

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. Even more, the mapping allows for any custom entity in Dynamics 365 to be used instead of the default 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. Of note are two of them called DefaultDealType and OpportunityMapping.

The first field, *DefaultDealType*, allows to specify a default Deal Type to be assigned to all opportunities created through Dynamics 365. This causes an automatic Team creation in Microsoft Teams with all the channels dictated by the Deal Type. If this is desired, the full display name of the Deal Type must be entered between quotes. Otherwise, the user can use the provided Lookup field in the Opportunity form.

The remaining field, OpportunityMapping, is a composite object. The Proposal Manager application expects this object to have the following structure:

1. **EntityName**: A string that holds the name of the Dynamics 365 entity to be used in the Integration. By default, the Automated Setup will autocomplete it with "opportunity".
2. **NameProperty**: A string that holds the name of the property within the Dynamics 365 entity that should be mapped to the name of the Opportunity in Proposal Manger. By default, the Automated Setup will autocomplete it with "name".
3. **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.
4. **Status**: An array of objects defining which values of the Dynamics' StatusCode field correspond to which values of the Proposal Manager's OpportunityState field.

We will now go in detail through each item.

EntityName

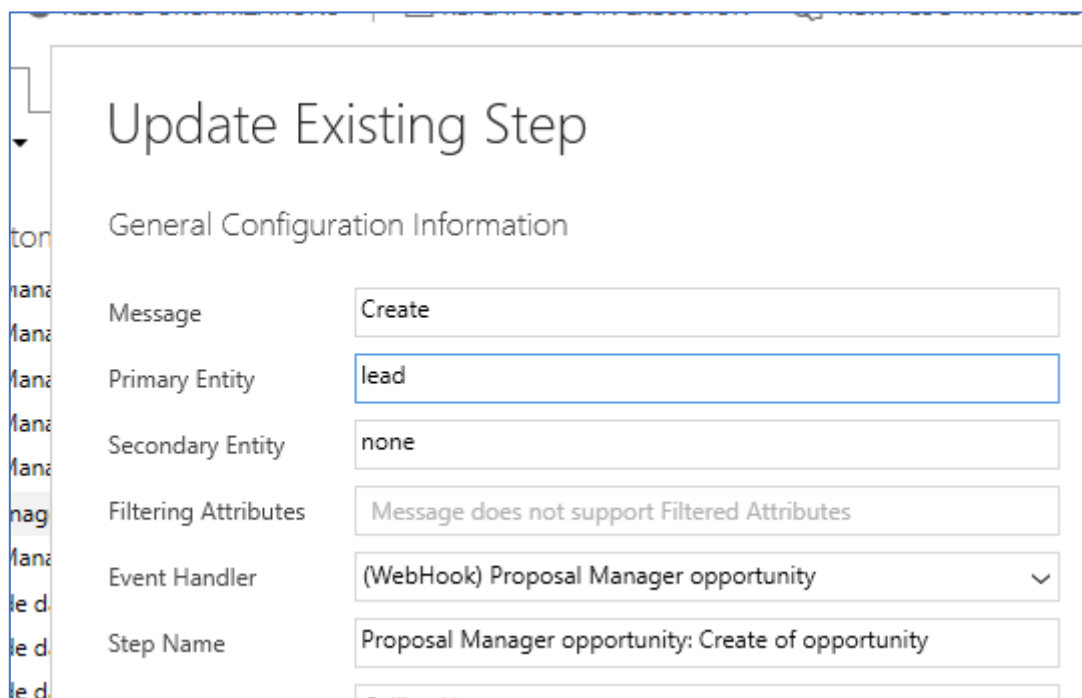
In the event that your organization uses another Out Of Box (OOB) or custom entity to represent an opportunity, this configuration allows the Integration to use that entity instead of the default one. Just enter the logical name (available in the Customizations section) and the Integration will expect an entity with that name.

In general terms, any custom entity derived from Opportunity should be able to be used in the Integration with no problems. Be aware of the following considerations:

- The entity must support connections in order to add team members to the opportunity from Dynamics 365.
- The entity must have Document Management activated in order to add attachments to the opportunity and being able to see them in Proposal Manager. This feature is also required to upload a Formal Proposal through Dynamics.

If any other entity other than “opportunity” is used, the Dynamics Webhook must be altered slightly for this to work fully. For this, you will need to use the Plugin Registration Tool to modify the webhook step that corresponds to the opportunity Webhook. Please refer to the manual Setup Guide, step 6, for instructions in how to obtain the tool, and connect to Dynamics.

After this is done, find the “Proposal Manager opportunity” webhook, and update its only step. Modify the “Primary Entity” field for it to match the desired entity to be used. For example, it should look like this if the “Lead” entity is desired:



The screenshot shows the 'Update Existing Step' configuration window. The 'General Configuration Information' section contains the following fields:

Field	Value
Message	Create
Primary Entity	lead
Secondary Entity	none
Filtering Attributes	Message does not support Filtered Attributes
Event Handler	(WebHook) Proposal Manager opportunity
Step Name	Proposal Manager opportunity: Create of opportunity

Confirm the changes and close the tool.

NameProperty

This parameter holds the property name that holds the display name for the opportunity. If using another entity that holds this information in another field, it can be written down here, and the Integration will read that property to use as the display name in Proposal Manager.

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 in the Notes field.

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