

PO-BC Integration Module

Enhancing Sales to Billing Experience
with Dynamics 365



✦ Executive Summary ✦

Microsoft Dynamics 365 Projects Operations (PO) and Business Central (BC) are two essential components of the Microsoft Business Applications suite, providing comprehensive functionalities for sales, project management, billing, and accounting within service organizations.

Integrating the sales and billing platforms is crucial for generating valuable reports and facilitating streamlined processes across departments and management. Organizations can avoid missed billing opportunities and ensure timely payments by enabling the seamless exchange of key metrics such as project billing and overdue invoices.

This whitepaper outlines the CloudFronts integration solution for PO and BC, highlighting its benefits and the underlying technology stack.

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Business Scenario

Professional services firms rely on projects and resources to track and bill their clients promptly, ensuring timely revenue collection.

While Project Operations excels as a sales and project management tool, it only supports up to Pro Forma Invoicing.

On the other hand, Business Central is a robust accounting and enterprise resource planning (ERP) platform, handling invoicing and accounting aspects.

However, the lack of integration between these systems hinders the automation of the sales-to-billing process.

Bridging this gap through our CloudFronts PO-BC Integration Module offers a seamless sales-to-billing experience, meeting the unique needs of professional services firms.

Moreover, this integration aims to provide comprehensive reporting capabilities, offering valuable insights into the business's overall health.

Process Flow

The following illustrates the process flow from sales to billing, outlining the integration steps between PO and BC:

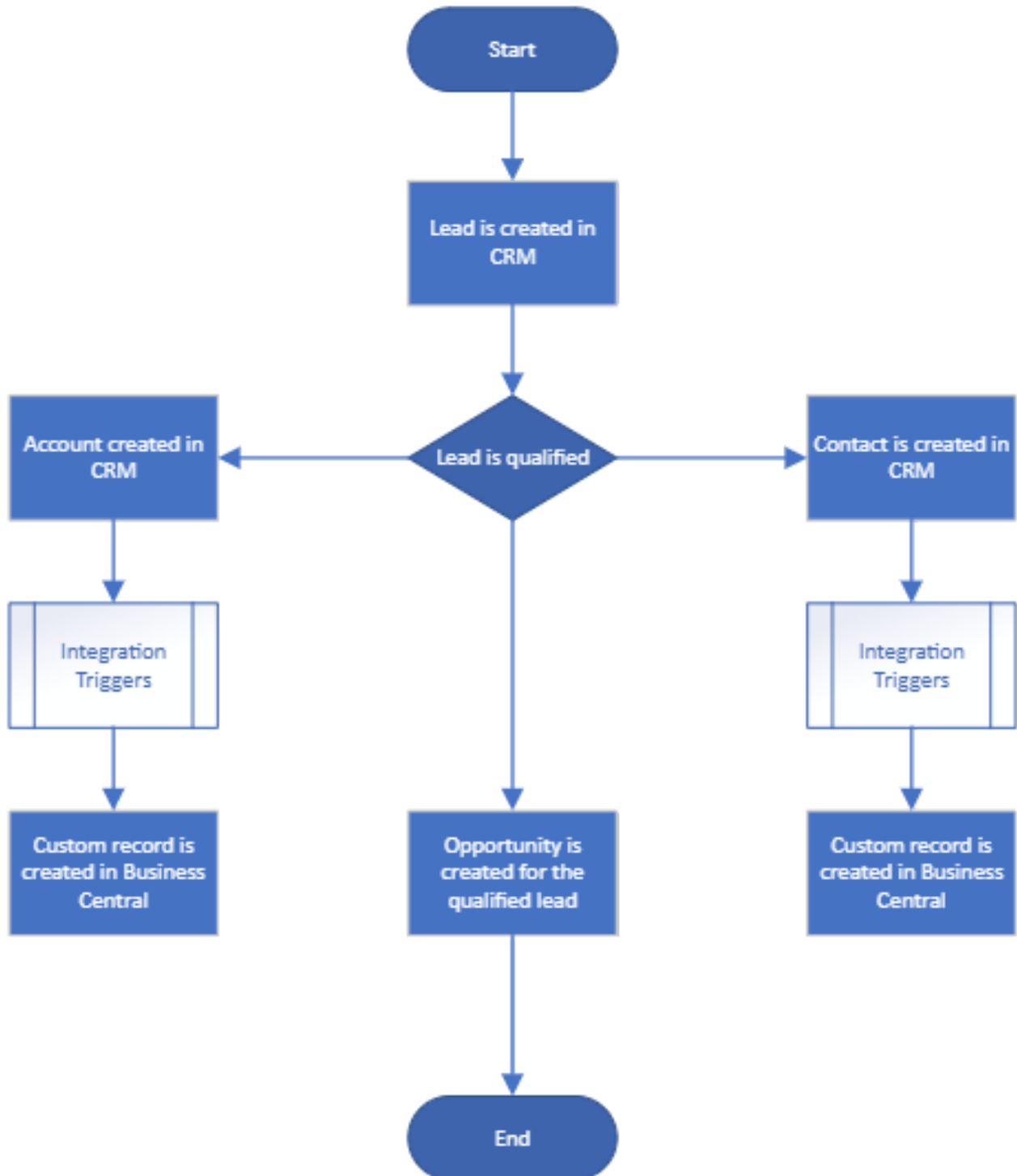
Sales Cycle and Account/Contact Data Sync

When a Lead is qualified, the Accounts and Contacts created in Project Operations are seamlessly synchronized with Business Central via the integration module.

Master Data Sync

In addition to Account and Contact information, Zip Codes and Country Codes are synchronized as master data in Business Central, enabling accurate address information.

Process Flow (Cont...)



Process Flow (Cont...)

Project Contract Creation

Upon winning a quote under an Opportunity, a Project Contract is generated in Project Operations, including the Fixed Price and/or Time and Material lines.

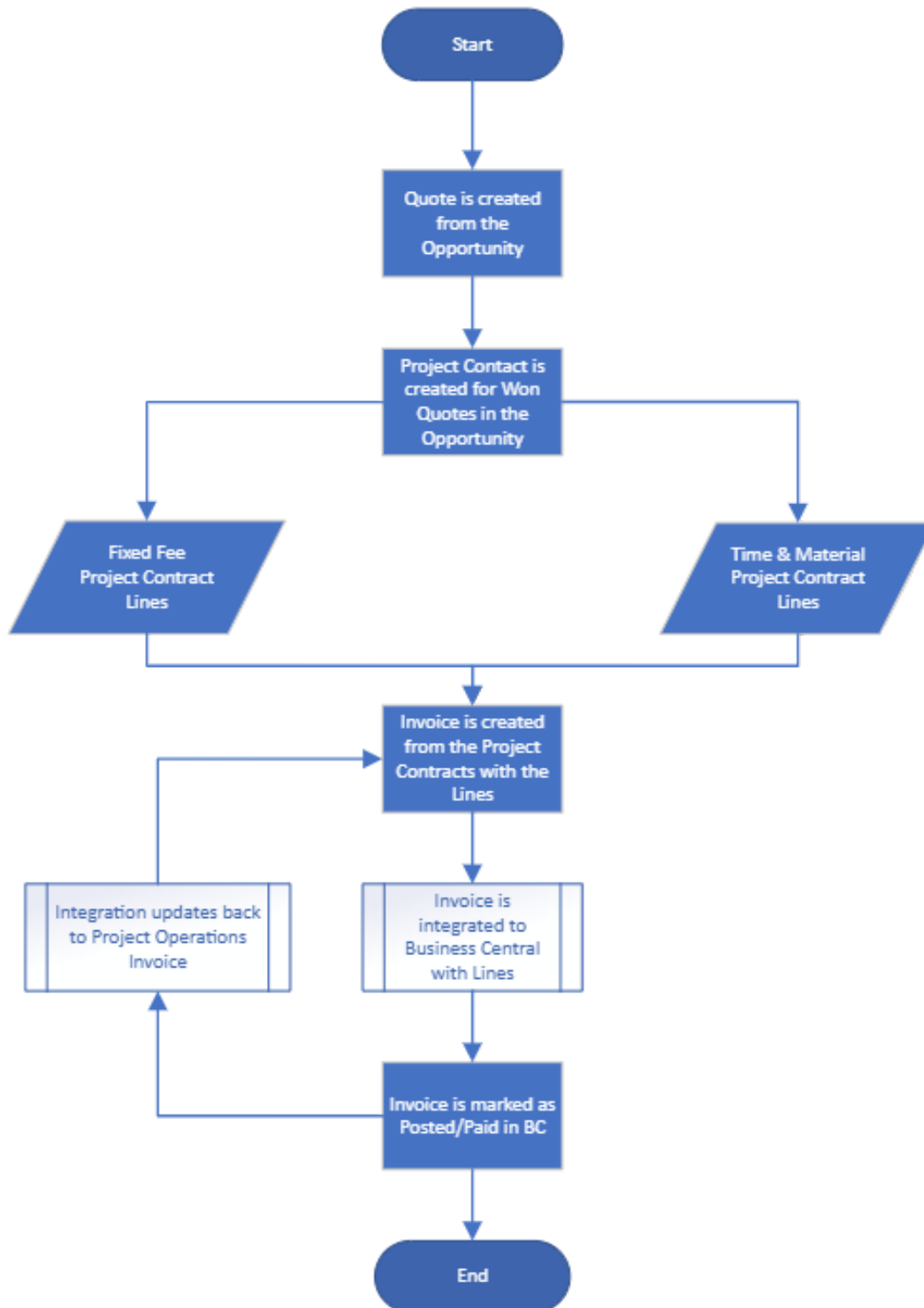
Invoice Generation and Sync

The Project Contract generates an Invoice containing the specified lines. By clicking a button, the Invoice is synchronized with Business Central.

Invoice Payment Update

Once an Invoice is marked as paid in Business Central, the update triggers back to Project Operations, marking the corresponding Invoice as paid.

Process Flow (Cont...)

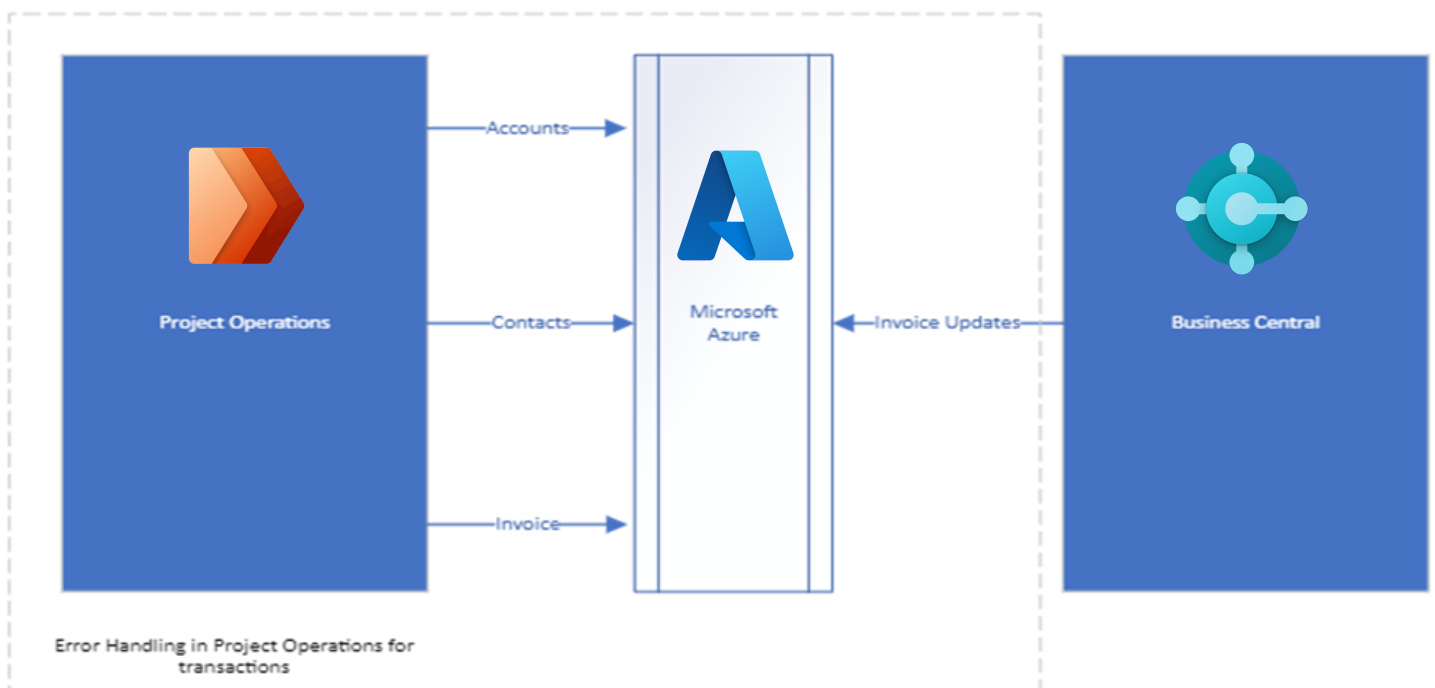


Process Flow (Cont...)


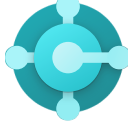

System Architecture

The high-level system architecture of the CloudFronts PO-BC Integration Module is depicted below.

Any integration errors occurring on the Project Operations side are recorded in Dynamics 365 Project Operations for easy issue identification.



Technology Stack

 Dynamics 365 Project Operations	 Dynamics 365 Business Central	 Microsoft Azure
Sales to Pro-Forma Invoicing Platform <ul style="list-style-type: none">• CloudFronts PO-BC Integration Module used for sending data out of Dynamics 365• Dynamics 365 Customization like Custom Entities to support Integration related details• JavaScript for custom buttons/controls	Accounting Platform <p>Dynamics 365 Business Central receives synchronized data from Project Operations. This robust ERP system provides comprehensive financial management capabilities and ensures accurate and timely invoicing and accounting processes.</p>	Integration Platform <p>Azure Functions, a serverless computing service, play a vital role in orchestrating the integration between Dynamics 365 Project Operations and Business Central. These functions enable seamless data transfer, trigger event-based actions, and facilitate reliable and scalable integration processes.</p>

Conclusion

By integrating Dynamics 365 Project Operations and Business Central, organizations can achieve a seamless sales-to-billing experience and unlock rich reporting capabilities. This can be accomplished using the CloudFronts PO-BC Integration Module, an Azure-based extension that enhances both platforms' functionalities.

With streamlined processes and reliable data exchange, businesses can optimize their sales, project management, billing, and accounting operations, driving growth and success in the dynamic professional services landscape.