

Proposal Manager & Dynamics 365 for Sales

Mapping Configuration Guide

Introduction

The Proposal Manager application allows an administrator to define as many custom data fields associated to an opportunity as his or her organization needs. These custom fields are named *metadata* and can be defined in the Configuration channel of the main Proposal Manager team.

The integration with Dynamics 365 for Sales further extends this customization feature by allowing to map these dynamic fields to fields in the Dynamics 365 Opportunity entity.

This guide is meant to help the IT Professional configure this mapping correctly while setting up the Integration.

Overview

Configuration structure

Inside the Proposal Manager solution, in the WebReact project, is the global configuration file for the application, called *appsettings.json*. A section in the file, appropriately named Dynamics365, groups many configuration variables associated with the Integration.

One of them is called OpportunityMapping. The Proposal Manager application expects this object to have the following structure:

1. **MetadataFields**: An array of objects defining which fields of a Proposal Manager opportunity should be filled with which fields of a Dynamics 365 opportunity. In other words, each object of this array defines the **mapping from** a field in Dynamics 365 **to** a field in Proposal Manager.
2. **Status**: An array of objects defining which values of the Dynamics' StatusCode field correspond to which values of the Proposal Manager's OpportunityState field.

MetadataFields Array

Each object of this array has a "From" field, where the name of the field in Dynamics365 (Not the "DisplayName") is specified, and a "To" field, where the name of the metadata field in Proposal Manager is identified, like this:

```
{
  "From": "description",
  "To": "Notes"
},
```

This defines a mapping between the Description field and the Notes field. Everything a user enters in the Description of an opportunity in Dynamics 365 is going to appear in the created opportunity in Proposal Manager.

There are two ways to get all possible mappable fields in a Dynamics opportunity:

1. Consulting the Opportunity entity in the Dynamics 365 Developer Guide (visit <https://docs.microsoft.com/en-us/dynamics365/customer->

[engagement/developer/entities/opportunity](#)). All Writable or Read-only attributes are able to be mapped. Use the “LogicalName” property in the mapping configuration, verifying that the Type property is compatible to the data type of the Proposal Manager metadata.

2. Examining the Opportunity entity directly in the Dynamics 365 configuration, by going to Settings > Customizations > Customize the System. In the Explorer Tree, go to Components > Entities > Opportunity > Fields. This opens a data grid with all possible fields; use the “Name” column in the mapping configuration, verifying that the Type property is compatible to the data type of the Proposal Manager metadata.

Once the “From” field has been completed, the “To” field should be completed with the “Display Name” of the metadata field, as defined in the Configuration channel of the main Proposal Manager team.

Status Array

Each object of this array has a “From” field, where the integer value of a status code in Dynamics365 is specified, and a “To” field, where the integer value of the OpportunityState field in Proposal Manager is identified, like this:

```
{  
  "From": 1,  
  "To": 2  
},
```

This defines that an opportunity created with the Status “In Progress” (value 1) should appear in Proposal Manager with the State “In Progress” (value 2). If not by this mapping, the opportunity would appear with the state “Creating...” (value 1).

Like before, there are two ways to get all possible values of the StatusCode field in a Dynamics opportunity:

1. Consulting the StatusCode attribute of the Opportunity entity in the Dynamics 365 Developer Guide (visit https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/entities/opportunity#BKMK_StatusCode). Use the “Value” column of the StatusCode Options table.
2. Examining the attribute directly in the Dynamics 365 configuration, by going to Settings > Customizations > Customize the System. In the Explorer Tree, go to Components > Entities > Opportunity > Fields. This opens a data grid with all possible fields; find the StatusCode field, and double click it. This will open another window, where in the lower section there is a Dropdown grouping all possible values. Double clicking one of the values will open another window where the integer value can be seen.

Once the “From” field has been completed, the “To” field should be completed with a value defined in the Proposal Manager solution:

| Value | Display Name |
|-------|--------------|
| 0 | None / Empty |
| 1 | Creating |
| 2 | In Progress |
| 3 | Assigned |

| | |
|-----------|-------------|
| 4 | Draft |
| 5 | Not Started |
| 6 | In Review |
| 7 | Blocked |
| 8 | Completed |
| 9 | Submitted |
| 10 | Accepted |
| 11 | Archived |