**Remanth Satish**

**[D365 finance and operations]  ARADA**

**Technical design document**

**for**

**IT-62 |Sentinal Integration with Dynamics**

**Revision and Signoff Sheet**

**Change Record**

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Author | Version | Change reference |
| 08/28/2023 | Nagendra | 1.0.0 | Sentinel Integration with D365 finance and operation -SI1-T28 |

**Reviewers**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Version reviewed | Position | Date |
| Nagendra Chitturi | 1.0.0 | Solution Architect | 08/30/2023 |

**Approvers**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Version reviewed | Position | Date |
| Awad | 1.0.0 | Senior Manager – Enterprise solutions | 08/30/2023 |

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1. Overview

## Objective

## This is a comprehensive document that outlines the technical details and specifications for D365 finance and operations Development and new enhancements.

## References

|  |  |  |  |
| --- | --- | --- | --- |
| ZOHO ID | Manage Engine ID | Description | Owner |
|  |  |  |  |

## Purpose and Overview

This document specifies technical details regarding the components involved in a D365 implementation. It serves as a blueprint to the programmers to follow, provides guidance to the developers, and discusses customizing certain components on top of Dynamics 365 Finance and operations. This document is designed to be used in conjunction with functional requirement or process flow Document.

## Requirement Overview

*Please write about requirement in short form which will be Received from Business or SME.*

## Solution Overview

Sentinel sales data and collections data will be extracted from the Sentinel system on a daily basis, utilizing a Logic App as an intermediary component. This extracted data will subsequently be transmitted to Microsoft Dynamics 365 Finance and Operations to generate Journal entries within the system. Simultaneously, a log will be generated to confirm the receipt of data from the middleware and to track the posting of data in the ERP system.

In the event that any issues arise during the validation of the journal data, a response will be relayed to the middleware. The middleware will then initiate communication with the business by means of email notifications. Once the business addresses and corrects these issues, the middleware will retransmit the data to the ERP system for processing.

Note: all the logs will be maintained in middleware.

**Following are the objects that are involved in Sentinel sales and collection integrations.**

**Project name: AR\_Sentinel\_CustomerPaymentsIntegration**

**Classes**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARCustomerPaymentInboundServices | Service trigger happens in this class for Sales and collection |
| ARSentinelCollectionContract | Contract class for collections header |
| ARSentinelCollectionContractLines | Contract class for collections lines |
| ARSentinelCollectionResponse | Response class for collections |
| ARSentinelCollectionService | Service class for collections |
| ARSentinelSalesContract | Contract class for sales header |
| ARSentinelSalesContractLines | Contract class for sales lines |
| ARSentinelSalesResponse | Response class for sales |
| ARSentinelSalesService | Service class for sales |

**Display Menu Items**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARSentinelCollectionLines | Display menu item to view collection lines |
| ARSentinelCollectionLog | Display menu item to view collection log |
| ARSentinelLocations | Display menu item to view sentinel location mapping |
| ARSentinelSalesLines | Display menu item to view sales lines |
| ARSentinelSalesLog | Display menu item to view sales log |

**Form Extensions**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| CustParameters.ISLDEV | Custom parameters have been added to capture sales and collection integration related parameters |

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARSentinelCollectionLines | Form to view collection lines |
| ARSentinelCollectionLog | Form to view collection log |
| ARSentinelLocations | Form to view sentinel location |
| ARSentinelSalesLines | Form to view sales lines |
| ARSentinelSalesLog | Form to view sales log |

**Forms**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| AccountsReceivable.ISLDEV | Menu items related to sentinel sales and collection integrations are added in this Menu |

**Menu Extensions**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARSentinelIntegrationServiceGroup | This service group contains all the sentinel sales and collection services |

**Service Groups**

**Service:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARSentinelCollectionService | Sentinel collection service |
| ARSentinelSalesService | Sentinel sales service |

**Tables:**

|  |  |
| --- | --- |
| **Object name** | **Purpose** |
| ARCustParameters | Added sentinel parameters in custom customer parameters table |
| ARSentinelCollectionLinesStaging | This is the staging table used for collection lines |
| ARSentinelCollectionLog | This is the staging table used for collection header |
| ARSentinelLocations | This table contains sentinel locations |
| ARSentinelSalesLinesStaging | This is the staging table used for sales lines |
| ARSentinelSalesLog | This is the staging table used for sales header |

### Security design

## Security Roles

|  |  |  |
| --- | --- | --- |
| **Name** | **Duties** | **Addl Remarks** |
|  |  |  |
|  |  |  |

## Duties

|  |  |  |
| --- | --- | --- |
| **Name** | **Privileges** | **Addl Remarks** |
|  |  |  |

## Privileges

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Entry Points** | **DATA entity permission** | **Access Level** | **Addl Remarks** |
|  |  |  |  |  |

## Process Cycles

|  |  |  |
| --- | --- | --- |
| **Name** | **Duties** | **Addl Remarks** |
|  |  |  |
|  |  |  |