

System Solutions LLC AutoQuotes AQ for D365 Business Central User Guide

Extension

- Extension Version Number: 1.0.1.0
- Extension Version Date: 06/04/2025
- Published by: [System Solutions LLC](#)
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Description

- This extension integrates Microsoft Dynamics 365 Business Central with Revalize AutoQuotes (AQ) software.
- Turn AQ Projects into Business Central Sales Orders.

AQ Setup

- You must have a license for AQ. Contact Revalize for AQ subscription information here: [AutoQuotes from Revalize](#)
 - You must have a Standard AQ License and the Open API Package; Contact your Revalize Sales Representative and tell them this.
- AQ Client software must be installed on the PC with the required Revalize AQ subscription (from above) before setup of the extension in Business Central.
- In AQ Admin Settings, go to API Keys > select API EEGeneric > Create new API key. This will be used when setting up the extension in Business Central.
- In AQ Admin Settings, go to Third Party Integrations > Generic tab > Status = On. If it requires a Webhook URL, you can input anything because it's not used by the extension.

Business Central Extension Setup

- **AutoQuotes Integration Setup**
 - Business Central > AutoQuotes Integration Setup
 - Configure AQ Integration fields:
 - Enabled AutoQuote Integration = On
 - API Key = The API key from AQ that allows the extension to retrieve data from it.
 - Customer Template Code = The template used when the extension needs to create a new customer.
 - Vendor Template Code = The template used when the extension needs to create a new vendor.
 - Item Template Code = The template used when the extension needs to create a new item.
 - Customer Mapping Method = Specifies how to connect customers from AutoQuotes to customers in Business Central. If no customer is found, a new one will be created.
 - Email: The email address of the project's customer.
 - Phone No.: The company, contact, or cell phone number of the project's customer.

- Email and Phone No.: First it will search for the email and if not found, it will search for the phone number instead.
 - Phone No. as Account No.: The company, contact, or cell phone number of the project's customer will be searched for in the customer number field. It will look for the phone number both with and without extra symbols such as hyphens. With this option selected, it will also use the phone number as the account number when a new customer is created.
 - Item No. Mapping Method = Specifies how to map the AQ item fields to the item number when finding existing items or creating new ones.
 - Mfr-Model: The first three characters of the manufacturer, a hyphen, and the model number. If the field is longer than 20 characters, it will be truncated.
 - Model: The model number of the item.
 - Add Manufacturer to Description = Specifies that the manufacture should be added to the beginning of a new item's description.
 - Freight Item Charge = The item charge to use when adding freight to the sales order.
 - Installation Item = The item of type service to use when adding an installation fee to the sales order.
 - Hide Projects Older Than Date = Projects with a last modified date older than this won't be included in the projects list.
- **Sales Taxes**
 - When an AQ Project is imported, the (2) Character AQ Project Customer's state field will be used to match and set the Customer's Tax Area Code.
 - Business Central > Tax Area and Create a Tax Area Code for any State which will have potential AQ Project Customers
 - Tax Area Code = <Two-character State abbreviation> example: NJ, FL, NC
 - Tax Description = <Free form> example: NJ Sales Tax
 - Tax Jurisdiction Code = <Add a Tax Jurisdiction row(s)> for each Tax Jurisdiction that makes up the Total Tax for the location(s) within the State
 - For most States there will only be (1) Tax Jurisdiction that needs to be created with the State's Sales Tax Rate
- **Freight and Installation Items**
 - Create in Business Central, Item Charges No. = Freight where Description = Freight
 - Create in Business Central, Item No. = Installation with Type = Service

Operation Instructions

- Create an AQ Project in the AQ Program
- Business Central > AutoQuotes Projects > Refresh Projects, will update the list of projects from AQ.
 - These are not Business Central orders or quotes as this time; it is just a list.
 - They can be deleted or refreshed at any time without losing previously imported project data.
- Business Central > AutoQuotes > Projects > Highlight a Project > Select Import Project
 - This Imports the AQ project line items and other details about the project.
- Business Central > AutoQuotes Projects > Highlight a Project and Select Imported "Yes" link to see the imported AQ project.
 - Business Central > Actions > Create Sales Order will create a Sales Order from the AQ Project
 - **Sales Order Customer**
 - The extension will attempt to match the incoming AQ customer to an existing Business Central customer by using the email address field. Otherwise, it will create a new one.
 - **Sales Order Items**
 - The App will attempt to match each incoming AQ Item to an existing Business Central item. Otherwise, it will create a new one. For each item created:
 - Item No. = <Per AutoQuotes Integration Setup Item Numbering Option Chosen>
 - **Note:** Item No. has a 20 Char Limit. For AQ Item Model numbers longer than 20 Characters
 - Item No. = <will be truncated to 20 Char>
 - Vendor Item No. = <will be the full Model number, 50 Char limit>
 - Description = <Per AutoQuotes Integration Setup Description option and AQ Spec field>
 - Standard Cost = <AQ New Price>
 - Last Direct Cost = <AQ New Price>
 - Unit Price = <AQ Sell Price>
 - **Item Vendor No.**
 - The App will attempt to match the incoming AQ Item Manufacturer to an existing Business Central vendor. Otherwise, it will create a new one. For each vendor created:
 - Vendor No. = AQ Item Manufacturer (short name)
 - Vendor Item No. = AQ Item Model
 - When a new vendor is created in Business Central, the manufacturer's Prime Spec field will also be added to the AQ Prime

Spec field on the Vendor Card. This field is for reference only and its value can be edited.

- Reordering Policy = Order
- Note: Items that are \$0.00 price in AutoQuotes will transfer to a Business Central AutoQuotes Project Card but an Item Card will not be created in Business Central, and Item will not show up on the Sales Order.
- **Variants**
 - For AQ Item options available e.g. voltage options, fuel options, pipe connection options, color, size and miscellaneous options that are not specifically specified by choice of model number, it is recommended to manually create variant(s) in Business Central for the Items.
- **Sales Order Freight and Installation Items**
 - A Sales Order Line Type Charge (Item) = Freight will be added to the Sales Order Lines with a Unit Price Exc. Tax = Sum of AQ Project Totals Freight
 - A Sales Order Item = Installation will be added to the Sales Order Lines with a Unit Price Exc. Tax = Sum of AQ Project Totals Installation
- **The total of the Business Central Sales Order must exactly match the Total of the AQ Project Quote including Sales Tax**
 - If these Totals do not match contact System Solutions if assistance is needed to determine the cause
 - If there is an error creating the sales order, it will be added to the project's Remarks field.
 - Business Central > Actions > Open Sales Order will open the sales order created in Business Central.
- The Business Central sales order can be Edited, Released, Shipped and / or Invoiced per your Sales & Receivables Setup, Locations, and Warehouse Setup settings.