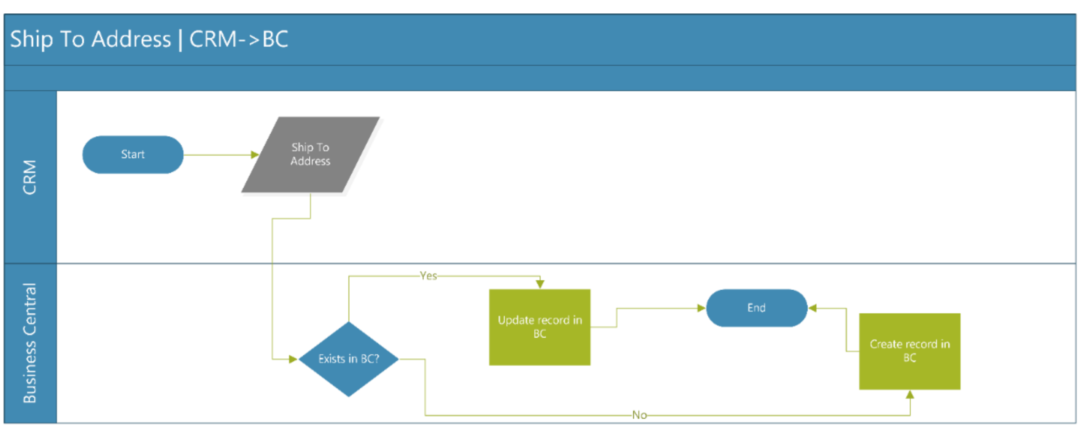
Shipping Agent (291) (Business Central)	CRM Field	Remarks
Code	Code	
Name	Description	
BCS CRM ID	GUID	

Ship To Address

A new master entity has been created in CRM.

Ship to Address created on Account in CRM is sent to BC along with the GUID.

The flow is shown below:



The field mappings are shown below:

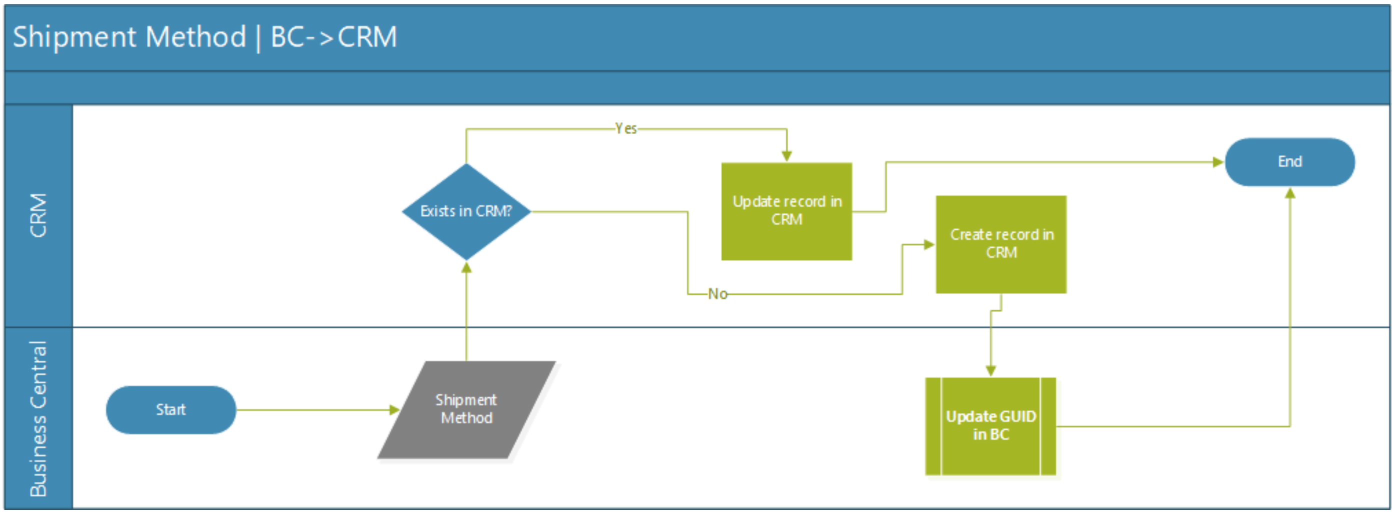
CRM Field	Shipping Address (291) (Business Central)	Remarks
Code	Code	
Name	Name	
Street 1	Address	
Street 2	Address 2	
City	City	
State	State	
Zip Code	Zip Code	
Country/Region	Country/Region	
Tax Liable	Tax Liable	
Tax Area	Tax Area	
Contact	Contact	
Email	Email	
Phone No.	Phone No.	

Shipment Method

A new master entity has been created in CRM to capture the data pushed from BC.

Shipment method created in BC is synced to CRM and the GUID is synced back to BC.

The flow is shown below:



The field mappings are shown below:

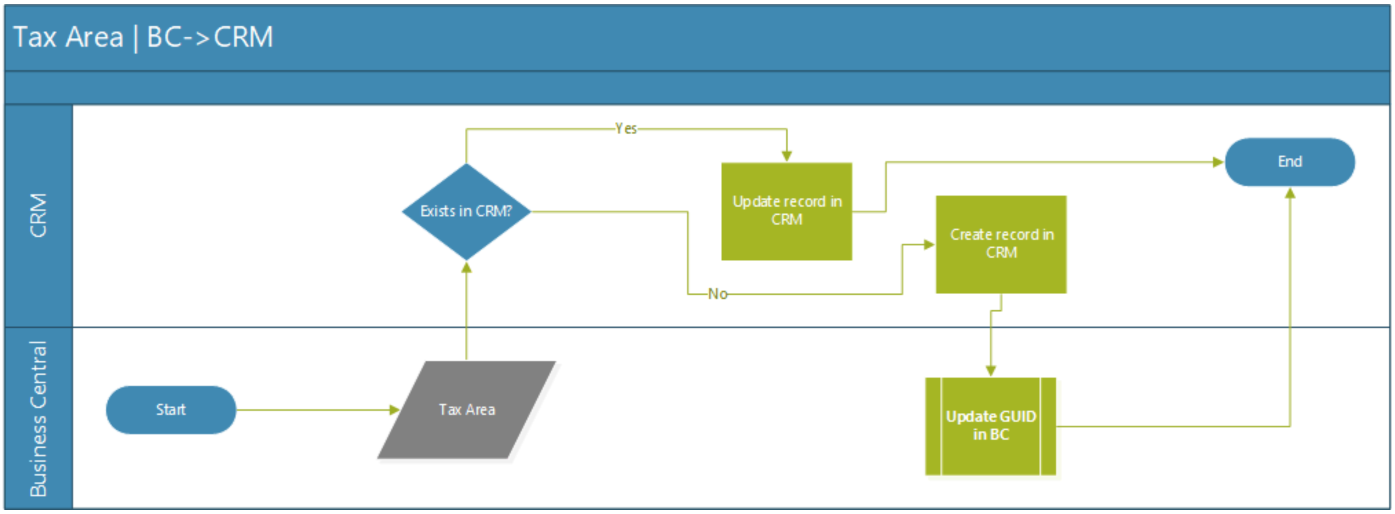
Shipment Method (11) **(Business Central)**	**CRM Field**	**Remarks**
Code	Code	
Description	Description	
BCS CRM ID	GUID	

Tax Area

A new master entity has been created in CRM to capture the data pushed from BC.

Tax area created in BC is pushed to CRM and the GUID generated is synced back to BC.

The flow is shown below:



The field mappings are shown below:

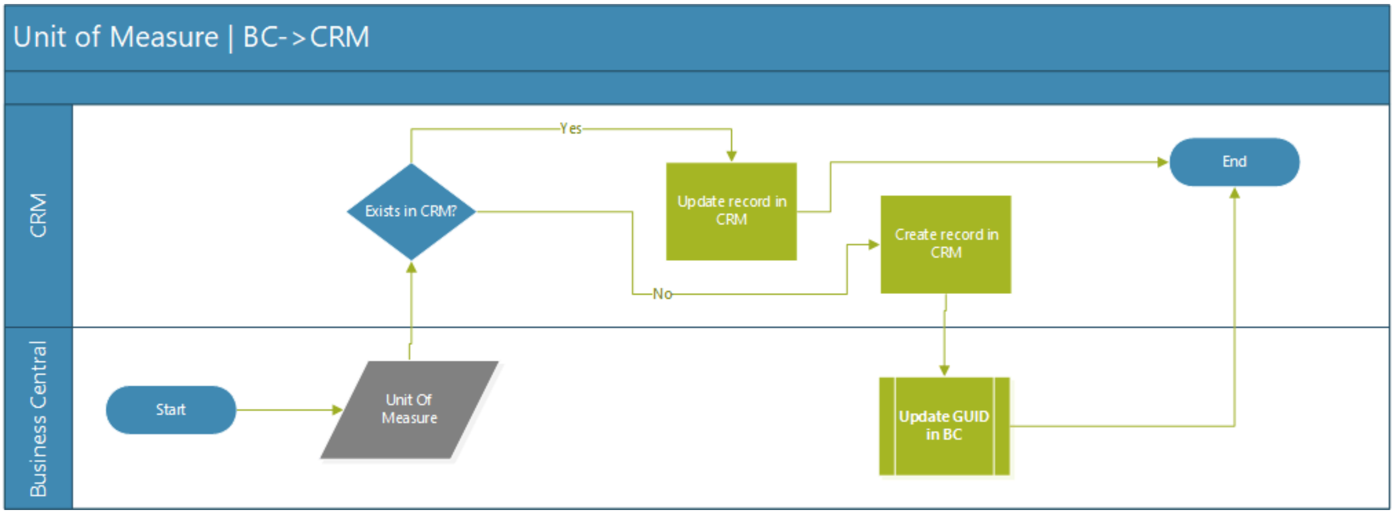
Tax Area (318) (Business Central)	CRM Field	Remarks
Code	Code	
Description	Description	
BCS CRM ID	GUID	

Unit of Measure

Units of Measure are created in BC and synced to CRM. Since the architecture of UOM is different in CRM, we will flow them under a UOM group named “Default”.

The GUID of UOM from CRM will be updated in BC.

The flow is shown below:



The field mappings are shown below:

Unit of Measure (204) **(Business Central)**	**CRM Field**	**Remarks**
Code		
Description	Description	
BCS CRM ID	GUID	