TO INCREASE

Release Notes for Business Integration Solutions 7.1.1701 for Microsoft Dynamics 365 for Operations

Release Notes

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Document information

Title	Release Notes for Business Integration Solutions 7.1.1701 for Microsoft Dynamics 365 for Operations
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1.   General

1.1   Purpose

This document describes the new releases of To-Increase Business Integration Solutions for Microsoft Dynamics 365 for Operations Update 3. Please read this document carefully before installing. If you are interested in the practical how-to information we provide on the To-Increase blog, you can follow the links we provide in some sections of the document. You find our blog at www.to-increase.com/blog/.

1.2   Audience

The document audiences are consultants and customer end users.

1.3   Installation Notes

To install Business Integration Solutions you need a valid license key. The following licenses are available:

- Business Integration Solutions
- Connectivity Studio
- EDI Studio

1.4   Software Requirements

Business Integration Solutions components are released on the following kernel build.

Version	Kernel build	Application version
Microsoft Dynamics 365 for Operations – Update 3	7.1.1541.3036	7.0.4307.16141

1.5   Documentation

Help documentation for Business Integration Solutions is available on the WIKI.

1.6   Support

You can obtain information regarding technical support from your Microsoft Dynamics 365 for Operations partner. You can also contact To-Increase through the **Partner Portal** or send email to **productsupport@to-increase.com**.

1.7   Labels

This release is shipped with U.S. English labels. Please contact your Microsoft Dynamics 365 for Operations partner for labels in other languages.
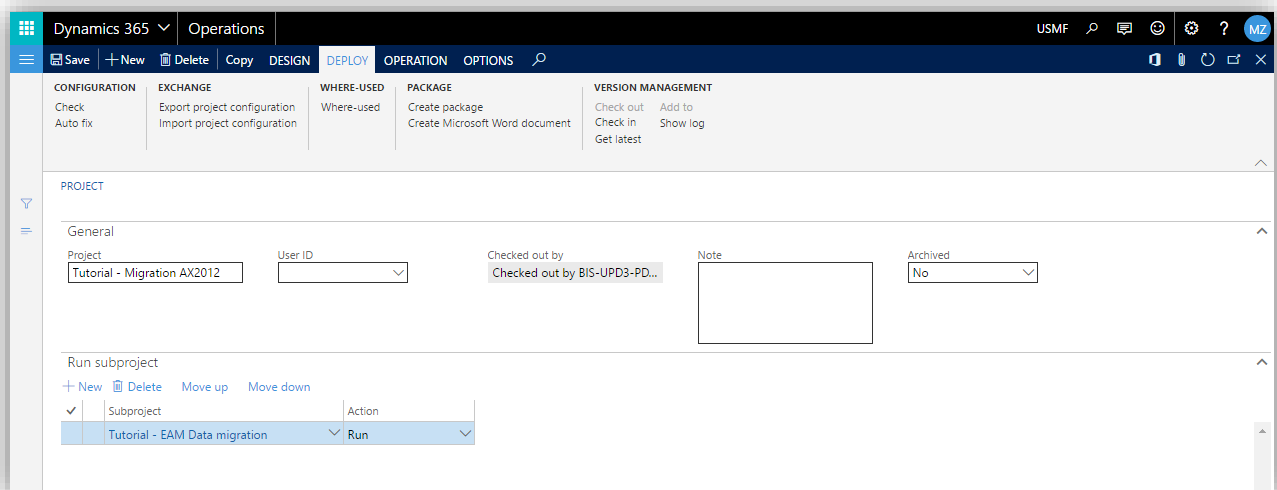
2.　　New features

In this latest release, the Business Integration Solutions suite many new features are added, based on requests from partners and customers. Section 2.1 describes new Connectivity Studio features and section 2.2 describes new EDI Studio features.
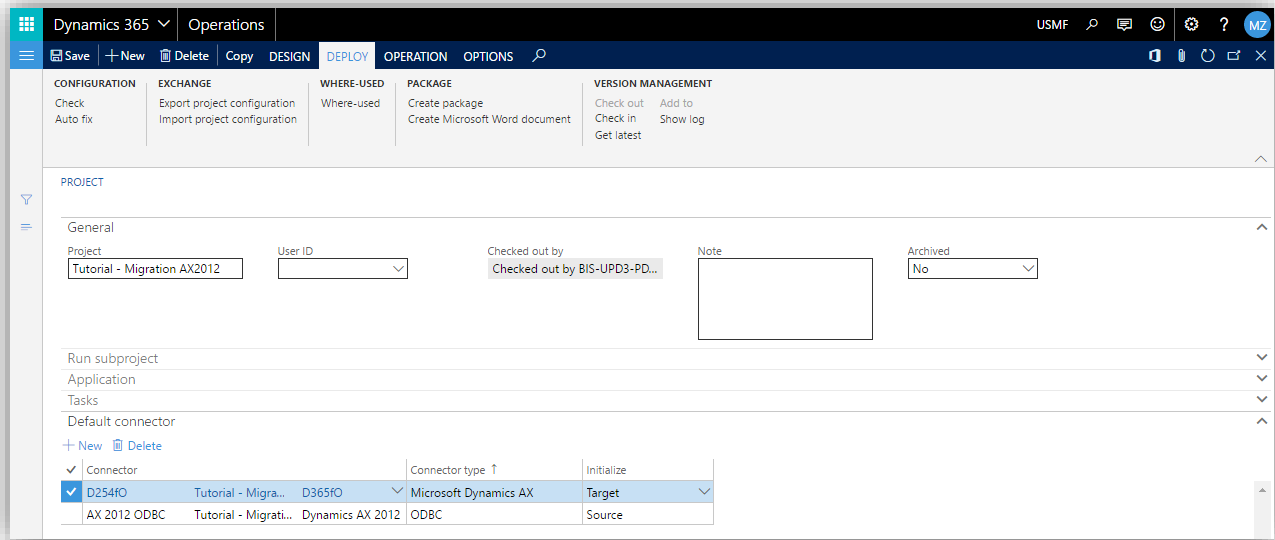
2.1　　Connectivity Studio

2.1.1　　Project dependencies

In our previous release, we used the concept of linked projects. This helped export and import the project configuration in the right sequence and made it easy to organize projects that involved many migrations. In addition to this feature, you now can run projects in a sequence by specifying dependencies on other projects. That means you can manage the task per project, which greatly simplifies the setup.
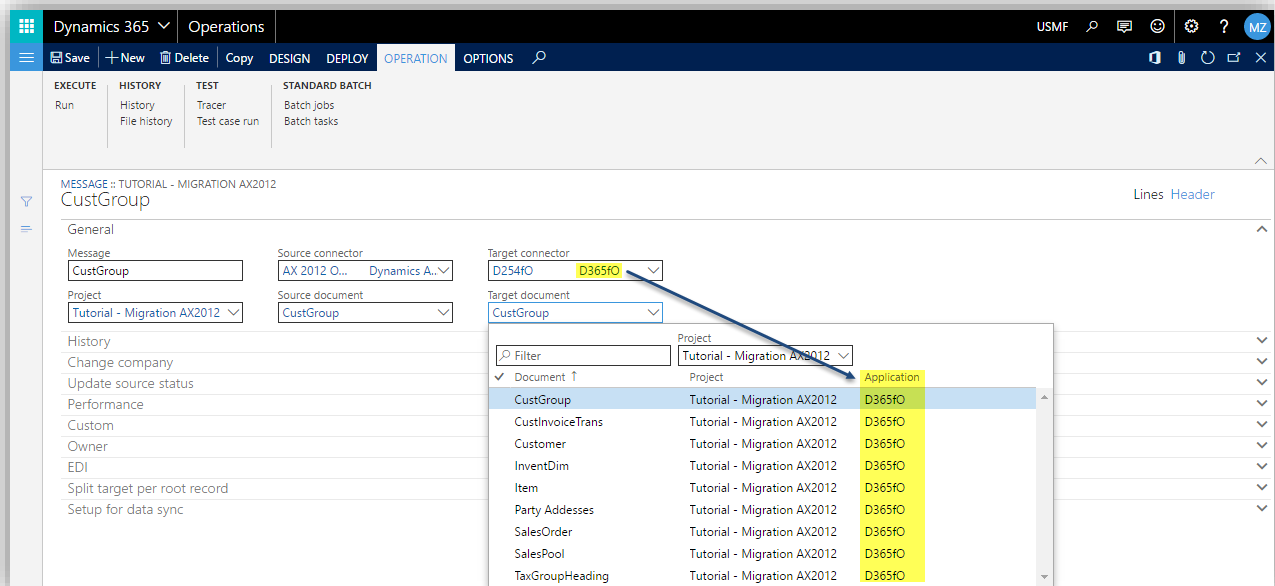
2.1.2 Default connector on project level

In a project you can now set up a default connector for each connector type.

The default connector feature is used when a new message is created. It initializes the source and target connector using the setup from your project.

2.1.3 Smart document lookup

The document lookup on the message now also limits the list for possible document types based on the application of the connector. For example, for ODBC, you can select the ODBC documents; for the Windows folder, you can select documents of the type Excel, text, XML, JSON, and others.
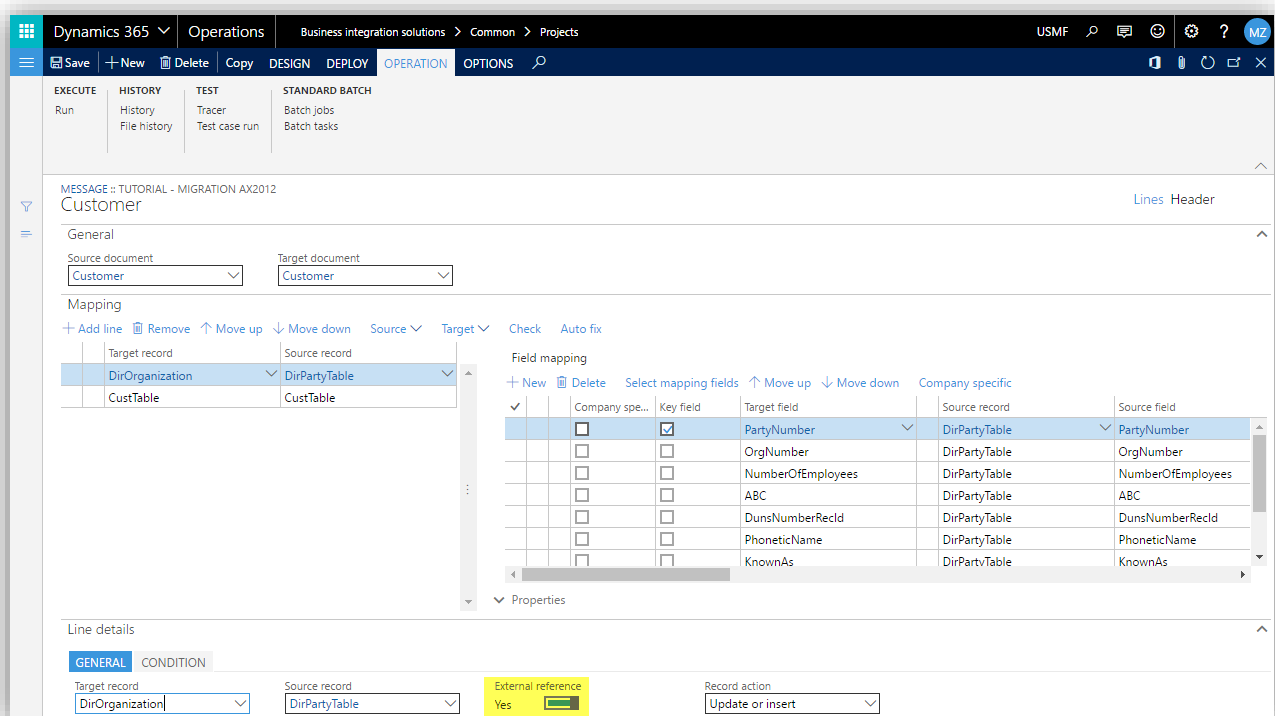
2.1.4   Initialization of fields

Using the default connector on the project, we can also make the initialization of the fields easier. For ODBC, delimited text, XML (no XSD or namespace support), and Microsoft Excel files we can now initialize the field names in the document. This is a tremendous time-saver!

- ODBC: We can now select a table from the database and initialize the fields.
- Delimited text: Initialize the fields from a file.
- Microsoft Excel: Initialize the fields from a file.
- XML: Initialize the document structure with record and fields. To keep it simple, the solution doesn't support XSD and namespaces.
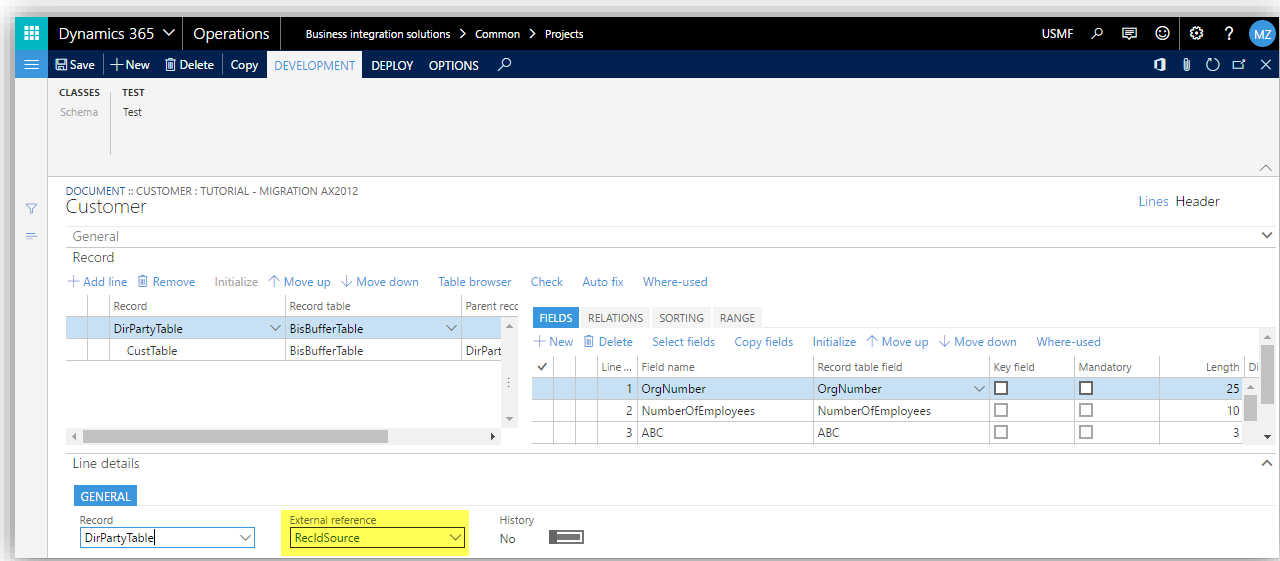
2.1.5   External IDs

The transformation of record IDs is a challenge when migrating or integrating. A new feature in the message help to transform between source and target IDs. This can be useful for integrations like Salesforce, Microsoft CRM, or data migration scenarios.
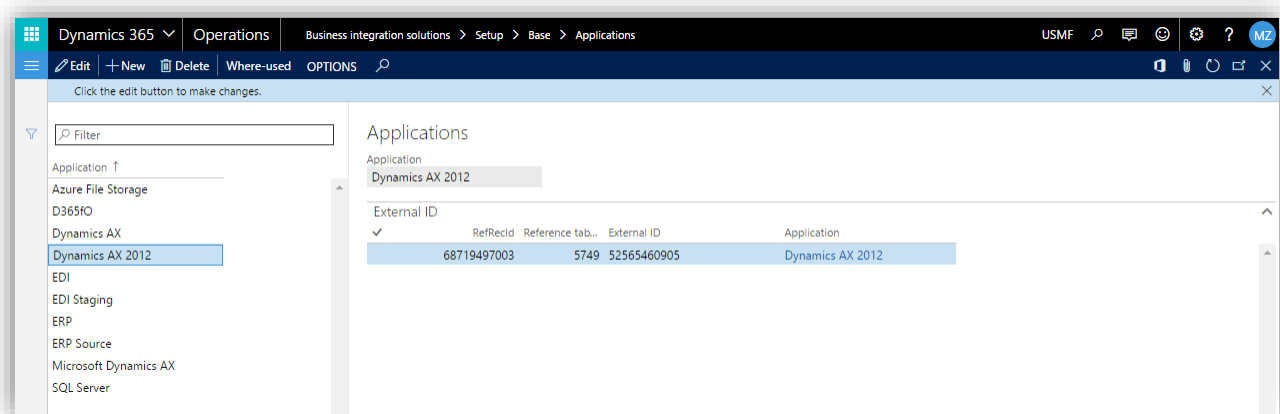
Consider this straight-forward scenario for data migrations: You define the migration of products. On the records, the IDs needs to be transformed from source to target.
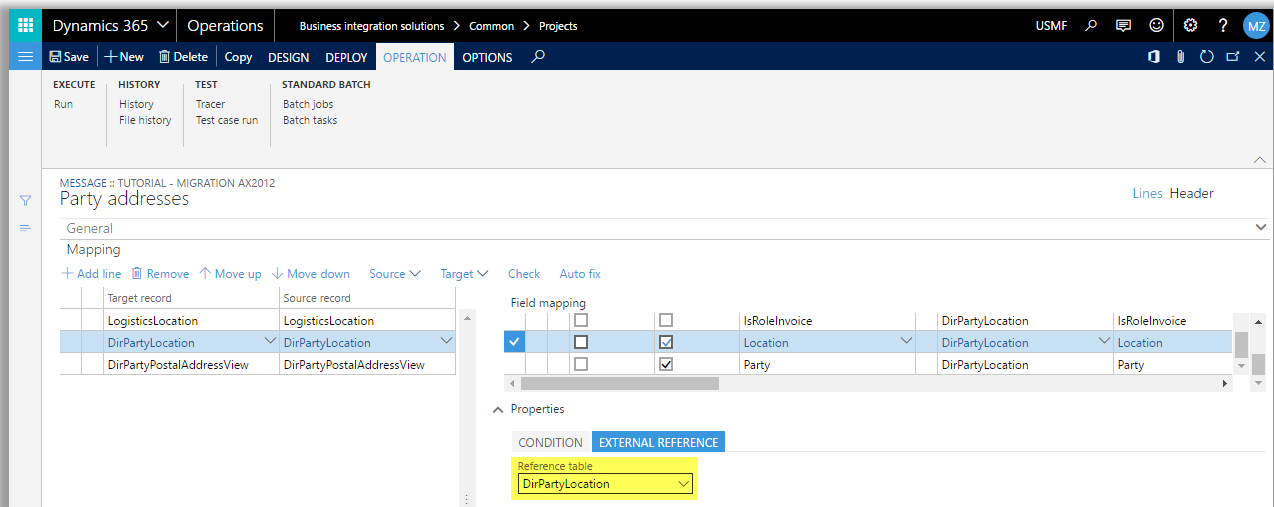
In the source document you can define which field is used for the transformation. In this case it's a record ID.

The result is a transformation list:

The transformation is now available for use for other imports. When an item is imported, we need to transform the product record ID from the old one to the new one. The transformation can be done by defining the mapping between the old and new product ID and selecting the external mapping option. The table is defaulted and can be changed.
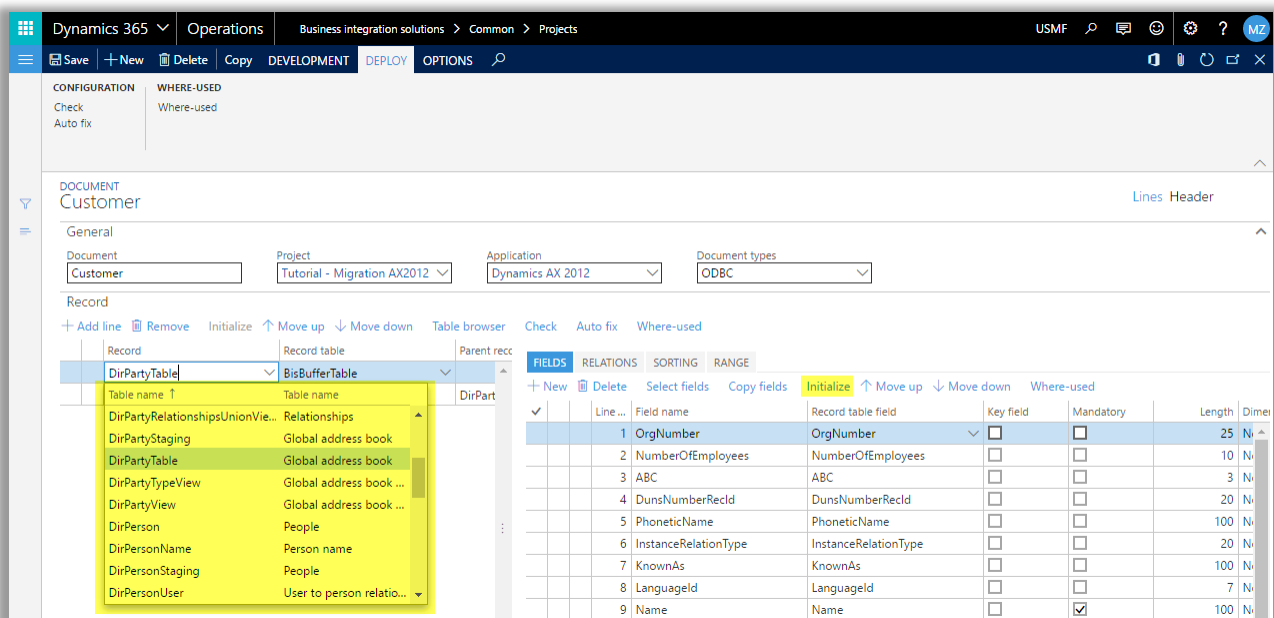

2.1.6 ODBC
Integrations and migrations can now easily be set up with this new type:
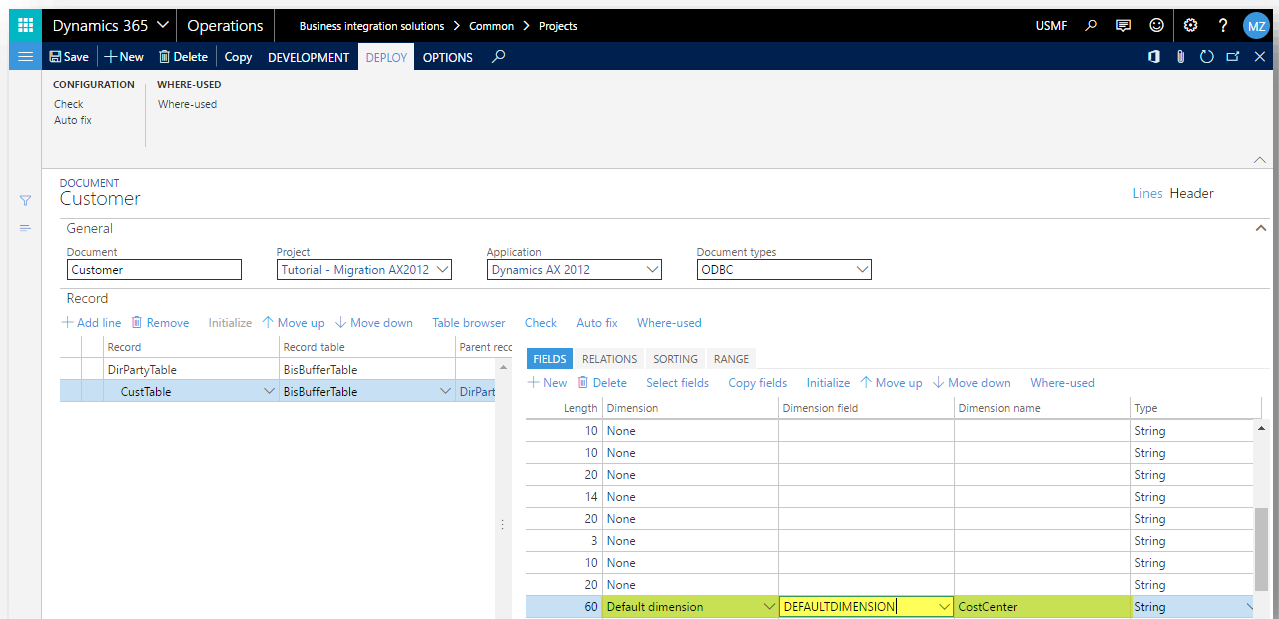
Select tables and initialize fields
You can now select the table when the ODBC connector is defined on the project. The initialize button gets all the fields from the SQL database.

Support for financial dimensions and ledger accounts (internal databases only)

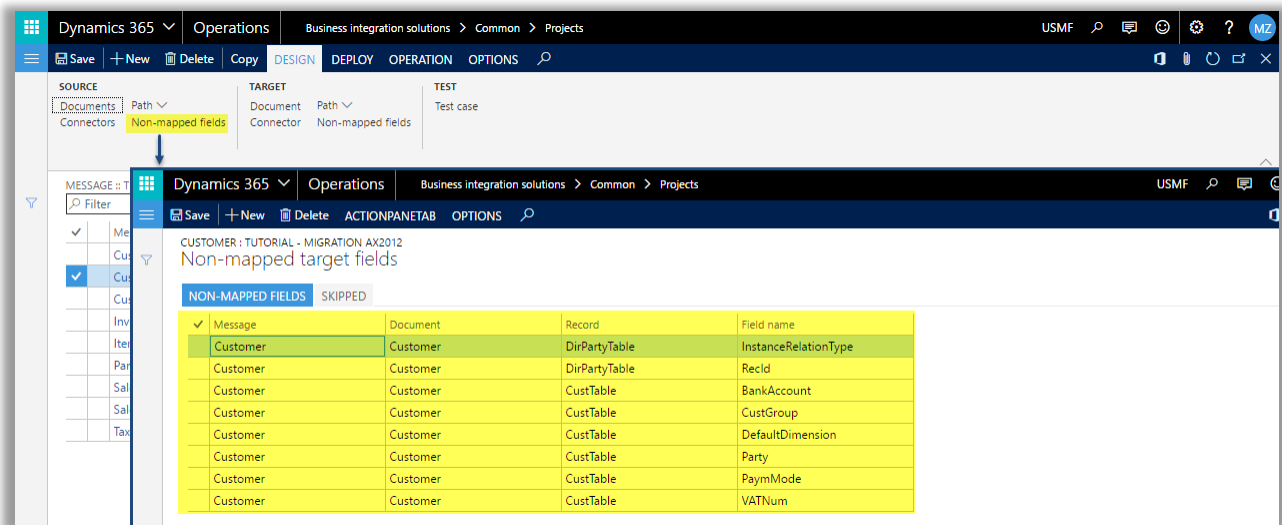Options are added to define if you want to read:

- Default dimension: Reads the financial dimension from the product, customer, vendor, and other entities.
- Ledger dimension: Reads the financial dimension from the ledger transactions when it's combined with a ledger account.
- Main account: Reads the main account.
- Ledger account: Reads the ledger account, which is combined with financial dimensions.

2.1.7 Show fields which are not mapped

When a lot of fields and tables need to be mapped, it can be very difficult to see progress. To make it easier to know what's left to map, you can now see per project and message which fields are not mapped. You can review this for the source fields and for the target fields.

Skip a field and specify the reason when a field should be skipped and not mapped. In this way you can immediately see when you have forgotten a field.
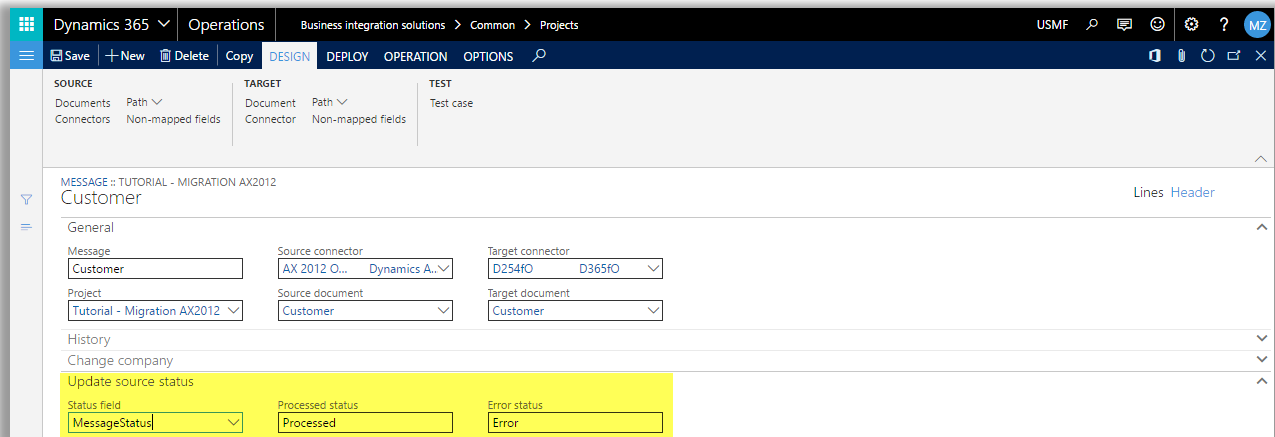
2.1.8 Connector changes

We made several changes in the connectors.

- Microsoft Dynamics 365 for Operations Connector
  - Define multiple target companies, which can be very useful in master data scenarios.
- ODBC Connector
  - Support for multiple ODBC connections with the same connection object.
  - A field can be defined as a company, like the data area ID. In addition to that, a transformation can be defined to map to a different company ID.
- Windows Connector
  - A split folder is added, which simplifies the setup to split text files (currently it's a specific file action).
- Staging Connector
  - The status updates for each step are now hard-coded, because they are always the same. You can no longer change the fields.
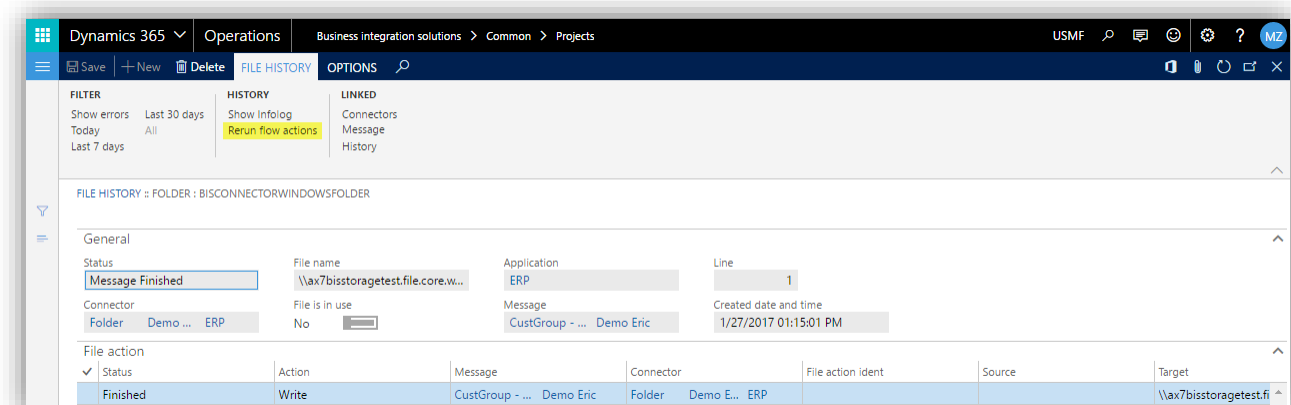
2.1.9 Status update for ODBC and internal

You can now update the status when data is exported and the result is OK. The status field from the first record in your document can be selected. Records from Microsoft Dynamics 365 for Operations are updated directly during the export. Records from ODBC are updated by means of an update statement during the import.

2.1.10 File flow actions can rerun

We improved the file import. When an error happens, the file can be rerun from the moment the error first occurred.

A new status field is added to the file history. This is the sequence of possible status indicators:

1. New
2. In process
3. Message finished
4. Archived
5. Finished

You also can use a variety of exceptions, such as *Has error*, *Reprocessed*, *Repaired* manually, *Did not run*. Files in the folder are picked up when a file doesn't exist in the file history or when the status is finished, reprocessed, or repaired manually.

That means the import process will only pick up files to be processed when that is possible and the files are not used and did not crash in another run.

2.1.11   Dialog range type gives flexibility to query

Starting an export with specific parameters is now supported without customization in the Business Integration Solutions. You can read more about this at the WIKI.
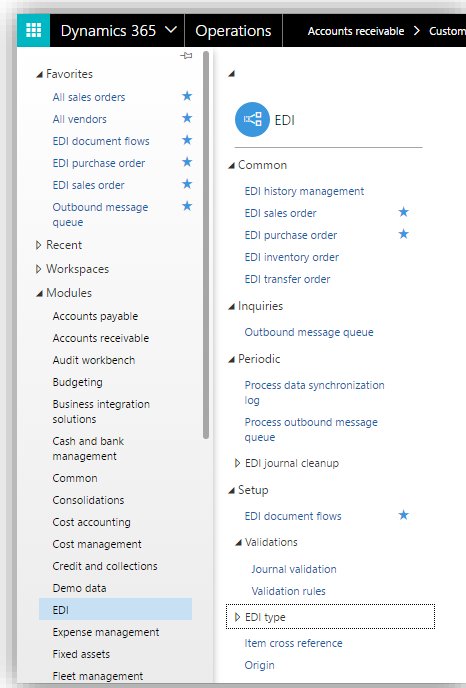
2.2 EDI Studio

EDI Studio is available on Microsoft Dynamics 365 for Operations with exactly the same functionality as the latest release of EDI Studio. This function highlights some features.

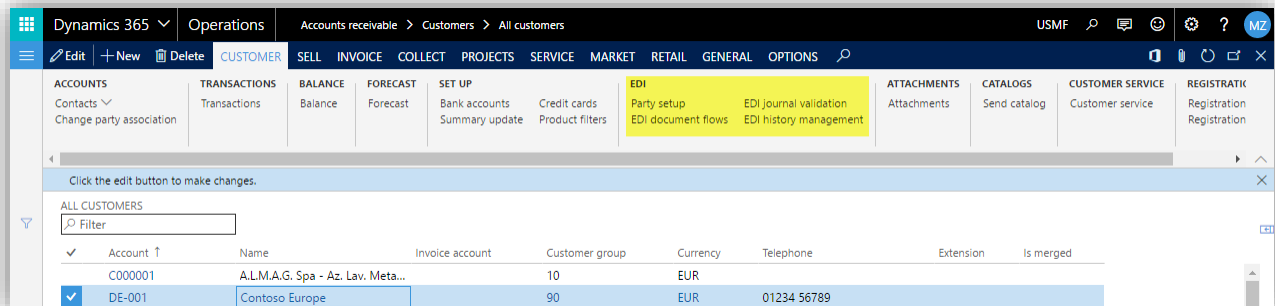TIP: You can find extensive product documentation on the WIKI.

2.2.1 Menu

EDI Studio has since Microsoft Dynamics 365 for Operations its own menu and is not underneath Business Integration Solutions menu anymore.
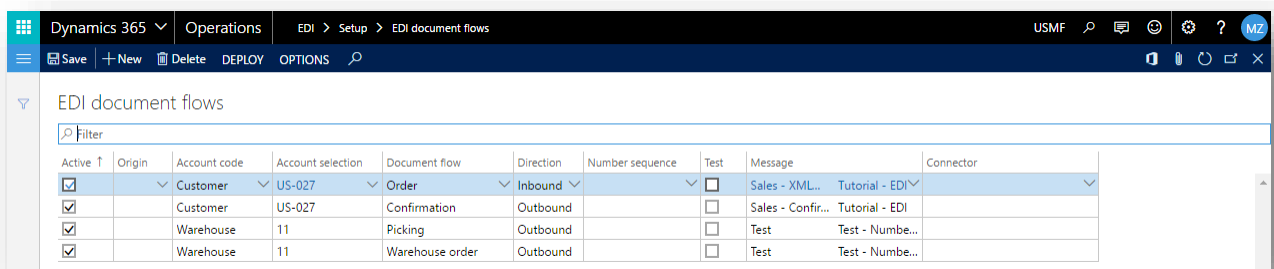
2.2.2 EDI party setup

The setup of a customer, vendor or warehouse in Microsoft Dynamics 365 for Operations can be managed from the standard forms:

The party types can be set up from here. You can now set up multiple streams with different processes.
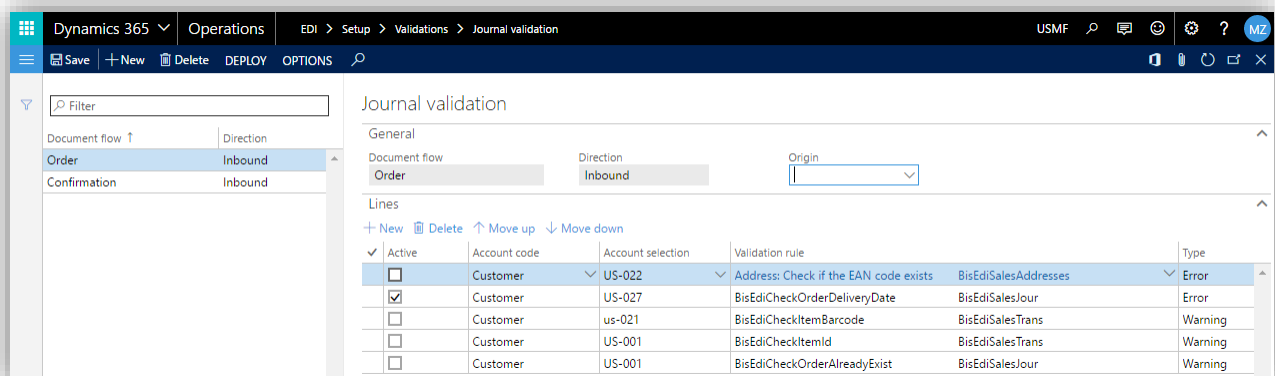
2.2.3 EDI document flows

Using document flows you can subscribe customers, vendors, sites or warehouses to document flows. This document describes the EDI Studio document flows in detail.

2.2.4 EDI journal validations

The validations can now be set up per document flow, which makes them easier to manage.

2.2.5 EDI journals

The validation error handling is greatly improved.

The field **Status** can be:

- **New**: Just created
- **Approved**: no validation error
- **Rejected**: journal with a validation error
- **Accepted**: Accept the warnings of the validations. This can be very useful for a quantity check, which is not mandatory.
- **Cancelled**: The record should not be used and is cancelled.

Delete EDI journal records

You cannot directly delete records from the EDI journal anymore. To delete records you have to use the EDI journal cleanup forms in **EDI Studio > Periodic > EDI journal cleanup**.

3.   Other improvements and fixes

3.1.1   Connectivity Studio
- Starting a message from code is now supported with parameters which can be used as ranges on documents. There is no code change required anymore in Connectivity Studio.
- You can now switch off the validation per field in the mapping.
- The tracer is extended with the method name, so it's easier to find the right spot to start the debugger.
- It's possible to run a task in test mode. Doing so runs the test case for each linked message.
- An empty lookup value results in an error. We also improved the error messages.
- The check on the message now has a warning if the display method is not available on the source table.
- Fixed: If the field mapping is a key and the input value is empty, an error message resulted.
- Fixed: The document display method that uses a number sequence for writing a file name created many number sequences when you keep the form open. That was not as expected.
- You can add a segment field to the XML document type.
- You can now select a file to be processed for the message run.
- You can perform single transactions for multiple table export with Direct SQL.
- You can now archive projects.
- You can now import and export company specific values.
- You can now run messages on 'parallel' on the client for testing purposes.
- Add check: Verify if the message 'Transaction level' is on Root record if you use Change company or update source status in the message.
- Fixed: XSLT editing is disabled when project is checked in.
- Added: You can now enabled the field number sequence without specifying the number sequence. Connectivity Studio is automatically determining the number sequence from the parameters.
- Improved: You can now also use expressions in the XML document type.
- Improved: The labels on the document type EDI have been changed to align with common EDI terminology.
- Improved: Dynamics ODBC and Service Bus Share document types are merged into ODBC.
- Improved: Azure Service Bus Share connector is removed and the ODBC share can be used instead.
- Added: Record actions in the message are extended with 'Find or error' and 'Insert or fail'.
- Removed: Case insensitive option is removed from the XML document type.
- Added: Skip when empty option on the XML and JSON document type.

3.1.2   EDI Studio
- The new tutorials for third-party logistics (3PL) are XML-based and give you a good starting point.
- Two new journals are added. The transfer order and inventory order staging journals can help streamline the integration with your warehouse and will be better documented in the next release.
- We added an *Inventory count* document flow.
- When a purchase order is confirmed and processed via EDI, EDI Studio updates the status to indicate that it was processed via EDI.

4. Known issues

There are currently no known issues.