

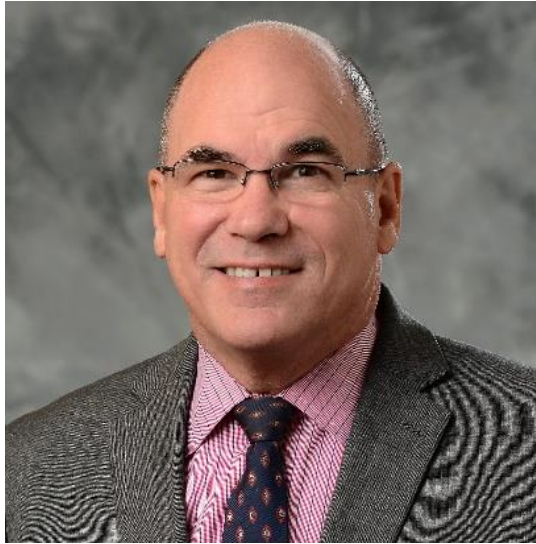
A stylized logo graphic consisting of a dark blue chevron pointing right, with a white line forming a square shape inside the chevron's path.

STONERIDGE CONNECT

2017 Client Conference



Dynamics CRM/AX Integration Options



About the Speaker

Steve Mortland

Principal Functional Consultant

Microsoft: 10 years

Total Industry Experience: 25+ years

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About the Speaker

Chris Hetzler

Architect

Microsoft: 12 years

Total Industry Experience: 14 years

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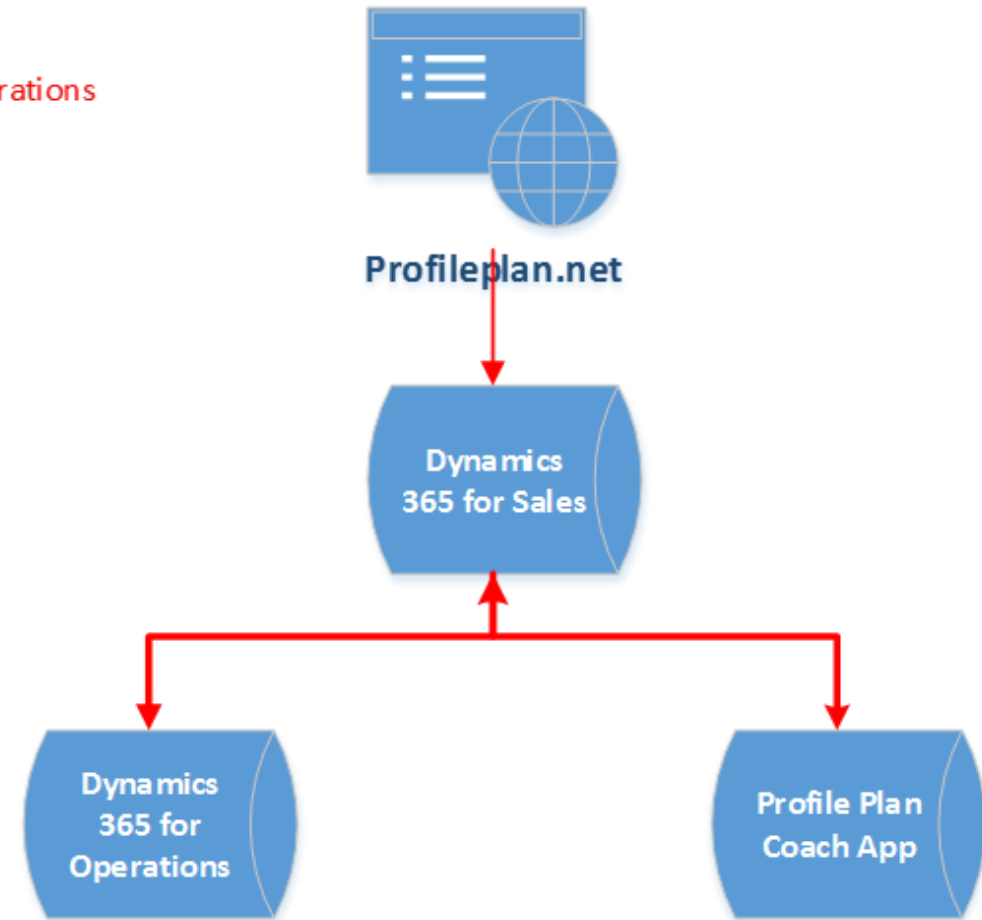
<https://stoneridgesoftware.com/team/chris-hetzler/>

Why Integrate CRM and ERP?

Customer story

- Profile by Sanford

→ Scribe Integrations



Considerations for Integrations

Applications

- Is there existing data in CRM or ERP?
 - If so, will this data need to be moved?
- Current application versions
 - When will you be moving to newer versions?
- Are there other applications that you would like to include in this integration?

Scenarios

- Are your business processes well defined and documented?
- What are the “need to have” and “nice to have” business processes that you want to enable via this integration and where should the ownership of these processes reside?

Considerations for Integrations

Data

- CRM and ERP have very different data schema (even in Dynamics products)
 - Transformation of the data will nearly always be required when performing an integration
- Do your scenarios require that transactions cross application boundaries?
 - If so, you will want to be extra diligent about documenting those processes and what the goals for acceptance are
- Do your scenarios only require reference data to be replicated?

Integration Tooling

- Some type of middleware is still needed when integrating Dynamics products with each other
- The type that you use will depend on your current and future version decisions
 - CDS (Common Data Service)
 - Scribe
 - Connector for Microsoft Dynamics
 - Others

Integration Middleware

- CDS (Common Data Service / Common Data Model)
 - Add-on for Power Apps
 - Connectors for Dynamics products coming this year
 - Will allow for syncing of Dynamics data with the CDS
 - Pre-defined templates will also be shipping soon for integrating Dynamics Sales with Dynamics Operations and/or Finance
 - Allows for the storage of the data that is common among the entities with your business
 - Will only support Dynamics 365 products out of the box
 - Requires an E2 subscription
 - More information: <https://powerapps.microsoft.com/en-us/blog/powerapps-cds-ga/>

Integration Middleware

- Scribe
 - Can integrate more than just CRM and ERP
 - Insights – on-premises
 - Older system that can be used with both online or on-premises products
 - Supports AX 2009 – D365 for Operations and CRM 4.0 – D365 for Sales
 - Online – Cloud-based
 - Supports D365 for Sales and D365 for Operations
 - Cloud-only integration

Integration Middleware

- Connector for Microsoft Dynamics
 - Does NOT support the Dynamics 365 product versions
 - Supports Dynamics AX 2009 & 2012 and NAV 2009 sp1 - 2016
 - Supports Dynamics CRM versions 4.0 – 2016, both on-premises and online (Cloud)
 - No additional licensing cost to licensed Dynamics customers
 - Limited scale and performance characteristics
 - On-premises deployment or IaaS cloud deployment
 - Requires a SQL Server database (versions 2008 – 2014)
 - SQL server 2016 is NOT supported

Integration middleware

- Others
 - Dell Boomi
 - Jitterbit
 - Flow / Azure Logic apps
 - BizTalk

Questions?

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