

Advanced Integration

For Dynamics 365 Finance & Operations, Enterprise Edition and Dynamics 365 for Field Service



Automation that suits your needs: Break free from the rigid CDS integration template, and integrate D365FO and D365FS on your terms with a custom Azure-based integration.

What is Advanced Integration?

Advanced Integration by Dynamic Consulting is a flexible, customizable integration between D365 Finance & Operations and Field Service, built using out-of-the-box D365 tools backed with the power of Azure.



Customizable

- Custom field mappings
- Flexible business logic
- Deliver the data your users need, where they need it
- Build the integration to suit your existing business processes

Easy to monitor

- Power BI monitoring
- Error handling made simple
- Create and customize Power BI to monitor the health of your integration
- Errors written directly to records in D365FS, empowering users to quickly identify and resolve

Why customers use Advanced Integration

The Advanced Integration solution was created to bridge the gap between the CDS template integration and real-world business needs

- Handles complex requirements
- Automated inventory processing
- Monitoring with Power BI
- Robust error handling

Built on Azure

- Enterprise grade reliability
- All in one tenant
- Built on the trusted reliability of the Azure Cloud
- Your data never leaves your secure Microsoft tenant

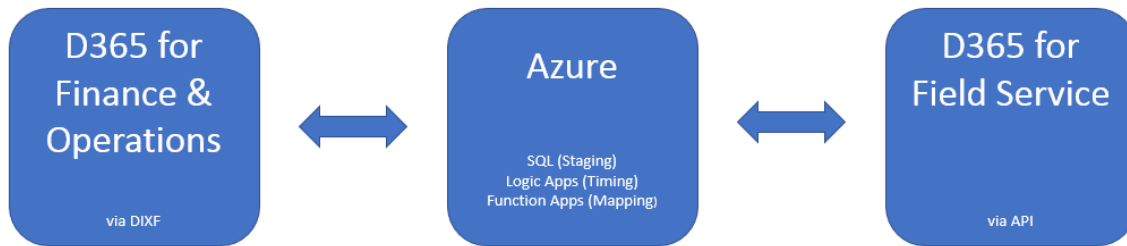
“Seamless integration out-of-the-box? Not quite...”

We were shocked to learn of the lack of integration between FIN/OPS and Field Service – it’s all on Dynamics, right? Not really. The applications run on entirely different databases. We tried using the Common Data Service, which is getting there, but we needed something now. Thankfully, Dynamic Consulting was able to deploy the Advanced Integration to get us the integration we need to run our business.

CIO of a publicly traded natural gas company

Advanced Integration: How does it work?

The integration is set up to be query-based, which will run every 5 minutes to check for records that need to be integrated. When records are found, they are processed in an Azure Function App and sent in the correct format to the target system.



D365FO to D365FS

This direction will be initiated by DIXF in D365FO. DIXF, which includes Change Tracking, can be configured (using standard functionality) to surface all relevant records that have been created, updated, or deleted since the last integration run and send them to Azure SQL for staging.

Next, an Azure Logic App, which also runs on a schedule, will trigger an Azure Function that will query the Azure SQL database and process any staged records. The Azure Function will handle the field mappings and any data transformations, and send the data into D365FS using a bulk ODATA call to the API.

Included entities

- Customers
- Currencies
- Products
- Projects
- Units
- Warehouses

Included entities

- Work Orders
- Part Requests
- Part Sales
- Inventory Transfers

D365FS to D365FO

Moving the other direction, from D365FS to D365FO, a scheduled Azure Logic App will trigger an Azure Function that will query D365FS for any records changed since the last run. Within the Azure Function, the fields will be mapped and any transformations handled, and the final data will be compiled into an XML file which will be sent to the DIXF queue via the standard web service.

A scheduled D365FO DIXF import job will run to and process any XML files in the import queue. DIXF will process the records and import, update, and/or delete records as necessary. In D365FS, the integration status of each record gets written to the record itself, allowing D365FS users (and administrators) to monitor the records processed and check for any errors.

Ready to see how Advanced Integration can help your business?

Contact us today for a free consultation