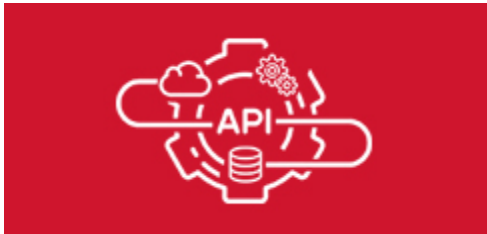


Configuration Document

## Intlix.Api for D365 Virtual Entity



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## Intlix.Api

Create & provision OData v4 Api of database just by configuration and use it in Virtual Entity.

Virtual entities let us integrate the data residing in external systems, without replication of data and often without custom coding. But for this integration, external system should have ready OData v4 services and there are many constraints that the external systems and its OData v4 API should satisfy.

Intlix.Api help to create & provision OData v4 Api of an external system which is required for Integration & to create “Virtual Entity Data Source” for Virtual Entity. Using this, admin or customizer can create the OData v4 Api from the external systems (data base) just by small configuration & that too without any code.

### Feature

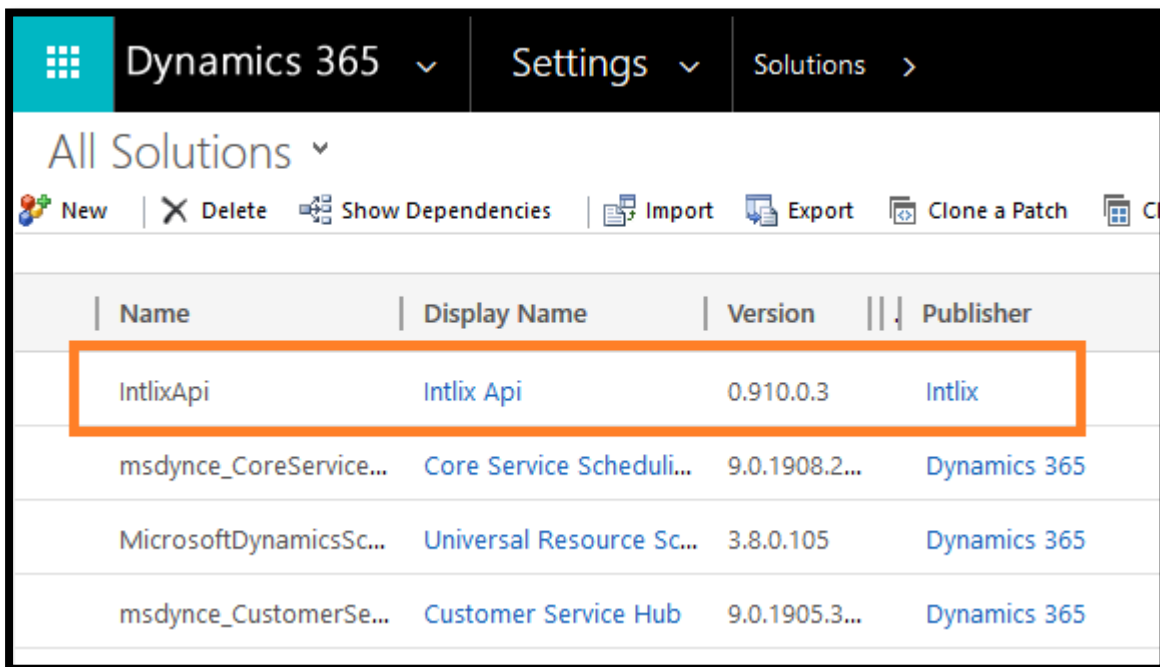
1. Provision OData v4 Api from Sql Server Database.
2. Provisioned Api can be used in Dynamics 365 Virtual Entity.
3. External data source table doesn't need to have primary key column of guid data type.
4. It provision Api in such a way that 1:N relationship of table can be configured as sub grid in virtual entity
5. It provision api in such a way that N:1 relationship of table can be configured as lookup in virtual entity

NOTE: We only support Sql Server for now. We provide other external system connectors on demand.

# Intlix.Api Solution for Dynamics 365

## Setup/Installation

1. Email us on [contact@intlix.com](mailto:contact@intlix.com) for solution. Or get it from below:
  - a. [Microsoft App Source](#)
  - b. [IntlixApi\\_managed.zip](#)
2. Import the solution in Dynamics 365
  - a. Navigate to Dynamics 365
  - b. Open Settings
  - c. Open Solutions
  - d. Click on Import
  - e. Browse “IntlixApi\_x\_x\_x\_x\_managed.zip” solution
  - f. Import the solution



Solution “IntlixApi\_x\_x\_x\_x\_managed.zip” have below components:

Sr. No.	Name	Type	Description
1	Intlix.Api Sample MsSql Datasource	Virtual Entity Data Source	Sample Data Source
2	IL: Configuration	Entity	Configuration entity
3	ILAPI: Supplier	Entity	Sample Virtual Entity which is pre-configured
4	ILAPI: Customer	Entity	to use Sample Data Source
5	ILAPI: Order	Entity	

<b>6</b>	ILAPI: Order Details	Entity	
<b>6</b>	ILAPI: Product	Entity	
<b>7</b>	Intlix.Api - Solution Configuration	Html web resource	Configuration page to configure new data source

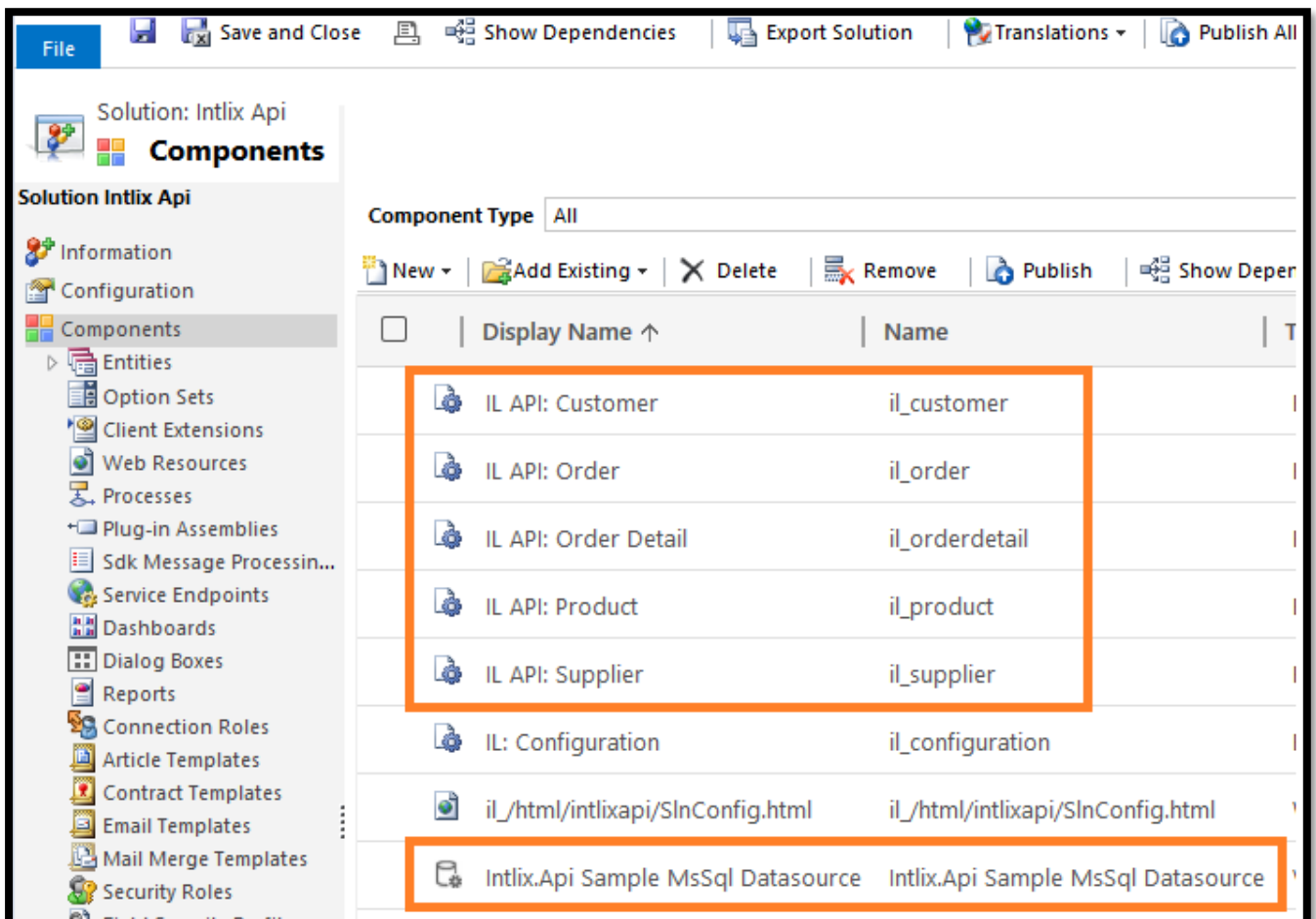
## Configuration

### Try out Sample Data Source

“IntlixApi\_x\_x\_x\_x\_managed.zip” comes with one pre-configured Sample Virtual Entity Data Source (Intlix.Api Sample MsSql Datasource) based on “OData v4 Data Provider” with pre-configured virtual entities.

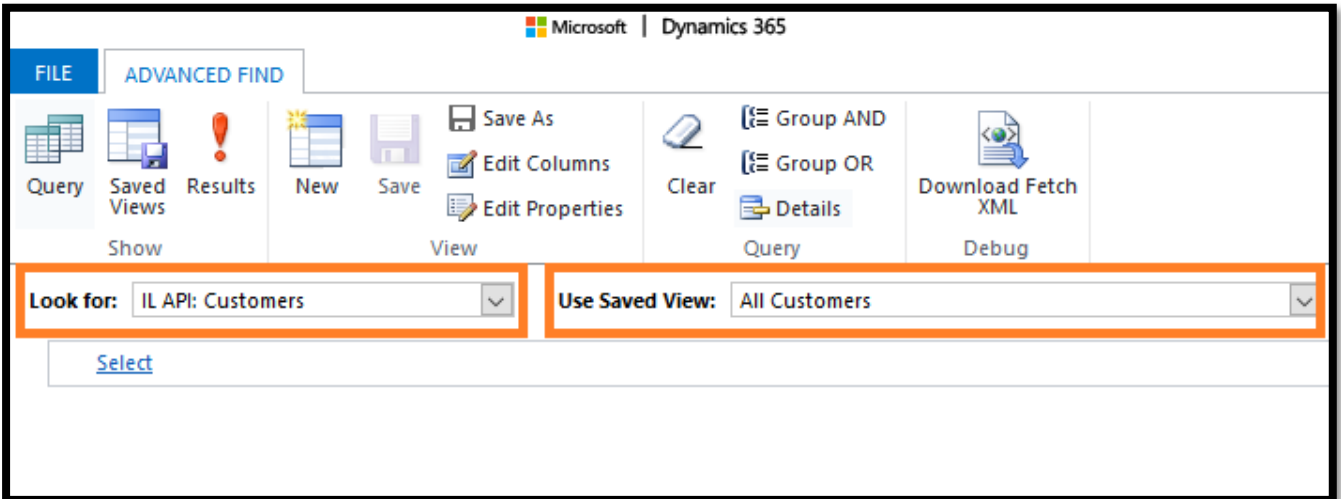
Sample Data Source is pre-configured along with below 5 sample virtual entities:

1. IL API: Customer
2. IL API: Order
3. IL API: Order Detail
4. IL API: Product
5. IL API: Supplier

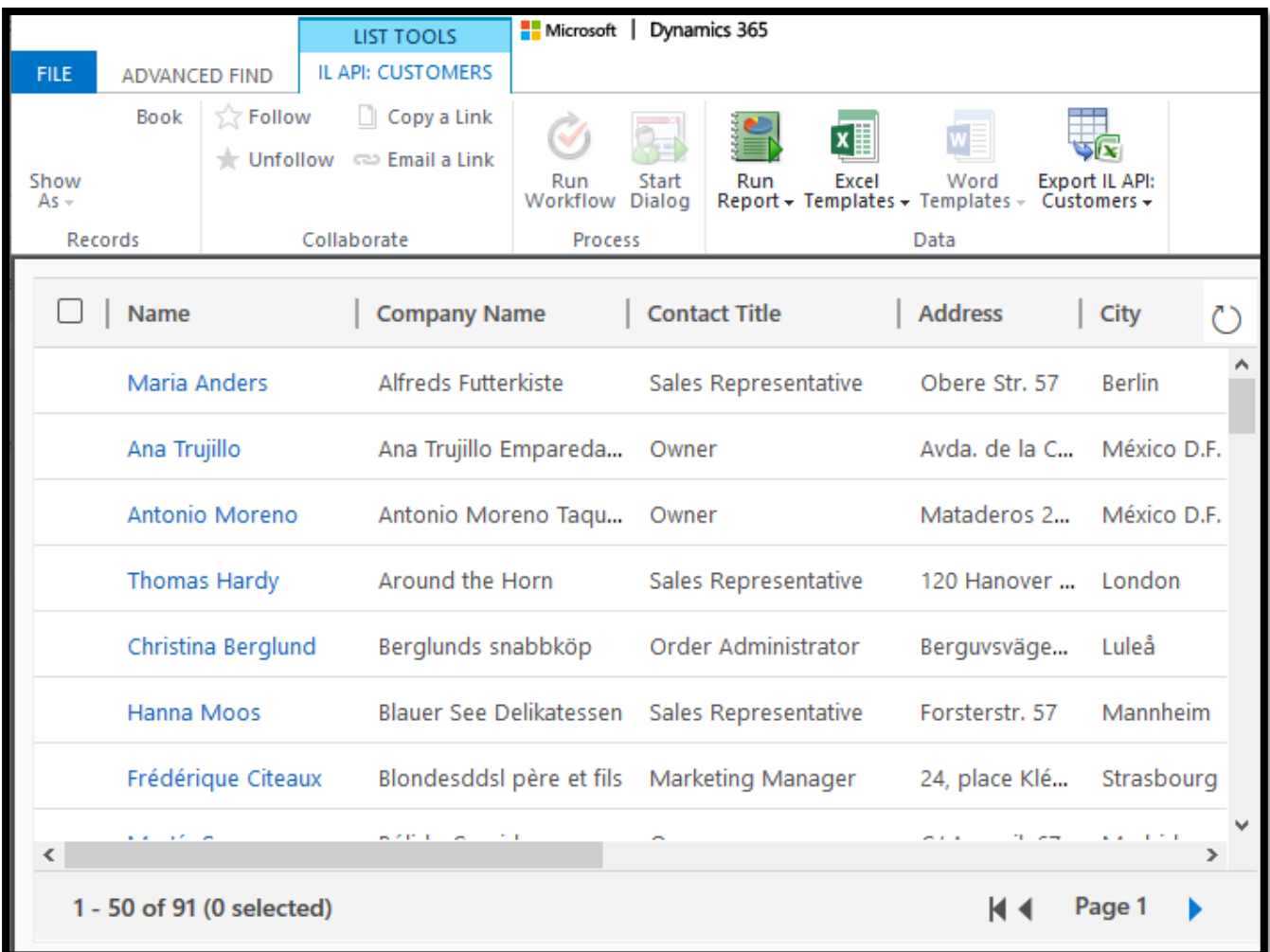


To browse this entity data:

1. Open Advance Find
2. Select IL API: Customer entity and select “All Customer” view:



3. Click on “Result”, it will fetch all the records from external system and show it in Dynamics 365



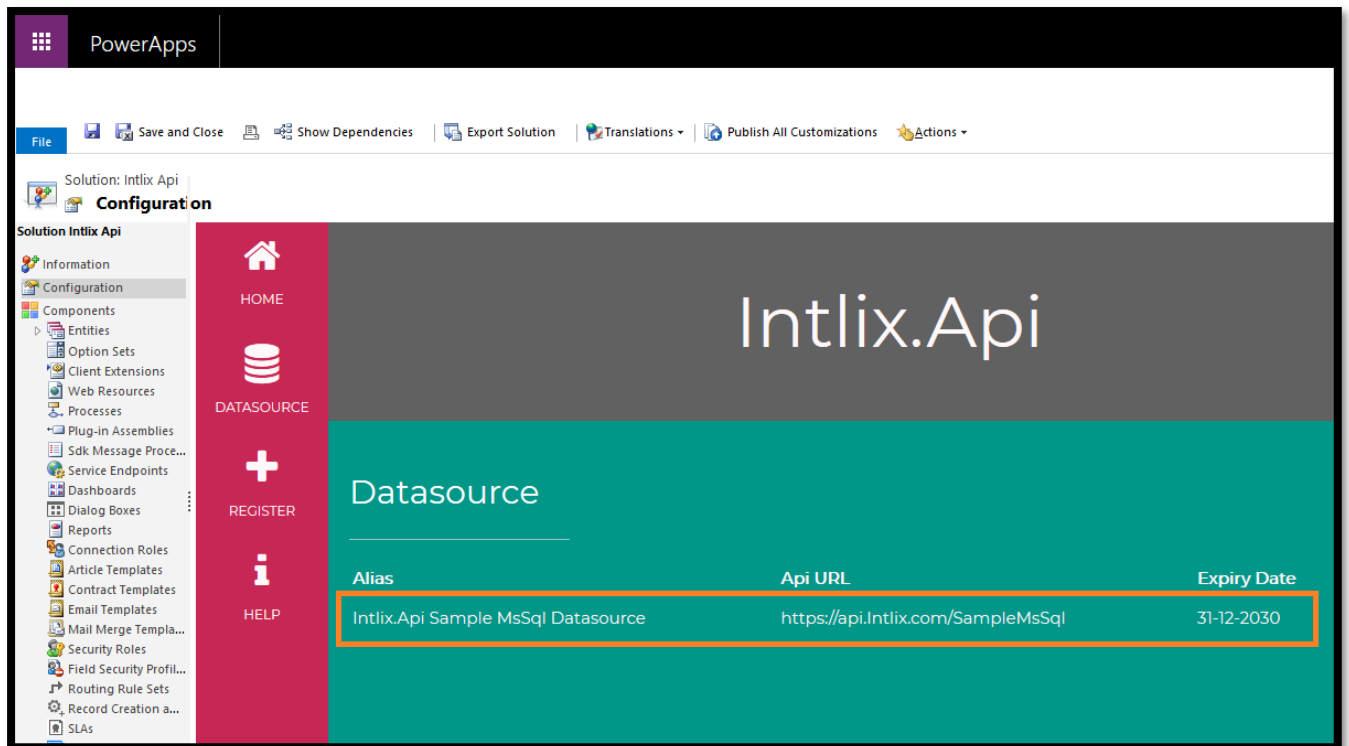
4. Same steps are applicable to browse the records of other sample virtual entities.

## Create new Data Source (Ms Sql)

This solution enables to create OData v4 API of any Sql Server database, which can be used to configure Virtual Entity.

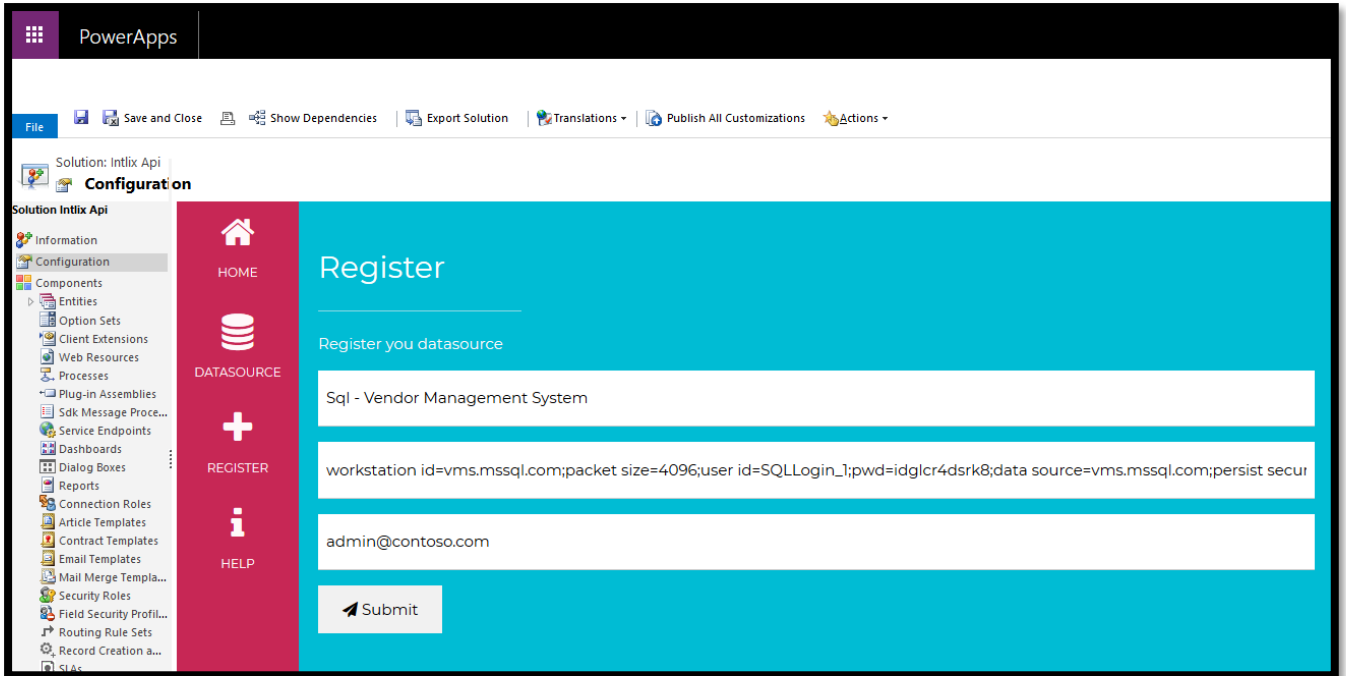
To create new Api for Sql Server data source:

1. Open “Intlix Api” solution in Dynamics 365 & navigate to “Configuration”
2. It will open the below screen:

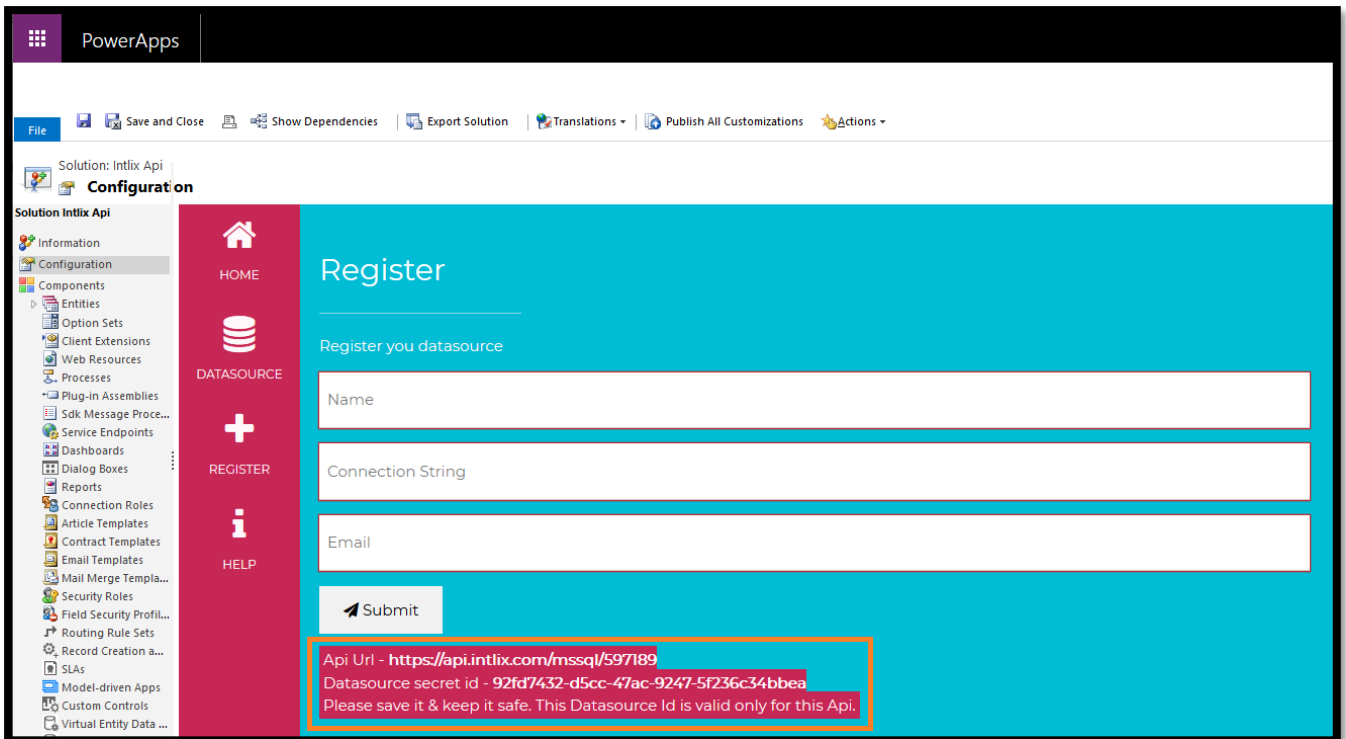


3. By default, it will list all the Data source available to use for your Dynamics 365 organization. You can see it will list one “Intlix.Api Sample MsSql Datasource” sample data source (this is the same Data source Api which is preconfigure in the solution).
4. Click on “REGISTER” icon – to create new OData v4 api of Ms Sql Database for integration and to use it in virtual entity.
5. Fill the details:

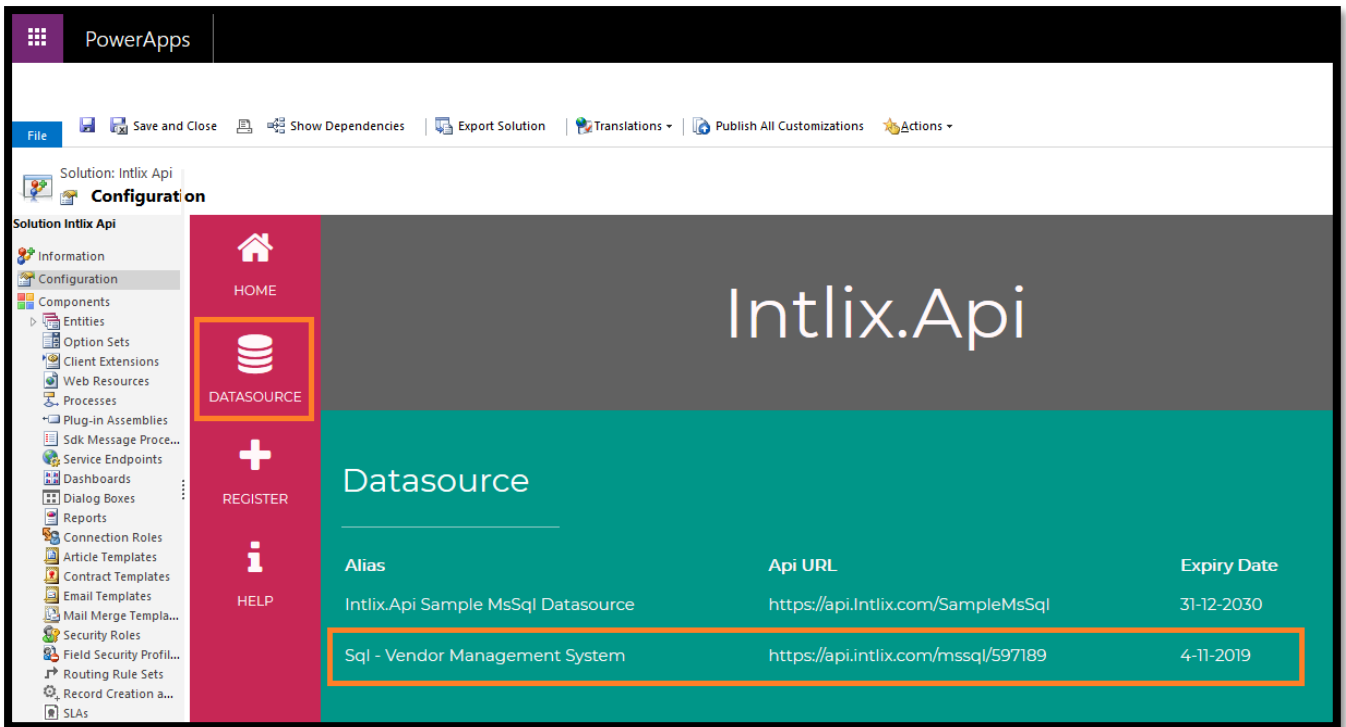




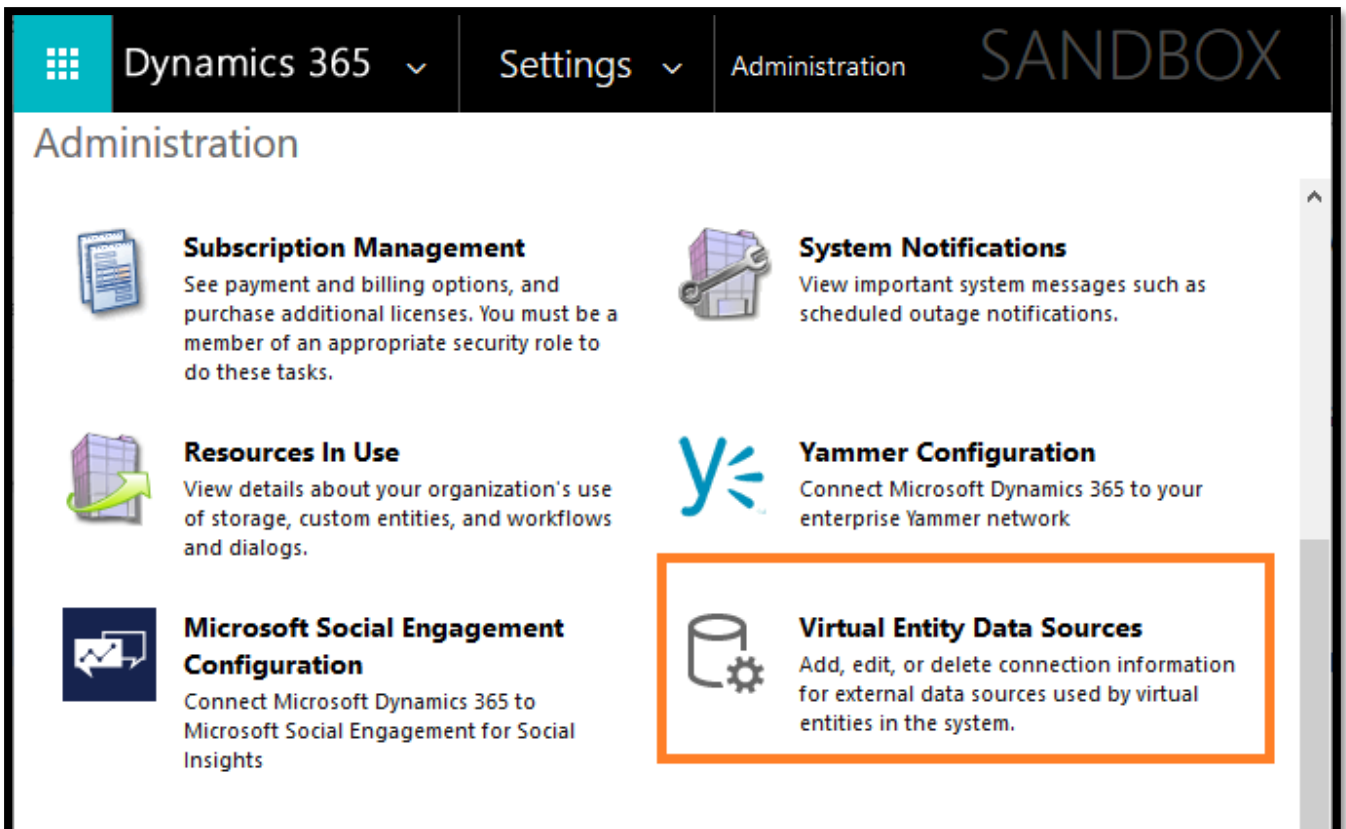
6. Click on Submit, it generates “Api Url” and **secret** “datasource id”.  
(Please save and keep the data source id safely – and do not share it with any one)



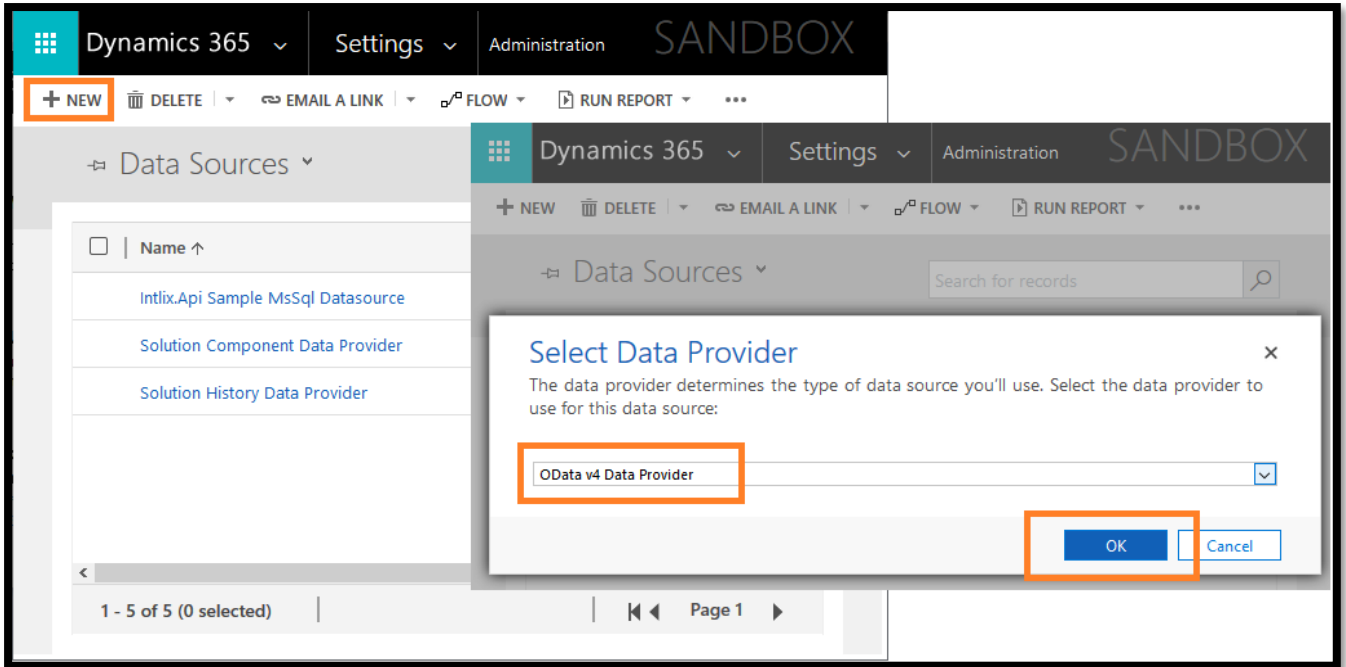
7. This registered Datasource is also list in “DATASOURCE” section:



- Navigate to "Virtual Entity Data Sources" of you Dynamics 365. Settings > Administration > Virtual Entity Data Sources.

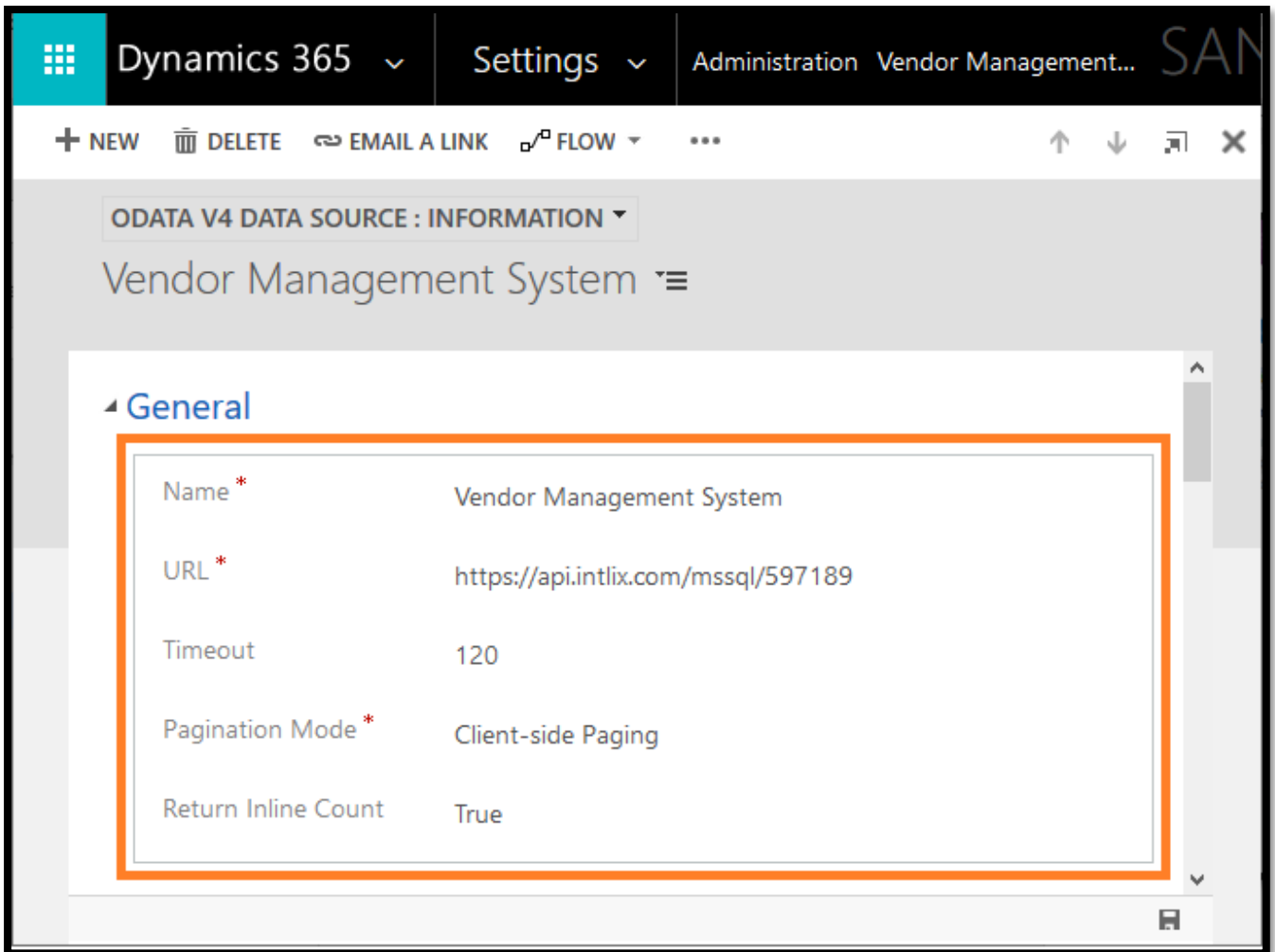


- Click New, it will open one popup - select "Odata v4 Data Provider" option and click Ok.



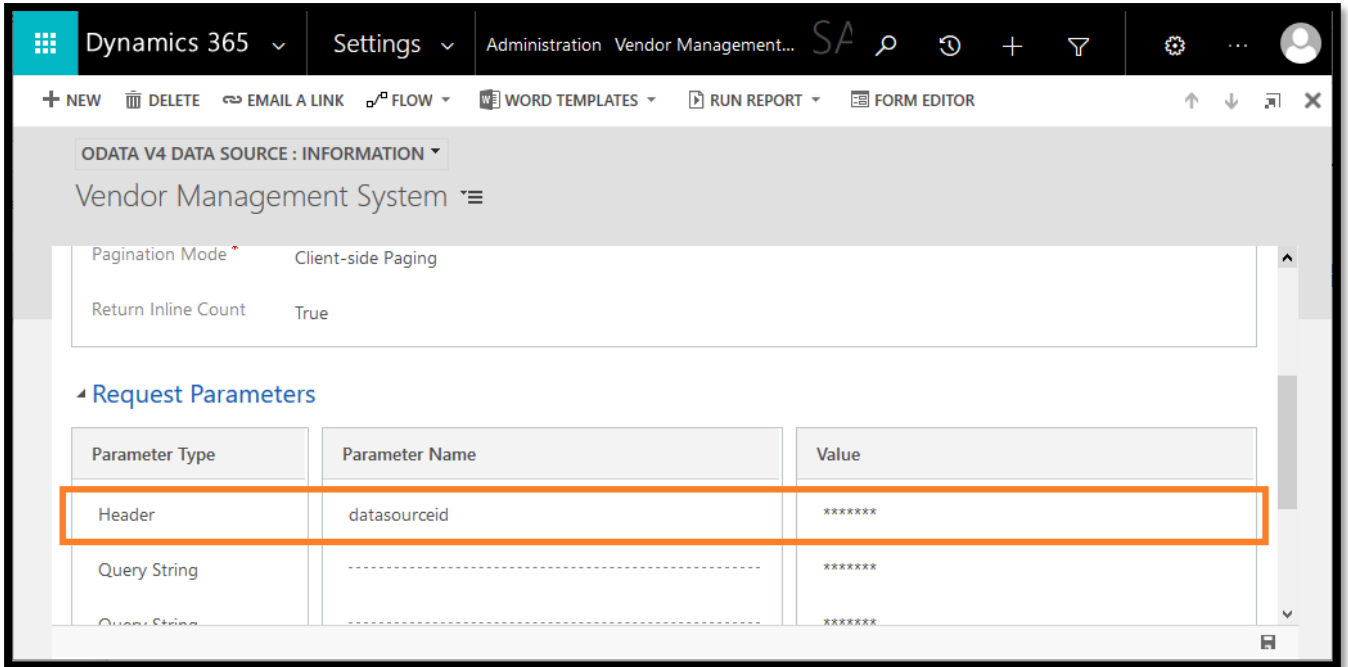
10. In General Tab:

- a. Enter Name, just for identification.
- b. Enter Url, of the registered datasource which created in step #6 (Get Url from "Datasource" section of solution).
- c. Set Timeout to 120.
- d. Set Pagination Mode to "Client-side Paging".
- e. Set Return Inline Count to "True".



11. In "Request Parameters" Section:

- a. Parameter Type - Header
- b. Parameter Name - datasourceid
- c. Set Parameter Value, with the "Datasource Secret Id", which created in step #6.



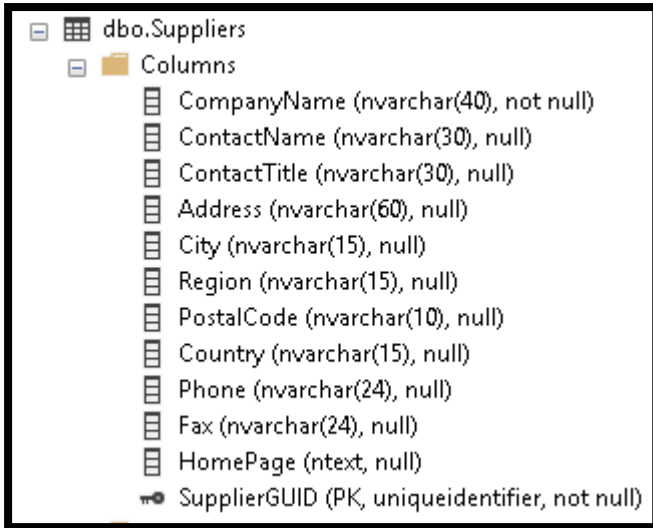
12. Save the record. It creates one new Data source in Dynamics 365, which can be use for creating virtual entity.

### Create Virtual Entity

After configuring Datasource, it is ready for use for use in Virtual entity. After creating & configuring the Virtual Entity it will show the data from registered Datasource (Ms Sql external system) into Dynamics 365.

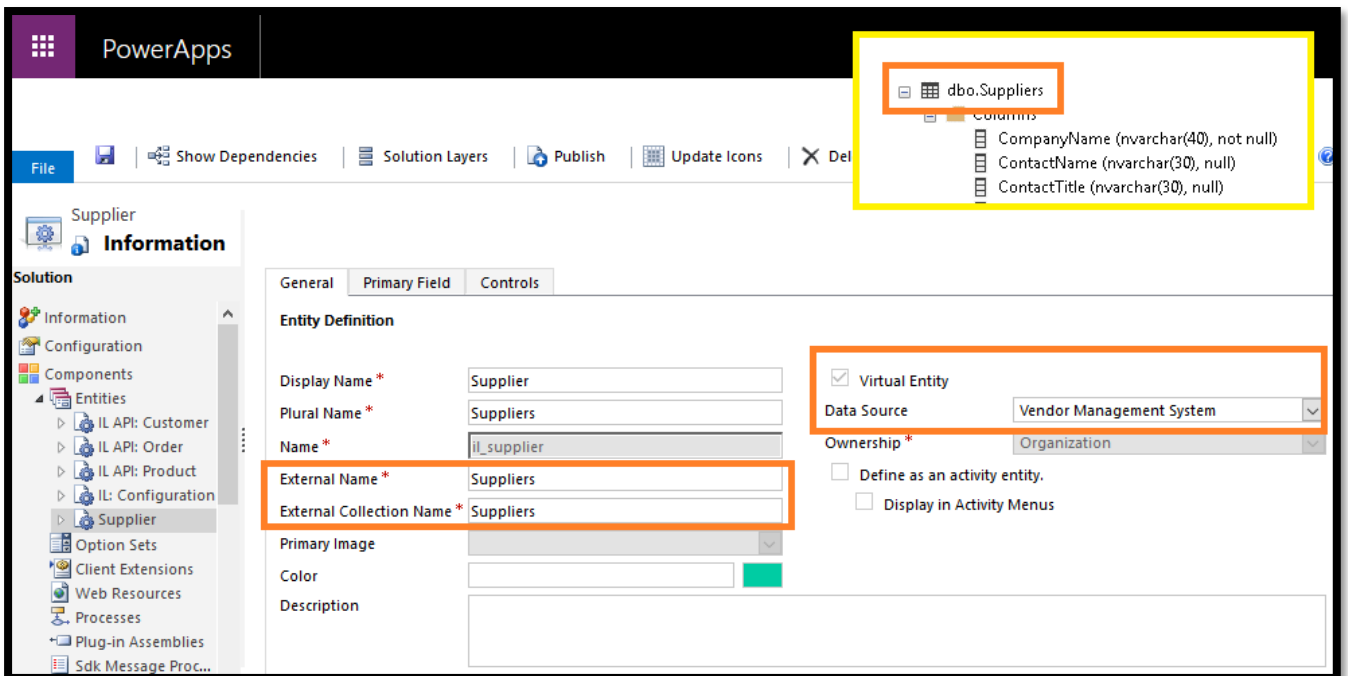
Let's take an example that, we want to show "Supplier" table records which is there in the external system (Ms Sql Server, in registered Datasource).

*External system "Supplier" table Schema:*



*Dynamics 365 Virtual Entity Configuration:*

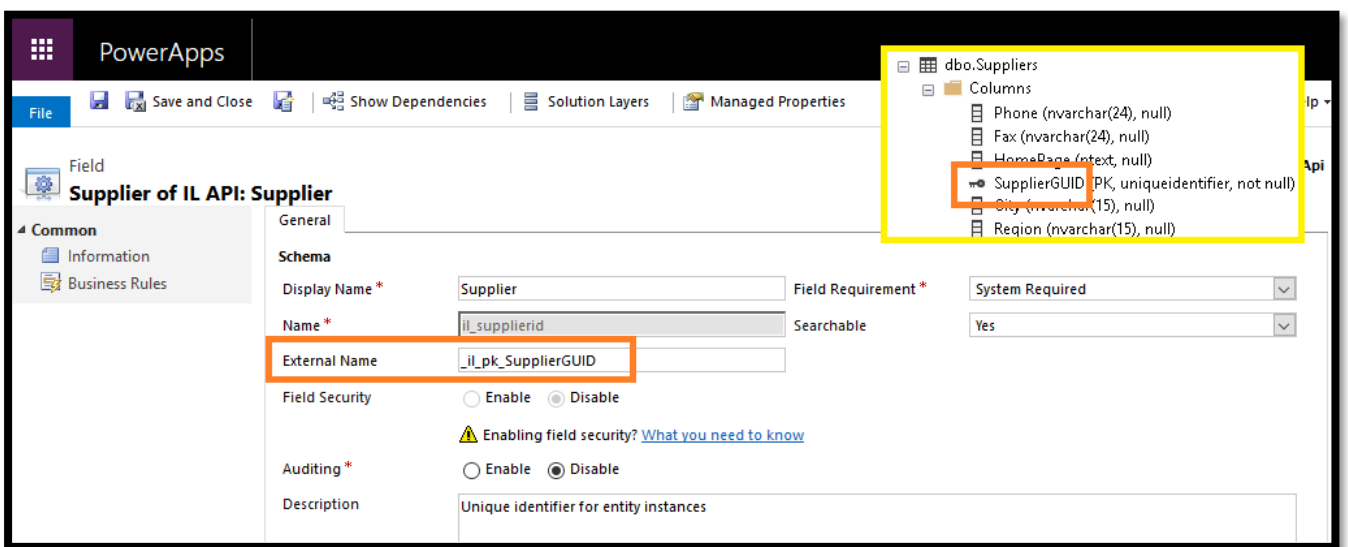
1. Create new Virtual entity:
  - a. External Name & External Collection Name should be the same as external system table name
  - b. Make sure you check “Virtual Entity” option
  - c. In Data Source, select the proper Datasource



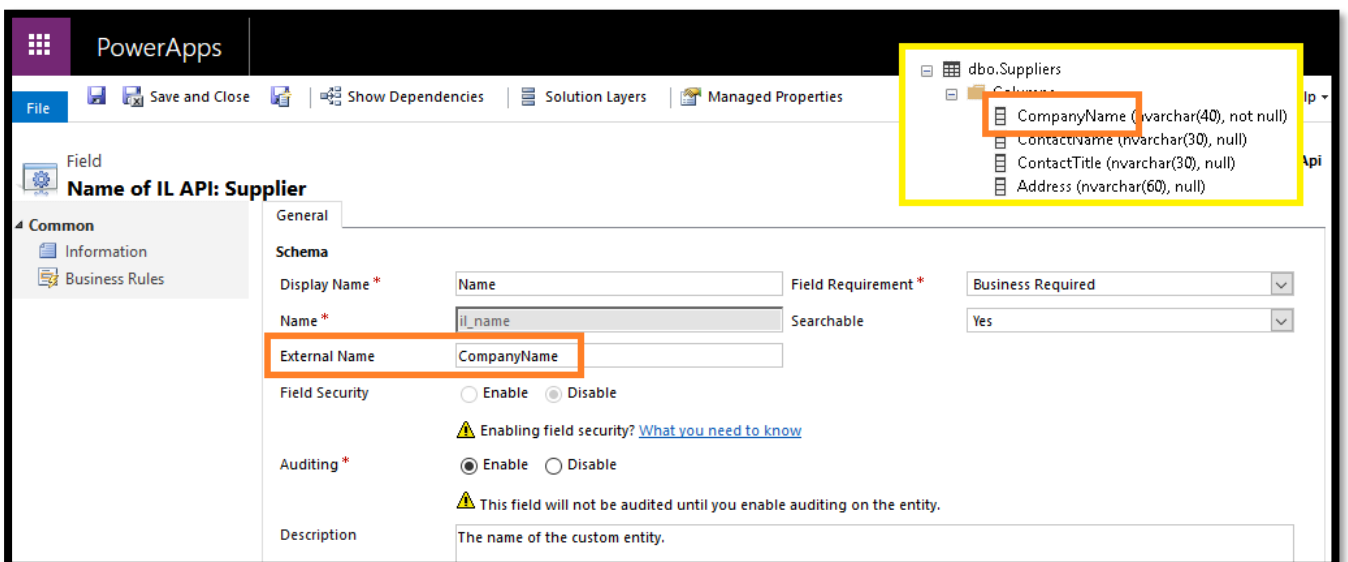
2. Navigate to “Fields” option
3. You can see, it already has 2 fields auto created:
  - a. Name
  - b. SupplierId

Name	Schema Name	Display Name	Type
il_name	il_name	Name	Single Line of...
il_supplierid	il_supplierid	Supplier	Primary Key

4. Open "Primary Key" field
  - a. In "External Name", set "Primary Key" field name of table of external system **but with prefix** `'_il_pk_'`:

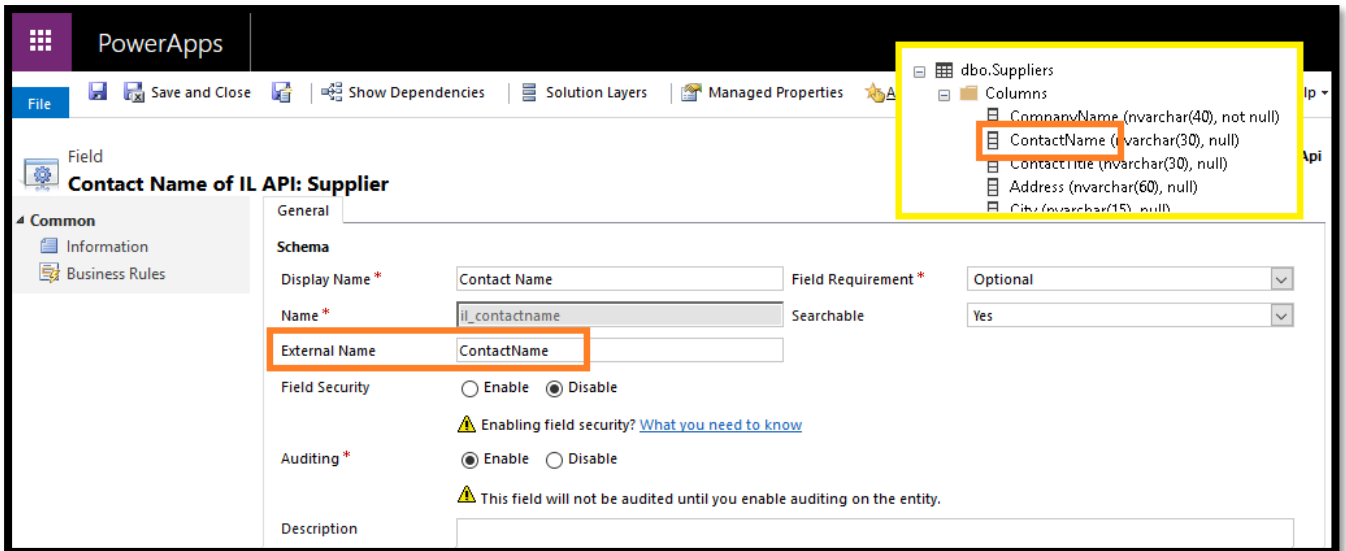


5. Now open "Name" field
  - a. Set any string field of table of external system in "External Name"

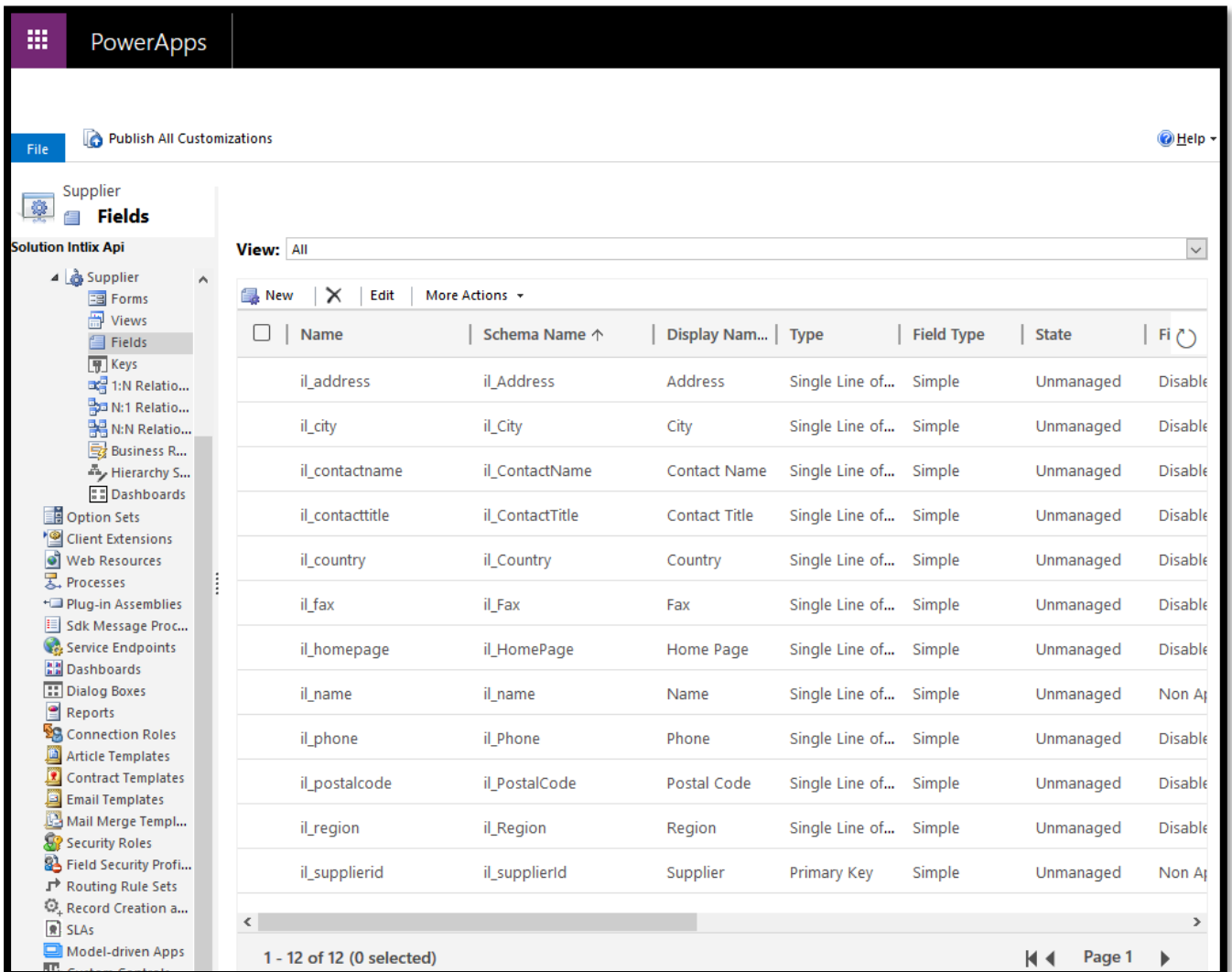


6. Now to bind other fields of table of external system, create the new fields in virtual entity

a. And always make sure to use the correct “External Name” from the table of external system



7. Same, you can create & map all the fields in virtual entity of table of external system.





8. After all the field creation, save the entity and publish it.
9. You can also configure the view and form of virtual entity.
10. After configuration, to test it, open advance find and select the newly configured entity, it will show all the records from external system into Dynamics 365 virtual entity:

Microsoft | Dynamics 365

FILE | ADVANCED FIND | LIST TOOLS | SUPPLIERS

Show As - Records Collaborate Process Data

Book Follow Copy a Link Unfollow Email a Link Run Workflow Start Dialog Run Report Excel Templates Word Templates Export Suppliers

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New England Seafood Cannery	Robb Merchant	Wholesale Ac...	Order Processing Dept...	Boston	USA	02134
Mayumi's	Mayumi Ohno	Marketing Re...	92 Setsuko Chuo-ku	Osaka	Japan	545
G'day, Mate	Wendy Mackenzie	Sales Repres...	170 Prince Edward Par...	Sydney	Australia	2042
New Orleans Cajun Delights	Shelley Burke	Order Admini...	P.O. Box 78934	New Orleans	USA	70117
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Norske Meierier	Beate Vileid	Marketing M...	Hatlevegen 5	Sandvika	Norway	1320
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## Help

For any help, please visit <https://intlix.com/contact-us> or email us at [contact@intlix.com](mailto:contact@intlix.com)