



CRM Connector

Microsoft Dynamics 365 Customer Engagement & Microsoft Dynamics 365 Business Central

VanRoey.be

CRM Connector

Goal

The CRM connector is built for the data-integration between Microsoft Dynamics 365 Customer Engagement and Microsoft Dynamics 365 Business Central.

CRM Connector

Integration Setup

❑ Connection

- Dynamics 365 sales URL
- Username
- Password

This screenshot shows the 'Microsoft Dynamics 365-verbinding instellen' (Set up Microsoft Dynamics 365 connection) window. The title bar includes a back arrow, edit, add, and delete icons, and a status '✓ OPGESLAGEN'. The main title is 'Microsoft Dynamics 365-verbinding instellen'. Below the title is a tabbed interface with 'Verbinding', 'Toewijzing', 'Synchronisatie', and 'Meer opties'. The 'Verbinding' tab is active, showing the title 'Verbinding vanuit Dynamics 365 Business Central met Dynamics 365 Sales'. The form contains three input fields: 'URL van Dynamics 365...' (with a blurred value), 'Gebruikersnaam' (with a blurred value), and 'Password' (with a blurred value). To the right of these fields are three controls: 'Geactiveerd' (a toggle switch that is currently off), 'Actieve geplande syn...' (displaying '0 van 0' in red), and 'Dynamics 365 SDK-ve...' (displaying '9 ...').

❑ Activate the connection

- Enable the connection

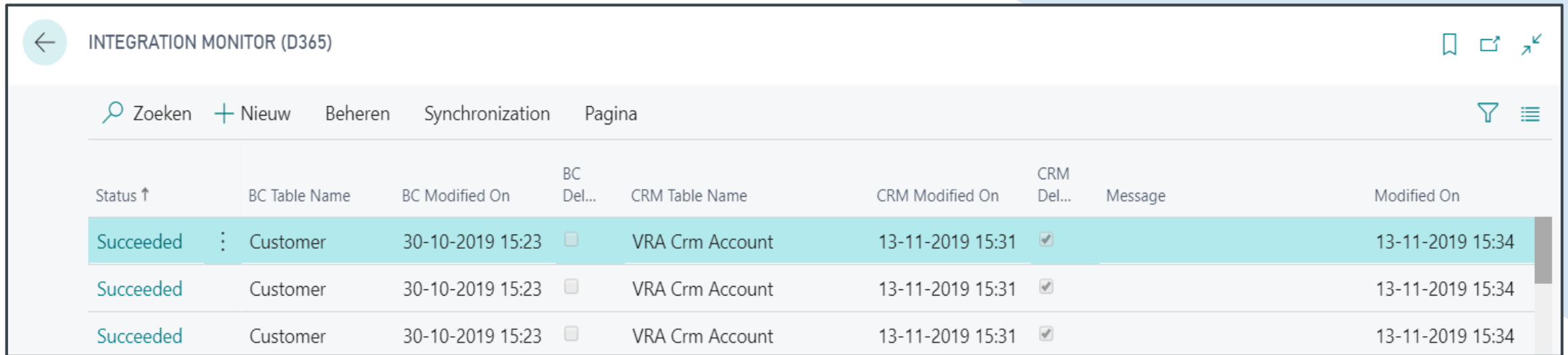
This screenshot shows the 'Integration Setup (D365)' window. The title bar includes a back arrow, edit, add, and delete icons, and a status '✓ OPGESLAGEN'. The main title is 'Integration Setup (D365)'. Below the title is a tabbed interface with 'Connection', 'BC Integration Tables', and 'CRM Integration Tables'. The 'Connection' tab is active, showing the title 'General'. The form contains one control: 'Is Enabled' (a toggle switch that is currently on).

!!! Please do not activate the standard connector!!!

CRM Connector

Synchronization

- ❑ Create/modify a record in
 - Microsoft Dynamics 365 Customer Engagement
 - Or
 - Microsoft Dynamics 365 Business Central



The screenshot shows the 'INTEGRATION MONITOR (D365)' interface. At the top, there is a navigation bar with a back arrow, the title 'INTEGRATION MONITOR (D365)', and icons for bookmark, share, and refresh. Below this is a secondary bar with tabs: 'Zoeken' (with a magnifying glass icon), '+ Nieuw', 'Beheren', 'Synchronization', and 'Pagina'. On the right of this bar are filter and list view icons. The main area contains a table with the following columns: 'Status ↑', 'BC Table Name', 'BC Modified On', 'BC Del...', 'CRM Table Name', 'CRM Modified On', 'CRM Del...', 'Message', and 'Modified On'. There are three rows of data, all with a status of 'Succeeded'. The first row is highlighted in light blue.

Status ↑	BC Table Name	BC Modified On	BC Del...	CRM Table Name	CRM Modified On	CRM Del...	Message	Modified On
Succeeded	Customer	30-10-2019 15:23	☐	VRA Crm Account	13-11-2019 15:31	☒		13-11-2019 15:34
Succeeded	Customer	30-10-2019 15:23	☐	VRA Crm Account	13-11-2019 15:31	☒		13-11-2019 15:34
Succeeded	Customer	30-10-2019 15:23	☐	VRA Crm Account	13-11-2019 15:31	☒		13-11-2019 15:34

- ❑ Create/modify the record in the target application

Thank you!

FOLLOW US ON SOCIAL MEDIA,

 linkedin.com/company/vanroey

 instagram.com/vanroey.be

 facebook.com/vanroey.be

 twitter.com/vanroeybe

 youtube.com/c/vanroey



vanroey.be/nieuwsbrief