



Technical Reference
**QAD CRM –
QAD Enterprise Applications
Database Field Mapping**

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QAD CRM 6.5.1
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QAD Inc.

100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
<http://www.qad.com>

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This document contains detailed information on database field mapping between QAD CRM 6.5.1 and QAD Enterprise Applications Standard Edition.

Address Integration

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	506
bisg_param.flag[1]	Logical	Transfer Customer Address from QAD ERP to QAD CRM
bisg_param.flag[2]	Logical	Transfer Customer Ship-to Address from QAD ERP to QAD CRM
bisg_param.flag[3]	Logical	Transfer Customer Enduser Address from QAD ERP to QAD CRM
bisg_param.flag[4]	Logical	Transfer Supplier Address from QAD ERP to QAD CRM
bisg_param.flag[5]	Logical	Transfer Supplier Remit-to Address from QAD ERP to QAD CRM
bisg_param.flag[6]	Logical	Transfer Profile from QAD CRM to QAD ERP
bisg_param.flag[7]	Logical	Transfer site_adr(Remit-to and Ship-to) from QAD CRM to QAD ERP

Customer Address

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
prospect.auth	Unit ID	cm_mstr.cm_domain	Domain	Yes	Yes
prospect.integration_type	Integration Type	MFG	-	-	-
prospect.erp_status	ERP Status	CUSTOMER	-	-	-
prospect.type	Type	prospect.type + cm_mstr.cm_type	Type	Yes	No
prospect.cust_no	Cust. No	cm_mstr.cm_addr	Customer	Yes	No
prospect.acnt_mgr	Ext A/C Mgr	If available users then cm_slspn	-	Yes	No
prospect.alias_name	Alias name	cm_mstr.cm_sort	Sort Name	Yes	Yes
prospect.cred_limit	Cr Limit	cm_mstr.cm_cr_limit	Credit Limit	Yes	No
prospect.nme	Profile Name	ad_mstr.ad_name	Name	Yes	Yes
prospect.curr_code	Currency	cm_mstr.cm_curr	Currency	Yes	Yes
prospect.adres[1]	Address[1]	ad_mstr.ad_line1	Address	Yes	Yes
prospect.adres[2]	Address[2]	ad_mstr.ad_line2	Address	Yes	Yes
prospect.adres[3]	Address[3]	ad_mstr.ad_line3	Address	Yes	Yes
prospect.twn	Town/City	ad_mstr.ad_city	City	Yes	Yes
prospect.state	State	ad_mstr.ad_state	State	Yes	Yes
prospect.cty	County	ad_mstr.ad_county	County	Yes	Yes
prospect.ctry	Country	ad_mstr.ad_ctry	Country Code	Yes	Yes
prospect.cde	Post Code	ad_mstr.ad_zip	Post	Yes	Yes
prospect.tel[1]	Tel No[1]	ad_mstr.ad_phone	Telephone	Yes	Yes
prospect.tel[2]	Tel No[2]	ad_mstr.ad_phone2	Telephone	Yes	Yes
prospect.tel[1]	Tel No[1]	ad_mstr.ad_ext	Ext	Yes	Yes
prospect.tel[2]	Tel No[2]	ad_mstr.ad_ext2	Ext	Yes	Yes
prospect.fax	Fax No	ad_mstr.ad_fax	Fax/Telex	Yes	Yes
prospect.tzone_code	Time zone	ad_mstr.ad_timezone	Time Zone	Yes	Yes
prospect.bill_to	Bill to	cm_mstr.cm_bill	Bill-To	Yes	Yes
prospect.reg	Region	cm_mstr.cm_region	Region	Yes	No
prospect.credit_hold	Credit Hold	cm_mstr.cm_cr_hold	Credit Hold	Yes	No
prospect.udf_char01	Credit Rating	cm_mstr.cm_cr_rating	Credit Rating	Yes	No
prospect.udf_char02	Terms	cm_mstr.cm_cr_terms	Terms	Yes	No
prospect.udf_char03	DB Number	cm_mstr.cm_db	DB Number	Yes	No
prospect.udf_char04	Site	cm_mstr.cm_site	Site	Yes	No
prospect.udf_char05	Stmt Cycle	cm_mstr.cm_stmt_cyc	Stmt Cycle	Yes	No
prospect.udf_char07	Customer Type	cm_mstr.cm_type	Type	Yes	Yes
prospect.udf_char08	Customer Class	cm_mstr.cm_class	Class	Yes	Yes
prospect.udf_date01	Last Credit Review	cm_mstr.cm_cr_review	Last Credit Review	Yes	No
prospect.udf_date02	Last Credit Updated	cm_mstr.cm_cr_update	Last Credit Updated	Yes	No
prospect.udf_dec01	Disc %	cm_mstr.cm_disc_pct	Disc%	Yes	No
prospect.udf_log01	Dun Letter	cm_mstr.cm_dun	Dun Letter	Yes	No
prospect.udf_log02	Finance Chg	cm_mstr.cm_fin	Finance Chg	Yes	No

2 Address Integration

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
prospect.udf_log03	PO Required	cm_mstr.cm_po_reqd	PO Required	Yes	No
prospect.udf_log04	Statement	cm_mstr.cm_stmt	Statement	Yes	No
prospect.created_by	Created By	global_userid	-	-	-
prospect.modified_by	Modified By	global_userid	-	-	-

Customer Ship-To

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
site_adr.auth	Unit ID	ad_mstr.ad_domain	Domain	Yes	No
site_adr.adr_type	Address Type	ls_mstr.ls_type	List Type	Yes	No
site_adr.nme	Profile Name	ad_mstr.ad_name	Name	Yes	Yes
site_adr.adres[1]	Address[1]	ad_mstr.ad_line1	Address	Yes	Yes
site_adr.adres[2]	Address[2]	ad_mstr.ad_line2	Address	Yes	Yes
site_adr.adres[3]	Address[3]	ad_mstr.ad_line3	Address	Yes	Yes
site_adr.twn	Town/City	ad_mstr.ad_city	City	Yes	Yes
site_adr.state	State	ad_mstr.ad_state	State	Yes	Yes
site_adr.cty	County	ad_mstr.ad_county	County	Yes	Yes
site_adr.ctr	Country	ad_mstr.ad_ctr	Country Code	Yes	Yes
site_adr.cde	Post Code	ad_mstr.ad_zip	Post	Yes	Yes
site_adr.tel[1]	Tel No[1]	ad_mstr.ad_phone	Telephone	Yes	Yes
site_adr.tel[2]	Tel No[2]	ad_mstr.ad_phone2	Telephone	Yes	Yes
site_adr.tel[1]	Tel No[1]	ad_mstr.ad_ext	Ext	Yes	Yes
site_adr.tel[2]	Tel No[2]	ad_mstr.ad_ext2	Ext	Yes	Yes
site_adr.fax	Fax	ad_mstr.ad_fax	Fax/Telex	Yes	Yes
site_adr.external_id	External Id	ad_mstr.ad_addr	Address	Yes	No
site_adr.reference	Reference	ad_mstr.ad_ref	Reference	Yes	No
site_adr.tzone_code	Time zone	ad_mstr.ad_timezone	Time Zone	Yes	No
site_adr.created_by	Created By	global_userid	-	-	-
site_adr.modified_by	Modified By	global_userid	-	-	-
site_adr.alias_name	Alias Name	ad_mstr.ad_sort	Sort Name	Yes	Yes

Supplier Address

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
prospect.auth	Unit ID	vd_mstr.vd_domain	Domain	Yes	No
prospect.integration_type	Integration Type	MFG	-	-	-
prospect.erp_status	ERP Status	"SUPPLIER"	-	-	-
prospect.type	Type	prospect.type + 'Supplier'	-	-	-
prospect.cust_no	Cust. No	vd_mstr.vd_addr	Supplier	Yes	No
prospect.curr_code	Currency	vd_mstr.vd_curr	Currency	Yes	No
prospect.alias_name	Alias name	vd_mstr.vd_sort	Sort Name	Yes	Yes
prospect.nme	Profile Name	ad_mstr.ad_name	Name	Yes	Yes
prospect.adres[1]	Address[1]	ad_mstr.ad_line1	Address	Yes	Yes
prospect.adres[2]	Address[2]	ad_mstr.ad_line2	Address	Yes	Yes
prospect.adres[3]	Address[3]	ad_mstr.ad_line3	Address	Yes	Yes
prospect.twn	Town/City	ad_mstr.ad_city	City	Yes	Yes
prospect.state	State	ad_mstr.ad_state	State	Yes	Yes
prospect.cty	County	ad_mstr.ad_county	County	Yes	Yes
prospect.ctr	Country	ad_mstr.ad_ctr	Country Code	Yes	Yes
prospect.cde	Post Code	ad_mstr.ad_zip	Post	Yes	Yes
prospect.tel[1]	Tel No[1]	ad_mstr.ad_phone	Telephone	Yes	Yes
prospect.tel[2]	Tel No[2]	ad_mstr.ad_phone2	Telephone	Yes	Yes
prospect.tel[1]	Tel No[1]	ad_mstr.ad_ext	Ext	Yes	Yes
prospect.tel[2]	Tel No[2]	ad_mstr.ad_ext2	Ext	Yes	Yes
prospect.fax	Fax No	ad_mstr.ad_fax	Fax/Telex	Yes	Yes
prospect.tzone_code	Time zone	ad_mstr.ad_timezone	Time Zone	Yes	Yes
prospect.udf_char06	Terms	vd_mstr.vd_cr_terms	Terms	Yes	No
prospect.udf_dec02	Disc%	vd_mstr.vd_disc_pct	Disc%	Yes	No
prospect.udf_log05	Payment Hold	vd_mstr.vd_hold	Payment Hold	Yes	No
prospect.created_by	Created By	global_userid	-	-	-
prospect.modified_by	Modified By	global_userid	-	-	-

Supplier Remit-To Address

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
site_adr.auth	Unit ID	ad_mstr.ad_domain	Domain	Yes	No
site_adr.adr_type	Address Type	'Remit-to'	-	-	-
site_adr.nme	Profile Name	ad_mstr.ad_name	Name	Yes	Yes
site_adr.adres[1]	Address[1]	ad_mstr.ad_line1	Address	Yes	Yes
site_adr.adres[2]	Address[2]	ad_mstr.ad_line2	Address	Yes	Yes
site_adr.adres[3]	Address[3]	ad_mstr.ad_line3	Address	Yes	Yes
site_adr.twn	Town/City	ad_mstr.ad_city	City	Yes	Yes
site_adr.state	State	ad_mstr.ad_state	State	Yes	Yes
site_adr.cty	County	ad_mstr.ad_county	County	Yes	Yes
site_adr.ctry	Country	ad_mstr.ad_ctry	Country Code	Yes	Yes
site_adr.cde	Post Code	ad_mstr.ad_zip	Post	Yes	Yes
site_adr.tel[1]	Tel No[1]	ad_mstr.ad_phone	Telephone	Yes	Yes
site_adr.tel[2]	Tel No[2]	ad_mstr.ad_phone2	Telephone	Yes	Yes
site_adr.tel[1]	Tel No[1]	ad_mstr.ad_ext	Ext	Yes	Yes
site_adr.tel[2]	Tel No[2]	ad_mstr.ad_ext2	Ext	Yes	Yes
site_adr.fax	Fax	ad_mstr.ad_fax	Fax/Telex	Yes	Yes
site_adr.external_id	External Id	vd_mstr.vd_remit	Remit-to	Yes	No
site_adr.tzone_code	Time zone	ad_mstr.ad_timezone	Time Zone	Yes	Yes
site_adr.alias_name	Alias name	ad_mstr.ad_sort	Sort Name	Yes	Yes
site_adr.created_by	Created By	global_userid	-	-	-
site_adr.modified_by	Modified By	global_userid	-	-	-

End User Address

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
prospect.auth	Unit ID	eu_mstr.eu_domain	Domain	Yes	No
prospect.integration_type	Integration Type	"MFG"	-	-	-
prospect.erp_status	ERP Status	"ENDUSER"	-	-	-
prospect.type	Type	prospect.type + 'EndUser'	-	-	-
prospect.cust_no	Cust. No	eu_mstr.eu_addr	End User	Yes	No
prospect.alias_name	Alias name	eu_mstr.eu_sort	Name	Yes	Yes
prospect.nme	Profile Name	ad_mstr.ad_name	Name	Yes	Yes
prospect.adres[1]	Address[1]	ad_mstr.ad_line1	Address	Yes	Yes
prospect.adres[2]	Address[2]	ad_mstr.ad_line2	Address	Yes	Yes
prospect.adres[3]	Address[3]	ad_mstr.ad_line3	Address	Yes	Yes
prospect.twn	Town/City	ad_mstr.ad_city	City	Yes	Yes
prospect.state	State	ad_mstr.ad_state	State	Yes	Yes
prospect.cty	County	ad_mstr.ad_county	County	Yes	Yes
prospect.ctry	Country	ad_mstr.ad_ctry	Country Code	Yes	Yes
prospect.cde	Post Code	ad_mstr.ad_zip	Post	Yes	Yes
prospect.tel[1]	Tel No[1]	ad_mstr.ad_phone	Telephone	Yes	Yes
prospect.tel[2]	Tel No[2]	ad_mstr.ad_phone2	Telephone	Yes	Yes
prospect.tel[1]	Tel No[1]	ad_mstr.ad_ext	Ext	Yes	Yes
prospect.tel[2]	Tel No[2]	ad_mstr.ad_ext2	Ext	Yes	Yes
prospect.fax	Fax No	ad_mstr.ad_fax	Fax/Telex	Yes	Yes
prospect.tzone_code	Time zone	ad_mstr.ad_timezone	Time Zone	Yes	Yes
prospect.udf_dec03	Disc%	eu_mstr.eu_disc_pct	Disc%	Yes	No
prospect.udf_log06	PO Required	eu_mstr.eu_po_reqd	PO Required	Yes	No
prospect.created_by	Created By	global_userid	-	-	-
prospect.modified_by	Modified By	global_userid	-	-	-

Currency

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	510
bisg_param.flag[1]	Logical	Transfer Currency Information from QAD ERP to QAD CRM

4 Exchange Rate

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
curr_hdr.curr_code	Currency	cu_mstr.cu_curr	Currency	Yes	No
curr_hdr.curr_desc	Description	cu_mstr.cu_desc	Description	Yes	No
curr_hdr.curr_active	Active	cu_mstr.cu_active	Active	Yes	No
curr_hdr.mem_union	Member of Union	If available mu_mstr of currency	-	Yes	No
curr_hdr.union_curr	Union Currency	if available mu_mstr then mu_mstr.mu_union_curr else "" :U	-	Yes	No
curr_hdr.rec_owner	Record Owner	M	-	-	-
curr_hdr.created_by	Created By	Logged userid	-	-	-
curr_hdr.modified_by	Modified By	Logged userid	-	-	-

Exchange Rate

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	510
bisg_param.flag[2]	Logical	Transfer Exchange Rate Information from QAD ERP to QAD CRM

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
exchrte.auth	Unit ID	exr_rate.exr_domain	Domain	Yes	No
exchrte.curr1	Currency 1	exr_rate.exr_curr1	Curr1	Yes	No
exchrte.curr2	Currency 2	exr_rate.exr_curr2	Curr2	Yes	No
exchrte.start_date	Start Date	exr_rate.exr_start_date	Start	Yes	No
exchrte.end_date	End Date	exr_rate.exr_end_date	End Date	Yes	No
exchrte.rate	Currency 1 Units	exr_rate.exr_rate	Units	Yes	No
exchrte.rate2	Currency 2 Units	exr_rate.exr_rate2	Units	Yes	No
exchrte.rec_owner	Record Owner	"M"	-	-	-
exchrte.created_by	Created By	global_userid	-	-	-
exchrte.modified_by	Modified By	global_userid	-	-	-

Product

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	501
bisg_param.flag[1]	Logical	Transfer Master comments from QAD ERP to QAD CRM
bisg_param.flag[3]	Logical	Transfer Product Information from QAD ERP to QAD CRM
bisg_param.flag[4]	Logical	Allow Addition of Product Information in QAD CRM
bisg_param.flag[2]	Logical	Transfer Product information from QAD CRM to QAD ERP
bisg_param.flag[6]	Logical	Transfer Product comments from QAD CRM to QAD ERP
bisg_param.ch_1[1]	Character	Comment Type
bisg_param.ch_1[2]	Character	Comment Language

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
product.auth	Unit ID	pt_mstr.pt_domain	Domain	Yes	No
product.prod_id	Product ID	pt_mstr.pt_part	Item Number	Yes	No
product.prod_line	Product Line	pt_mstr.pt_prod_line	Prod Line	Yes	No
product.break_cat	Break Cat	pt_mstr.pt_break_cat	Price Break Cat	Yes	No
product.unit_price	List Price	pt_mstr.pt_price	Price	Yes	No
product.prod_desc	Desc	pt_mstr.pt_desc1) + '':U + trim(pt_mstr.pt_desc2	Description	Yes	Yes
product.vat_code	VAT Code	pt_mstr.pt_taxc	Tax Class	Yes	No
product.create_date	Create date	pt_mstr.pt_added	Added	Yes	No
product.valid_from	Valid from	pt_mstr.pt_added	Added	Yes	No
product.product_status	Product Status	pt_mstr.pt_status	Status	Yes	Yes
product.txt	Notes	Master comments attached to the Product— cd_det.cd_cmmt	Comment Data	Yes	Yes
product.prod_grp	Product Group	pt_mstr.pt_group	Group	Yes	Yes
product.prod_type	Product Type	pt_mstr.pt_part_type	Item Type	Yes	Yes
product.external_seq	Page Sequence	Master Comments page no— cd_det.cd_seq	Page	Yes	Yes
product.um	UOM	pt_mstr.pt_um	UM	Yes	Yes
product.udf_char01	Site	pt_mstr.pt_site	Site	Yes	Yes
product.udf_char02	Configuration	pt_mstr.pt_cfg_type	Configuration	Yes	Yes
product.udf_char03	Pur/Mfg	pt_mstr.pt_pm_code	Pur/Mfg	Yes	Yes
product.udf_char04	Freight class	pt_mstr.pt_fr_class	Freight class	Yes	Yes
product.udf_char05	Ship weight UM	pt_mstr.pt_ship_wt_um	Ship weight UM	Yes	Yes
product.udf_char06	Location	pt_mstr.pt_loc	Location	Yes	Yes
product.udf_dec01	Ship weight	pt_mstr.pt_ship_wt	Ship weight	Yes	Yes
product.udf_dec02	Mfg LT	pt_mstr.pt_mfg_lead	Mfg LT	Yes	Yes
product.udf_log01	Tax	pt_mstr.pt_taxable	Tax	Yes	Yes
product.cost_price	Cost Price	sct_det.sct_cst_tot	Cost Total	Yes	No
product.created_by	Created By	global_userid	-	-	-
product.modified_by	Modified By	global_userid	-	-	-
product.integration_type	Integration Type	MFG	-	-	-

Product Line

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
prodline.auth	Unit ID	pt_mstr.pt_domain	Domain	Yes	No
prodline.prod_line	Product Line	pt_mstr.pt_prod_line	Prod Line	Yes	No
prodline.line_desc	Description	pl_mstr.pl_desc	Description	Yes	No
prodline.created_by	Created By	global_userid	-	-	-
prodline.modified_by	Modified By	global_userid	-	-	-

UOM

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
uom.auth	Unit ID	um_mstr.um_domain	Domain	Yes	No
uom.um	UOM	um_mstr.um_um	Unit of Measure	Yes	No
uom.alt_um	Alternate UOM	um_mstr.um_alt_um	Alternate UM	Yes	No
uom.conv	UM Conversion	um_mstr.um_conv	UM Conversion	Yes	No
uom.prod_id	Product ID	um_mstr.um_part	Item Number	Yes	No
uom.um_desc	Description	um_mstr.um_desc	Description	Yes	No
uom.created_by	Created By	global_userid	-	-	-
uom.modified_by	Modified By	global_userid	-	-	-

Sales Quote

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	505
bisg_param.flag[1]	Logical	Transfer QAD ERP Sales Quote Information to QAD CRM
bisg_param.flag[5]	Logical	Transfer Transaction comments from QAD ERP to QAD CRM
bisg_param.ch_1[1]	Character	Comment Type
bisg_param.ch_1[2]	Character	Comment Language
bisg_param.flag[2]	Logical	Transfer QAD Sales Quote Information to QAD ERP
bisg_param.flag[3]	Logical	Create customer in QAD ERP if QAD CRM sales quote customer not found
bisg_param.flag[6]	Logical	Allow QAD CRM to update datacomplete of QAD ERP customer
bisg_param.flag[4]	Logical	Allow modification of quote opportunity lines in QAD CRM
bisg_param.flag[7]	Logical	Delete the quote line in QAD ERP if it was originally created in QAD CRM
bisg_param.flag[8]	Logical	Delete the quote line in QAD ERP if it was originally created in QAD ERP

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
quote_hdr.auth	Unit ID	qo_mstr.qo_domain	Domain	Yes	Yes
prospect.cust_no	Customer No	qo_mstr.qo_cust	Sold-To	Yes	Yes
prospect.bill_to	Bill To	qo_mstr.qo_bill	Bill-To	Yes	Yes
quote_hdr.external_id	External Id	qo_mstr.qo_nbr	Quote	Yes	Yes
quote_hdr.integration_type	Integration Type	MFG	-	-	-
quote_hdr.quote_date	Quote Date	qo_mstr.qo_ord_date	Quote Date	Yes	No
quote_hdr.req_date	Required Date	qo_mstr.qo_req_date	Required Date	Yes	Yes
quote_hdr.due_date	Due Date	qo_mstr.qo_due_date	Due Date	Yes	Yes
quote_hdr.trl3_cd	Trailer 3	qo_mstr.qo_trl3_cd	Trailer 3	Yes	No
quote_hdr.trl3_amt	Trailer amount 3	qo_mstr.qo_trl3_amt	Trailer 3	Yes	Yes
quote_hdr.trl2_cd	Trailer 2	qo_mstr.qo_trl2_cd	Trailer 2	Yes	No
quote_hdr.trl2_amt	Trailer amount 2	qo_mstr.qo_trl2_amt	Trailer 2	Yes	Yes
quote_hdr.trl1_cd	Trailer 1	qo_mstr.qo_trl1_cd	Trailer 1	Yes	No
quote_hdr.trl1_amt	Trailer amount 1	qo_mstr.qo_trl1_amt	Trailer 1	Yes	Yes
quote_hdr.pricing_date	Pricing Date	qo_mstr.qo_pricing_dt	Pricing Date	Yes	No
quote_hdr.priced_date	Last Price Date	qo_mstr.qo_priced_dt	Last Price Dt	Yes	No
quote_hdr.fr_min_wt	Frt Min Wt	qo_mstr.qo_fr_min_wt	Frt Min Wt	Yes	No
quote_hdr.project_id	Project ID	qo_mstr.qo_project	Project	Yes	No
quote_hdr.curr_code	Currency	qo_mstr.qo_curr	Currency	Yes	Yes
quote_hdr.quote_release	Release	qo_mstr.qo_release	Release	Yes	Yes
quote_hdr.exp_date	Expires	qo_mstr.qo_exp_date	Expires	Yes	Yes
quote_hdr.rel_date	Release Date	qo_mstr.qo_rel_date	Release Date	Yes	No
quote_hdr.confirm_date	Confirm Date	qo_mstr.qo_confirm	Confirm Date	Yes	Yes
quote_hdr.taxable	Taxable	qo_mstr.qo_taxable	Taxable	Yes	No
quote_hdr.ship_date	Ship Date	qo_mstr.qo_ship_date	Ship Date	Yes	No
quote_hdr.prepaid_amnt	Prepaid Amount	qo_mstr.qo_prepaid	Prepaid Amount	Yes	No
quote_hdr.tax_pct[3]	Tax[3]	qo_mstr.qo_tax_pct[3]	Tax	Yes	No
quote_hdr.tax_pct[2]	Tax[2]	qo_mstr.qo_tax_pct[2]	Tax	Yes	No
quote_hdr.tax_pct[1]	Tax[1]	qo_mstr.qo_tax_pct[1]	Tax	Yes	No
quote_hdr.disc_pct	Disc %	qo_mstr.qo_disc_pct	Disc %	Yes	No
quote_hdr.quote_status	Action Status	qo_mstr.qo_stat	Action Status	Yes	No
quote_hdr.source	Order Source	qo_mstr.qo_source	Order Source	Yes	No
quote_hdr.po_no	Purchase Order	qo_mstr.qo_po	Purchase Order	Yes	Yes
quote_hdr.partial	Partial OK	qo_mstr.qo_partial	Partial OK	Yes	No
quote_hdr.pr_list	Manual	qo_mstr.qo_pr_list	Manual	Yes	No
quote_hdr.comments	Comments	cmt_det.cmt_cmnt	Comment Data	Yes	Yes
quote_hdr.udf_char01	Channel	qo_mstr.qo_channel	Channel	Yes	Yes
quote_hdr.udf_log03	Recurring	qo_mstr.qo_recur	Recurring	Yes	No
quote_hdr.udf_log02	Print Quote	qo_mstr.qo_print_qo	Print Quote	Yes	No
quote_hdr.udf_log01	Fixed Rate	qo_mstr.qo_fix_rate	Fixed Rate	Yes	No
quote_hdr.udf_date01	Date	qo_mstr.qo_flw_date	Date	Yes	No
quote_hdr.udf_char07	Site	qo_mstr.qo_site	Site	Yes	Yes
quote_hdr.udf_char06	Language	qo_mstr.qo_lang	Language	Yes	No
quote_hdr.udf_char05	Freight Terms	qo_mstr.qo_fr_terms	Freight Terms	Yes	No

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
quote_hdr.udf_char04	Freight List	qo_mstr.qo_fr_list	Freight List	Yes	No
quote_hdr.udf_char03	Cycle Code	qo_mstr.qo_cycle	Cycle Code	Yes	No
quote_hdr.udf_char02	Credit Terms	qo_mstr.qo_cr_terms	Credit Terms	Yes	No
"Created by QAD CRM"	-	qo_mstr.qo_rmks	Remarks	-	-
quote_hdr.created_by	Created By	global_userid	-	-	-
quote_hdr.modified_by	Modified By	global_userid	-	-	-
quote_hdr.udf_char08	FOB Point	quote_hdr.qo_fob	FOB	Yes	No

Opportunity

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
Opportunity.auth	Unit ID	qo_mstr.qo_domain	Domain	Yes	No
Opportunity.source	Source	qo_mstr.qo_source	Order Source	Yes	Yes
opportunity.opport_type	Type	"MFG/PRO":U	-	-	-
opportunity.forecast_date	Forecast Date	qo_mstr.qo_confirm	Confirm Date	Yes	No
opportunity.ref	Reference	qo_mstr.qo_nbr	Quote	Yes	No
opportunity.quote_ref	Quote Ref.	qo_mstr.qo_nbr	Quote	Yes	No
opportunity.effective_date	Effective Date	qo_mstr.qo_ord_date	Quote Date	Yes	No
opportunity.opport_cur	Currency	qo_mstr.qo_curr	Currency	Yes	Yes
opportunity.decision_date	Due date	qo_mstr.qo_flw_date	Follow-up	Yes	Yes
opportunity.stage_date	Stage Date	qo_mstr.qo_ord_date	Quote Date	Yes	No
Opportunity.stage	Stage	Quote	-	-	-
opportunity.probab	Probability	Probability of Quote stage stored in the lookup value	-	-	-
opportunity.integration_type	Integration Type	MFG	-	-	-
opportunity.created_by	Created By	global_userid	-	-	-
opportunity.modified_by	Modified By	global_userid	-	-	-
opportunity.inside_rep	Sales Person	if valid(qo_mstr.qo_slspn) else global_userid	Salesperson	Yes	Yes
opportunity.site	Site	qo_mstr.qo_site	Site	Yes	No
opportunity.channel	Channel	qo_mstr.qo_channel	Channel	Yes	No

Sales Quote Line

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
oprline.srl_no	Line	qod_det.qod_line	Line	Yes	Yes
oprline.line_stage	Opr Type	quote	-	-	-
oprline.qty	Quantity	qod_det.qod_qty_quot	Qty Quoted	Yes	Yes
oprline.prod_id	Product ID	qod_det.qod_part	Item Number	Yes	Yes
oprline.disc	Disc %	qod_det.qod_disc_pct	Disc %	Yes	Yes
oprline.unit_price	List price	qod_det.qod_list_pr	List Price	Yes	Yes
oprline.site	Site	qod_det.qod_site	Site	Yes	Yes
oprline.um	UOM	qod_det.qod_um	UM	Yes	Yes
oprline.net_price	Net Price	qod_det.qod_price	Price	Yes	Yes
oprline.line_ref	Line Ref	qod_det.qod_line	Line	Yes	No
oprline.cost_price	Cost Price	qod_det.qod_std_cost	Cost	Yes	Yes
oprline.integration_type	Integration Type	"MFG"	-	-	-
oprline.pricing_date	Pricing Date	qod_det.qod_pricing_dt	Pricing Date	Yes	Yes
oprline.price_list	Price List	qod_det.qod_chr01	Price List	Yes	Yes
oprline.effective_date	Effective Date	qo_mstr.qo_ord_date	Quote Date	Yes	No
oprline.udf_char07	Freight List	qod_det.qod_fr_list	Freight List	Yes	No
oprline.udf_log03	Taxable	qod_det.qod_taxable	Taxable	Yes	No
oprline.udf_log02	Fixed Price	qod_det.qod_fix_pr	Fixed Price	Yes	No
oprline.udf_dec03	UM Conversion	qod_det.qod_um_conv	UM Conversion	Yes	No
oprline.udf_dec02	Qty to Release	qod_det.qod_rel_chg	Qty to Release	Yes	No
oprline.udf_date06	Required Date	qod_det.qod_req_date	Required Date	Yes	No
oprline.udf_date05	Performance Date	qod_det.qod_per_date	Performance Date	Yes	No
oprline.udf_date04	Due Date	qod_det.qod_due_date	Due Date	Yes	No
oprline.udf_char13	Ship Type	qod_det.qod_type	Ship Type	Yes	No
oprline.udf_char12	Tax Class	qod_det.qod_taxc	Tax Class	Yes	No
oprline.udf_char11	Lot/Serial	qod_det.qod_serial	Lot/Serial	Yes	No
oprline.udf_char10	Reason Lost	qod_det.qod_rsn_lost	Reason Lost	Yes	No
oprline.udf_char09	Project	qod_det.qod_project	Project	Yes	No

8 Sales Order

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
oprline.udf_char08	Location	qod_det.qod_loc	Location	Yes	No
oprline.txt (if not available pt_mstr then - "Item not in inventory" else "")	Internal text	cmt_det.cmt_cmmt qod_det.qod_desc	Comment Data Description	Yes -	No Yes
oprline.integration_type	In tegration Type	MFG, CRM (depending on where the record is created)	-	-	-

Sales Order

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	507
bisg_param.flag[1]	Logical	Transfer QAD ERP Sales Order information to QAD CRM
bisg_param.flag[6]	Logical	Transfer RMA orders to QAD CRM
bisg_param.flag[7]	Logical	Create History
bisg_param.flag[5]	Logical	Transfer Transaction Comments from QAD ERP to QAD CRM
bisg_param.ch_1[1]	Character	Comment Type
bisg_param.ch_1[2]	Character	Comment Language
bisg_param.flag[2]	Logical	Transfer QAD CRM Sales Order information to QAD ERP
bisg_param.flag[3]	Logical	Create customer in QAD ERP if QAD CRM sales order customer not found
bisg_param.ch_80[1]	Character	Service name
bisg_param.ch_80[2]	Character	CIM Script file

Field Mapping

Note Unlike other add-on products, CRM does not directly create sales orders using APIs. Instead, it first creates sales quotes and then releases them to sales orders using CIM. Refer to the sales quote section for field mapping information.

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM
order_hdr.auth	Unit ID	so_mstr.so_domain	Domain	Yes
order_hdr.external_id	External Id	so_mstr.so_nbr	Sales Order	Yes
order_hdr.integration_type	Integration Type	MFG	-	-
order_hdr.project_id	Project ID	so_mstr.so_project	Project	Yes
order_hdr.conf_date	Confirmed Date	so_mstr.so_conf_date	Confirmed Date	Yes
order_hdr.taxable	Taxable	so_mstr.so_taxable	Taxable	Yes
order_hdr.due_date	Due Date	so_mstr.so_due_date	Due Date	Yes
order_hdr.req_date	Required Date	so_mstr.so_req_date	Required Date	Yes
order_hdr.trl3_cd	Trailer 3	so_mstr.so_trl3_cd	Trailer 3	Yes
order_hdr.trl3_amt	Trailer amount 3	so_mstr.so_trl3_amt	Trailer Amt 3	Yes
order_hdr.trl2_cd	Trailer 2	so_mstr.so_trl2_cd	Trailer 2	Yes
order_hdr.trl2_amt	Trailer amount 2	so_mstr.so_trl2_amt	Trailer Amt 2	Yes
order_hdr.trl1_cd	Trailer 1	so_mstr.so_trl1_cd	Trailer 1	Yes
order_hdr.trl1_amt	Trailer amount 1	so_mstr.so_trl1_amt	Trailer Amt 1	Yes
order_hdr.type	Type	so_mstr.so_type	Type	Yes
order_hdr.order_to_inv	Ready to Invoice	so_mstr.so_to_inv	Ready to Invoice	Yes
order_hdr.shipvia	Ship Via	so_mstr.so_shipvia	Ship Via	Yes
order_hdr.weight_um	Weight UM	so_mstr.so_weight_um	Weight UM	Yes
order_hdr.weight	Weight	so_mstr.so_weight	Weight	Yes
order_hdr.priced_date	Last Price Date	so_mstr.so_priced_dt	Last Price Dt	Yes
order_hdr.ship_date	Ship Date	so_mstr.so_ship_date	Ship Date	Yes
order_hdr.prepaid	Prepaid	so_mstr.so_prepaid	Prepaid	Yes
order_hdr.disc_pct	Disc %	so_mstr.so_disc_pct	Disc %	Yes
order_hdr.source	Order Source	so_mstr.so_source	Order Source	Yes
order_hdr.partial	Partial OK	so_mstr.so_partial	Partial OK	Yes
order_hdr.order_status	Action Status	so_mstr.so_stat	Action Status	Yes
order_hdr.curr_code	Currency	so_mstr.so_curr	Currency	Yes
order_hdr.pricing_date	Pricing Date	so_mstr.so_pricing_dt	Pricing Date	Yes

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM
order_hdr.ord_date	Order Date	so_mstr.so_ord_date	Order Date	Yes
order_hdr.pr_list	Manual	so_mstr.so_pr_list2	Price Tbl	Yes
order_hdr.po_no	Purchase Order	so_mstr.so_po	Purchase Order	Yes
order_hdr.udf_char01	Channel	so_mstr.so_channel	Channel	Yes
order_hdr.udf_log01	Fixed Rate	so_mstr.so_fix_rate	Fixed Rate	Yes
order_hdr.udf_char06	Site	so_mstr.so_site	Site	Yes
order_hdr.udf_char05	Language	so_mstr.so_lang	Language	Yes
order_hdr.udf_char04	Freight Terms	so_mstr.so_fr_terms	Freight Terms	Yes
order_hdr.udf_char03	Freight List	so_mstr.so_fr_list	Freight List	Yes
order_hdr.udf_char02	Credit Terms	so_mstr.so_cr_terms	Credit Terms	Yes
order_hdr.comments	Comments	cmt_det.cmt_cmmt	Comment Data	Yes
order_hdr.created_by	Created By	global_userid	-	-
order_hdr.modified_by	Modified By	global_userid	-	-

Opportunity

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM
opportunity.auth	Unit ID	so_mstr.so_domain	Domain	Yes
opportunity.source	Source	so_mstr.so_source	Order Source	Yes
opportunity.stage	Stage	ORDER	-	-
opportunity.ref	Reference	so_mstr.so_nbr	Sales Order	Yes
opportunity.forecast_date	Forecast Date	today	Order Date	Yes
opportunity.effective_date	Effective Date	so_mstr.so_ord_date	Order Date	Yes
opportunity.decision_date	Due date	so_mstr.so_ord_date	Order Date	Yes
opportunity.stage_date	Stage Date	so_mstr.so_ord_date	Order Date	Yes
opportunity.opport_cur	Currency	so_mstr.so_curr	Currency	Yes
opportunity.order_ref	Order Ref.	so_mstr.so_nbr	Sales Order	Yes
opportunity.probab	Probability	Probability of ORDER stage stored in the lookup value	-	-
opportunity.created_by	Created By	global_userid	-	-
opportunity.modified_by	Modified By	global_userid	-	-
opportunity.site	Site	so_mstr.so_site	Site	Yes
opportunity.channel	Channel	so_mstr.so_channel	Channel	Yes
opportunity.inside_rep	Sales Person	if valid(so_mstr.so_slspn) else global_userid	Salesperson	Yes

Sales Order Line

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM
oprline.srl_no	Line	sod_det.sod_line	Line	Yes
oprline.integration_type	Integration Type	MFG	-	-
oprline.qty	Quantity	sod_det.sod_qty_ord	Qty Ordered	Yes
oprline.prod_id	Product ID	sod_det.sod_part	Item Number	Yes
oprline.disc	Disc %	sod_det.sod_disc_pct	Disc %	Yes
oprline.net_price	Net price	sod_det.sod_price	Price	Yes
oprline.unit_price	List price	sod_det.sod_list_pr	List Price	Yes
oprline.um	UOM	sod_det.sod_um	UM	Yes
oprline.line_ref	Line Ref	sod_det.sod_line	Line	Yes
oprline.price_list	Price List	sod_det.sod_pr_list	Price List	Yes
oprline.pricing_date	Pricing Date	sod_det.sod_pricing_dt	Pricing Date	Yes
oprline.cost_price	Cost Price	sod_det.sod_std_cost	Cost	Yes
oprline.effective_date	Effective Date	so_mstr.so_ord_date	Order Date	Yes
oprline.site	Site	sod_det.sod_site	Site	Yes
oprline.udf_char01	Freight List	sod_det.sod_fr_list	Freight List	Yes
oprline.udf_log01	Taxable	sod_det.sod_taxable	Taxable	Yes
oprline.udf_dec01	UM Conversion	sod_det.sod_um_conv	UM Conversion	Yes
oprline.udf_date03	Required Date	sod_det.sod_req_date	Required Date	Yes
oprline.udf_date02	Performance Date	sod_det.sod_per_date	Perform	Yes
oprline.udf_date01	Due Date	sod_det.sod_due_date	Due Date	Yes
oprline.udf_char06	Ship Type	sod_det.sod_type	Ship Type	Yes
oprline.udf_char05	Tax Class	sod_det.sod_taxc	Tax Class	Yes
oprline.udf_char04	Lot/Serial	sod_det.sod_serial	Lot/Serial	Yes
oprline.udf_char03	Project	sod_det.sod_project	Project	Yes

10 Invoice History

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM
oprline.udf_char02	Location	sod_det.sod_loc	Location	Yes
oprline.txt	Internal text	cmt_det.cmt_cmmt	Comment Data	Yes
oprline.created_by	Created By	global_userid	-	-
oprline.line_stage	Opr Type	"Order"	-	-

Invoice History

Invoice History

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM
oprline.srl_no	Line	idh_hist.idh_line	Line	Yes
oprline.line_stage	Opr Type	"Invoiced"	-	-
oprline.qty	Quantity	idh_hist.idh_qty_inv	Qty Invoiced	Yes
oprline.unit_price	List price	idh_hist.idh_list_pr	List Price	Yes
oprline.disc	Disc %	idh_hist.idh_disc_pct	Disc %	Yes
oprline.net_price	Net Price	idh_hist.idh_price	Price	Yes
oprline.cost_price	Cost Price	idh_hist.idh_std_cost	Cost	Yes
oprline.um	UOM	idh_hist.idh_um	UM	Yes
oprline.created_by	Created By	global_userid	-	-
oprline.modified_by	Modified By	global_userid	-	-
oprline.udf_dec04	Qty Invoiced	idh_hist.idh_qty_inv	Qty Invoiced	Yes

Installed Base

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	503
bisg_param.flag[1]	Logical	Transfer Installed Base information from QAD ERP to QAD CRM
bisg_param.flag[2]	Logical	Transfer Parents
bisg_param.flag[3]	Logical	Transfer Components
bisg_param.flag[6]	Logical	Transfer unconfigured Products
bisg_param.flag[4]	Logical	Allow addition of Installed Base information in QAD CRM
bisg_param.flag[5]	Logical	Allow deletion of Installed Base information in QAD CRM

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
profitem.auth	Unit ID	isb_mstr.isb_domain	Domain	Yes	No
profitem.prod_id	Product ID	isb_mstr.isb_part	Item Number	Yes	No
profitem.rec_owner	Record Owner	M	-	-	-
profitem.integration_type	Integration Type	MFG	-	-	-
profitem.item_status	Status	isb_mstr.isb_status	Status	Yes	No
profitem.qty	Quantity	isb_mstr.isb_qty	Qty	Yes	No
profitem.install_date	Installed date	isb_mstr.isb_ins_date	Install Date	Yes	No
profitem.curr_code	Currency	ih_hist.ih_curr	Currency	Yes	No
profitem.sale_order_no	Sales Order No	isb_mstr.isb_so_nbr	Sales Order	Yes	No
profitem.invoice_no	Invoice number	isb_mstr.isb_inv_nbr	Invoice	Yes	No
profitem.pm_days	PM Days	isb_mstr.isb_pm_days	PM days	Yes	No
profitem.last_pm_date	Last PM Date	isb_mstr.isb_last_pm	Last PM date	Yes	No
profitem.warr_exp_date	Warranty Expire Date	isb_mstr.isb_warr_exp	Warranty Expiration	Yes	No
profitem.next_pm_date	Next PM Date	isb_mstr.isb_next_pm	Next PM Date	Yes	No
profitem.warr_code	Warranty Code	isb_mstr.isb_warr_cd	Warranty Code	Yes	No
profitem.model	Model/Version	isb_mstr.isb_model	Model	Yes	No

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
profitem.serial_no	Serial No	isb_mstr.isb_serial	Serial	Yes	No
profitem.ref	Reference	string(isb_mstr.isb_ref)	Ref	Yes	No
profitem.udf_char01	Ownership	isb_mstr.isb_owner	Ownership	Yes	No
profitem.udf_char02	Item Type	isb_mstr.isb_sys_type	Item Type	Yes	No
profitem.created_by	Created By	global_userid	-	-	-

Call

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	502
bisg_param.flag[1]	Logical	Customer Calls Information
bisg_param.flag[2]	Logical	Transaction Comments
bisg_param.ch_1[1]	Character	Comment Type
bisg_param.ch_1[2]	Character	Comment Language
bisg_param.flag[3]	Logical	CSR
bisg_param.flag[4]	Logical	Call Status

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
call_log.auth	Unit ID	ca_mstr.ca_domain	Domain	Yes	No
call_log.call_id	Issue ID	ca_mstr.ca_nbr	Call ID	Yes	No
call_log.call_date	Issue date	ca_mstr.ca_opn_date	Call Date	Yes	No
call_log.call_time	Issue time	ca_mstr.ca_opn_time	Time Opened	Yes	No
call_log.prod_id	Product ID	ca_mstr.ca_part	Item Number	Yes	No
call_log.severity	Severity	ca_mstr.ca_severity	Severity	Yes	No
call_log.call_status	Status	ca_mstr.ca_status	Status	Yes	No
call_log.next_status_date	Next status date	ca_mstr.ca_nxt_date	Next Status Date	Yes	No
call_log.call_next_status	Next status	ca_mstr.ca_nxt_act	Next Status	Yes	No
call_log.next_status_time	Next status time	ca_mstr.ca_nxt_time	Next Status Time	Yes	No
call_log.skill_level	Skill	ca_mstr.ca_problem	Prob/Skill	Yes	No
call_log.call_serial_no	Serial No	ca_mstr.ca_serial	Serial	Yes	No
call_log.total_time	Total time	ca_mstr.ca_time_log	Time Spent	Yes	No
call_log.assigned_to	Assigned to	ca_mstr.ca_assign	Assigned	Yes	No
call_log.scheduled_Call	Scheduled Issue	ca_mstr.ca_schedule_ca	Schedule	Yes	No
call_log.event_time	Event time	ca_mstr.ca_evt_time	Event Time	Yes	No
call_log.event_date	Event date	ca_mstr.ca_evt_date	Event Date	Yes	No
call_log.call_desc	Subject	ca_mstr.ca_desc	Description	Yes	No
call_log.service_queue	Service queue	ca_mstr.ca_que	Queue	Yes	No
call_log.call_priority	Priority	ca_mstr.ca_pri	Priority	Yes	No
call_log.prob_desc	Problem description	cmt_det.cmt_cmmt	Comment Data	Yes	No
call_log.created_by	Created By	global_userid	-	-	-
call_log.modified_by	Modified By	global_userid	-	-	-

Call Status

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
call_status.auth	Unit ID	cas_mstr.cas_domain	Domain	Yes	No
call_status.status_code	Status code	cas_mstr.cas_status	Status	Yes	No
call_status.status_label	Status label	cas_mstr.cas_status	Status	Yes	No
call_status.comments	Comments	cas_mstr.cas_desc	Description	Yes	No
call_status.next_service_queue	Next Service Queue	cas_mstr.cas_nxt_que	Next Queue	Yes	No
call_status.next_status_code	Next Status code	cas_mstr.cas_nxt_stat	Next Status	Yes	No
call_status.created_by	Created By	global_userid	-	-	-
call_status.modified_by	Modified By	global_userid	-	-	-

Engineer

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
csr.auth	Unit ID	eng_mstr.eng_domain	Domain	Yes	No
csr.csr_id	CSR ID	eng_mstr.eng_addr	Engineer	Yes	No
csr.service_area	Service area	eng_mstr.eng_area	Service Area	Yes	No
csr.csr_status	Status	eng_mstr.eng_status	Status	Yes	No
csr.calls_per_day	Issues per day	eng_mstr.eng_call_load	Calls per Day	Yes	No
csr.schedule	Schedule	eng_mstr.eng_esh_schedule	Schedule	Yes	No
csr.created_by	Created By	global_userid	-	-	-
csr.modified_by	Modified By	global_userid	-	-	-

Call Quote

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	508
Bisg_param.flag[1]	Logical	Transfer QAD ERP Call Quote Information to QAD CRM

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
opportunity.auth	Unit ID	ca_mstr.ca_domain	Domain	Yes	No
opportunity.opport_type	Type	CallQuot	-	-	-
opportunity.stage	Stage	CallQuot	-	-	-
opportunity.external_id	External Id	ca_mstr.ca_nbr	Call ID	Yes	No
opportunity.integration_type	Integration Type	MFG	-	-	-
opportunity.ref	Reference	ca_mstr.ca_nbr	Call ID	Yes	No
opportunity.inside_rep	Sales Person	ca_mstr.ca_assign	Assigned	Yes	No
opportunity.decision_date	Due date	ca_mstr.ca_tax_date	Tax Date	Yes	No
opportunity.stage_date	Stage Date	ca_mstr.ca_tax_date	Tax Date	Yes	No
opportunity.opport_curr	Currency	ca_mstr.ca_curr	Currency	Yes	No
opportunity.effective_date	Effective Date	ca_mstr.ca_tax_date	Tax Date	Yes	No
opportunity.udf_char01	Bill-To	ca_mstr.ca_bill	Billed	Yes	No
opportunity.udf_char02	Channel	ca_mstr.ca_channel	Channel	Yes	No
opportunity.udf_char03	Terms	ca_mstr.ca_cr_terms	Terms	Yes	No
opportunity.udf_char04	Language	ca_mstr.ca_lang	Language	Yes	No
opportunity.udf_char05	PO	ca_mstr.ca_po_nbr	PO	Yes	No
opportunity.udf_char06	Price List	ca_mstr.ca_pr_list	Price List	Yes	No
opportunity.udf_char07	Ship To	ca_mstr.ca_ship_to	Ship To	Yes	No
opportunity.udf_char08	Site	ca_mstr.ca_site	Site	Yes	No
opportunity.udf_log01	Fixed Rate	ca_mstr.ca_fix_rate	Fixed Rate	Yes	No
opportunity.udf_log02	Taxable	ca_mstr.ca_taxable	Taxable	Yes	No
opportunity.opport_desc	Description	Cost summary	-	-	-
opportunity.created_by	Created By	global_userid	-	-	-
opportunity.modified_by	Modified By	global_userid	-	-	-

Contract

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	504
bisg_param.flag[1]	Logical	Transfer Service Contracts from QAD ERP to QAD CRM
bisg_param.flag[2]	Logical	Allow Creation of Contracts in QAD CRM

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
contract_hdr.auth	Unit ID	sa_mstr.sa_domain	Domain	Yes	No
contract_hdr.contract_no	Contract no.	sa_mstr.sa_nbr	Number	Yes	No
contract_hdr.contract_type	Contract type	sa_mstr.sa_type	Type	Yes	No
contract_hdr.service_type	Service type	sa_mstr.sa_sv_code	Service Type	Yes	No
contract_hdr.integration_type	Integration type	MFG	-	-	-
contract_hdr.txt	Remarks	QAD ERP	-	-	-
contract_hdr.project	Project	sa_mstr.sa_project	Project	Yes	No
contract_hdr.fix_rate	Fixed rate	sa_mstr.sa_fix_rate	Fixed Rate	Yes	No
contract_hdr.channel	Channel	sa_mstr.sa_channel	Channel	Yes	No
contract_hdr.site	Site	sa_mstr.sa_site	Site	Yes	No
contract_hdr.ctr_lang	Language	sa_mstr.sa_lang	Language	Yes	No
contract_hdr.taxable	Taxable	sa_mstr.sa_taxable	Taxable	Yes	No
contract_hdr.price_list	Price list	sa_mstr.sa_pr_list	Price List	Yes	No
contract_hdr.credit_term	Credit terms	sa_mstr.sa_cr_terms	Credit Terms	Yes	No
contract_hdr.trl3_amt	Trailer amount 3	sa_mstr.sa_trl3_amt	Trailer Amt 3	Yes	No
contract_hdr.trl2_amt	Trailer amount 2	sa_mstr.sa_trl2_amt	Trailer Amt 2	Yes	No
contract_hdr.trl1_amt	Trailer amount 1	sa_mstr.sa_trl1_amt	Trailer Amt 1	Yes	No
contract_hdr.trl3_cd	Trailer 3	sa_mstr.sa_trl3_cd	Trailer 3	Yes	No
contract_hdr.trl2_cd	Trailer 2	sa_mstr.sa_trl2_cd	Trailer 2	Yes	No
contract_hdr.trl1_cd	Trailer 1	sa_mstr.sa_trl1_cd	Trailer 1	Yes	No
contract_hdr.disc	Discount %	sa_mstr.sa_disc_pct	Disc %	Yes	No
contract_hdr.exch_rate	Exchange rate	sa_mstr.sa_ex_rate	Exch Rate	Yes	No
contract_hdr.curr_code	Currency	sa_mstr.sa_curr	Currency	Yes	No
contract_hdr.cancellation_date	Cancellation date	sa_mstr.sa_cancel	Cancel Date	Yes	No
contract_hdr.next_bill	Next bill	sa_mstr.sa_nxt_bill	Next Bill	Yes	No
contract_hdr.last_bill	Last billed	sa_mstr.sa_last_bill	Last Billed	Yes	No
contract_hdr.bill_freq	Bill frequency	sa_mstr.sa_cycle	Billing Cycle	Yes	No
contract_hdr.po_no	Purchase order	sa_mstr.sa_po	Purchase Order	Yes	No
contract_hdr.end_date	End date	sa_mstr.sa_end_date	End Date	Yes	No
contract_hdr.start_date	Start date	sa_mstr.sa_st_date	Start Date	Yes	No
contract_hdr.order_date	Order date	sa_mstr.sa_ord_date	Order Date	Yes	No
contract_hdr.created_by	Created By	global_userid	-	-	-
contract_hdr.modified_by	Modified By	global_userid	-	-	-

Contract Line

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
contract_line.auth	Unit ID	sad_det.sad_domain	Domain	Yes	No
contract_line.contract_no	Contract no.	sad_det.sad_nbr	Contract	Yes	No
contract_line.contract_type	Contract type	sad_det.sad_prefix	Pf	Yes	No
contract_line.line_no	Line no.	sad_det.sad_line	Contract Line	Yes	No
contract_line.service_type	Service type	sad_det.sad_sv_code	Service Type	Yes	No
contract_line.bill_freq	Bill frequency	sad_det.sad_cycle	Billing Cycle	Yes	No
contract_line.end_date	End date	sad_det.sad_end_date	End Date	Yes	No
contract_line.start_date	Start date	sad_det.sad_st_date	Start Date	Yes	No
contract_line.qty_per	Duration	sad_det.sad_qty_per	Duration	Yes	No
contract_line.line_type	Line type	sad_det.sad_line_type	Line Type	Yes	No
contract_line.curr_code	Currency	sad_det.sad_curr	Currency	Yes	No
contract_line.exch_rate	Exchange Rate	sad_det.sad_ex_rate	Exch Rate	Yes	No
contract_line.disc	Discount %	sad_det.sad_disc_pct	Disc %	Yes	No
contract_line.unit_price	Unit price	sad_det.sad_list_pr	List Price	Yes	No
contract_line.net_price	Net price	sad_det.sad_price	Net Price	Yes	No
contract_line.serial_no	Serial no.	sad_det.sad_serial	Lot/Serial	Yes	No
contract_line.qty	Quantity	sad_det.sad_qty_item	Item Quantity	Yes	No
contract_line.prod_line	Product line	sad_det.sad_prodlne	Product Line	Yes	No
contract_line.prod_id	Product ID	sad_det.sad_for	Supported Item	Yes	No
contract_line.created_by	Created By	global_userid	-	-	-
contract_line.modified_by	Modified By	global_userid	-	-	-

Contract Quote

Control Settings

Field Name	Data Type	Description
bisg_param.auth	Character	THISNODE
bisg_param.rec_num	Integer	511
bisg_param.flag[1]	Logical	Transfer of Service Contract Quotation from QAD ERP to QAD CRM

Field Mapping

Contract quote field mapping is the same as that of contract.

Users

Field Mapping

CRM Field Name	CRM Field Label	ERP Field Name	ERP Field Label	ERP > CRM	CRM > ERP
users.user_id	User ID	usr_mstr.usr_userid	User ID	Yes	No
users.passwd	Password	usr_mstr.usr_passwd	Password	Yes	No
users.name	Name	usr_mstr.usr_name	User Name	Yes	No
users.tzone_code	Time zone	usr_mstr.usr_timezone	Time Zone	Yes	No
users.business_e_mail	Business Email	usr_mstr.usr_mail_address	E-mail Address	Yes	No
users.txt	Notes	usr_mstr.usr_remark	Remark	Yes	No
users.ctry	Country	usr_mstr.usr_ctry_code	Country Code	Yes	No
users.type	Type	usr_mstr.usr_type	User Type	Yes	No
userse.created_by	Created By	global_userid	-	-	-
users.modified_by	Modified By	global_userid	-	-	-