

External Data Manager

for Microsoft Dynamics 365 Finance & Operations/
Supply Chain Management, Commerce

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WaveAccess offers a Dynamics 365 Finance & Supply Chain extension that allows displaying any data from any system without additional programming. With this Extension you have an ability to show and edit external data at D365 F&O interface without creating the new extension for each case.

Benefits

- Enjoy the convenience of seeing necessary data displayed in a single window
- Save Time and effort. Here's how: We all know, creating a field in ERP is complicated and takes time. In our solution you create a field in CRM and use it in the ERP system.
- Display data from non-user interface sources, for example, from a database
- Avoid double licensing, for example, you can use 1 user ERP system instead of 2, both an ERP and a CRM

Features

- Convenient setup and an easy to use data type selection
- Search, filter and sort data from an external system
- Edit external system data directly from your Dynamics 365 Finance & Supply Chain interface

What data can be integrated

into Dynamics 365 F&O

- Databases (Oracle, MS SQL, PostgreSQL etc)
- ERP (SAP, MS Dynamics 365 Business Central, etc)
- CRM (Dynamics D365 CE, SugarCRM, HubSpot, Salesforce etc)
- OData
- CSV

We can easily develop a custom connector for any type of structured data.

How it works

Example: we work with D365 Customer Engagement(CRM) and D365 F&O (ERP). The data is synchronized, but we have created new columns at CRM and want to show it at ERP interface to filter by the field.

Fields “Telephone” and “Created on” are from CRM displayed as a standard grid in ERP.

Account ID	Name	Invoice account	Customer group	Currency	Telephone	Extension	Is merged	Created on
20191202-1	Test20191202-1		10	USD				
ACC-01000-SZCB50	Sang		10	USD	892343	123456		6/16/2020 10:48:21 AM
ACC-01001-XYZCD	Hensel		10	USD	839291			
CST-000026								
CST-000027								
CST-000028								
CST-000029								
DE-001	Contoso Europe		30	EUR	01234 56789			
US-001	Contoso Retail San Diego		30	USD	321-555-0160			
US-002	Contoso Retail Los Angeles		30	USD	123-555-0111			
US-003	Forest Wholesales		10	USD	123-555-0159			
US-004	Cave Wholesales		10	USD	123-555-0168			
US-005	Contoso Retail Seattle		30	USD	123-555-0172			
US-006	Contoso Retail Portland		10	USD	123-555-0112			
US-007	Desert Wholesales		30	USD	123-555-0162			
US-008	Sparrow Retail		30	USD	123-555-0163			
US-009	Owl Wholesales		10	USD	123-555-0164			
US-010	Sunset Wholesales		10	USD	123-555-0160			
US-011	Contoso Retail Dallas		30	USD	123-555-0117			

Exported data is displayed as a group at tab

ACC-01000-SZCB50 : Sang

Miscellaneous details

One-time customer: No

Country/region:

State:

Statistics group:

Account statement: Always

CUSTOMER SELF SERVICE

History available:

Web orders:

GOVERNMENT IDENTIFICATION

ID number:

REMITTANCE

Vendor account:

AUTOMATIC NOTIFICATION AND CANCELLATION PROCESSING

Automatic notification and cancellat...: No

FEDERAL ATTRIBUTES

Federal/Non-Federal indicator:

Trading partner code:

Agency location code:

1099-C indicator: No

Comments:

INTERCOMPANY

Active: No

Company:

Vendor account:

Create intercompany orders: No

Direct delivery: No

Create indirect order lines: No

CUSTOMER

Edit entity

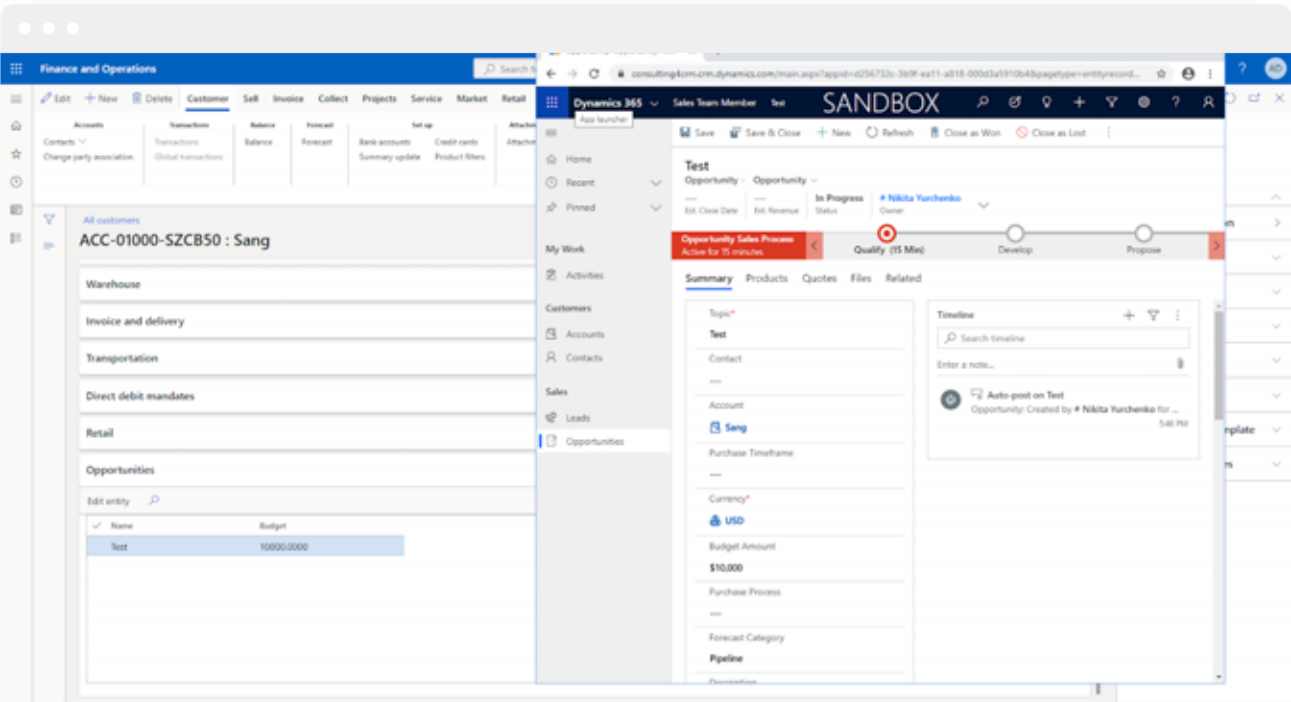
Telephone: 123456

Created on: 6/16/2020 10:48:21 AM

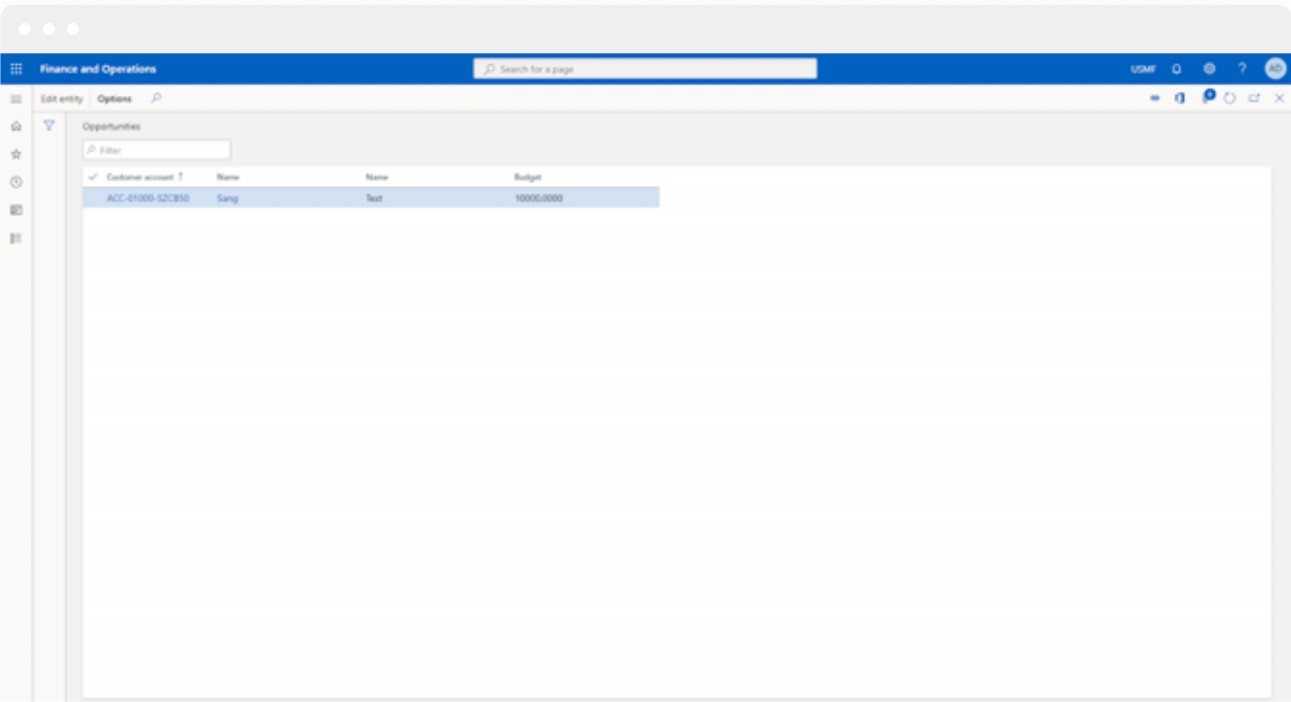
Revenue:

Description:

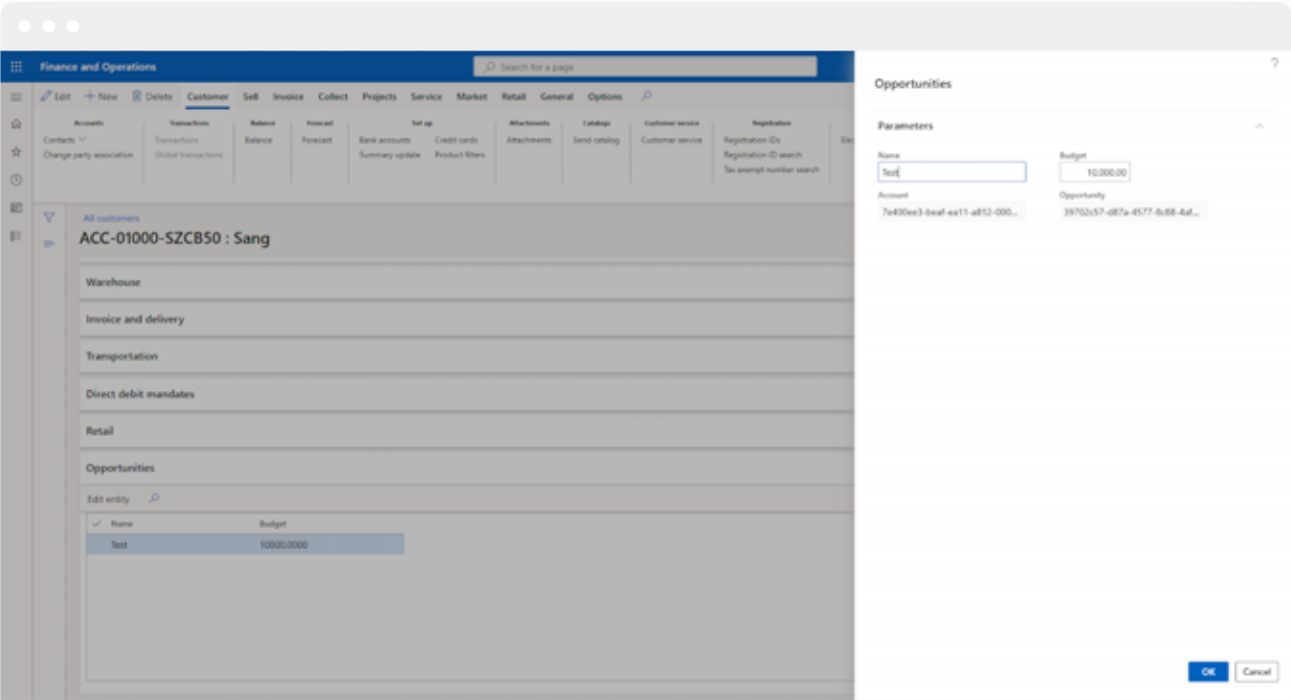
Related customer data i.e. opportunities from CRM are displayed in ERP interface



Also it is possible to show all related data at additional dynamic form: (for example, if there are no licenses for CRM, you can display the data from D365F&O in a simple grid)

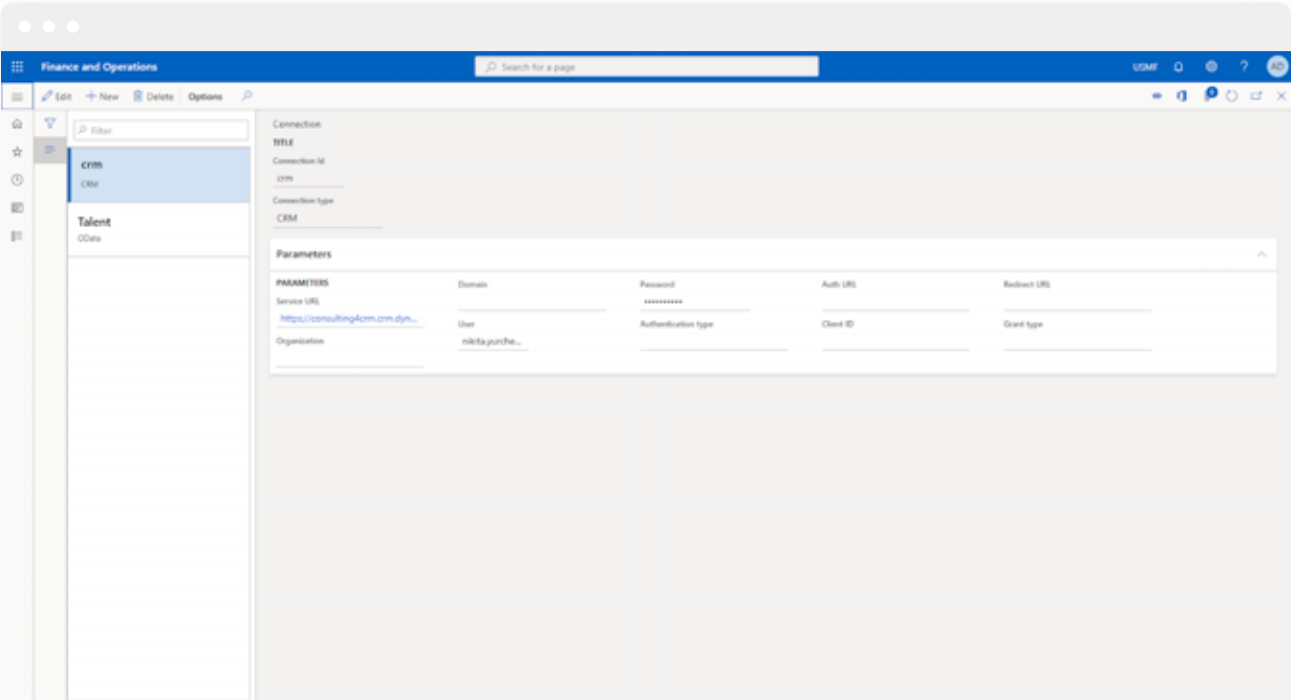


Edit option: you can edit any record from an external system — data is stored in this external system

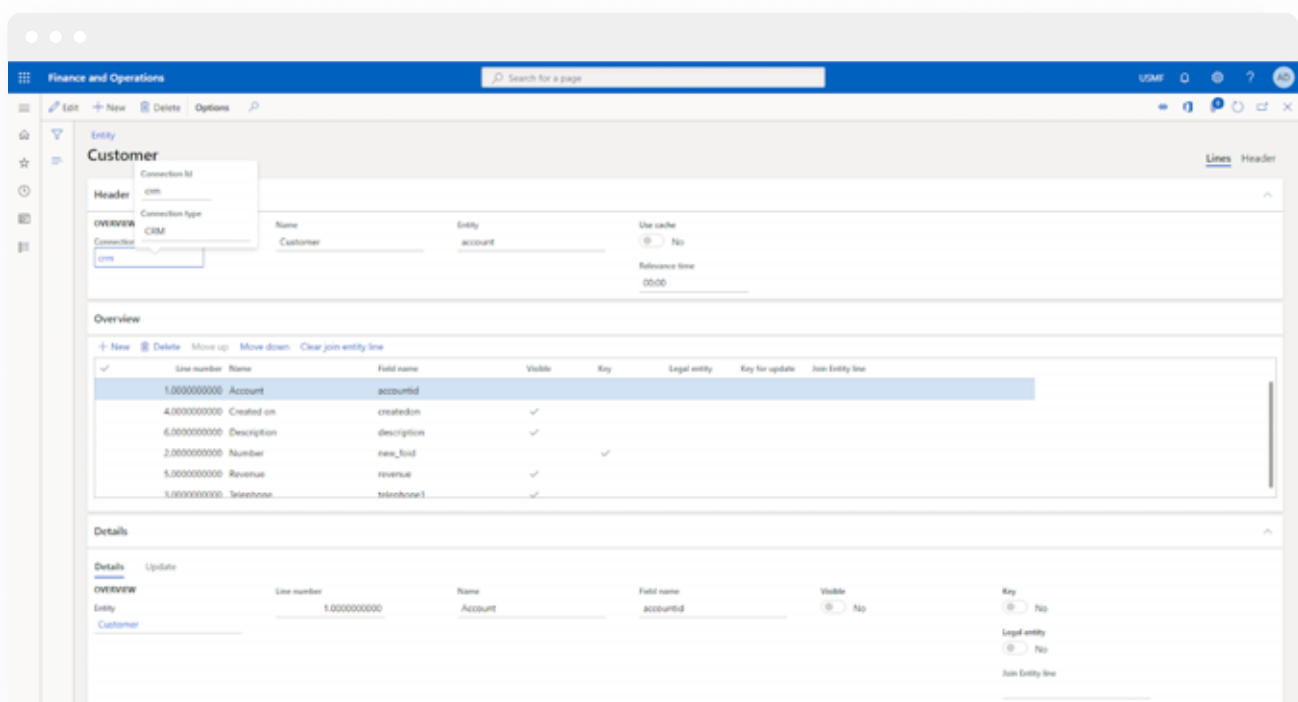
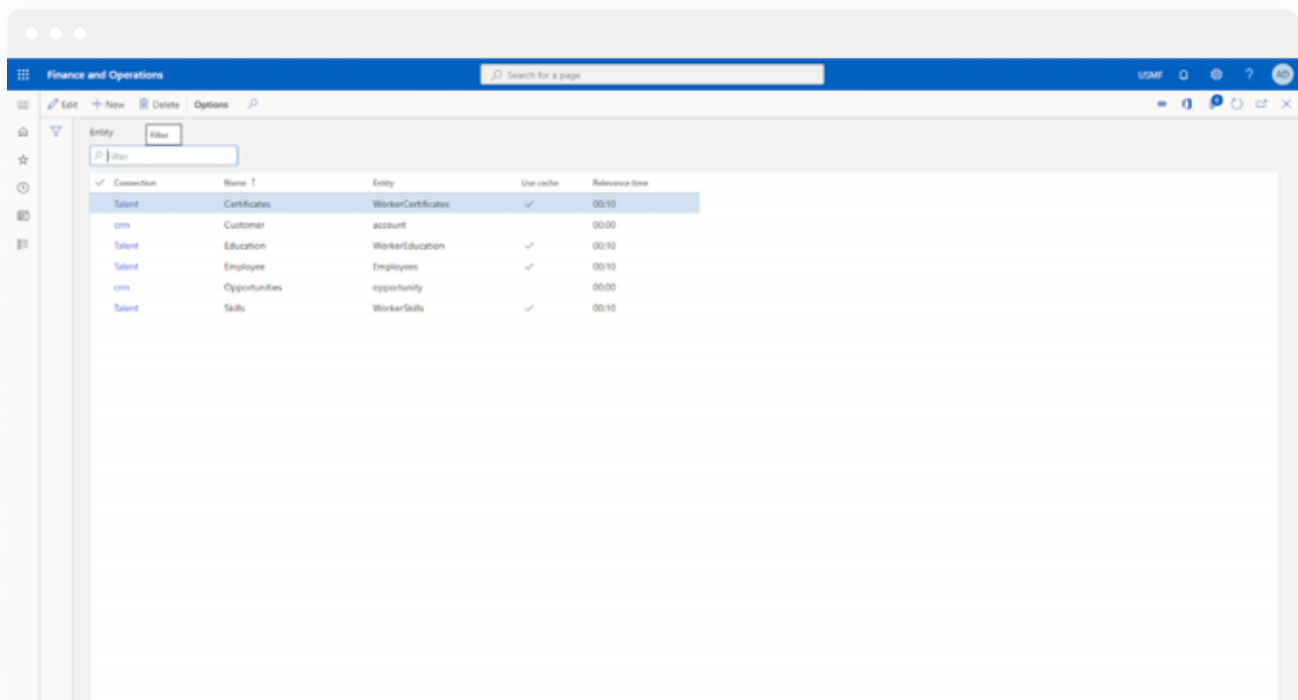


Settings

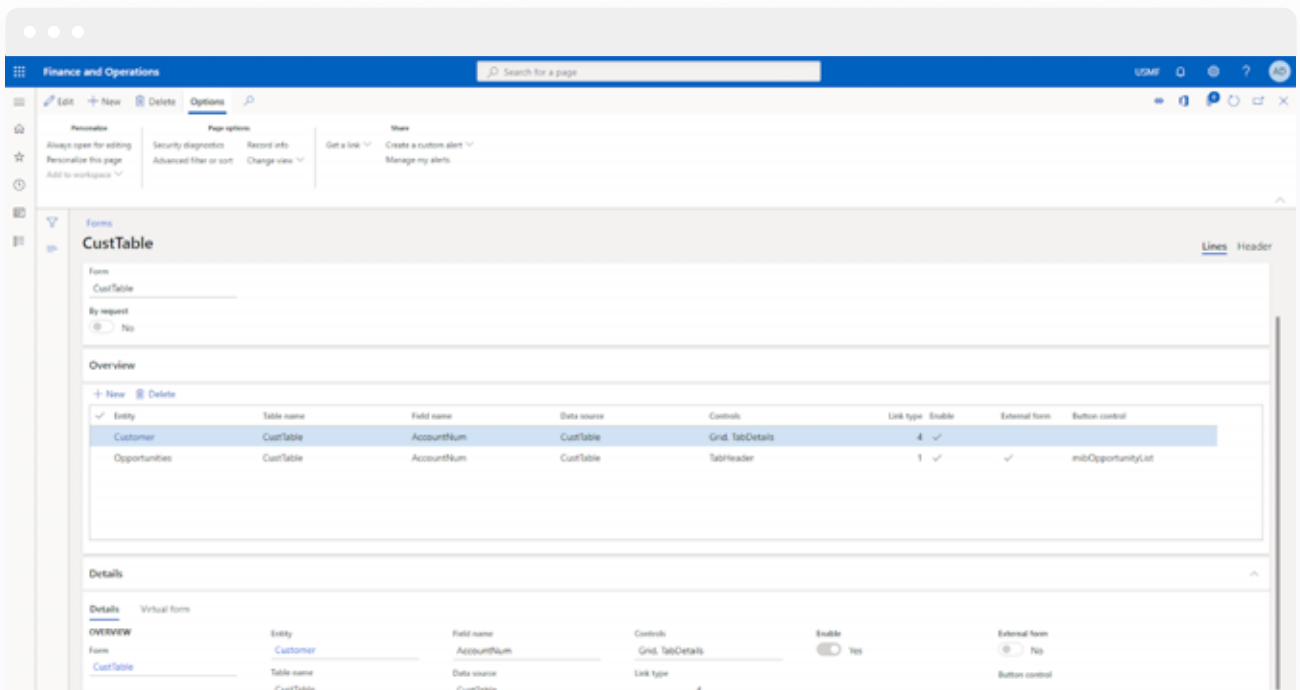
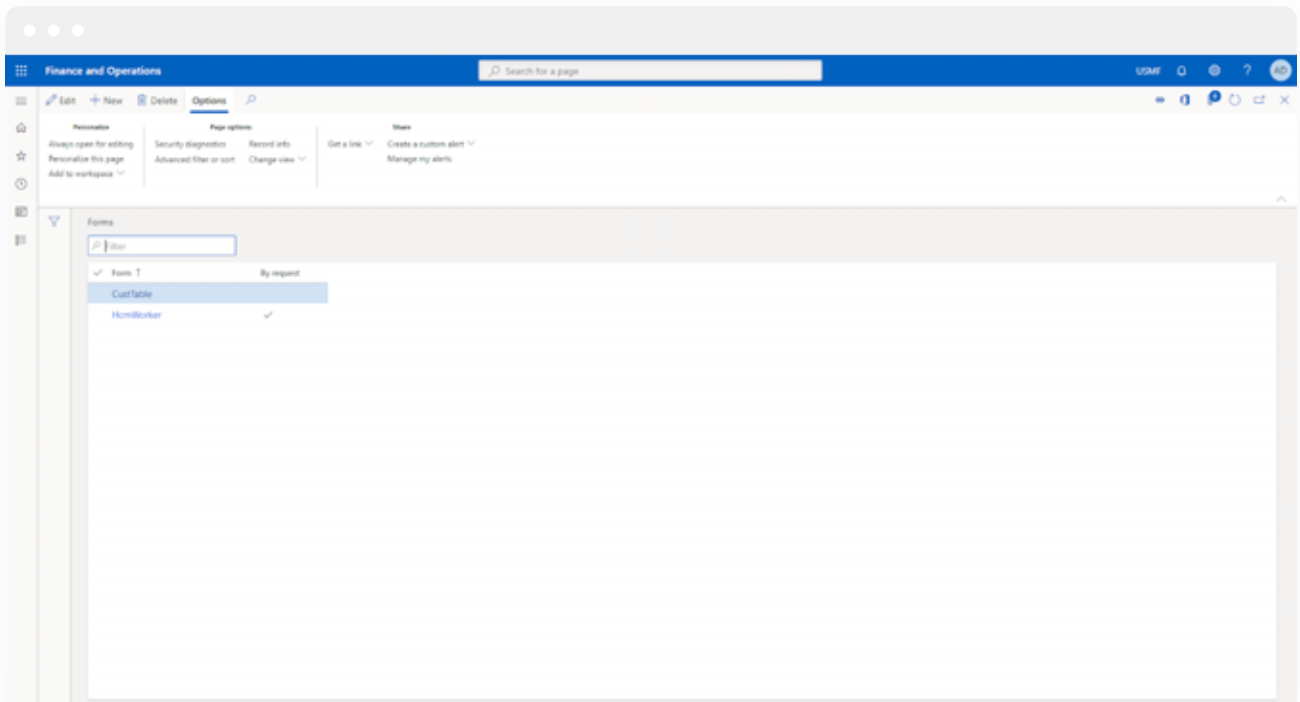
- Connections: (define ID and Type of connections and connection parameters)



- Entities to connect: setting up the necessary relationships between entities: one to one, one to many



- Mapping: In this window, the Customer entity is configured (we select which fields to display in D365F&O from the Account entity in D365CE(CRM))
- Forms: how and where to display new entities in D365F&O



About

Wave Access is a results focused software development company that provides high quality software outsourcing services to hundreds of emerging and established companies globally. We use our technical expertise to increase business efficiencies, optimize slow or unreliable systems, recover projects that have gone off track and bring ambitious ideas to life.

20+

years of delivering
successful outcomes
for customers

500+

talented & passionate
professionals

4

global R&D centers

20+

completed machine
learning projects

300+

successful projects
delivered and counting

96%

of our customers
are repeat business

Las Vegas

headquarters

**USA, Germany, Denmark
and Eastern Europe**

sales offices



2019 Partner of the Year
Media & Communications
2018 Partner of the Year
Artificial Intelligence Award
2017 Partner of the Year
Business Analytics Award



SCI-TECH AWARDS
(ACADEMY OF MOTION PICTURE
ARTS AND SCIENCES)

