

BC-CRM Connector

For Dynamics 365

CRM & Business Central Integration

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Overview

Requirement:

BC-CRM Connector is a connector using direct API communication which serves as a tool for seamless integration between entities of Dynamics 365 CRM and Dynamics 365 Business Central.

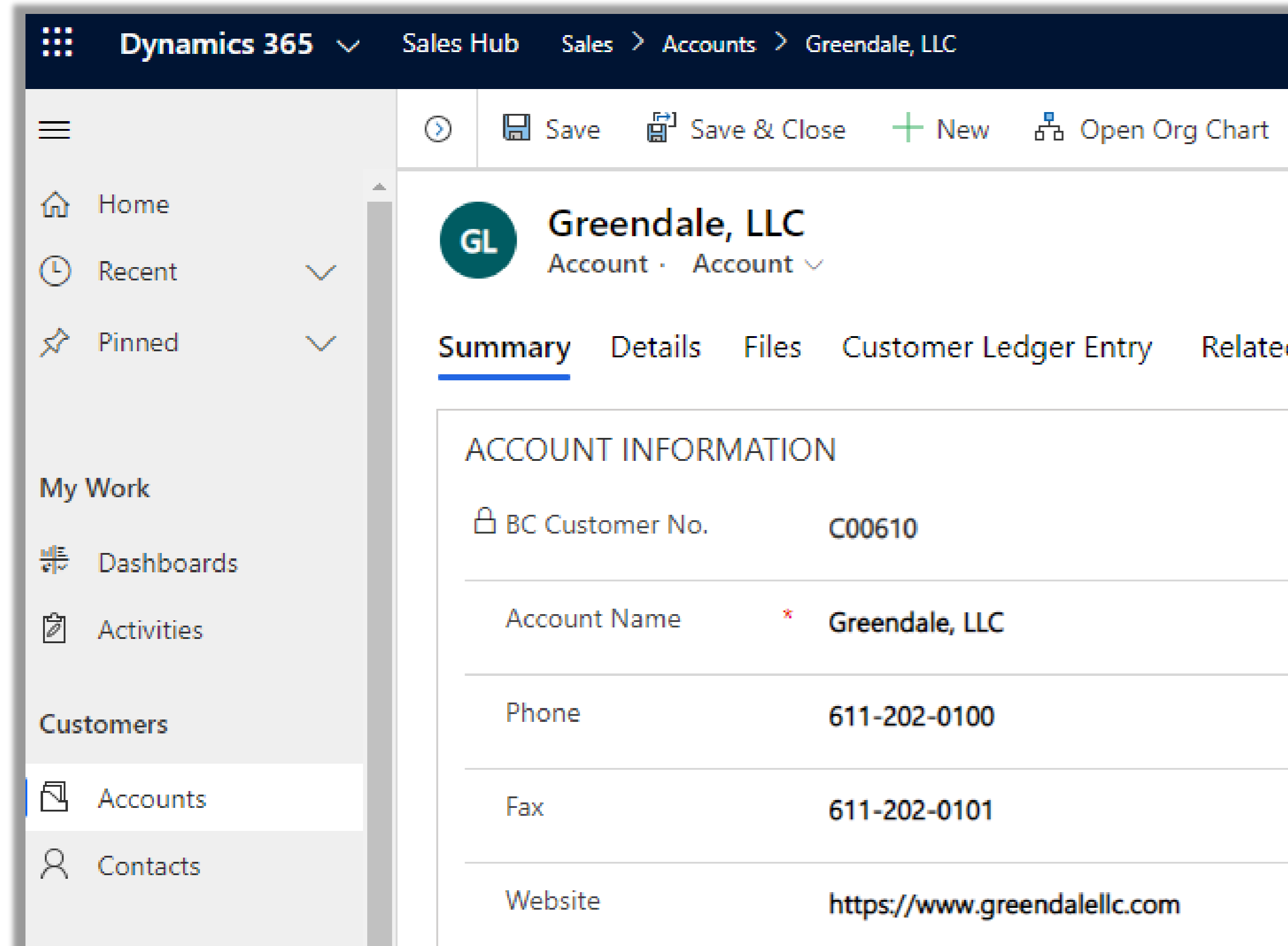
System Requirements:

Dynamics 365 Sales Enterprise (or Field Service) subscription

Dynamics 365 Business Central subscription

Integration user with Dynamics 365 Sales (or Field Service) and Dynamics 365 licenses

Dynamics 365 CRM



The screenshot displays the Dynamics 365 CRM interface for the 'Sales Hub' section, specifically the 'Accounts' page for 'Greendale, LLC'. The breadcrumb navigation shows 'Sales > Accounts > Greendale, LLC'. The left-hand navigation pane includes 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', and 'Contacts'. The main content area shows the account details for 'Greendale, LLC' with a 'Summary' tab selected. The 'ACCOUNT INFORMATION' section includes the following fields:

BC Customer No.	C00610
Account Name *	Greendale, LLC
Phone	611-202-0100
Fax	611-202-0101
Website	https://www.greendalellc.com

- Manage customer information and track sales activities
- Qualify leads/prospects
- Create quotes and initiate sales order process
- Manage work orders and schedule resources
- Manage inventory, purchasing, returns

Dynamics 365 Business Central

The screenshot shows the Dynamics 365 Business Central interface for CRONUS USA, Inc. The top navigation bar includes 'Finance', 'Cash Management', and 'Sales'. Below this, there are links for 'Customers', 'Vendors', 'Items', 'Bank Accounts', and 'Chart of Accounts'. A prominent insight card states: 'INSIGHT FROM LAST MONTH: Mir Shikeb Ali was busy, 56 units booked'. Below this, there are two summary cards: 'SALES THIS MONTH' with a value of \$950 and 'OVERDUE SALES INVOICE AMOUNT' with a value of \$769,680. Both cards have a 'See more' link below them.

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance ▾ Cash Management ▾ Sales ▾

Customers Vendors Items Bank Accounts Chart of Accounts

INSIGHT FROM LAST MONTH

Mir Shikeb Ali was busy,
56 units booked

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Activities

Activities ▾

SALES THIS MONTH	OVERDUE SALES INVOICE AMOUNT
\$950	\$769,680
See more	See more

- Manage products, pricing, and inventory
- Process sales orders, payments, and invoices
- Run financial reports
- Bank reconciliation
- General accounting needs

Standard Dynamics 365 Sales Integration Mappings

BC Entity	CRM Entity	Direction
Customer	Account	Bidirectional
Contact	Contact	Bidirectional
Sales Quote	Quote	CRM to BC
Sales Orders	Order	CRM to BC
Posted Sales Invoice	Invoice	BC to CRM
Payment Term	Payment Term	BC to CRM
Items	Products	Bidirectional
Resources	Products	BC to CRM
Unit of Measure	Unit of Measure	BC to CRM
Salesperson	Owner	Manual
Customer Ledger Entry	Customer Ledger Entry	BC to CRM
Tax Area	Tax Area	BC to CRM
Location	Location	BC to CRM
Shipping Address	Shipping Address	CRM to BC
Inventory	Inventory	BC to CRM

Dynamics 365 Field Service Integration Mappings

BC Entity	CRM Entity	Direction
Item Journal Line/ Item Ledger Entry	Inventory Adjustment	CRM to BC
Transfer Order	Inventory Transfer	CRM to BC
Purchase Order	Purchase Order	CRM to BC
Posted Purchase Order Receipt	Purchase Order Receipt	CRM to BC
Posted Purchase Order Receipt	Purchase Order Bill	CRM to BC
Sales Invoice	Invoice	CRM to BC
Tax Area	Tax Code Detail	CRM to BC
Vendor	Account	Bidirectional