DYNAVISION

Documentation:
Elfsquad Connector

Document version: 23.0.11

Date: 13/05/2024

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1 Introduction

Welcome to the official manual of the Elfsquad Connector module.

This extension provides functionalities for connecting to Elfsquad. The master data set up in Business Central is synced to Elfsquad in which configurations can be done and quotes can be made that are synced back to Business Central.

2 Installation

2.1 Extension

The Dynavision Elfsquad Connector module is a separate Business Central extension.
1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Elfsquad Connector** and install this app.

2.1.1 Dependencies (dependencies)

The Dynavision Elfsquad module has dependencies to other modules. Those modules are automatically installed when the Dynavision Elfsquad Connector extension is installed.

3 Configuration

3.1 Masterdata

There is masterdata in Elfsquad and masterdata in Business Central. The masterdata like items and Item Attributes will be managed in Business Central.
Features added in Elfsquad will not be synced back to Business Central, only the quotations and the items added to that quotation will be synced back.
Following master data is synchronized to Elfsquad (**one-way sync**):
- Customers,
- Contacts,
- Unit of Measure,
- Associated Features (with translations),
- Item Attributes (with translations), and
- Items (with translations).

3.1.1 Items

The items are added and are managed in Business Central.
A function has been added to Business Central in order to push the newly created items and their attributes to Elfsquad.
There is a field in the Elfsquad tab in which the price can be set that needs to be pushed to Elfsquad. This is the price that will be shown for the item. The translations, Sales UoM are also synced.

When the item needs to be synced to Elfsquad, it is important to enable the **Sync To Elfsquad** field on the **Item Card**.
The field **Elfsquad Item Identifier** specifies the identifier that is known in Elfsquad for this item. *This is limited to 255 characters.*

3.1.1.1 Item attributes

A new type of entity is created to make sure that the sync between BC and Elfsquad does not pollute the system.
This entity is called **Associated Features** and is used to make it possible in Elfsquad to choose a value to filter on items in Elfsquad when *e.g. creating possible options for a configuration*.
This **Associated Feature** can be created on the **Item Card** by choosing **Associated Feature**.
1. **Code**
   The code used to identify the associated feature (*e.g. COLOR*).
2. **Value**
   The options from which the user can choose in Elfsquad (*e.g. RED, WHITE*).
Remark: the associated Features that are added to an item are by default synced to Elfsquad.

The standard BC item attributes will also be synced to Elfsquad, but when a filter value needs to be specified in this field, it will be an input field.

When the item attributes need to be synced to Elfsquad, it is important to enable the **Sync To Elfsquad** column on the **Item attribute**.

3.1.1.2 Unit of Measure

The Unit of Measure of the item is also synced to Elfsquad.
On the Units of Measure page, there is also a column **Sync to Elfsquad** that will make sure the corresponding UoM will be synced to Elfsquad.

3.1.2 Production BOM's

On the Production BOM, an extra field is added in order to be able to specify the price that will be synced to Elfsquad for the Production BOM. Only Certified Production BOM's will be synced to Elfsquad.
1. Navigate to the **Production BOM's** and select the BOM that needs to be synced to Elfsquad, in order to become a feature in Elfsquad.
2. In the tab **Elfsquad**, insert (optionally) the **Elfsquad Sales Price** for the BOM.
3. Set the **Status** of the BOM to **Certified**.
4. Enable the option **Synchronize to Elfsquad**.

Remark: The Units of Measures need to be synced to Elfsquad, before sending the Production BOM. If the BOM or a version with status Certified is modified, the system will check if the Unit Of Measure is already sent to Elfsquad, and if not, the Sync to Elfsquad option is activated for that Unit of Measure.

3.1.3 Customers / contacts / Ship-to Addresses

On the **Customer Card, and the Ship-to Address** there is also a new tab added, the **Elfsquad Tab** in which it is possible to indicate if the Customer or address needs to be synced to Elfsquad.
When working with opportunities (creating an **Opportunity Card**) a contact is created in Business Central. When the First stage of the Opportunity is activated and the Elfsquad connector is set up and active, there is an option on the **Opportunity Card**, **Create Elfsquad quotation** that can be used to immediately create a linked quotation in Elfsquad for this Opportunity.
When this action is chosen, a check will be performed to make sure customer exists in BC for this contact. When no Customer is found, the user will get the question if one should be created, and when chosen yes, the customer will be created and the contact on the Opportunity will be linked.
In business Central, it is possible to create a contact without it being linked to a customer. In Elfsquad this is not possible, and a customer should always be created in order for it to be linked.

3.1.3.1 Elfsquad Properties

In order link Elfsquad entities to the customers, *and possibly other tables,* and sync this information between Elfsquad and Business Central, the functionality of **Associated Features** has been added in a generic way. The new entity for setting these features up is called **Elfsquad Properties**.

1. Choose the search icon, enter **Elfsquad Properties**, and choose the related link.
2. Add lines for each property that needs to be synced.
   a. **Name**
      Specifies the name of the property.
   b. **Type**
      Specifies the type of the property.
      The options are:
      i. Text,
      ii. Number,
      iii. Date, and
      iv. Dropdown.
   c. **Values**
      In case Type Dropdown is chosen, the values for the property need to be specified. This can be done by choosing either the action **Property Values** or by selecting the value in the **Values** field.
   d. **Required**
      Specifies if the property is required to be filled in in Elfsquad.
   e. **Read Only**
      Specifies if the property is read-only in Elfsquad.
3. Choose the action **Translations** to set up translations for both the properties and property values.
4. Properties can be assigned on the Customer List or Customer Card. Navigate to the Customer list view or select a Customer to which the properties need to be added.
5. In the fact box **Elfsquad Properties**, choose the action **Edit**.
6. Select the Elfsquad Properties and assign a value for the properties. *If no value is set, the property will not be saved.*
   a. The value that is entered will be checked. If the format is not correct, an error message will be displayed.

3.2 Setting up the Elfsquad connection

3.2.1 Elfsquad Setup Wizard

When setting up Elfsquad in Business Central, a wizard is implemented to make sure that everything is set up as needed. The **Elfsquad Setup Wizard** will help with the configuration of the Elfsquad connector.
In Elfsquad, an OpenID client (client secret post) needs to be added.

1. Choose the search icon, enter **Elfsquad Setup**, and then choose the related link.
2. On the page, when the wizard has not yet been executed, as message is shown on top of the page. Choose the action **Start Wizard** to open the **Elfsquad Setup Wizard**.

It is also possible to start the wizard by choosing **Setup Wizard** on the **Elfsquad Setup** page.

3. Choose **Next** to start the configuration.
4. Fill in the needed fields on the next page.
    a. **Client Id**
    Fill in the Client ID that can be found in the OpenId client settings in Elfsquad.
    b. **Client Secret**
    Fill in the Secret that can be found in the OpenId client settings in Elfsquad.
    c. **Scope**
    The API of Elfsquad. This field is pre-filled in and does not need to be modified.
    Value needs to be "Elfskot.Api".
    d. **Token URL**
    Specifies the URL used to retrieve the access token to communicate with the Elfsquad API. This field is pre-filled in and does not need to be modified. *Value needs to be "https://login.elfsquad.io/connect/token".*
    e. ***Remark:*** *Make sure that in Elfsquad, the OpenId client setting **Token auth method** is set to **Client Secret Port**. This setting is by default none.*
5. Choose the action **Next** and select the needed Template on the page that is shown.
    a. **Customer Configuration Template**
    Specifies the default configuration template that will be applied to newly created customers when no other template can be found.
6. Choose the action **Next** and specify the settings for new Configuration Items that need to be created in Business Central based on quotes that are send trough from Elfsquad.
    a. **Create New Configuration Item**
    Specifies when the system should create new configuration items.
    The options are:
        i. **Always**
        Even when the item already exists in Business Central, a new item will be created for the configured item that is noted in the quote send from Elfsquad to Business Central.
        ii. **If not found**
        The system will check based on parameters configured in **Config Item No** field if the item already exists. If the item is not already created in the system, a new item will be created. This item will be created using the number series configured in the Config No. Series.
        iii. **Never**
        Don't create new items.
    b. **Configuration No. Series**
    Specifies the no. series that will be used to create new configuration items.
    c. **Configuration Item No. Field**
    Specifies the buffer field used to find existing configuration items.
    The options are:
        i. **Article Code**
        Search for an item that contains the same value in the Item No. field as

the value noted in the Code field of the Configuration item that is noted on the Elfsquad Quotation.

    ii. **Text Value**

Search for an item that contains the same value in the Description field as the value noted in the Code field of the Configuration item that is noted on the Elfsquad Quotation.

    iii. **Group Title**

Search for an item that contains the same value in the Item Price Group field as the value noted in the Code field of the Configuration item that is noted on the Elfsquad Quotation.

  a. **Configuration Item Template**

Specifies the default item template applied when new configuration items are created and no item template code can be retrieved via Elfsquad (via the Configuration Item Template Feature Id parameter)

When 0 is entered, the default template for item creation will be used.

It is also possible to configure a template in Elfsquad. When an item needs to be created and this template is configured, the item will be created using that template.

  7. Choose **Next** and **Finish** to complete the setup wizard.

Once this wizard is completed and everything is up and running, no extra setup is necessary and no changes need to be made.

Remark*: when the wizard is executed and there is already an existing Elfsquad setup, this setup will be overwritten.*

Important Remark*: only changes or additions that have been added after the sync has been set up will be synced to Elfsquad. In case the setup is changed, and the necessary information is not synced, edit the item/customer/... and sync again.*

*The status, and if the information is synced, can be found in the logs in the **synchronization Setup**. Select the line of the information that had to be synced and choose the action **Log**.*

3.2.2 Elfsquad Setup

The Elfsquad Setup is used to configure the connection to Elfsquad and to define how the quotes should be imported from Elfsquad to Business Central. *This setup is best set up using the **Setup Wizard** and afterwards does not need to be modified.*

  1. Choose the search icon, enter **Elfsquad Setup**, and then choose the related link.

  2. This page contains some mandatory settings and options that needs to be set in order for the user to take advantage of all the features in this app.

  3. The page contains fields that are configured by executing the Setup Wizard for the Elfsquad connection.

    a. **API Base URL**

Specifies the base URL of the Elfsquad API.

    b. **Web Base URL**

Specifies the base URL of the Elfsquad web portal.

    c. **Authentication Code**

Specifies the authentication Code that is used by Business Central to connect to the Elfsquad API.

    d. Integration Enabled
Specifies if the integration with Elfsquad is enabled.
- **i.** *Remark: when copying a Company with this setting enabled, the setting in the copied Company will also be enabled and will also copy all Elfsquad setup from the origin company. **Disable** this option in the copied company to make sure that no incorrect data is synced back to Elfsquad coming from the copied Company.*

    e. Opportunity Property ID
Specifies the unique ID of the Elfsquad quotation property containing the opportunity no.
- **i.** In order to set this up, select the 3 points next to the field to navigate to the Quotations properties page in Elfsquad. Select the property **Opportunity** and copy the value after the last **/**. *Example given: a97073bc-3204-4f4a-31a5-08db6e6b292f.*
- **ii.** Paste this id in the field.

    f. Integration Type
Specifies the integration type used to create sales quote lines. Currently, only the options Item and Item (extended description) are supported.
- **i. Item**
Add the main item to the quotation.
- **ii. Item (extended description)**
Add the main item to the quotation, and add the components of the configuration as description lines.
- **iii.** *Production*
create a BOM for the chosen components and link this to the main item. Also creates the routing and routing links.
- **iv.** *Assemblage BOM*
Create a BOM with the chosen components and link this to the main item.

    g. Create New Configuration Item
Specifies when the system should create new configuration items.
The options are:
- **i. Always**
Even when the item already exists in Business Central, a new item will be created for the configured item that is noted in the quote send from Elfsquad to Business Central.
- **ii. If not found**
The system will check based on parameters configured in **Config Item No** field if the item already exists. If the item is not already created in the system, a new item will be created. This item will be created using the number series configured in the Config No. Series.
- **iii. Never**
Don't create new items.

    h. Configuration No. Series
Specifies the number series that will be used to create new Configuration items.

a. **Configuration Item No. Field**
Specifies the buffer field used to find existing configuration items.
The options are:
   i. **Article Code**
   Search for an item that contains the same value in the Item No. field as the value noted in the Code field of the Configuration item that is noted on the Elfsquad Quotation.
   ii. **Text Value**
   Search for an item that contains the same value in the Description field as the value noted in the Code field of the Configuration item that is noted on the Elfsquad Quotation.
   iii. **Group Title**
   Search for an item that contains the same value in the Item Price Group field as the value noted in the Code field of the Configuration item that is noted on the Elfsquad Quotation.

i. **Default Configuration Item Template**
Specifies the default <u>Item Template</u> applied when new configuration items are created and no item template code can be retrieved via Elfsquad (via the Configuration Item Template Feature Id parameter)
When 0 is entered, the default template for item creation will be used.
It is also possible to configure a template in Elfsquad. When an item needs to be created and this template is configured, the item will be created using that template.
   i. In order to set this up, select the 3 points next to the field to navigate to the Master Data Feature properties page in Elfsquad. Search and select the **BC Item Template** property and copy the value after the last **/**. *Example given: 0f21a97f-cc7d-426f-cd32-08db68d1b0ce.*
   ii. Paste this id in the field.

j. **Configuration Item Template Feature Id**
Specifies the unique id of the Elfsquad feature property containing the item template code.

k. **Default Customer Configuration Template**
Specifies the <u>Configuration Template (Type = Customer)</u> that will be used to create a customer in Business Central, when a CRM account is added in Elfsquad and a quotation is synced to Business Central with this CRM account.

l. **Process via Job Queue**
Specifies if the quotations that are received from Elfsquad in the Quotation buffer should be automatically be transferred to Quotes in Business Central.

m. **Status Filter**
In Elfsquad, there can be several statuses used for quotations. This field makes it possible to specify a status that needs to be set on a quotation to indicate that the quotation can be processed in Business Central.
Choose the More options action, next to the field, to open the list of possible statuses that can be used as filter. Select the desired status and choose **OK**.
Remark*: it is recommended to use the ID of the Quotation statuses, instead of the name. This will make sure there are less errors by typing the name of the status.*

> **n. Import Properties**
> Specifies if quotation properties are also imported
>
> **o. Import Discounts**
> Specifies it quotation Discount lines are also imported. These will be imported in the Elfsquad Quotation Buffer and will not be transferred to the created quotation in Business Central. In case these need to be transferred to the created quotation, a customer specific PTE needs to be created.
>
> **p. Import Ship-To Address**
> Specifies if the Ship-to address is also imported.
>
> **q. Ship-To Address No. Series**
> Specifies the no. series that will be used to create new ship-to addresses. It should be configured in such a way it generates numbers with maximum 10 characters.

4. Choose the action **Synchronization Setup** to open the page in which the Synchronization setup is configured. On this page, the different API URL connections are noted that are used for synchronization and the table that is synchronized. *This setup is default filled in by setting up the Elfsquad connector using the Dynavision Advanced Sync and does not need to be modified.*

5. Choose the action **Create Job Queue Entry** to create a job queue entry that will periodically execute the synchronization to and from Elfsquad. This entry will periodically do the following:
   a. Synchronize master data,
   b. Import quotations to the buffer, and
   c. (optionally) process buffers to sales quotes (this requires the Process via Job Queue parameter to be enabled in the Elfsquad Setup).

6. When the **Job Queue Entry** is created, the action **Cancel Job Queue Entry** will be visible. When chosen, the Elfsquad Job queue entry will be cancelled.

7. Choose the action **Re-create Synchronization Setup** to erase the existing Synchronization Setup (configured by Elfsquad in the Dynavision Advanced Sync app) and re-create the default setup.

Important Remark: only changes or additions that have been added after the sync has been set up will be synced to Elfsquad. In case the setup is changed, and the necessary information is not synced, edit the item/customer/... and sync again.
*The status, and if the information is synced, can be found in the logs in the **Synchronization Setup**. Select the line of the information that had to be synced and choose the action **Log**.*

4 Export of opportunities

It is made possible to export opportunities that are created in Business Central to Elfsquad. An Opportunity can be send to Elfsquad once the first stage is activated in Business Central, meaning that the Opportunity is started.

1. Choose the search icon, enter **Opportunities**, and then choose the related link.
2. Select the Opportunity that needs to be send to Elfsquad, or create a new opportunity and activate the first stage.
3. Choose the action **Create Elfsquad Quotation** to create a new Elfsquad Quotation.

4. When the quotation is created in Elfsquad, by using the previous action, the action **Open in Elfsquad** can be chosen. By choosing this action, the created quotation in Elfsquad is opened.
5. *Remark: these actions are also available on the **Opportunity Card**.*
6. On the **Opportunity Card** in the field **Elfsquad Quotation Number** the number of the quotation that has been created in Elfsquad is shown. When selecting this number, the quotation in Elfsquad is opened.
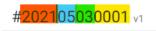
Remark: make sure the number series used for opportunities (Opportunity No. on the Marketing Setup) generates numbers that result in a unique number in Elfsquad. Otherwise a runtime error will be shown.

Remark: The Quotation numbers in Elfsquad can be formatted as follows: using the year, month, day and quotation number. Using this format, the Quotation numbers can be configured and the quotation number will be incremented.
Example given:
- *Red: Year;*
- *Blue: Month;*
- *Green: Day; and*
- *Yellow: quotation number.*

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4.1 Export Opportunity for unlinked contact

In Elfsquad, a quotation requires a customer. In some cases, it might occur that the user wants to send an opportunity for a contact without a linked customer in Business Central. To cover this, the sending process includes logic to create a new customer and send it to Elfsquad.

*Remark: the Elfsquad quotations can only be send with contacts with a **Company No.** linked in the **Contact Card**. This is automatically filled in when creating a customer from a contact with **Contact Type Company**. When the contact has **Contact Type Person**, when creating the customer by using the template, the **Company No.** needs to be specified in the **Contact Card**.*

1. Choose the search icon, enter **Opportunities**, and then choose the related link.
2. Choose the action **Create Elfsquad Quotation** to create a new Elfsquad Quotation.
   a. The system detects if there is no linked customer in Business Central for the selected contact.
   b. If there is no customer linked, a message will be shown with the question to create the new customer in Business Central and sending it to Elfsquad.
3. Choose the action **Yes** on the popup screen that opens.
4. Select a template that will be used to create the customer in Business Central.
5. After selecting the template to use, the contact will be created and the quotation will be send to Elfsquad.

5 Import of quotations

The process for importing quotations from Elfsquad to Business Central consists out of two steps:

1. **Import of the Elfsquad quotation into the quotation buffer**. This import can either be executed manually using the Synchronize action or automatically trough the job queue. During the import the lines and the opportunity numbers are also retrieved (using the Property Id parameter on the Elfsquad setup).
2. **Processing of the quotation buffer to a sales quote**. This processing can either be executed manually using the Process action, or automatically trough the job queue. During this processing, the contact or customer is also imported if required.
    Remark: if the quotation buffer is linked to an opportunity with a different contact than the contact noted on the linked opportunity in Business Central, the contact on the existing opportunity will also be updated.

5.1 Quotation buffer

All quotations that are synced from Elfsquad (with the correct status) to Business Central are added to the Quotation Buffer. From this page, it is possible to import these quotations in Business Central.

1. Choose the search icon, enter **Quotation Buffer**, and then choose the related link.
2. The page that opens contains the overview of all quotations (imported from Elfsquad) that still need to be processed in Business Central.
3. If the page is empty and the quotations import is not set up to run automatically, choose the action **Synchronize** in order to import the quotations from Elfsquad to the buffer. After selecting the action, when there are quotations in Elfsquad that are not yet synced and have the **Status** as set in the **Elfsquad Setup**, these will be imported and shown in the overview.
    It is also possible to choose the action **Synchronize (Preview Mode)**. This action has the same result and functionality as the **Synchronize** function, but a screen will be shown with the entries to synchronize if applicable.
    a. ***Remark****: make sure that the Opportunity that has been specified on the Elfsquad quotation counts less than 20 characters, otherwise the **Synchronization** will fail.*
4. It is possible to link an Opportunity to an imported entry in the quotation buffer by choosing the action **Link Opportunity**. *Remark: the system will automatically try to link an existing opportunity during processing if the Opportunity No. field is filled.*
5. In case an opportunity needs to be unlinked from an imported quotation in the Quotation Buffer, choose the action **Unlink Opportunity**.
6. Choose the action **Open in Elfsquad** to open the imported quotation in Elfsquad.
7. Following fields are shown on the page.
    a. **Quotation Number**
        Displays the unique identifier or the imported quotation.
    b. **Debtor Name**
        Displays the unique number of the customer.

    c. **Debtor Contact Name**
       Displays the name of the customer.
    d. **Version Number**
       Displays the number of the version of the quotation.
    e. **Total Price Excl. VAT**
       Displays the total Price Excl VAT for the quotation.
    f. **Customer Reference**
       Shows the customer reference.
    g. **Opportunity No.**
       Displays the suggested Opportunity No. received from Elfsquad.
    h. **Link to Opportunity No.**
       Specifies the number of the Opportunity to which the quotation will be linked.
    i. **Error**
       Shows if an error has occurred during processing.
    j. **Error Message**
       Displays the error message when an error has occurred during processing.
    k. **Processed**
       Specifies if the buffer has already been processed.
    l. **Skipped**
       Specifies if the entry has been skipped while processing.
    m. **Has Properties**
       Displays if the quotation has properties. This column is added and filled in when the option **Import Properties** is enabled in the **Elfsquad Setup.**
    n. **Has Discounts**
       Displays if the imported Quotation contains Discount lines.
       Selecting the value in the column will show the discount lines that are defined on the Elfsquad Quotations.
       These will be imported in the Elfsquad Quotation Buffer and will not be transferred to the created quotation in Business Central. In case these need to be transferred to the created quotation, a customer specific PTE needs to be created.
          i. *Remark: this excludes the discount % defined on the item lines of the quotation. This line discount will be transferred for the line to the quotation created in BC.*
    o. **Remarks**
       Displays if the imported quotation has remarks. Choose the value in the remarks column, or the action **Remarks** to display the remarks that are included in the imported quotation. The imported remarks are imported with the formatting as set on the Elfsquad Quotation.
    p. **Lines section**
       Shows the items and prices of the configuration items that are included in the quotation. These are the items that will be noted and created in the system based on the settings in the **Elfsquad Setup** page.
8. When the option **Import Properties** is enabled in the **Elfsquad Setup**, the action **Properties** is added on the page. Choose this action to view the properties that are set on the Elfsquad Quotation that is synced.

> ***Remark****: these properties are only displayed in the page **Quotation Buffer**, and are not transferred to the Sales quote that is created from the Elfsquad quotation.*

9. Choose the action **Process** to create sales quotes in Business Central for the selected imported entries from Elfsquad in the Quotation Buffer.
10. The created quotes linked to an imported Elfsquad quotation can be viewed by choosing the action **Show Sales Quote(s)**.

5.2 Created Elfsquad Sales Quotes

Sales quotes that are created based on an Elfsquad quotation van be easily located using the **Imported from Elfsquad** view in the Sales Quotes list page.

For the sales quotes that are created from an Elfsquad quotation, the action **Open in Elfsquad** can be chosen to view the quotation in Elfsquad.

The field **Elfsquad Quotation Number** show the quotation number of the linked Elfsquad quotation and is also clickable in order to navigate to the Elfsquad quotation.

If the option **Import Ship-To Address** is enabled in the Elfsquad Setup, the ship-to address that is imported in the quotation will be filled in as a Custom Address on the sales quote when the buffer is processed.

If this address is different from the default Ship-to Code set on the customer, the **Ship-to Code** will be empty on the created sales quote.

The number series, configured in the Elfsquad Setup, will be used to assign a new Ship-To Address code in case a delivery address is assigned in Elfsquad, that does not yet exist in BC. In this address, the Elfsquad ID will be filled in.

Remark*: when a Ship-to Address is already existing in BC with an Elfsquad identifier, and the same address is used in Elfsquad for another customer (with the same Elfsquad ID), the Elfsquad ID for the other (existing) ship-to address will be blanked out. This will be filled in with a new ID after the next sync to Elfsquad.*

A new ship-to address will be created in BC, for the current customer on the imported quotation with the Elfsquad ID from the buffer.

Based on the setting **Create New Configuration Item**, new Elfsquad items will be created if the configuration is not found in the Business Central System, using the set Configuration Item No. series.

This will be done when the item cannot be found. The existence of the item is checked using the information set in the **Configuration Item No. Field** in the Setup.

Remark*: it is possible that features are added in an Elfsquad location that do not yet exist in Business Central. This will result in the creation of an item in Business Central, without a description, as this is based on the Configuration Group Title.*

Make sure to first define the item in Business Central, sync this to Elfsquad and use this item in the quotation. This will make sure no wrong items are created in Business Central.

The section **Elfsquad Remarks** will contain the imported remarks from the Elfsquad quotation with the formatting as specified in the Elfsquad quotation.

6 Insert Custom Elfsquad Sync Entry

It is also possible to add a Custom API dor Elfsquad. This is possible trough a PTE, or bu setting up using the GUI.
Contact your partner or support to help set up this custom connection.

In order to be able to set up a custom Elfsquad Sync Entry, the Elfsquad **Setup Wizard** has to be completed.
Otherwise an error will be shown when setting up the custom entry.
Once the setup has been completed, follow the following steps in order to set up the custom entry.

1. Navigate to the **Synchronization Setup** page.
2. Choose the action **New > New Elfsquad Synchronization Setup**.
3. Fill in the information requested.
    a. **Code**
        The code to identify the custom sync entry.
    b. **Source Table**
        Specifies the table that is being synchronized using the custom sync entry.
    c. **Authentication Code**
        Specifies the authentication code used to connect to the Elfsquad API.
    d. **Culture Info**
        Specifies the culture info, used to process the data from the API.
    e. **URL**
        Specifies the API URL used for synchronization.