Dualwrite and Dataverse from a FnO perspective

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Podcasts:

- Dynamics Update

- En Liten Podd om IT

- The Nerd Herd

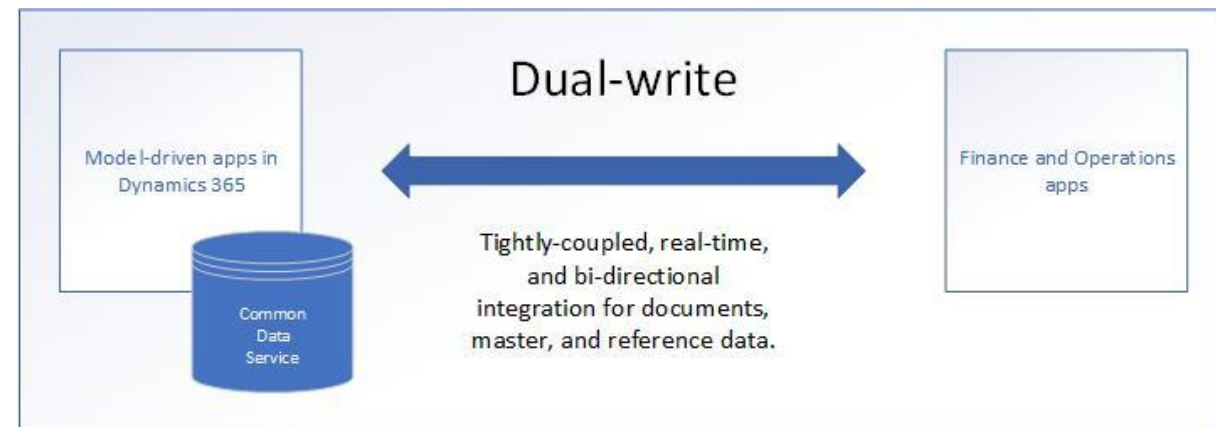**MVP** Microsoft® Most Valuable Professional

CONTENT

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What is DualWrite

Overview
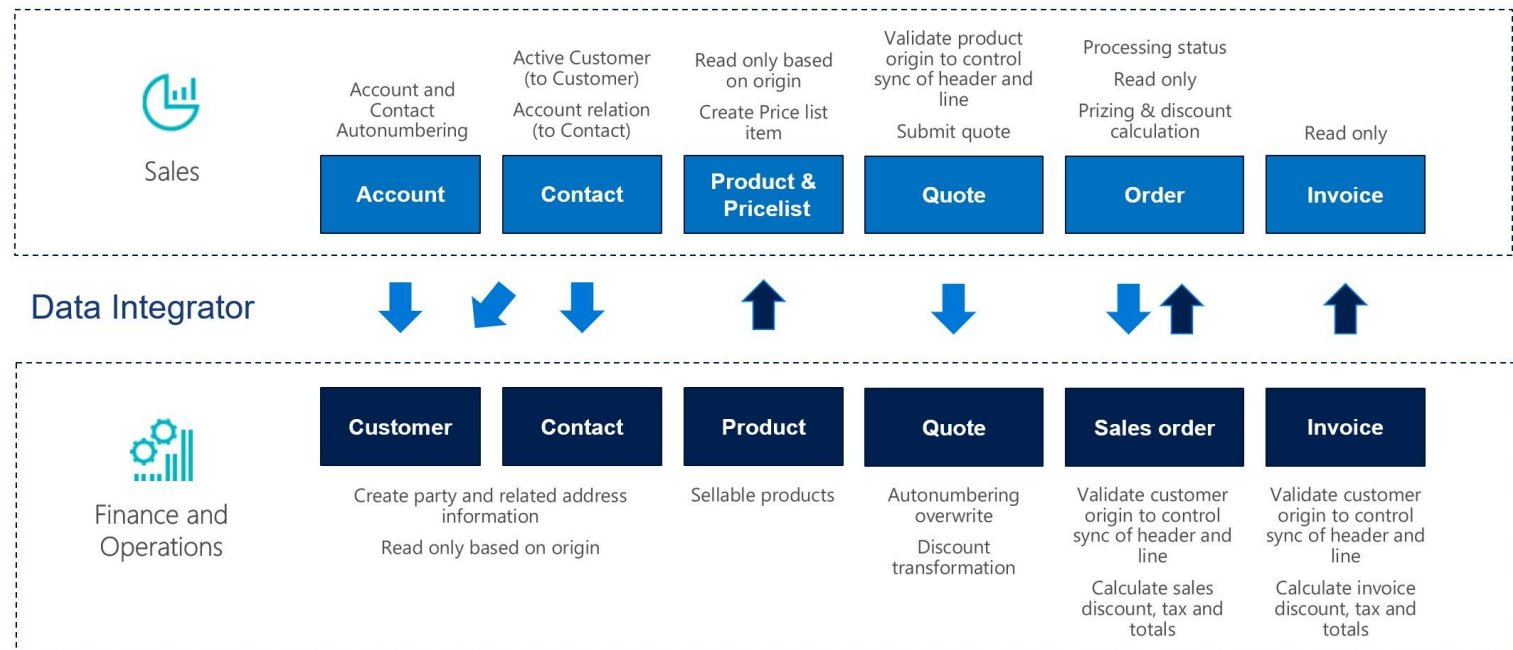
- Synchronous
- Bidirectional
- Initial Sync/Incremental
- Customizable mappings
- Filter and transform
- Complete end-to-end scenarios

Dual-write

Model-driven apps in Dynamics 365 ↔ Finance and Operations apps

Common Data Service

Tightly-coupled, real-time, and bi-directional integration for documents, master, and reference data.

Why use DualWrite?

- Out-of-the-box-solution
- Dataverse
- Power Platform enabled
- No-code/LowCode approach
- Resilience
- A lot is pre-made
- Microsoft method of choice
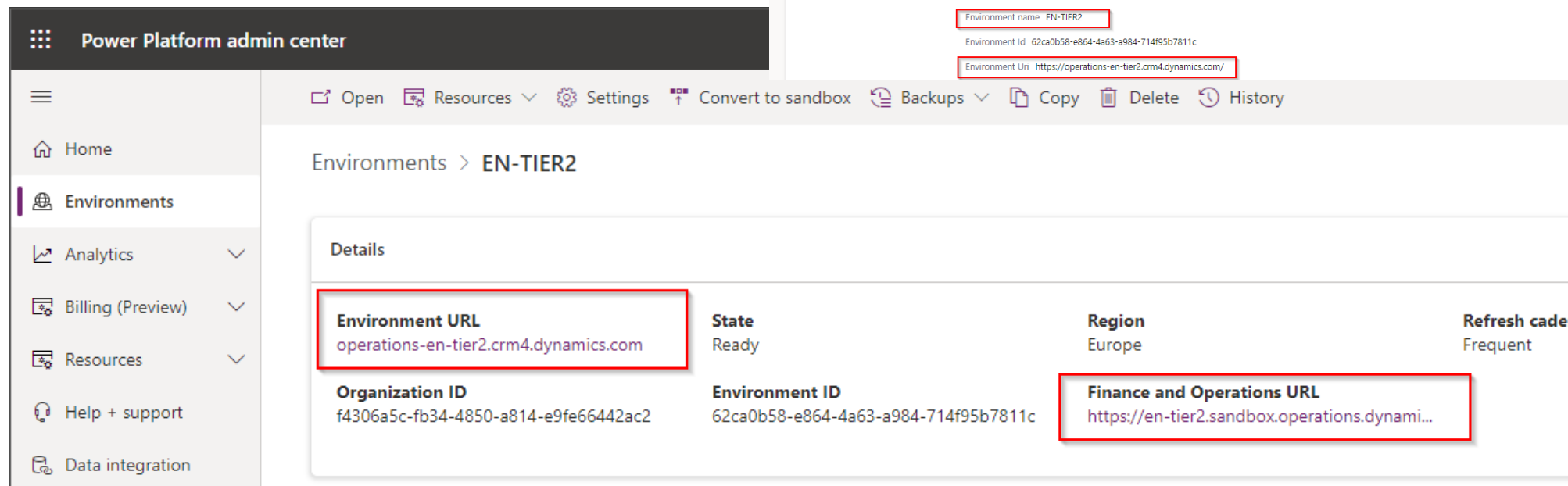
Prospect to Cash data flow

Sales						
	Account and Contact Autonumbering	Active Customer (to Customer) / Account relation (to Contact)	Read only based on origin / Create Price list item	Validate product origin to control sync of header and line / Submit quote	Processing status / Read only / Prizing & discount calculation	Read only
	Account	**Contact**	**Product & Pricelist**	**Quote**	**Order**	**Invoice**

Data Integrator

Finance and Operations						
	Customer	**Contact**	**Product**	**Quote**	**Sales order**	**Invoice**
	Create party and related address information / Read only based on origin		Sellable products	Autonumbering overwrite / Discount transformation	Validate customer origin to control sync of header and line / Calculate sales discount, tax and totals	Validate customer origin to control sync of header and line / Calculate invoice discount, tax and totals

Power Platform and Finance and Supply Chain

Is Dataverse FnO or CRM?

- Power Platform for every FnO environment
- Created regardless
- Linked if you want
- All Micro Service Add-ins depend on DataVerse
- Data Events and other dependencies

Setup and troubleshooting

Initial Setup

- Setup during Environment provisioning

- Setup after provisioning

- Linking in DualWrite setup

- Supported scenarios

Linking from LCS

- Use a new environment

- Use an existing CRM environment

- Need to be in the correct tenant

- Need permission and License for Power Platform

- Use the default Admin account

Power Platform Integration Setup

Use a different Power Platform Environment

⬤ No

Template

Dynamics 365 standard

Project Operations

Dynamics 365 standard with Dual-write

installed but not enabled. Data will not be written via Dual-write to the Power Platform environment by default, but can be configured to do so as part of a later step.

By selecting any template other than the one mentioned above, data will be synchronized via Dual-write functionality by default. The available template options vary based on the licenses for the tenant which owns this LCS project.

☐ By clicking 'Setup' below, I agree that Power Platform Integration will be enabled and the Finance and Operations environment will be unavaliable during this operation.

Linking in Dual-write

- You need to be in the correct tenant

- You need permission to the Power Platform environment

- "Needs" to use the same environment as LCS

Setup link to Dataverse

● **Choose environment**

○ Select legal entities

○ Health check

○ Summary

Select the Dataverse environment that you wish to link

Filter by keyword

Environment ↑	Unique name
○ EN-TIER2 (operations-en-tier2)	f4306a5cfb344850a814e9fe66442a...
○ Engage Group (default) (org1965d475)	orge6767f75
○ Engage Group (engagegroup)	org2d8fe219
○ Engage Group - CRM Demo (engagecrmdemo)	orgce68b468
○ GuSuAITest (org372fc445)	org593ce5c2
○ GuSuDemoPWRApps (org771fb7e1)	org2ada5529
○ GuSuPowerAppsDemo (org33640a9a)	orgb4118ca1
○ Johan Persson's Environment (org0a3314be)	unq84a64fea9adb43689682a114d8...

Lessons Learned

Lessons Learned

- Initial Sync and continuous sync does not work the same
- Beware of the dependencies
- Customizations make things ALOT harder
- The address structure in CRM and FnO is VERY different (DirPartyTable is no party)
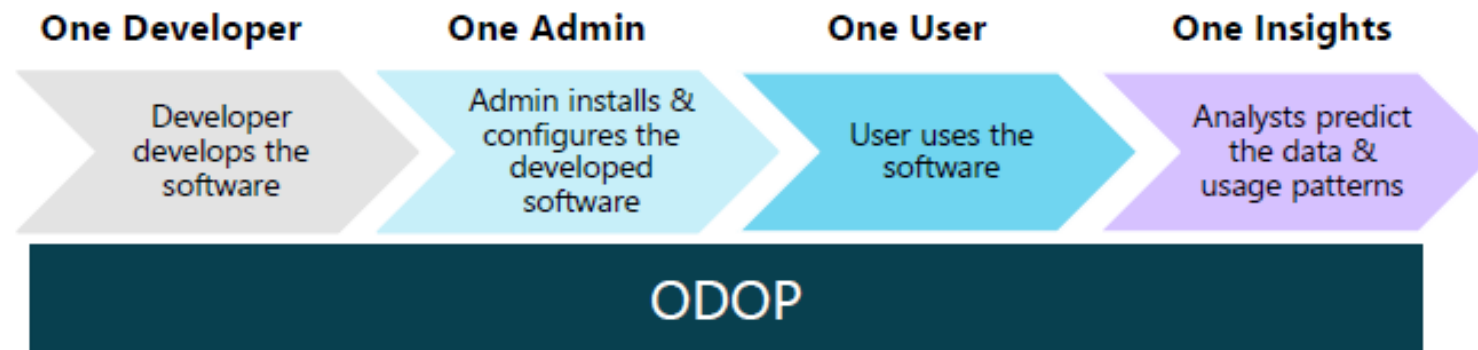- The FnO UI is not FnO
- Lifecycle Management

THE FUTURE
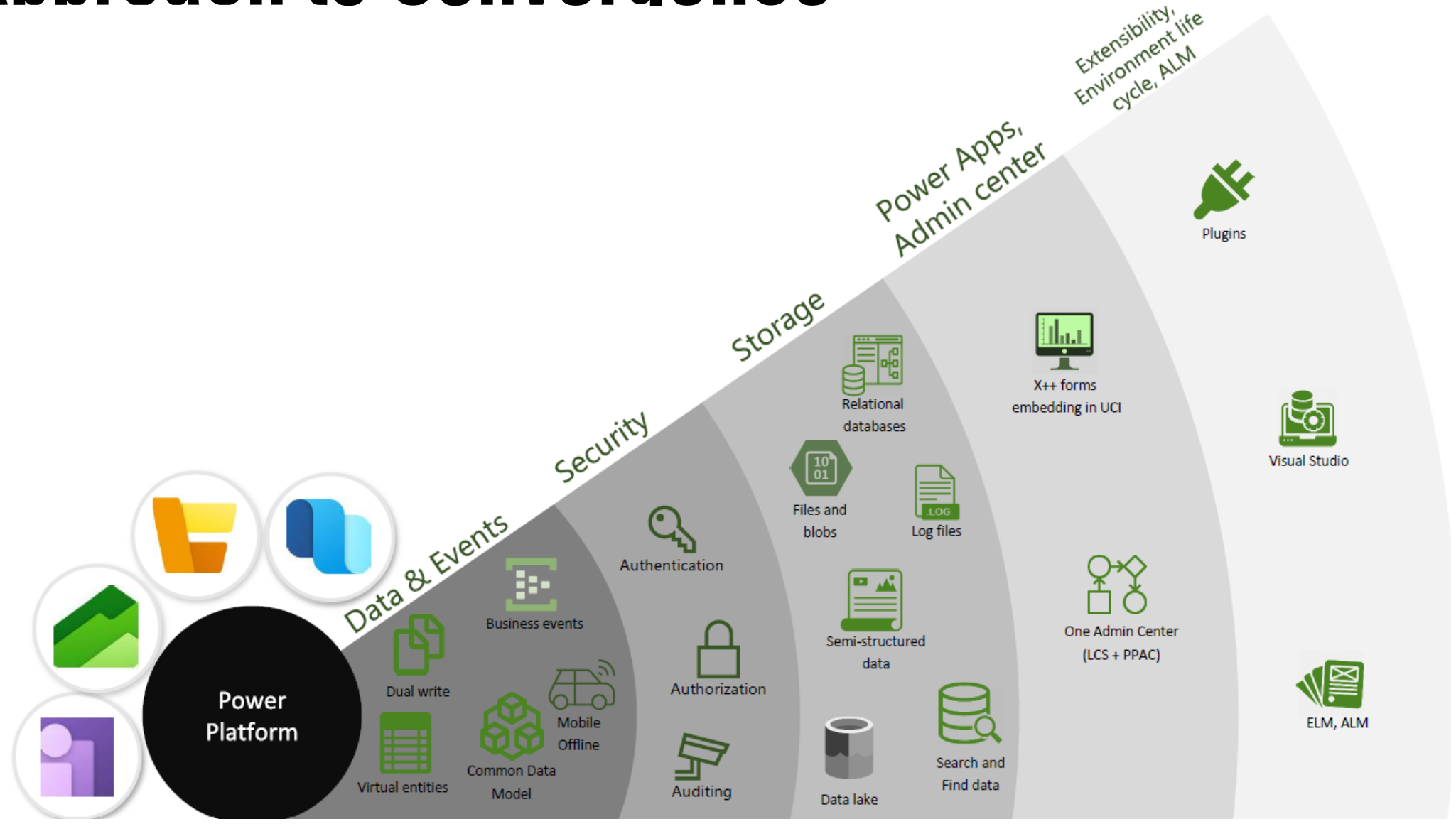
One Dynamics One Platform

What is the objective?

One Admin, One User, One Developer, One Insights is the vision to enable the converged experiences across F&O and the Power Platform.

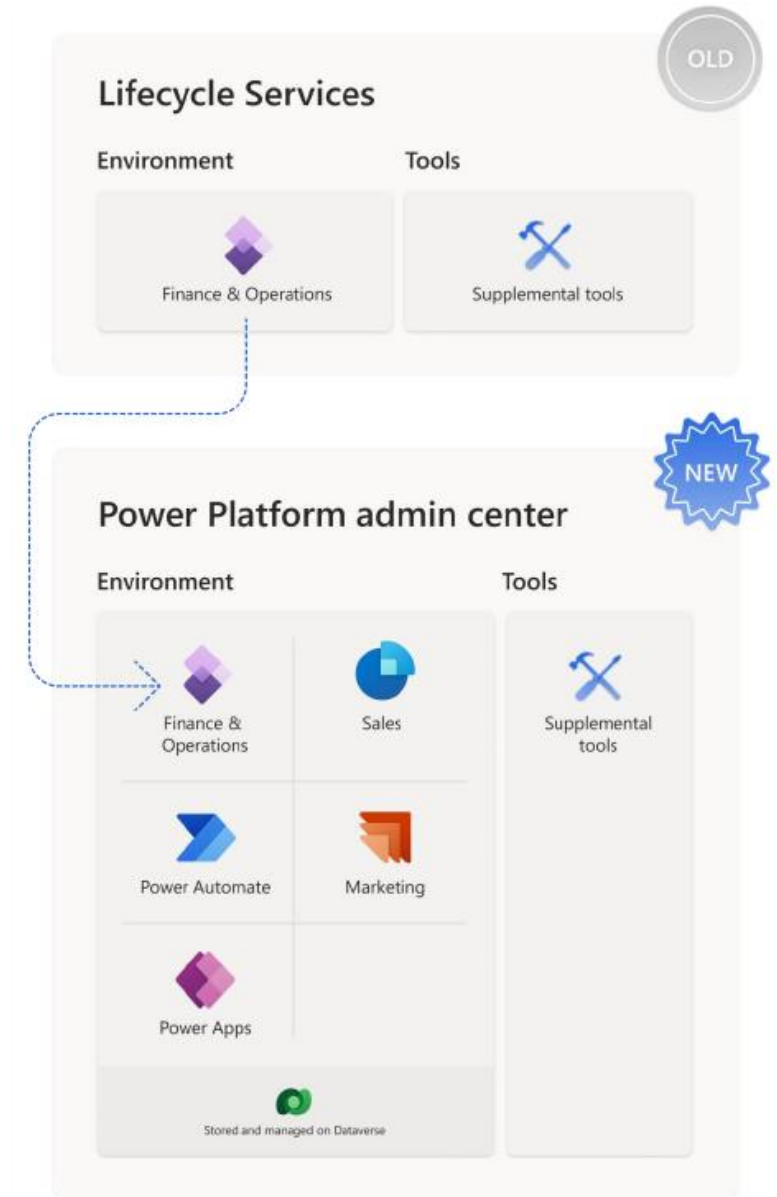| One Developer	One Admin	One User	One Insights
Developer develops the software	Admin installs & configures the developed software	User uses the software	Analysts predict the data & usage patterns

ODOP

Approach to Convergence

One Dynamics One Platform

One Admin Experience

- F&O as an app, not an environment
- Support for unified ALM operations such as Copy/Backup/Restore
- Available in Power Platform Admin Center as well as Power Platform API
- Deployed on an entirely new stack within Dataverse

- Transparent admin experience across D365 apps
- Less tools to understand
- Less manual work
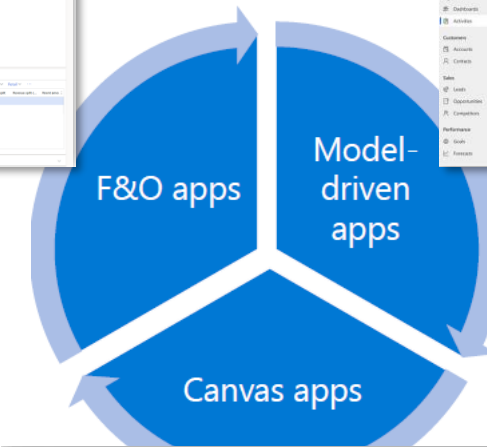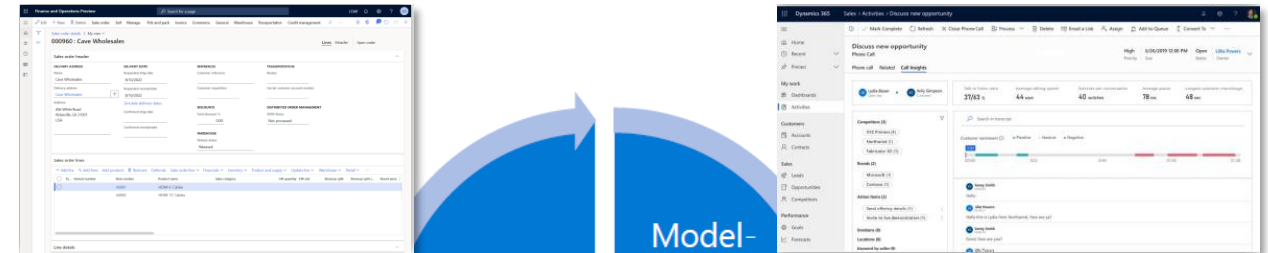- More admin capabilities to utilize
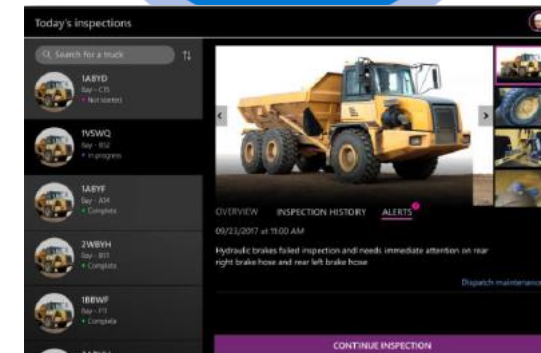
One Dynamics One Platform
One User Experience

- The aim is to provide a consistent user experience across D365- & PP apps
- Unlock "mix-and-match" possibilities by embedding apps
  - Canvas apps embedded in F&O
  - Model-drive apps embedded in F&O
  - F&O pages embedded in model-driven apps

- Increase end-user experience
- End-user adoption
- Limit complexity & integration needs by embedding apps
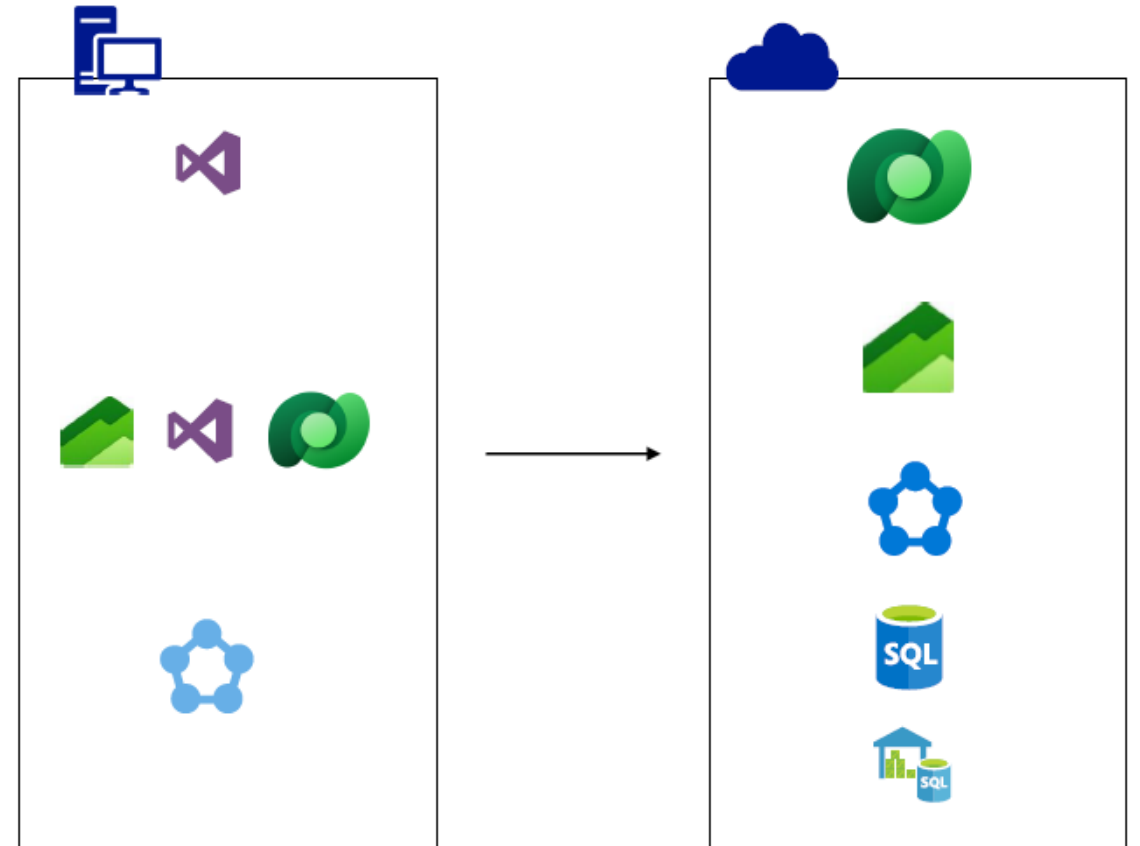
One Dynamics One Platform
One Developer Experience

- Dataverse/Power Platform/CE/F&O connected and preconfigured
- Dev environments provisioned from PPAC
- Runs on the same Service Fabric infrastructure
- Online development instead of local VHD

- Less time to prepare and maintain Dev machines
- Less time for integrated CE / F&O development
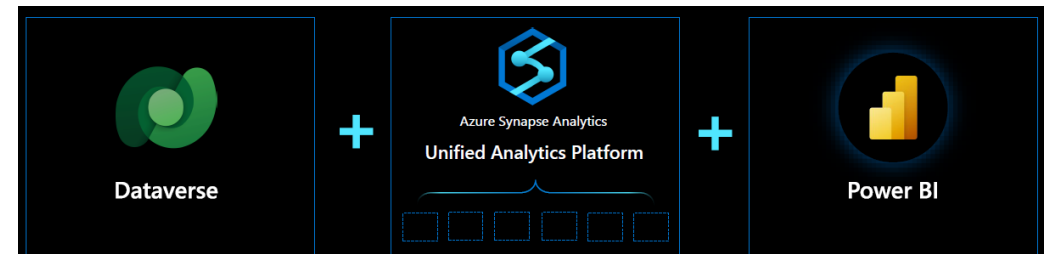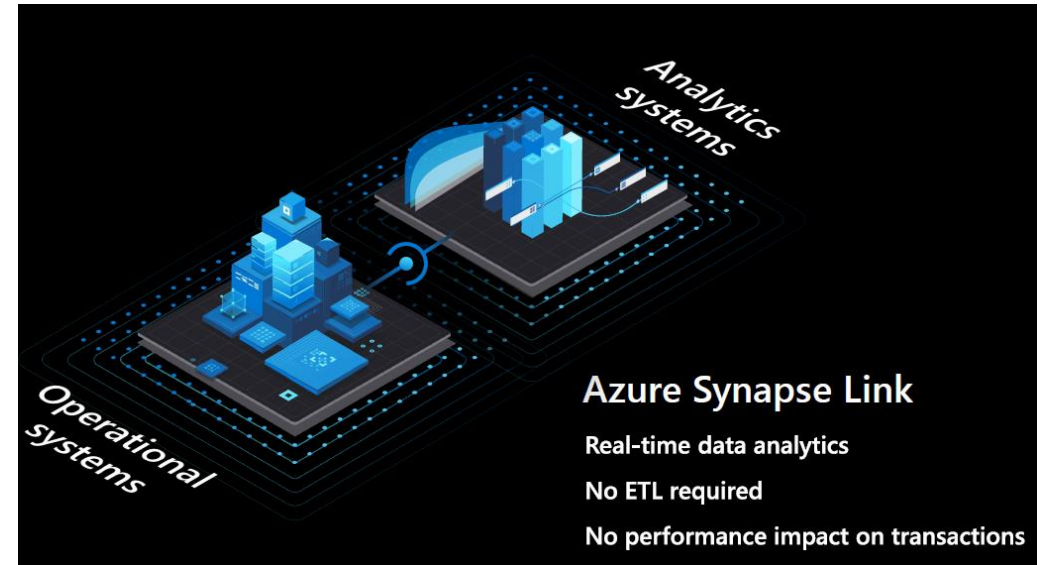- All apps provisioned from one experience (PPAC)

One Dynamics One Platform

One Insights Experience

- One integrated experience – Export to Data lake using Synapse Link for Dataverse
- Launch Synapse from Dataverse or F&O
- Dynamics metadata in Synapse
- Save data as parquet for better performance

- Unified experience independent of app
- Easier to create views and unlock insights
- Better performance

QUESTIONS?

(Our) Final Thoughts

- Maybe set FnO projects should also contain CRM?

- Install CRM in the provisioned Power Platform Enviroment

- Dedicated vs Out of box entities?

- Virtual Entities

Thank you!

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