

External Data Manager

for Microsoft Dynamics 365 Finance & Operations/
Supply Chain Management, Commerce

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WaveAccess offers a Dynamics 365 Finance & Supply Chain extension that allows displaying any data from any system without additional programming. With this Extension you have an ability to show and edit external data at D365 F&O interface without creating the new extension for each case.

Benefits

- Enjoy the convenience of seeing necessary data displayed in a single window
- Save Time and effort. Here's how: We all know, creating a field in ERP is complicated and takes time. In our solution you create a field in CRM and use it in the ERP system.
- Display data from non-user interface sources, for example, from a database
- Avoid double licensing, for example, you can use 1 user ERP system instead of 2, both an ERP and a CRM

Features

- Convenient setup and an easy to use data type selection
- Search, filter and sort data from an external system
- Edit external system data directly from your Dynamics 365 Finance & Supply Chain interface

What data can be integrated

into Dynamics 365 F&O

- Databases (Oracle, MS SQL, PostgreSQL etc)
- ERP (SAP, MS Dynamics 365 Business Central, etc)
- CRM (Dynamics D365 CE, SugarCRM, HubSpot, Salesforce etc)
- OData
- CSV

We can easily develop a custom connector for any type of structured data.

How it works

Example: we work with D365 Customer Engagement(CRM) and D365 F&O (ERP). The data is synchronized, but we have created new columns at CRM and want to show it at ERP interface to filter by the field.

Fields "Telephone" and "Created on" are from CRM displayed as a standard grid in ERP.

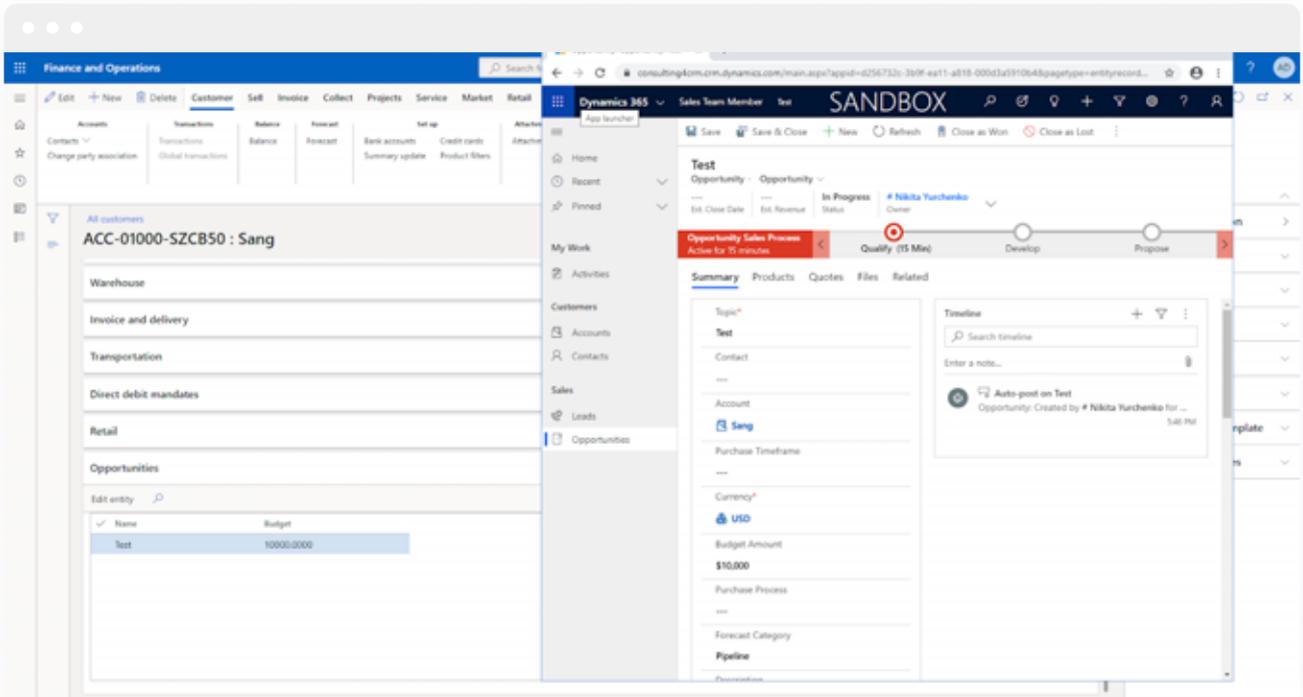
The screenshot shows the Dynamics 365 Finance and Operations interface. The main area displays a grid of customer records. The columns include Account ID, Name, Invoice account, Customer group, Currency, Telephone, Extension, Is merged, Telephone, and Created on. The 'Created on' column is highlighted in blue, indicating it is a field imported from CRM. The 'Telephone' column is also highlighted in blue. The grid shows several customer records, including 'ACC-01000-SZCB50 : Sang' and 'ACC-01001-YN2KD : Hensal'.

Account ID	Name	Invoice account	Customer group	Currency	Telephone	Extension	Is merged	Telephone	Created on
20191202-1	Test20191202-1		10	USD					
ACC-01000-SZCB50	Sang		10	USD	892343			123456	6/16/2020 10:48:21 AM
ACC-01001-YN2KD	Hensal		10	USD	839291				
CST-000026									
CST-000027									
CST-000028									
CST-000029									
DE-001	Contoso Europe		90	EUR	01234 56789				
US-001	Contoso Retail San Diego		30	USD	321-555-0160				
US-002	Contoso Retail Los Angeles		30	USD	123-555-0111				
US-003	Forest Wholesales		10	USD	123-555-0159				
US-004	Cave Wholesales		10	USD	123-555-0168				
US-005	Contoso Retail Seattle		30	USD	123-555-0172				
US-006	Contoso Retail Portland		10	USD	123-555-0112				
US-007	Desert Wholesales		30	USD	123-555-0162				
US-008	Sparrow Retail		30	USD	123-555-0163				
US-009	Owl Wholesales		10	USD	123-555-0164				
US-010	Sunset Wholesales		10	USD	123-555-0160				
US-011	Contoso Retail Dallas		30	USD	123-555-0117				
US-012	Contoso Retail New York		30	USD	410-555-0444				

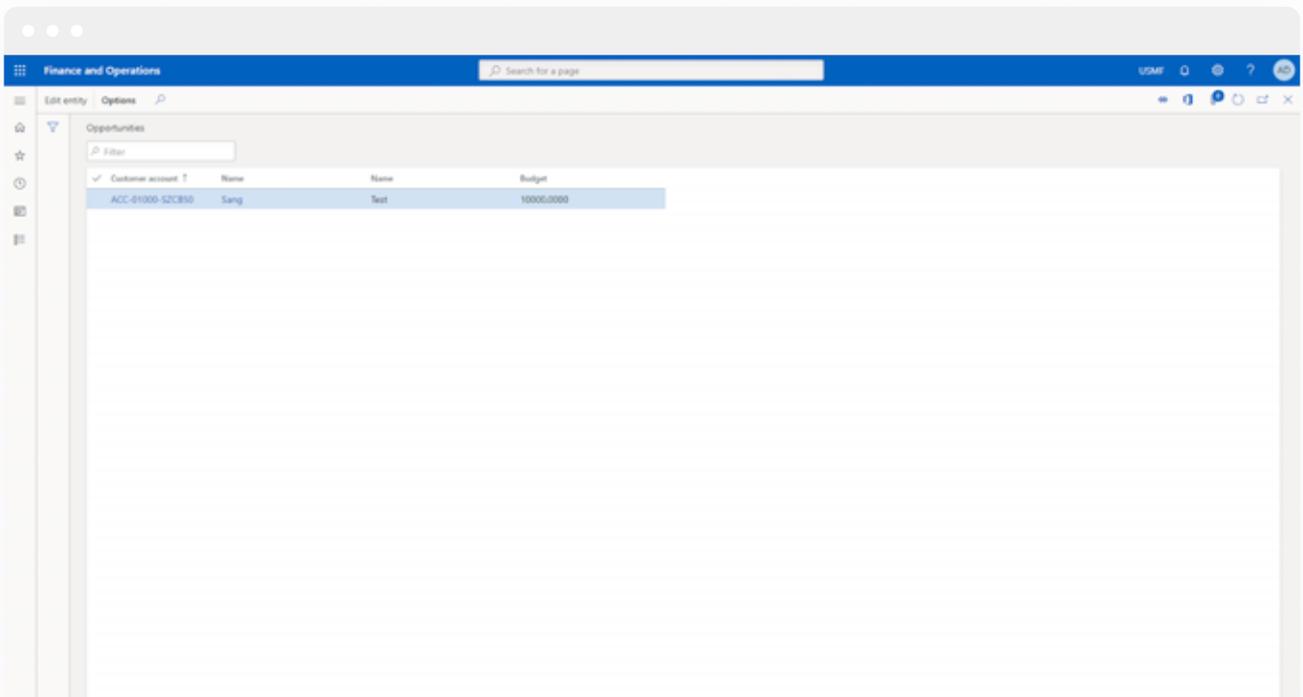
Exported data is displayed as a group at tab

The screenshot shows the Dynamics 365 Finance and Operations interface with a detailed view of a customer record. The customer name is 'ACC-01000-SZCB50 : Sang'. The 'CUSTOMER' tab is selected, and the 'Edit entity' button is highlighted with a red box. The 'CUSTOMER' tab contains fields for Telephone (123456), Created on (6/16/2020 10:48:21 AM), and Revenue. The 'Miscellaneous details' section includes fields for One-time customer, Country/region, FEDERAL ATTRIBUTES, INTERCOMPANY, and REMITTANCE. The 'Sales demographics' section includes fields for Sales demographics and Credit and collections.

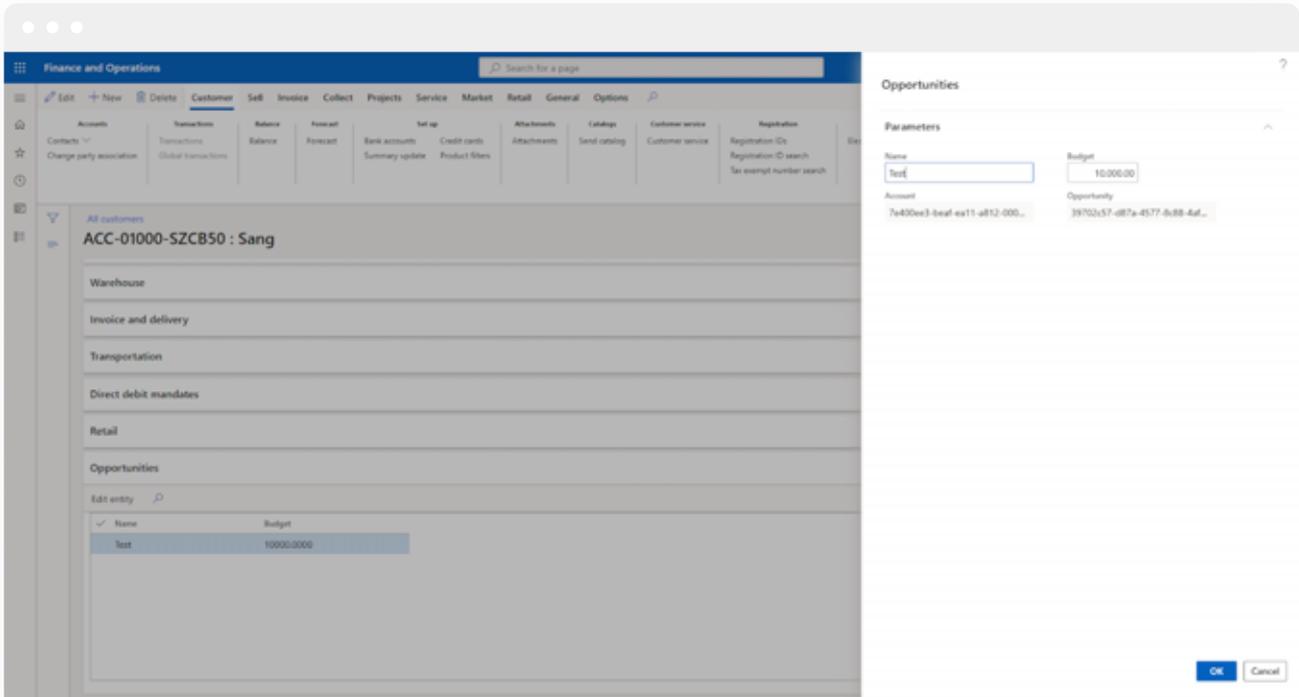
Related customer data i.e. opportunities from CRM are displayed in ERP interface



Also it is possible to show all related data at additional dynamic form: (for example, if there are no licenses for CRM, you can display the data from D365F&O in a simple grid)

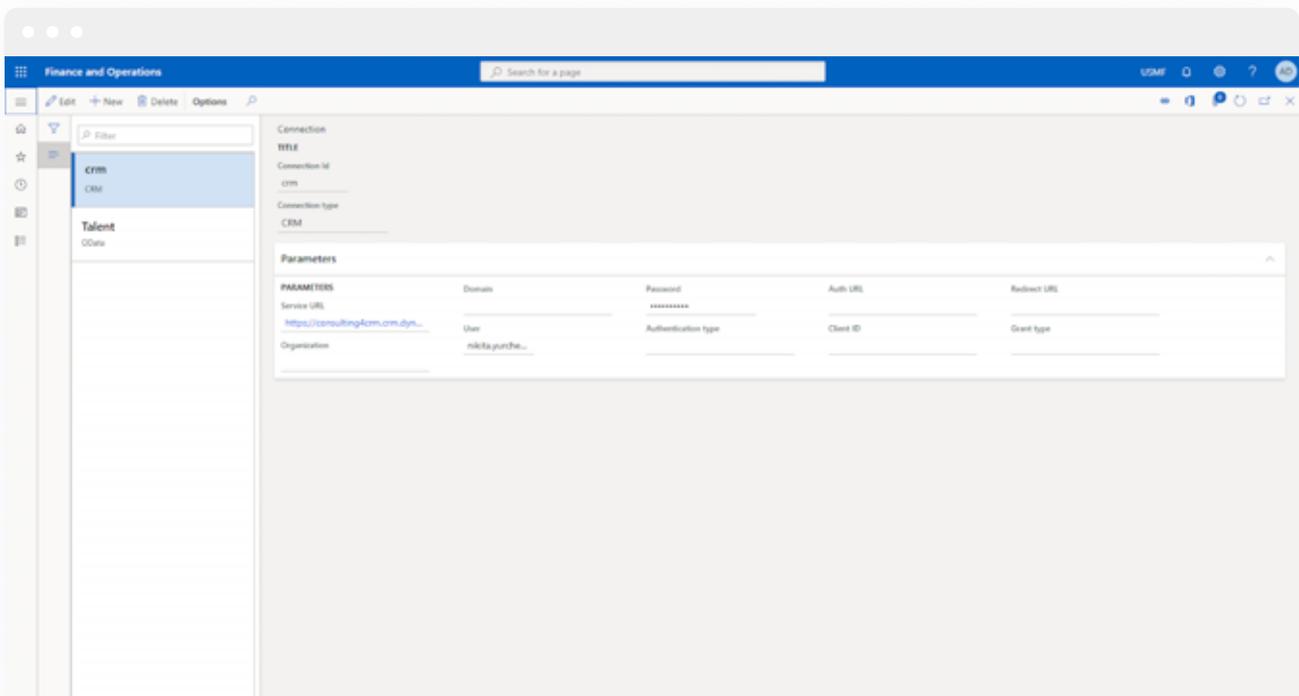


Edit option: you can edit any record from an external system – data is stored in this external system

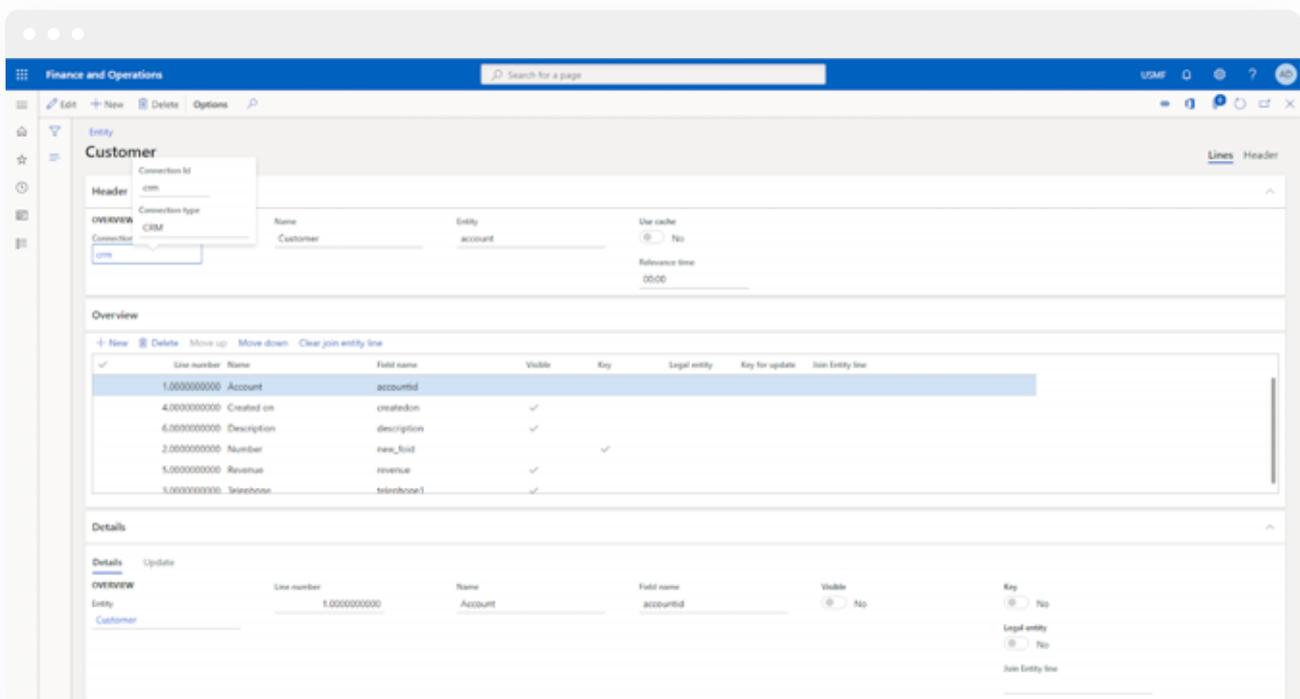
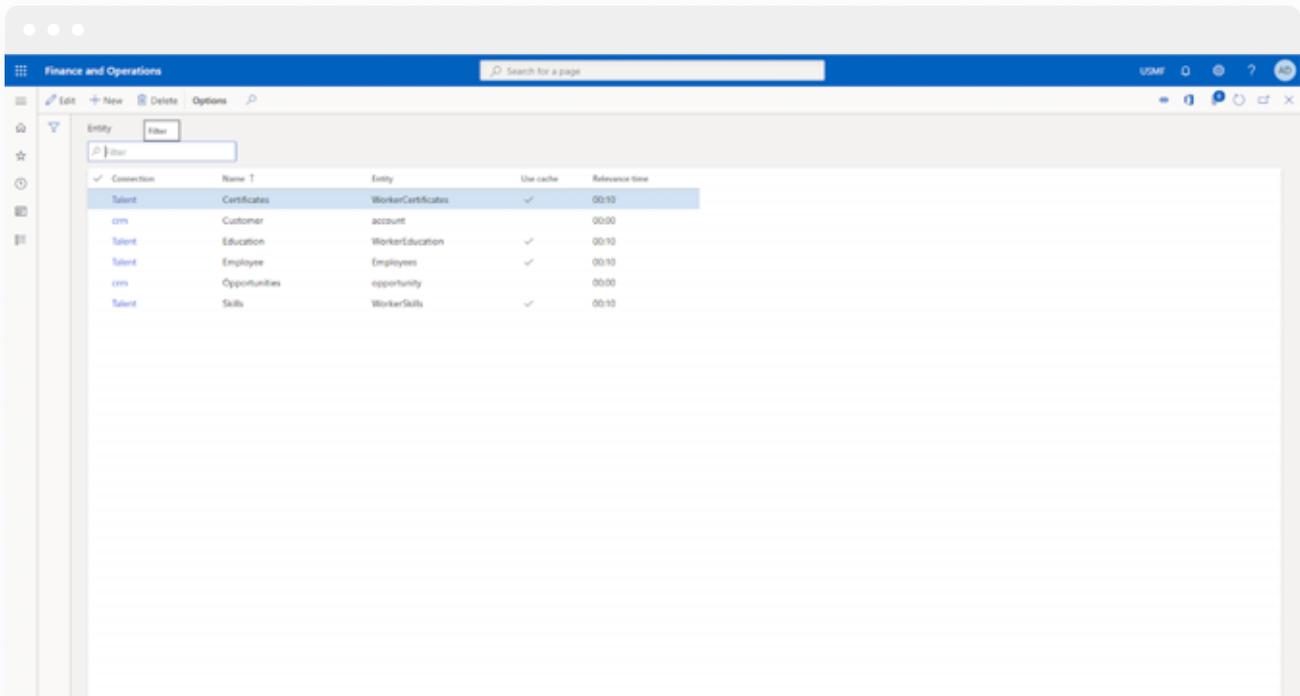


Settings

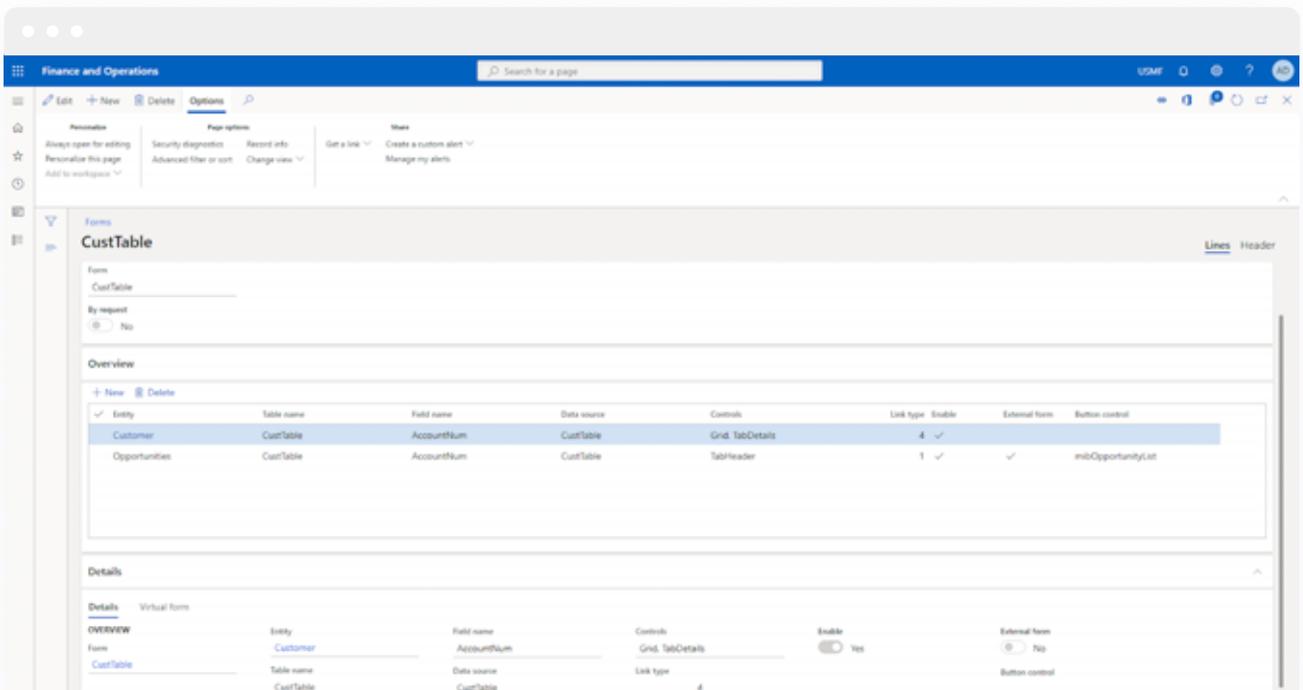
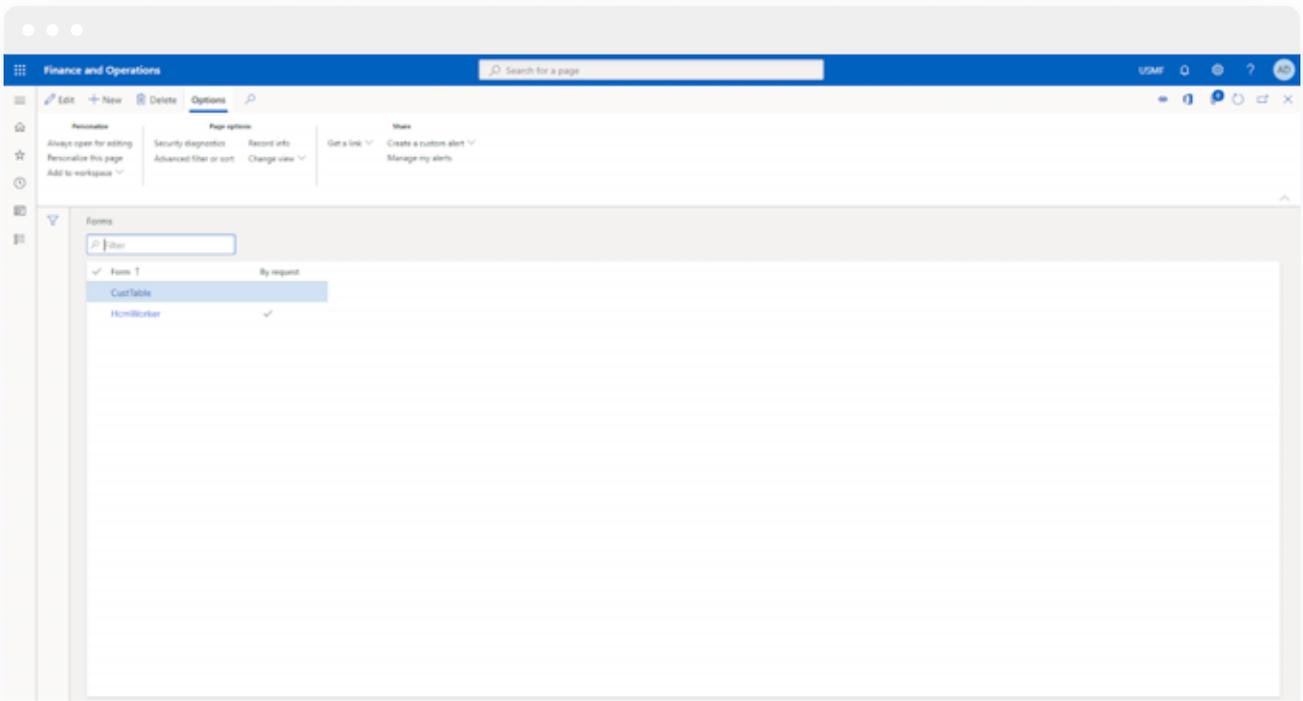
– Connections: (define ID and Type of connections and connection parameters)



- Entities to connect: setting up the necessary relationships between entities: one to one, one to many



- Mapping: In this window, the Customer entity is configured (we select which fields to display in D365F&O from the Account entity in D365CE(CRM))
- Forms: how and where to display new entities in D365F&O



About

Wave Access is a results focused software development company that provides high quality software outsourcing services to hundreds of emerging and established companies globally. We use our technical expertise to increase business efficiencies, optimize slow or unreliable systems, recover projects that have gone off track and bring ambitious ideas to life.

20+

years of delivering successful outcomes for customers

500+

talented & passionate professionals

4

global R&D centers

20+

completed machine learning projects

300+

successful projects delivered and counting

96%

of our customers are repeat business

Las Vegas

headquarters

USA, Germany, Denmark and Eastern Europe

sales offices

