

Advanced CRM Connector

for Microsoft Dynamics 365 Business Central

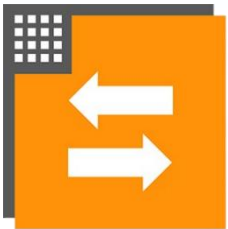


intelligent
systems



Microsoft Dynamics 365
Business Central

Overview



Advanced CRM/ Dataverse Connector is an extension, developed by the team of Intelligent Systems. The application facilitates the customized data mapping between Microsoft Dynamics 365 Business Central, Dynamics 365 for Sales, and Dataverse, without development involvement.

The application improves the standard connector, which is capable only to sync small number of predefined tables and data. **Advanced CRM/ Dataverse Connector** offers flexible and enhanced mapping of fields and tables not included in standard connector without the need for any additional coding.

It is a perfect tool for:

- Businesses who use Dynamics 365 Business Central, Dynamics 365 for Sales, or any Power Platform customizations that depend on data from Dataverse.

The application is integrated within Dynamics 365 Business Central.

Advanced CRM Connector is available on Microsoft AppSource.



Features

General:

- Add new fields in the data exchange between Dynamics 365 Business Central and Dataverse without coding.
- Ability to change tables in Dataverse to point to different tables in Dynamics 365 Business Central, from those that come in the standard connector without additional coding.
- No coding when changing standard mappings.

Nota Bene:

When creating a custom table in Dynamics 365 Business Central and data is called from a custom table in Dataverse or CRM, developer intervention is required to the table visible in Dynamics Business Central.

[Get in touch with us](#) to learn more about Advanced CRM Connector.

Integration Table Mapping

Integration Table Mappings

Search Edit List Delete Synchronization Mapping Uncoupling Coupling More options

Job Queue Entry Use Default Synchronization Setup Fields Custom Integration Table Mappings

Name ↑	Table	Table Filter	Direction	Integration Table
→ CONTACT	Contact	VERSION(1) SORTING(Field1) W...	Bidirectional	Dataverse
CURRENCY	Currency		ToIntegrati...	Dataverse
CUSTOMER	Customer	VERSION(1) SORTING(Field1) W...	Bidirectional	Dataverse
PAYMENT TERMS	Payment Terms		ToIntegrati...	Dataverse
SALESPEOPLE	Salesperson/Purchaser		FromIntegr...	Dataverse
SAMY1	Item		Bidirectional	CRM Pro
SAMY12	Item		Bidirectional	CRM Pro
SAMY13	Payment Terms		Bidirectional	Dataverse

Custom Integration Table Mapping

Custom Integration Table Mappings

Search + New Edit List Delete Mapping More options

Name ↑	Table ID	Table	Table Filter	Direction	Integration Table ID	Integration Table	Integration Table Filter	Sym... Only Cou... Rec...	Integration Table UID Fid. No.	Int. Tabl. Modified On Fid. No.	Integr...
→ CONTACT	5050	Contact	VERSION(1) SORTING(Field1) W...	Bidirectional	5342	Dataverse Contact	VERSION(1) SORTING(Field1) W...	<input checked="" type="checkbox"/>	1	59	Cont
CURRENCY	4	Currency		ToIntegrati...	5345	Dataverse Transactioncurrency		<input checked="" type="checkbox"/>	9	2	Trans
CUSTOMER	18	Customer	VERSION(1) SORTING(Field1) W...	Bidirectional	5341	Dataverse Account	VERSION(1) SORTING(Field1) W...	<input checked="" type="checkbox"/>	1	49	Accou
PAYMENT TERMS	3	Payment Terms		ToIntegrati...	5341	Dataverse Account		<input checked="" type="checkbox"/>	203	0	Paym
SALESPEOPLE	13	Salesperson/Purchaser		FromIntegr...	5340	Dataverse Systemuser	VERSION(1) SORTING(Field1) W...	<input checked="" type="checkbox"/>	1	27	User
SAMY1	27	Item		Bidirectional	5348	CRM Product		<input checked="" type="checkbox"/>	1	25	Prodr
SAMY12	27	Item		Bidirectional	5348	CRM Product		<input checked="" type="checkbox"/>	0	0	Prodr
SAMY13	3	Payment Terms		Bidirectional	5341	Dataverse Account		<input checked="" type="checkbox"/>	203	0	Paym
SAMY2	840	Cash Flow Forecast		Bidirectional	0			<input checked="" type="checkbox"/>	0	0	Prodr
SHIPMENT METHOD	10	Shipment Method		ToIntegrati...	5341	Dataverse Account		<input checked="" type="checkbox"/>	204	0	Addr
SHIPPING AGENT	291	Shipping Agent		ToIntegrati...	5341	Dataverse Account		<input checked="" type="checkbox"/>	205	0	Addr
VENDOR	23	Vendor	VERSION(1) SORTING(Field1) W...	Bidirectional	5341	Dataverse Account	VERSION(1) SORTING(Field1) W...	<input checked="" type="checkbox"/>	1	49	Accou

Integration Field Mapping

CONTACT

Integration Field Mapping List Search + New Edit List Delete More options

Status	Field No.	Field Name	Integration Table Field No.	Integration Field Name	Direction
Enabled			128	OwnerIdType	ToIntegrat
Enabled	29	Salesperson Code	127	Owner	ToIntegrat
Enabled	22	Currency Code	141	Currency	Bidirector
Enabled	5	Address	83	Address 1: Street 1	Bidirector
Enabled	6	Address 2	84	Address 1: Street 2	Bidirector
Enabled	91	Post Code	91	Address 1: ZIP/Postal Code	Bidirector
Enabled	7	City	86	Address 1: City	Bidirector
Enabled	35	Country/Region Code	89	Address 1: Country/Region	Bidirector
Enabled	92	County	87	Address 1: State/Province	Bidirector
Enabled	102	Email	39	Email	Bidirector
Enabled	84	Fax No.	69	Fax	Bidirector
Enabled	5054	First Name	16	First Name	Bidirector
Enabled	5055	Middle Name	19	Middle Name	Bidirector
Enabled	5056	Surname	20	Last Name	Bidirector
Enabled	103	Home Page	36	Website	Bidirector
Enabled	5061	Mobile Phone No.	64	Mobile Phone	Bidirector
Enabled	5062	Pager	65	Pager	Bidirector
Enabled	9	Phone No.	66	Business Phone	Bidirector
Enabled	5050	Type			FromInteg
→ Enabled	...		140	Parent Customer Type	ToIntegrat

About us



Employing more than 200 people and reporting continuous growth, **Intelligent Systems** is an international consultancy company that delivers business software projects to local and multi-country organizations. A leading Microsoft Dynamics partner in Europe, the company has been part of the Inner Circle Partner Program – the highest recognition given to only 60 out of more than 10 000 Microsoft Dynamics Partners worldwide.

Intelligent Systems has carried out more than 500 implementation projects in over 55 countries for organizations running businesses in the areas of retail, wholesale, manufacturing, automotive, transportation, logistics, and more.

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