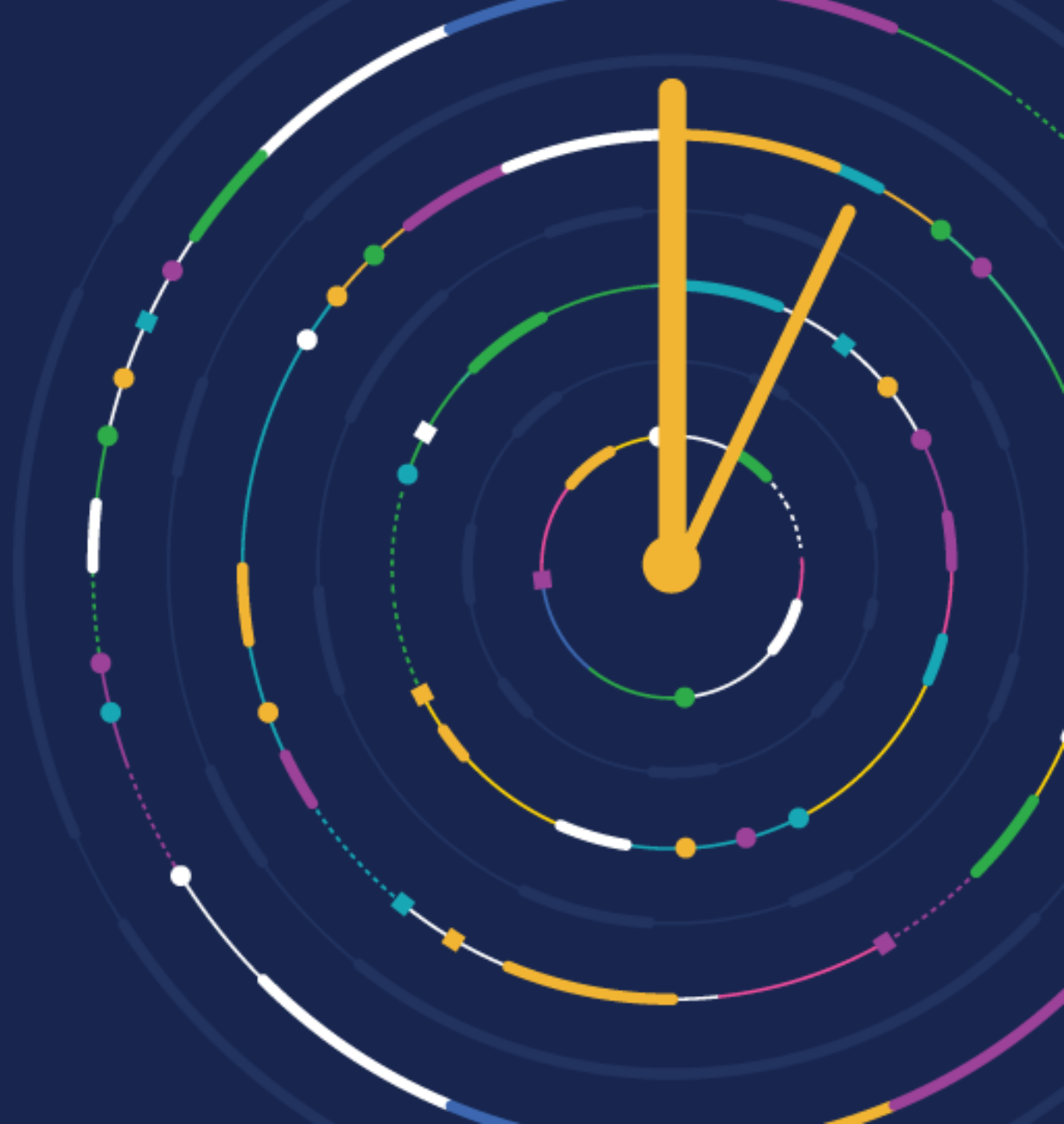




# Business Central & CRM - your options for making the Dynamics 365 integration seamless

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**CUSTOMER DAY** 2023



# What we'll cover

**1** What, Where, When & Why?

**2** How?

**3** Standard Microsoft Integration

**4** Power Automate

**4** Virtual Tables

**5** 3<sup>rd</sup> Party 'Middle Ware'

**6** Q & A

# Hands up, who is using BC < > CRM Integration?



# Methods of BC < > CRM Integration

- Standard
- Power Automate
- Virtual Tables
- Third-Party

## Definition of Data Integration

*'Data integration refers to the process of bringing together data from multiple sources across an organization to provide a complete, accurate, and up-to-date dataset for BI, data analysis and other applications and business processes. It includes data replication, ingestion and transformation to combine different types of data into standardized formats to be stored in a target repository such as a data warehouse, data lake or data lakehouse.'*

# Considerations of Integration

## What?

- What data do you need to integrate?
  - Which tables do you need?
  - Which fields do you need?
  - It doesn't have to be all or nothing – can you filter it down?

## Where?

- Where does the data live?
  - Is there a master data source?
  - Where are you moving data to?
  - Relational data structures are designed to be presented as cohesive, but that doesn't mean they are



# Considerations of Integration

## When?

- When do you need data to transfer?
  - Event based?
  - Scheduled?
  - Sensible timeframes

## Why?

- Why do you need this data?
  - Reporting?
  - Informational?
  - Triggering further Business Processes



# Choosing the Right Tool – Can I have multiple?

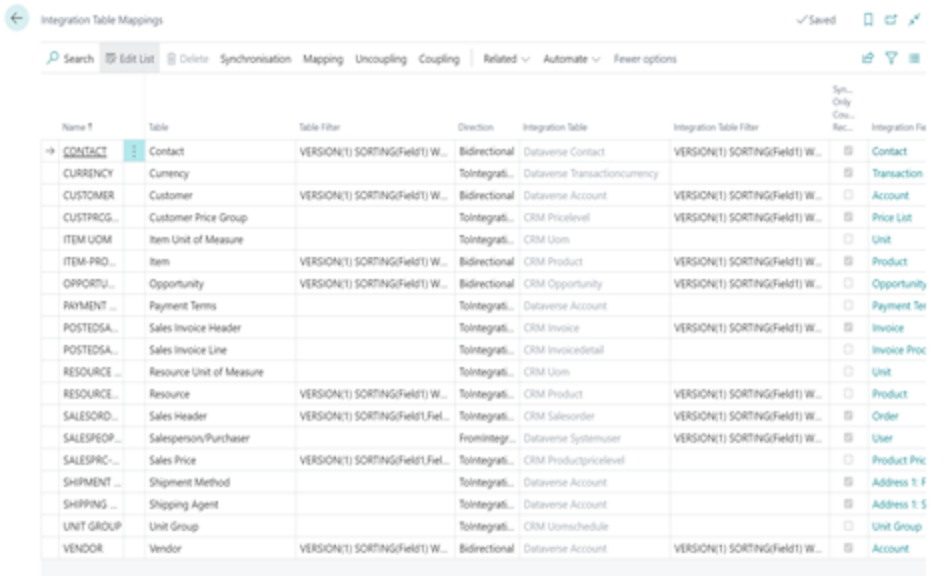
Driven by what needs to be integrated.

- Standard Microsoft Integration
  - Power Automate (SaaS & PaaS – Custom Connector)
  - Virtual Tables
  - 3<sup>rd</sup> Party Middle Ware (E One Solutions, Kingswaysoft)
  - Power BI (Collaborate data between CRM & Business Central)
- Tailoring / Extending these for specific Business Needs
  - Tecman Integration Framework tools
  - Custom APIs



# Standard Microsoft Integration

- Preferred Use Case
  - Master Data on a Schedule
- Pros
  - Easy Set Up OOTB (SaaS to SaaS)
  - Updated every 6 months
  - Responsive to Business Events
  - No additional licencing
  - Can be used with either system as the source (Uni/Bi-directional sync)
  - Simplified navigation between BC and CRM
  - Runs on customisable job schedule (job queues)
- Cons
  - Extending the standard integration can be cumbersome, but the Tecman framework makes this easier
  - Data exists in both systems, taking up storage space
  - Error handling interface can be daunting
  - Customer expected to take a level of ownership of integration.

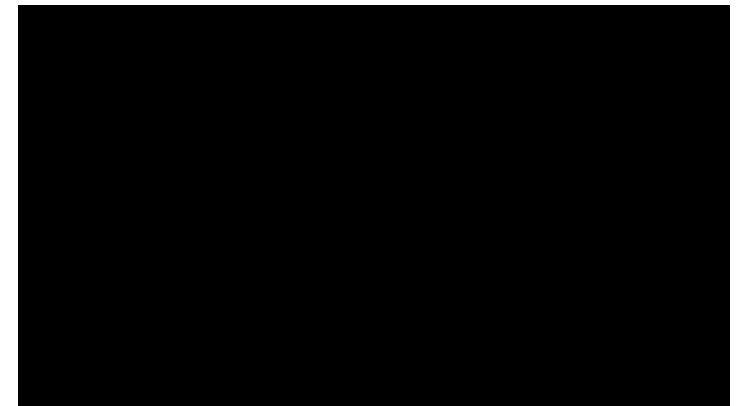


Name 1	Table	Table Filter	Direction	Integration Table	Integration Table Filter	Sync Only	Integration File
CONTACT	Contact	VERSION(1) SORTING(Field) W...	Bidirectional	Dataverse Contact	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Contact
CURRENCY	Currency		ToIntegrat...	Dataverse Transactioncurrency		<input checked="" type="checkbox"/>	Transaction
CUSTOMER	Customer	VERSION(1) SORTING(Field) W...	Bidirectional	Dataverse Account	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Account
CUSTPRGS...	Customer Price Group		ToIntegrat...	CRM Pricelevel	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Price List
ITEM UOM	Item Unit of Measure		ToIntegrat...	CRM Uom		<input checked="" type="checkbox"/>	Unit
ITEM-PRO...	Item	VERSION(1) SORTING(Field) W...	Bidirectional	CRM Product	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Product
OPPORTU...	Opportunity	VERSION(1) SORTING(Field) W...	Bidirectional	CRM Opportunity	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Opportunity
PAYMENT ...	Payment Terms		ToIntegrat...	Dataverse Account		<input checked="" type="checkbox"/>	Payment Ter
POSTEDSA...	Sales Invoice Header		ToIntegrat...	CRM Invoice	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Invoice
POSTEDSA...	Sales Invoice Line		ToIntegrat...	CRM InvoiceDetail		<input checked="" type="checkbox"/>	Invoice Proc
RESOURCE ...	Resource Unit of Measure		ToIntegrat...	CRM Uom		<input checked="" type="checkbox"/>	Unit
RESOURCE...	Resource	VERSION(1) SORTING(Field) W...	ToIntegrat...	CRM Product	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Product
SALESORD...	Sales Header	VERSION(1) SORTING(Field) Fat...	ToIntegrat...	CRM Salesorder	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Order
SALESPEOP...	Salesperson/Purchaser		FromIntegr...	Dataverse Systemuser	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	User
SALESPRC...	Sales Price	VERSION(1) SORTING(Field) Fat...	ToIntegrat...	CRM Productpricelevel		<input checked="" type="checkbox"/>	Product Pric
SHIPMENT ...	Shipment Method		ToIntegrat...	Dataverse Account		<input checked="" type="checkbox"/>	Address 1: F
SHIPPING ...	Shipping Agent		ToIntegrat...	Dataverse Account		<input checked="" type="checkbox"/>	Address 1: S
UNIT GROUP	Unit Group		ToIntegrat...	CRM Uomschedule		<input checked="" type="checkbox"/>	Unit Group
VENDOR	Vendor	VERSION(1) SORTING(Field) W...	Bidirectional	Dataverse Account	VERSION(1) SORTING(Field) W...	<input checked="" type="checkbox"/>	Account



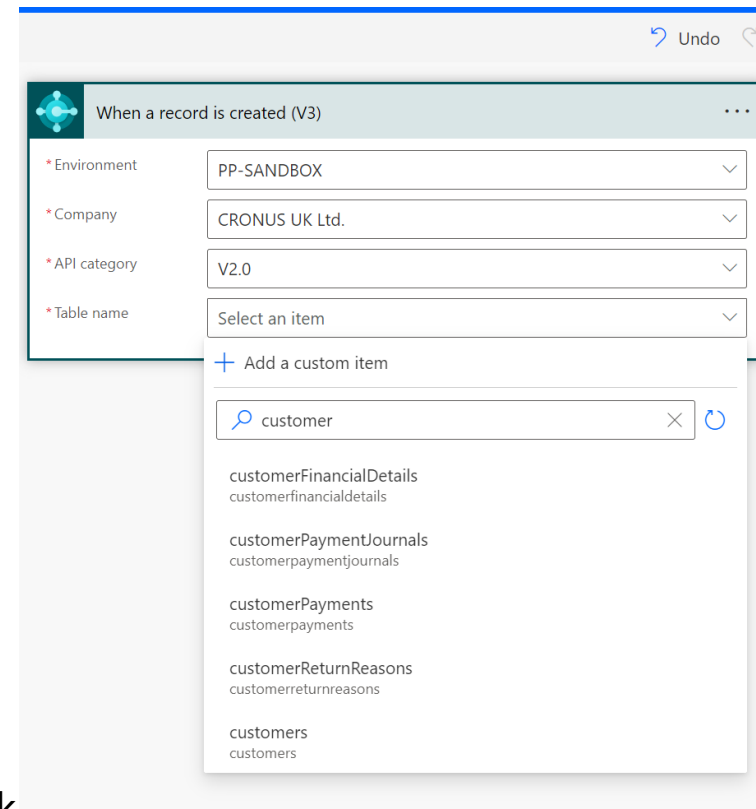
# Standard Integration DEMO

- Sending sales orders from CRM to BC
- Navigating between CRM & BC using the magic button -
- [Account: Account Management Form: \\* Adatum Corporations - Dynamics 365](#)



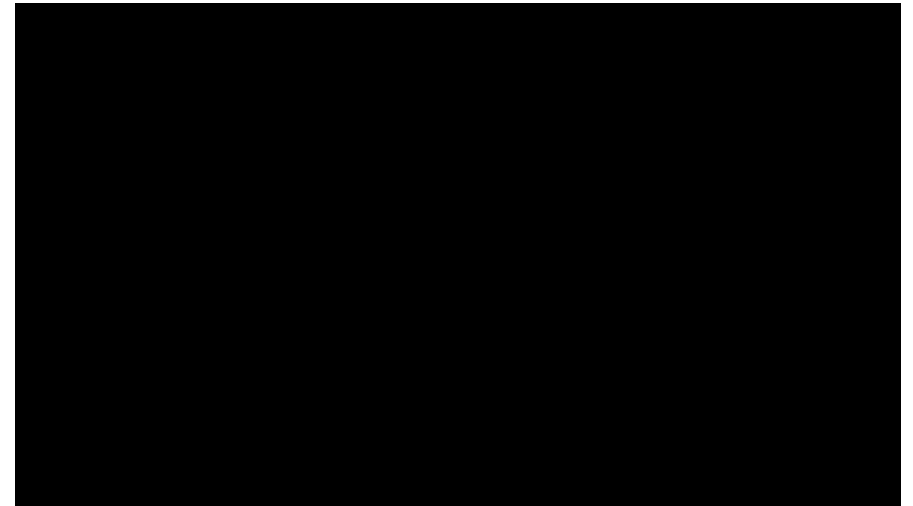
# Power Automate

- Preferred Use Case:
  - Triggerable Events (from BC or CRM)
- Pros
  - Easier to define 'When'
  - Works using standard or customised API's so it easier to extend.
  - Doesn't consume [much] 'resource' from either platform
  - No additional third-party licence
  - Can be used with either system as the source
- Cons
  - Nothing templated as Standard, so longer set up time
  - Data exists in both systems, taking up storage space
  - Error handling is a Super User/System Admin task
  - Can be slower than the Standard Integration (Depending on the complexity of the flow)



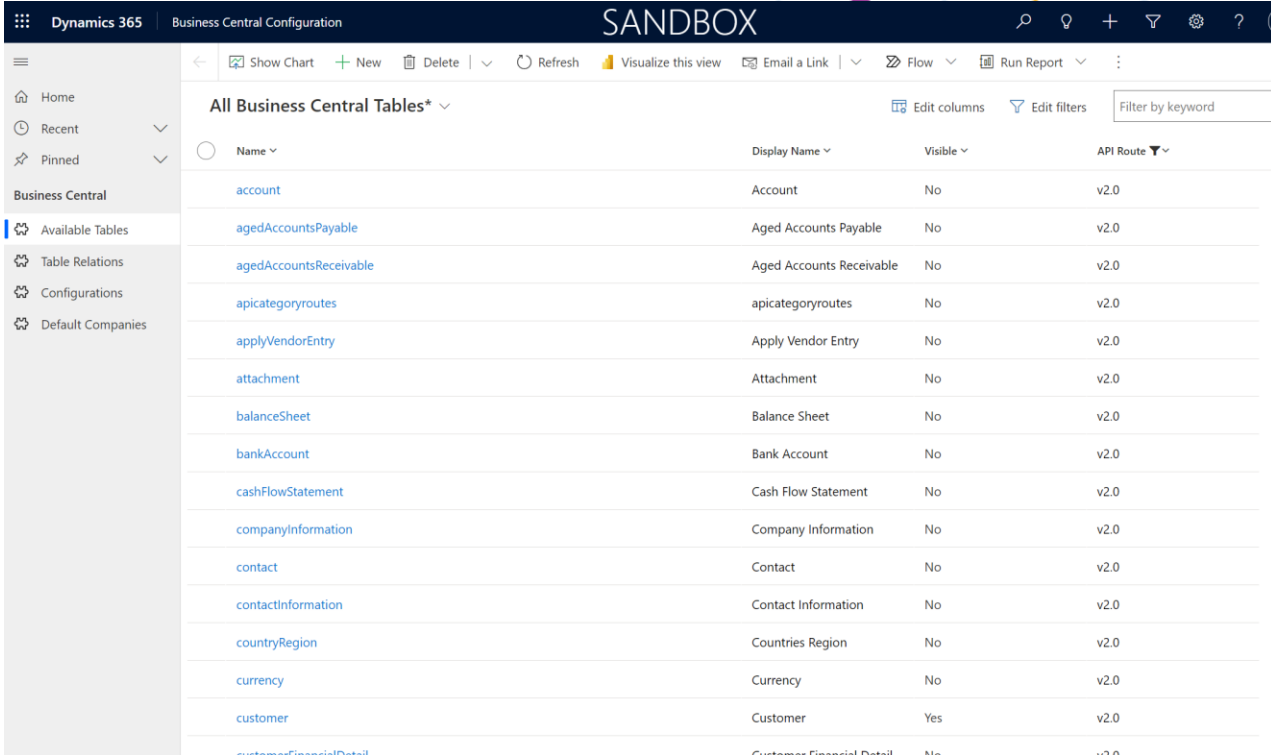
# Power Automate Integration DEMO

- Business Events triggers – syncing credit on hold / blocked customers and JavaScript warning



# Virtual Tables

- Preferred Use Case:
  - Informational Data & Large Tables
- Pros
  - Data is Live
  - Doesn't require additional storage in target system
  - Can be used to perform advanced actions by combining with Power Automate
  - No data transfer, therefore, no error handling
- Cons
  - Can only be used from BC to Dataverse (CRM)
  - Additional setup required to take advantage of the data (needs exposing within CRM)
  - Requires both a Dataverse and BC Licence

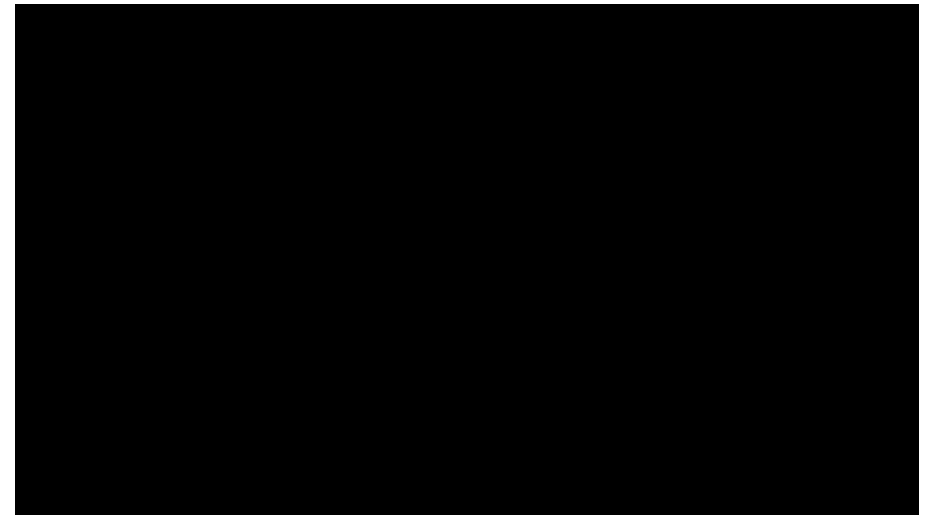


The screenshot shows the Dynamics 365 Business Central Configuration interface in a sandbox environment. The page title is "All Business Central Tables\*". The table lists various tables with columns for Name, Display Name, Visible, and API Route. The "Available Tables" section is selected in the left-hand navigation pane.

Name	Display Name	Visible	API Route
account	Account	No	v2.0
agedAccountsPayable	Aged Accounts Payable	No	v2.0
agedAccountsReceivable	Aged Accounts Receivable	No	v2.0
apicategoryroutes	apicategoryroutes	No	v2.0
applyVendorEntry	Apply Vendor Entry	No	v2.0
attachment	Attachment	No	v2.0
balanceSheet	Balance Sheet	No	v2.0
bankAccount	Bank Account	No	v2.0
cashFlowStatement	Cash Flow Statement	No	v2.0
companyInformation	Company Information	No	v2.0
contact	Contact	No	v2.0
contactInformation	Contact Information	No	v2.0
countryRegion	Countries Region	No	v2.0
currency	Currency	No	v2.0
customer	Customer	Yes	v2.0
customerFinancialDetail	Customer Financial Detail	No	v2.0

# Virtual Tables DEMO

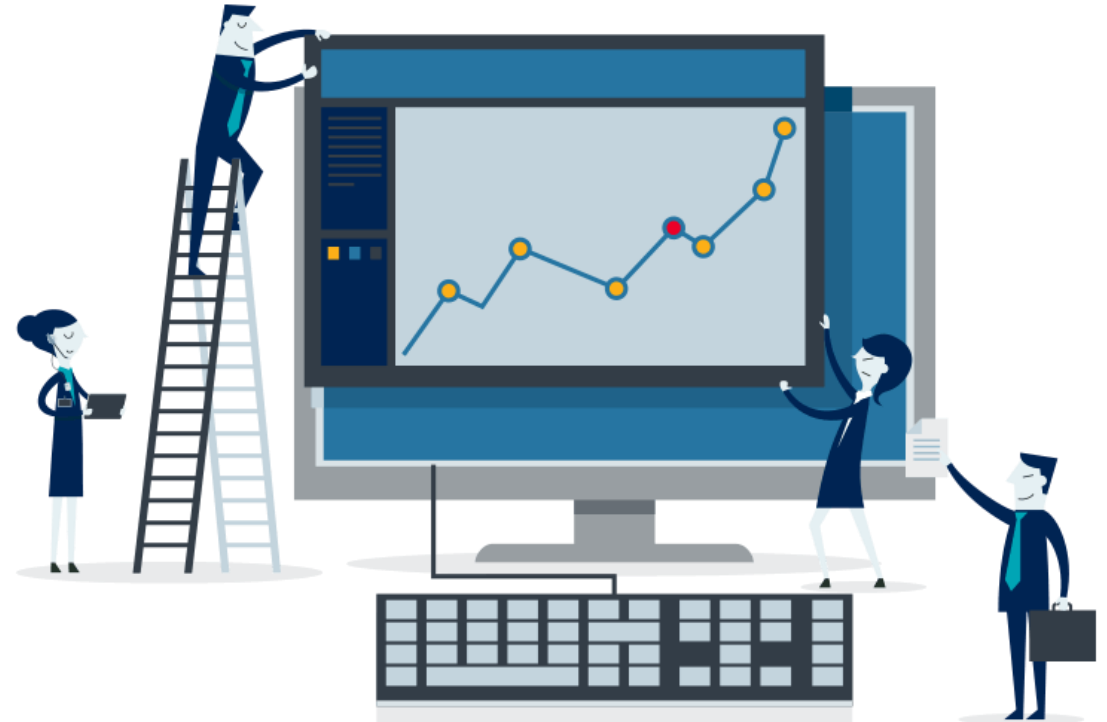
- Lookup to warranties (service items) on a case.
- Add service items to sitemap.



# 3<sup>rd</sup> Party Middle Ware

Preferred Use Case:

- Legacy / PaaS / on-premise platforms
  - When Standard Integration, Power Automate or Virtual Entities are not viable (
- Pros
  - Uses a similar set up to standard integration with defined table mappings
  - Works using Published API's
  - Doesn't consume [much] 'resource' from either platform
  - Can be used with either system as the source
- Cons
  - Depending on the platform, templates can be limited, so set up can be complex and time consuming
  - Requires additional software licencing
  - Data is duplicated across platforms taking up storage space
  - Error handling is a Super User/System Admin task



# What we covered

1 What, Where, When & Why?

2 How?

3 Standard Microsoft Integration

4 Power Automate

4 Virtual Entities

5 3<sup>rd</sup> Party 'Middle Ware'

6 Q & A



QUESTIONS ?







THANK YOU

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