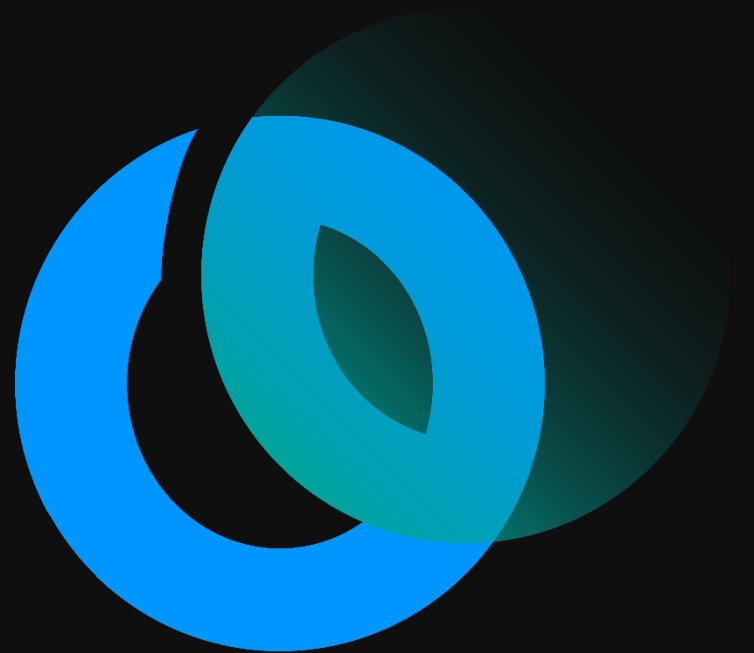


Azure extensions for Dynamics CRM

11th Feb 2022



Why is the need for Azure extensions for Dynamics CRM?

Trend

- More & more organizations are moving towards Dynamics CRM online implementation where data integration is becoming a key responsibility.
- Azure is having great connectors which can work seamlessly with Dynamics CRM for Data integration and Migration
- Licensing cost at times go high when we connect to Dynamics CRM online every time from individual apps .So applications are trying to see best usage of dynamics CRM using Azure SAAS resources

Some use cases around Dynamics CRM

- ❖ How to share data Realtime with integration partners
- ❖ How to archive and restore data from one environment to other environment in Dynamics CRM over a period
- ❖ How to expose data from Dynamics CRM over an custom API framework
- ❖ How to use AI to read email attachments in Dynamics CRM and create an record?

Solution: Using Azure extensions for dynamics CRM will help to implement smart solutions when it comes to Data integrations, API management and Data archival from Dynamics CRM .

Atos Azure Extensions for Dynamics CRM

Azure extensions to Dynamics CRM provides well defined configured process, prerequisites and steps which can be used by organizations for data real time integration, Custom jobs, Sentiment analysis, Data archival and retention

TOOLS

Publish Subscribe Mechanism

Provides a framework for exchanging messages between publishers and subscribers. Realtime data integration

Background Automation

Code-first service built to run as Azure Web Jobs. Used for complex data associations in dynamics crm

Artificial Intelligence

Leveraging Power Platform AI feature to read emails from users and extract content to use it in Dynamics CRM

API Management

API management through by using configurations in Azure API management. An wrapper around Dynamics CRM.

Sentiment Analysis

AI cognitive feature analysis to understand mood of end users through cognitive analysis.

Data Archival & Retention

Data retention and archival of data for large organizations where more transactional data stored in Dynamics CRM.

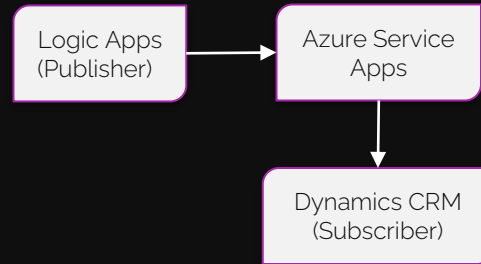
Publish Subscribe through Logic Apps

An asynchronous messaging system which shares information between dynamics CRM and Azure publish subscribe mechanism.

What it Delivers...

- Keep the data integration close to real-time from or to dynamics CRM
- Will prevent lag time of using system jobs where we are pushing data once in a day.
- It can be used as single source of truth for Dynamics CRM data that needs to be published to multiple consumers.

Logical Flow



Publishers - who sends the information

Subscribers - who receives the information

Use cases

- This can be implemented in areas where customer is looking to share data from dynamics instance to multiple integration partners
- It is best alternative to biz talk kind of implementation if we are already using Azure platform in the current implementation

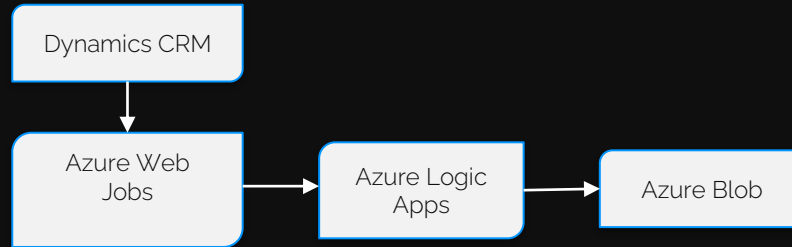
Web Jobs – Dynamics CRM Data upload to Azure Blob

A scheduled recursive background job which takes data from Dynamics CRM and store it in Azure Blob storage.

What it Delivers...

- This solution is an alternative to generate feeds with external partners using code first approach .
- It can be extended to do any complex retrieval of data sourced from CRM, we can rely on web jobs to do the same other than using Azure data factory or integration streams where we have limitations.
- Supports features such as source control integration, authentication and monitoring with Application Insights integration.

Logical Flow



Use cases

- Users can use this tool to share data with external partners in the form of files where we don't want to invest on additional azure resources and looking for cost less approach
- Can be used in implementations Where customer is not looking for ETL to extract data and relying on traditional jobs to extract data

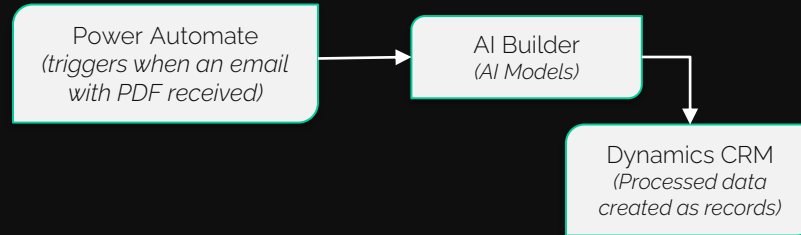
AI Builder – Processing PDFs in CRM emails

AI Builder extracts information from PDF document which comes as an attachment in emails, extract the content to create records in Dynamics CRM.

What it Delivers...

- It is a turnkey solution that brings the power of AI through a point-and-click experience, so you don't need coding or data science skills to access the power of AI.
- It can support custom models tailored as per customer needs to support their business requirement.
- Power platform is a robust framework and we got support for any issues at the platform end.

Logical Flow



Use cases

- If there is huge inflow of attachments in email in Dynamics CRM for a customer and if it needs to be automated this implementation will be best fit
- Can be used where we are looking for less investment in AI skills and rely on cost effective approach for automation of reading attachments

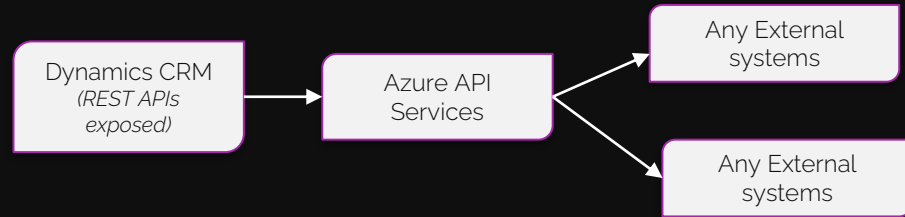
API Management to expose CRM APIs

It helps organizations publish APIs to external partner, and internal developers to unlock the potential of CRM data.

What it Delivers...

- These are API's exposed over Dynamics CRM helps organization to expose data to partners with only configuration and no code.
- Supports security by leveraging authentication and authorization using OOB configuration.
- We can gain business and operational insights by connecting with app insights and log analytics.

Logical Flow



Use cases

- Azure API management (APIM) can be helpful for customers who looks for onboarding and managing API calls to Dynamics 365 this framework can be supporting the same
- It will be helpful where we don't want to rely on coding to create wrapper APIs and use OOB configuration to build APIs

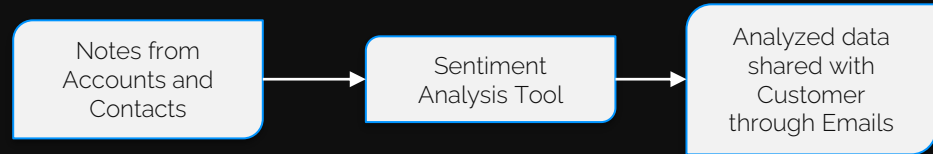
Cognitive Analysis on Dynamics CRM entities

A scheduled recursive background job which takes data from Dynamics CRM and store it in Azure Blob storage.

What it Delivers...

- This solution is an alternative to generate feeds with external partners using code first approach .
- It can be extended to do any complex retrieval of data sourced from CRM, we can rely on web jobs to do the same other than using Azure data factory or integration streams where we have limitations.
- Supports features such as source control integration, authentication and monitoring with Application Insights integration.

Logical Flow



Use cases

- If we are looking constantly for end user feedback and to understand their usage Cognitive features can help to evaluate the same
- Organizations looking for constant upgrade of product using feedback can opt for this tool as an implementation

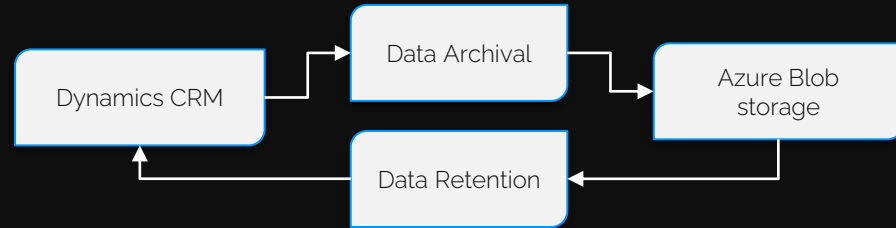
Data Archival and Retention of Dynamics CRM data

Data Archival and Retention' solution enables administrators of Dynamics CRM to do archive of required range of data to COSMOS DB, Azure Blob and Azure Data Lake Storage using Azure platform.

What it Delivers...

- Configured CRM user friendly UI to enable user to select what data needs to be archived.
- This archival data can be shared with analytics team or DWH team to create a member specific data. Eg: 360-degree member centric data.

Logical Flow



Use cases

- Organizations who are thinking of maintaining data volume and number of records in transactional environment
- Organizations where they are looking for creation of multiple dynamics instance mirroring out from single instance can use this feature

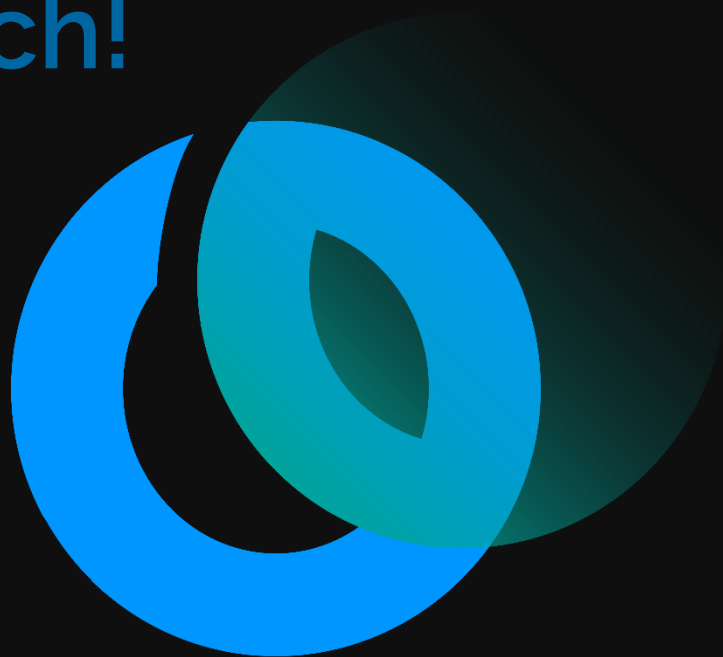
Benefits of Azure extensions to Dynamics CRM

- Readily available implementation team to apply configurations from Dynamics CRM to Azure and vice-versa to make data integrations and data movement close to real-time.
- Reduce cost of delivery and time taken to implement Azure extensions in projects.
- New teams can be easily ramped up with various training material and product guides available for use in projects.
- Value added benefits when used alongside Dynamics CRM

Target Customers?

- Organizations who have already adopted Dynamics CRM (on-premise/cloud) and looking for using Azure platform to leverage data from Dynamics CRM.
- Organizations using Dynamics CRM looking for data integration, API management, archival

Thank you very much!



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