# Salesforce & Dynamics NAV Bidirectional Integration

- Overview
- Data Flow
- Process Map
- Pre-requisites for Integration
- Import Salesforce & MS Dynamics NAV Template
- DBSync Configuration Of Salesforce & Microsoft Dynamics NAV
- Salesforce To MS NAV Field Mapping
- MS NAV To Salesforce Field Mapping
- · Related References

#### Overview

DBSync for Salesforce and Microsoft Dynamics NAV Integration template is easy to use integration solution. It integrates Salesforce Accounts, Products and Opportunity with NAV Customers, Items and Sales orders/Invoices respectively. This solution provides bi-directional sync between Salesforce and MS NAV with the pre-built, field-to-field mappings, along with flexibility for more complex and dynamic mapping capabilities. It is also useful in migrating historical NAV data into Salesforce or vice versa.

#### **Data Flow**

The data flow of Bi-directional integration between Salesforce & Microsoft Dynamics NAV is shown in the table below.

#### **Process Map**

The process map of bi-directional integration between Salesforce & Microsoft Dynamics NAV is shown in the image below.

### **Pre-requisites for Integration**

To ensure DBSync is accurately configured to integrate data between Salesforce and Microsoft Dynamics NAV instance, the user must meet the following requirements:

- Have a valid license to DBSync NAV connector, Salesforce connector, Username, Password, and Microsoft Dynamics NAV Odata to be enabled to connect to DBSync iPaaS platform.
- Access to Dynamics Nav with valid Username and Password.
- Have login and password of Salesforce, to access their web service.

Related references to learn about Pre-requisites of Salesforce and MS NAV connectors are listed below.

http://help.mydbsync.com/docs/display/dbsync/Microsoft+Dynamics+NAV+Connector and the connector of the con

Salesforce Connector

# Import Salesforce & MS Dynamics NAV Template

### Unregistered user

- 1. Go to www.mydbsync.com from a preferred web browser.
- 2. Click "Start your free trial" on the home page.
- 3. Follow the registration steps by activating your account through the activation link sent to your registered Email ID. Follow the registration steps below.

#### Registered User

- 1. Go to www.mydbsync.com from a preferred web browser.
- 2. Navigate to the login page through Account section Customer login.
- 3. Input your Username and Password to login to your DBSync account.
- 4. Navigate to the Template library menu tab and choose the PDL of Salesforce & Nav bi-direction. Click on "Import To Workspace" to start your integration between the source and target applications respectively.
- 5. Follow the steps in the 'DBSync Configuration of Salesforce & Microsoft Dynamics NAV section, to configure your connectors. This will result in data flow between Salesforce and MS NAV.

# **DBSync Configuration Of Salesforce & Microsoft Dynamics NAV**

- 1. After the successful import of Salesforce & Microsoft Dynamics NAV into your account, a user will be re-directed to the connector listing page.
- 2. You will see MS NAV & Salesforce connectors.
- 3. Click on the Edit of the MS NAV to configure the NAV connector to connect to your NAV instance.
  - a. Nav requires the following parameters to connect to your NAV instance.
    - i. Username: A Username to connect to MS Dynamics NAV instance.
    - ii. Password: A Password to connect to the hosted Navision.
    - iii. URL: Connection URL for Microsoft NAV.
- 4. Click on Save and Validate Connection to save and validate your NAV connector.
- 5. Click Edit on the Salesforce connector to connect to your Salesforce instance.
  - Select an End Point you wish to connect to and, under the Quick Setup tab, click on Connect to Salesforce button. This will
    open up a Salesforce pop up window.
    - i. Username: Input a Username of the Salesforce instance you wish to connect to.
    - ii. Password: Input password to connect to your Salesforce instance.
- 6. Once you login to Salesforce, your Salesforce connector is connected to your Salesforce instance. If you want to connect using different Salesforce instance, click on **Disconnect** on the **Quick Setup** tab. Then, connect using credentials with which you wish to connect with.
- 7. You can also use the **Advanced Properties** tab to connect to your Salesforce instance. Go to **Advanced Properties**. Fill in Salesforce Username, Password & Security Token of your Salesforce Instance. Select the appropriate End Point. Once you enter all the required details, click on **Validate Connection**. If the validation is successful, click on **Save** to Save the Salesforce details. If the validation fails, you will see **Validation Errors** on the top right corner. Refer the details in **Validation Errors** section and make the necessary information in the Advanced Properties, click on Validate Connection again.
- 8. Click on Save and Validate Connection to save and validate your Salesforce connector.

## Salesforce To MS NAV Field Mapping

# MS NAV To Salesforce Field Mapping

#### **Related References**

Related references to learn about Salesforce and MS NAV connectors are listed below.

Salesforce Connector

Microsoft Dynamics NAV Connector