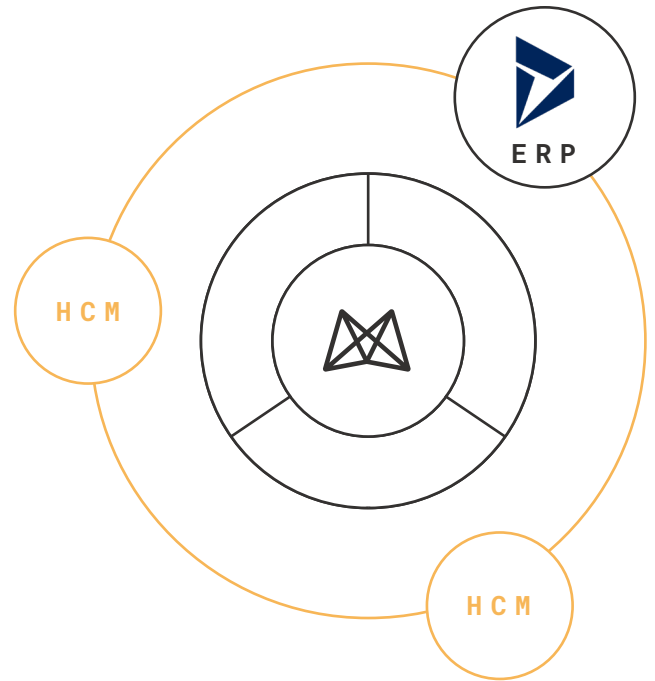




# Microsoft Dynamics 365

## Finance & Operations Integration



Mavenlink's Dynamics 365 integrations automate project creation and provide Dynamics users with key information about Mavenlink projects.

### BENEFITS

- Increase revenue forecasting accuracy with direct insight into your project's progress
- Save time by eliminating redundant data entry
- Stay informed on the health of each engagement by monitoring budget, status, and percent complete
- Save time and gain efficiency by creating projects in just one system
- Log time in one place, the place your team members do their work
- Gain real-time visibility into the status of time and expense approvals
- Immediate visibility into % paid on your project budget burn



### AVAILABILITY & ACCESS

These Microsoft Dynamics 365 integrations are available to Mavenlink Premier and Enterprise accounts. Microsoft Dynamics 365 API access is also required.

Once the integration has been activated by a Solutions Engineer, the integration will be administrator-configurable using the Mavenlink Integrations web-based user interface.

# GET A COMPLETE VIEW OF YOUR PIPELINE AND PROJECTS

## Functional Capabilities

### Expenses

- Approved expenses in Mavenlink are pushed to MS Dynamics.
- Approved Vendor Bills in Mavenlink are pushed to MS Dynamics.
- Configuration of Expenses will include required mappings with MS Dynamics Accounts Payable to facilitate reimbursement of employees for expenses in MS Dynamics (if required).

### Invoices: the following options are mutually exclusive

#### Mavenlink to Business Central:

- Approved invoices in Mavenlink will be pushed to MS Dynamics.
- Invoice data can include detail data such as hourly time, completed fixed fee tasks/milestones, billable expenses, and additional items added in Mavenlink's Invoices screen.
- Configuration of Invoices will include mapping to MS Dynamics Products to facilitate interfacing this data.

### Business Central to Mavenlink:

- A custom dropdown field will be introduced to the Business Central Invoice object to present a list of active Mavenlink projects to the user; selecting a value from this list will mark the invoice for synchronization to Mavenlink.
- A summary invoice will be created in Mavenlink with a single Additional Items line item for the entire invoice amount.

### Payments

- Payments applied to invoices in MS Dynamics will be interfaced and applied to invoices in Mavenlink.

### CONFIGURATION OPTIONS

Map Mavenlink project statuses to Microsoft Dynamics 365 statuses

Map custom field in Mavenlink to store Subsidiary

Select the frequency and schedule of the integration sync

Select which status a project/job must have in order to be included in the integration

Schedule data sync between Mavenlink and Microsoft Dynamics 365

# Dynamics 365 for Finances and Operations Field Mappings

## Required User/Job Object Attribute Mappings

Mavenlink User	Direction	Microsoft Dynamics 365 Worker/Project Resource
ID	▶	Custom Field: Mavenlink User ID
Full Name	◀▶	Worker First Name and Last Name
Photo Path	▶	Start Date
Email	◀▶	Worker Primary Email
Headline	◀▶	Worker Title

## Project Task / Activity Object Attribute Mappings

Mavenlink User	Direction	Microsoft Dynamics 365 Activity/Activity Setup
ID	▶	Custom Field: Mavenlink Story ID
User ID	▶	Resource (the Mavenlink user ID field is used to find resource)
Workspace ID	▶	Project (the Mavenlink workspace ID field is used to find resource)
Title	▶	Activity Purpose
Description	▶	Activity Description
Task Type	▶	Activity Category
State	▶	Activity Status
Priority	▶	Activity Priority
Completed Percentage	▶	Activity Completed Percentage
Start Date	▶	Activity Start Date
Due Date	▶	Activity End Date
Time Estimate in Minutes	▶	The Effort in Hours Field in the Activity Setup Table

# Dynamics 365 for Finances and Operations Field Mappings

## Project Object Attribute Mappings

Mavenlink Project	Direction	Microsoft Dynamics 365 Project/Project Contract
ID	▶	Custom Field: Mavenlink Workspace ID
Title	▶	Project Name
Archived	◄▶	Project Stage (user-defined stage should be configured)
Currency	◄▶	Sales Currency in the Related Project Contract
Start Date	◄▶	Project Start Date
Due Date	◄▶	Project End Date
Status	◄▶	Project Stage
Team Lead	◄▶	Project Manager

## Time Entry/Timesheet Object Attribute Mappings

Mavenlink Time Entry	Direction	Microsoft Dynamics 365 Timesheet
ID	▶	Custom Field: Mavenlink Time Entry ID in the Timesheet Week Lines
User ID	▶	Resource (the Mavenlink user ID field is used to find resource)
Workspace ID	▶	Project (the Mavenlink workspace ID field is used to find resource)
Date Performed	▶	Date Column in the Timesheet Lines
Time in Minutes	▶	Time in the Appropriate Date Column in the Timesheet Lines
Billable	▶	Line Property
Notes	▶	Internal Comment
Rate in Cents	▶	Sales Price in the Timesheet Transactions
Cost Rate in Cents	▶	Activity Completed Percentage
Currency	▶	Cost Price in the Timesheet Transactions

# Dynamics 365 for Finances and Operations Field Mappings

## Invoice Object Attribute Mappings

Mavenlink User	Direction	Microsoft Dynamics 365 Project Invoice
ID	▶	Custom Field: Mavenlink Invoice ID
Workspace ID	◀	Custom Field: Mavenlink Workspace ID
Invoice Number	◀	Invoice
Invoice Date	◀	Invoice Date
Invoice Message	◀	Invoice Header Text
Invoice Title	◀	Project Contract Name
Project Code	◀	Project ID
Payment Schedule	◀	Days from Customer's Terms of Payment

 **LEARN MORE**

Call (800) 860-9544 or visit [mavenlink.com/integrations](https://mavenlink.com/integrations)

