



D365 - SFDC Integrator

OnActuate

Connect your entire operations with a turnkey integration solution for Salesforce.com and Dynamics 365 Finance & Supply Chain.

Salesforce.com Integration with Dynamics 365 Finance & Supply Chain

Your sales and operations teams need to be able to share data and communicate through a single platform. If you are currently trying to manage transactional data in Dynamics 365 Finance & Supply Chain (D365 F&SC) and customer centric relational data in Salesforce.com (SFDC) separately, it's time to start working together as one.

OnActuate's D365 F&SC SFDC Integrator is an easy, configurable, and cost-effective way to synchronize accounts, customers, sales orders, and opportunities in SFDC with inventory, accounting, items, and vendors in D365 F&SC. By providing an interface between the two systems, this standalone pre-built integration solution makes sharing data simple, reliable, and extensible.

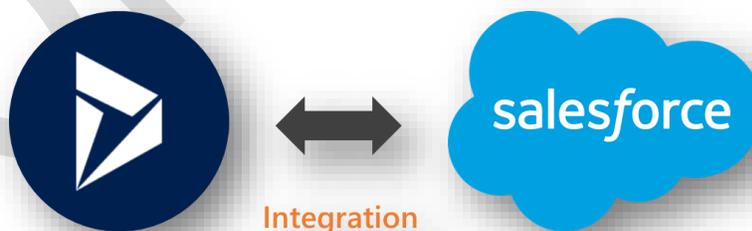


Figure: D365 F&SC SFDC Integrator

Feature Highlights

- Easily create functions to perform any calculation/conversion before the data is pushed to destination system
- Define a default value for a field which is mandatory in destination, but no corresponding data is available at source
- Add additional filter logic to ensure that junk data is not pushed to destination system
- Specify controls and permissions for initiating sync
- Manage logs for all transactions (success and failed)
- A simple salesforce extension for accessing invoice data

Configurable Features

- Entities to be synced
- Direction of Sync for each Entity
- Batch Mode of synchronization
- For each Entity, actions allowed at the destination system (Insert/Delete/Update)
- Field mapping for each Entity
- Fields in an Entity that should/shouldn't be updated at the destination system
- Multiple tables of an Entity in D365 F&SC can be mapped to a single Salesforce Objects
- Entities like Customer, Contact, Products, Opportunity, Quotation, Sales order & Invoice are already available with configuration and field mapping. If required, others can be configured with minimum customization.