Guide to Select a Dynamics 365 Business Central **Integration Solution**

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BACKGROUND

A business of any size needs to integrate the systems and solutions they use to keep their business running on a day to day basis.

Gone are the days when a slimmed down ERP does the trick to keep track of all mission-critical information. Today, businesses use a combination of on-premise solutions, cloud applications, spreadsheets, websites, and more.

It's not unusual to see a mid-size business use more solutions than it has employees. The key to making important business decisions, reporting appropriate numbers, showing correct inventory totals, paying employees what they've earned, turning around expense claims and more – is by integrating data to the correct system(s).

In this guide, you'll learn what to consider as you select the best integration solution for your integrations with Microsoft Dynamics 365 Business Central.

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MEETING YOUR INTEGRATION REQUIREMENTS

Dynamics 365 Business Central – Microsoft's latest hosted ERP based on Dynamics NAV code – offers a couple options to access data via web services. There are advantages to each way of connecting to Microsoft Dynamics 365 Business Central based on what you'd like to accomplish. Microsoft offers pages, queries, and code units as objects to connect to, and there are certain lookups that need to be handled in Dynamics 365 Business Central integrations.

When selecting an integration solution, make sure you understand what you'd like to accomplish with your integrations. Understanding your requirements will save you time in evaluating integration solutions and ensure you invest in a solution that meets all your needs.

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CONNECTING WITH OTHER APPLICATIONS

Two things that are almost always true in integration: you're usually not working with perfect data and there is something unique about the other application to which you're connecting. For that reason, consider an integration solution that offers multiple ways to connect to your data.

In many integration scenarios, there may be requirements to connect to more than two systems. The integration point (source or destination) may be a file, database, folder, or via web services to an application. Understand the way in which you'll need to access your other integration point(s) and make sure the solution you select can connect.

Next, ensure you can transform the data in the way you need. Date/time fields are a great example of a data format that varies from system to system. When you take data from one system and integrate it with another, in many cases, data transformation is required. A good integration solution will have many options to transform your data so that it's in the appropriate format when it's sent to your destination.

CUSTOM DEVELOPMENT VS. TOOLSET

Although custom development used to be a popular approach for ERP integrations (especially Dynamics NAV integrations), companies have learned:

- At some point, they need to upgrade their systems – thus, their integrations will need to be updated. Custom integrations are often very costly to upgrade.

- Developers are expensive and their project list can be long. Why not allocate your developers to the most complex projects and handle your integrations without code?

- Teams will change. The people who build integrations might retire, go to your competitor, switch teams, etc. Rather than try to Figure out someone else's code, use an integration solution.

- Errors will occur. Will you have a way to notify, view, log, and fix them easily?

Ensure the solution you select can handle complex integrations so **you do not have to hire a developer.**

EASE OF USE

The integration solution you select should be easy to use. Do not select a solution that requires you to bring in developers to set up basic integrations or data migrations, or to maintain existing integration solutions. Use their skillset for more difficult projects.

Ensure the integration solution you select has an intuitive user interface. The interface should allow users to see all integrations that have been created, drill into what data sources are being used, and quickly view where the data is being sent. It needs to allow users to add data validations, view error logs, and act on integrations that need to be changed.

BEYOND BUILT-IN SOLUTIONS

Dynamics 365 Business Central have a data migration tool kit available to its users. While the RapidStart solution is good for basic data migration, it does not cover any steps beyond that. Rather than use a feature-lacking migration tool and then move to a second tool for your next round of integrations – use one that works for both. Invest your time in one integration solution that covers everything you need.

The same goes for working with the standard Dynamics connector. It works great as long as your business and integration needs fit in the tiny box Microsoft gives you. You may be able to migrate orders from your CRM into Dynamics 365 Business Central, but what happens when you have a process unique to your company?

You may have rules around quotes, orders and invoices that only allow them to be editable in the CRM or ERP system at any one time, or data should only flow between systems when specific criteria is met. You might also have custom attributes or entities that you want to include in the standard synchronization between CRM and Dynamics 365 Business Central. The Dynamics connector doesn't allow you to change the business flow, add in automations, account for custom processes, push from Excel, etc. You need a tool with more functionality.

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INCREASE BUSINESS EFFICIENCY

Your company is unique and involves varying systems and processes not required by other companies. Your integration solution needs to make your team and processes more efficient. Make your systems talk to each other so you don't have to perform duplicate data entry, or go hunting for data from one system to make informed decisions about data in other systems. Have your systems connected in a way that will create the records you need, when and where you need them.

Perhaps you use a cloud-based expense application that your field team uses to enter their expenses when they are out on the road. How are you planning to pay them for those expenses if the data does not end up in your ERP system? Set up an integration to move the data to your ERP and generate the transactions you need to pay expenses.

You might have an online store used to sell your goods. How is that connected to your ERP? New customers and orders need be sent to your ERP to be invoiced, and inventory products and their available quantities have to be passed from the ERP to the online store to give customers an accurate representation of what goods are available.

FIT YOUR BUDGET

This is a no-brainer. Before you begin viewing solution demos, determine a budget (with a little bit of wiggle room for the unknowns!). Consider where your current resources are being spent to get the data where it needs to be and the ROI for moving to an integration solution.

As you consider budgeting for an integration solution, account for things like training, ongoing support and assistance with complicated integrations. An integration solution can quickly feel like a poor investment if your plan is to spend your entire budget on the solution itself and not setting yourself up for success in actually using it!
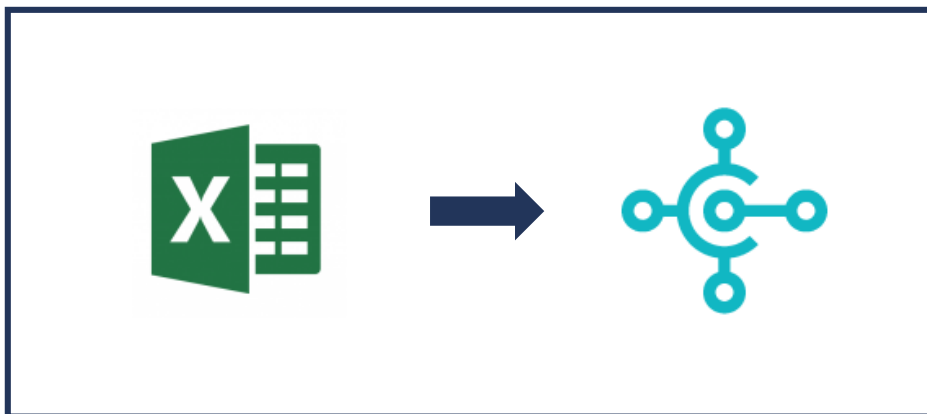
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PUSH FROM EXCEL TO D365 BUSINESS CENTRAL

A key feature of an integration tool worth using with Dynamics 365 Business Central is one that allows you to integrate right from within Excel, with the push of a button.

You may be thinking "But there is a native edit in Excel feature already built into Dynamics 365 Business Central" – which is true. There are some options for working with master data like items or customers. And, while some integration options allow you to run a process taking data from Excel and generating new data in a destination system, think about the experience of the end user.

The end user, in most cases, is not an integration expert nor does he or she always have access to resource who manages the integration toolset to import data. In the role of an accountant, one common job task is entering journals into the accounting system. What if the accountant could save hours by clicking a button in Excel to push his or her journal entries into Dynamics 365 Business Central? Many people like the benefits of saving time, eliminating manual entry, which is what having this feature achieves.

Use an integration tool that allows you to send data from Excel, a solution your team knows and loves, directly into Dynamics 365 Business Central while handling the complexity for the data you need to integrate.

We'd love to hear from you and look forward to discuss making Dynamics 365 Business Central integration easy using **SmartConnect**.

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