

With CRM to Online the following entities are transferred:

- ✓ all custom entities
- ✓ all custom activity entities
- ✓ all system and custom entity n:n relationships between transferred entities
- ✓ all system and custom fields, which have the following properties in the CRM attributes: IsValidForRead and (IsValidForCreate or IsValidForUpdate)
- ✓ all system and custom entity 1:n,n:1 relationships, which have the following properties in their CRM relationship attributes: IsValidForRead and (IsValidForCreate or IsValidForUpdate)
- ✓ all activities
- ✓ all annotations and attachments

General

- ✓ Currency (transactioncurrency)
- ✓ Contact (contact)
- ✓ Account (account)
- ✓ Address (customeraddress)
- ✓ Task (task)
- ✓ Appointment (appointment)
- ✓ Phone Call (phonecall)
- ✓ Letter (letter)
- ✓ Fax (fax)
- ✓ Recurring Appointment (recurringappointmentmaster)
- ✓ Email (email)
- ✓ Attachment (activitymimeattachment)
- ✓ Connection Role (connectionrole)
- ✓ Connection (connection)
- ✓ SharePoint Site (sharepointsite)
- ✓ Document Location (sharepointdocumentlocation)
- ✓ Note (annotation)

Marketing

- ✓ Lead (lead)
- ✓ Marketing List (list)
- ✓ Campaign (campaign)
- ✓ Campaign Activity (campaignactivity)
- ✓ Campaign Response (campaignresponse)

Product Catalog

- ✓ Product (product)*
- ✓ Unit (uom)
- ✓ Unit Group (uomschedule)
- ✓ Discount (discount)
- ✓ Discount List (discounttype)
- ✓ Price List (pricelevel)
- ✓ Price List Item (productpricelevel)
- ✓ Subject (subject)

Security

- ✓ Business Unit (businessunit)
- ✓ Team (team)
- ✓ User (systemuser)*
- ✓ Team Template (teamtemplate)
- ✓ Security role (role)

Sales

- ✓ Opportunity (opportunity)
- ✓ Opportunity Product (opportunityproduct)
- ✓ Opportunity Close (opportunityclose)
- ✓ Competitor (competitor)
- ✓ Sales Literature (salesliterature)
- ✓ Sales Attachment (salesliteratureitem)
- ✓ Quote (quote)
- ✓ Quote Product (quotedetail)
- ✓ Quote Close (quoteclose)
- ✓ Order (salesorder)
- ✓ Order Product (salesorderdetail)
- ✓ Order Close (orderclose)
- ✓ Invoice (invoice)
- ✓ Invoice Product (invoicedetail)

Service

- ✓ Service (service)
- ✓ Facility/Equipment (equipment)
- ✓ Resource Group (constraintbasedgroup)
- ✓ Case (incident)
- ✓ Case Resolution (incidentresolution)
- ✓ Service Activity (serviceappointment)
- ✓ Resource Specification (resourcespec)
- ✓ Contract Template (contracttemplate)
- ✓ Contract (contract)*
- ✓ Contract Line* (contractdetail)

User settings

- ✓ Personal View (userquery)*
- ✓ User Chart (userqueryvisualization)
- ✓ User Dashboard (userform)
- ✓ Assigning business units to users
- ✓ Assigning security roles to users

Exclusions

- ≠ All not explicitly named system entities
- ≠ When the conversion factor for the currency was changed retroactively the previous value won't be set (exchangerate, *_base)
- ≠ Business Process Flows
- ≠ Auditing

*** For the transfer of these entities please refer to the corresponding section of the user manual.**