

Mapping for Microsoft Partner Center Referral fields and your CRM that gets synchronized using Co-sell CRM Connector

Dynamics 365

Microsoft Partner Center Referral	Dynamics 365 (CRM)	
	Opportunity	Remarks
id	Referral Identifier	
engagementId		
name	Topic	
organizationId		
organizationName		
externalReferenceId	Opportunity id	
createdDateTime		
updatedDateTime		
expirationDateTime		
status	Status	
substatus	Status Reason	
statusReason		
qualification	Qualification Comments	
type		
referralProgram	Microsoft Partner Center Referral Program	
referralSource		
eTag		
target.type		
target.id		
consent.consentToShareInfoWithOthers		
consent.consentToShareReferralWithMicrosoftSellers	Microsoft Partner Center Referral Visibility	
consent.consentToContact		
details.notes	Description	
details.dealValue	Budget Amount	
details.currency	Currency (Currencies)	Mapped to transactioncurrency
details.closingDateTime	Est. Close Date	

details.customerRequestedContact		
details.customerAction		
details.requirements.industries		
details.requirements.products		
details.requirements.services		
details.requirements.solutions	Microsoft Solutions	
inviteContext		
links		
customerProfile.name	Account	
customerProfile.size		
customerProfile.ids		
customerProfile.address.country	Account.Address 1: City	
customerProfile.address.addressLine1	Account.Address 1: Street1	
customerProfile.address.addressLine2	Account.Address 1: Street2	
customerProfile.address.city	Account.Address 1: City	
customerProfile.address.state	Account.Address 1: State	
customerProfile.address.postalcode	Account.Address 1: PostalCode	
customerProfile.address.region		
customerProfile.team[0].email	Contact.Email	
customerProfile.team[0].firstName	Contact.First Name	
customerProfile.team[0].lastName	Contact.Last Name	
customerProfile.team[0].phoneNumber	Contact.Address 1: Phone	
customerProfile.team[0].title		
customerProfile.team[0].contactPreference.locale		
customerProfile.team[0].contactPreference.disableNotif ications		
team[0].email	User.Primary Email	
team[0].firstName	User.First Name	
team[0].lastName	User.Last Name	
team[0].phoneNumber	User.Main Phone	
team[0].title		
team[0].contactPreference.locale		
team[0].contactPreference.disableNotifications		

Mapping for status field value in Microsoft Partner Center Referral and your CRM that gets synchronized using Co-sell CRM Connector

Microsoft Partner Center Referral	Dynamics 365 (CRM)	
Status.Substatus	statecode/statuscode	
New.Recieved	Open/OnHold	
Active.Accepted	Open/In Progress	
Closed.Won	Won/Won	
Closed.Lost	Lost/Canceled	
Closed.Declined	Lost/Canceled	
New.Expired	Lost/Canceled	

Salesforce

Microsoft Partner Center Referral	Salesforce (CRM)	
	Opportunity	Remarks
id	Referral Identifier	
engagementId		
name	Name	
organizationId		
organizationName		
externalReferenceId	Opportunity id	
createdDateTime		
updatedDateTime		
expirationDateTime		
status	Stage	
substatus	Stage	
statusReason		
qualification		
type		

referralProgram	Referral Program	
referralSource		
eTag		
target.type		
target.id		
consent.consentToToShareInfoWithOthers		
consent.consentToShareReferralWithMicrosoftSellers	Microsoft Partner Center Referral Visibility	
consent.consentToContact		
details.notes	Description	
details.dealValue	Amount	
details.currency	Opportunity Currency (for Multi Currency enabled)	
details.closingDateTime	Close Date	
details.customerRequestedContact		
details.customerAction		
details.requirements.industries		
details.requirements.products		
details.requirements.services		
details.requirements.solutions	Microsoft Solutions	
inviteContext		
links		
customerProfile.name	Account Name	
customerProfile.size		
customerProfile.ids		
customerProfile.address.country	Account.BillingCountry	
customerProfile.address.addressLine1	Account.BillingStreet	
customerProfile.address.addressLine2		
customerProfile.address.city	Account.BillingCity	
customerProfile.address.state	Account.BillingState	
customerProfile.address.postalcode	Account.BillingPostalCode	
customerProfile.address.region		
customerProfile.team[0].email	Contact Role.Email	
customerProfile.team[0].firstName	Contact Role.Firstname	
customerProfile.team[0].lastName	Contact Role.Lastname	

customerProfile.team[0].phoneNumber	Contact Role.Phone	
customerProfile.team[0].title		
customerProfile.team[0].contactPreference.locale		
customerProfile.team[0].contactPreference.disableNotif ications		
team[0].email	User.Email	
team[0].firstName	User.First Name	
team[0].lastName	User.Last Name	
team[0].phoneNumber	User.Phone	
team[0].title		
team[0].contactPreference.locale		
team[0].contactPreference.disableNotifications		

Mapping for status field value in Microsoft Partner Center Referral and your CRM that get synchronized using Co-sell CRM Connector

Microsoft Partner Center Referral	Salesforce (CRM)	
Status.Substatus	stage	
New.Recieved	Prospecting	Can be changed using On-hold stage name environment variable
Active.Accepted	Qualification	Can be changed using Active stage name environment variable
Closed.Won	Closed Won	
Closed.Lost	Closed Lost	
Closed.Declined	Closed Lost	
New.Expired	Closed Lost	