**Ref links:**

<https://kurthatlevik.com/2021/11/02/d365-recurring-integrations-schedulerris/>

<https://github.com/microsoft/Recurring-Integrations-Scheduler/wiki>

The file-based integration (for on premise) has been done referring the links specified above. It contains two type of integration specified below:

* Register application in AAD for D365 FO url
* Export Customers from D365 FO to the location on drive
* Import Customers to D365 FO from the location on drive
* Install RIS
* Configure RIS
* Download customers to specific location using RIS (Auto)
* Upload customers from specific location using RIS (Auto)

**Register application in AAD for D365 FO url**

Register application on portal.azure.com, note down application id, tenant id, client secret and its value

Graphical user interface, text, application

Description automatically generated

* Application ID: 4d8516f4-fabd-4845-9613-b7fdf14e5e8d
* Object ID: 7f196b9c-bad4-409d-935f-90b16e6ea6fd
* Tenant ID: 7eb749a1-a2ec-4260-bb87-c77c7a0a0b7a
* Secret ID: 6614280e-bc95-4731-ad3f-f1b0321f0125
* Value: mTB8Q~FDgcy8L.xKmoJ4x1AQ.6T~ix6r-8hfQcGK

Add the application id (client id) in D365 FO environment as shown below:

Graphical user interface, text, application, email

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**Export customers from D365 FO to the location drive**

1. Create entity, if not exist (We have used inbuilt entity i.e. Customers V3)
2. Create export project

Graphical user interface, text, application

Description automatically generated

1. Export customers using export now, verify for successful export of customers, go to job history, select Job Id and download the file

A screenshot of a computer

Description automatically generated

1. This downloaded file you can use as a template to import the customers
2. Schedule for auto (recurring export)
   1. Select Manage recurring data jobs in Manage tab

A screenshot of a computer

Description automatically generated

* 1. Create new schedule as shown in the screen below, in Manage authorization policy you need to add the application (client) id generated on AAD.

**Set processing recurrence** to set recurring schedule, enable the recurring job. On enabling the job, set processing recurring will be disabled.

The Id highlighted in the screen below, need to be used while configuring RIS.

Graphical user interface, text, application, Word

Description automatically generated

**Import customers to D365 FO from the location drive**

1. Create import project, add entity and file to be imported and import the customers using import now

A screenshot of a computer

Description automatically generated

For customer import, mandatory fields are Customer account, customer group, Organization name and Sales currency.

While import, you can add values to these 4 mandatory fields and use that file to import the customers.

View job history to view successful import of the customers.

1. Schedule for auto (recurring export)
   1. Select Manage recurring data jobs in Manage tab
   2. Create new schedule as shown in the screen below, in Manage authorization policy you need to add the application (client) id generated on AAD.

**Set processing recurrence** to set recurring schedule, enable the recurring job. On enabling the job, set processing recurring will be disabled.

The Id highlighted in the screen below, need to be used while configuring RIS.

Graphical user interface, text, application, Word

Description automatically generated

**Install RIS**

Download the Recurring Integration Scheduler from the link below and install it

[Releases · microsoft/Recurring-Integrations-Scheduler · GitHub](https://github.com/microsoft/Recurring-Integrations-Scheduler/releases)

**Configure RIS**

**Connect to service**

Open Recurring Integration Scheduler App and connect to ServiceA screenshot of a computer

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It will show you default setup as below, click on connect.Graphical user interface, application

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**Parameters**

Click on parameters to configure the parameters as shown in the screen below:Graphical user interface, application

Description automatically generated

**Dynamics 365 instances**: Click Add button to add D365 FO instance. Add name, AOS URL and Tenant id. Tenant id is the one which is showing in the AAD application registration, in step-1.

**Azure App registration**: Click Add button to add Azure application registration detail. You will have to add Name, client id, client secret and authentication type as shown in the screen below.

Graphical user interface, application

Description automatically generated

**User credentials**: Add user credentials by clicking Add button

**RIS job groups:** By default, this tab will have job groups – import jobs, export jobs, download jobs, upload jobs

**Dynamics data jobs:**

Download customers

To download the exported customers’ files at specific location you need to add Download job. Click on Add button to add the data job for the same.

Enter name, activity id highlighted in D365 FO >> Export customer project >> Manage recurring data job

Graphical user interface, application, Word

Description automatically generated

Upload customers

To import customers to D365 FO from the file at specific location you need to add Upload job. Click on Add button to add the data job for the same.

Enter name, activity id highlighted in D365 FO >> Import customer project >> Manage recurring data job

Graphical user interface, application, Word

Description automatically generated

**Add Jobs**

To add schedule jobs for Download customers and upload customers, click on Add jobs at the bottom

Graphical user interface, application

Description automatically generated

Add download job (Recurring Integration API):

**Download job overview tab**

Enter job name, select RIS job group as download jobs, select path where file needs to be downloaded.

Graphical user interface, application

Description automatically generated

**Download job details tab**

Job details will show the Data job name as Download customers (as per parameter setup)

Graphical user interface, application

Description automatically generated

**Download job recurrence**

Set recurrence for 10 min

Graphical user interface, text, application

Description automatically generated

**Connection tab**

Select service authentication and select Azure app registration (as per parameter setup)

Graphical user interface, text, application, email

Description automatically generated

Click on Add to Schedule to schedule the recurring job.

Once job will run, refresh the grid from bottom, then you can see the Last run and Next run

Graphical user interface, text

Description automatically generated

Also, verify the download folder, you will find the downloaded files as shown below:

Graphical user interface, application

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Add upload job (Recurring Integration API):

**Upload job overview tab**

Enter RIS Job name, select RIS job group to upload jobs, enter job description, select folders for file management as shown in the screen below:

Graphical user interface, application

Description automatically generated

**Upload job details tab**

Job details will show the Data job name as Upload Customers RIS (as per parameter setup)

Graphical user interface, application

Description automatically generated

**Upload job recurrence tab**

Set job recurrence to 10 min

Graphical user interface, text, application

Description automatically generated

**Processing monitoring job tab**

This is non mandatory so no need to add this for processing.

Graphical user interface, text, application

Description automatically generated

**Connection tab**

Set connection as shown in the screen below

Graphical user interface, text, application

Description automatically generated

Add to schedule to schedule the recurring job.

To upload the file, you can add the file with data to be imported in input folder specified below:

Graphical user interface, text, application

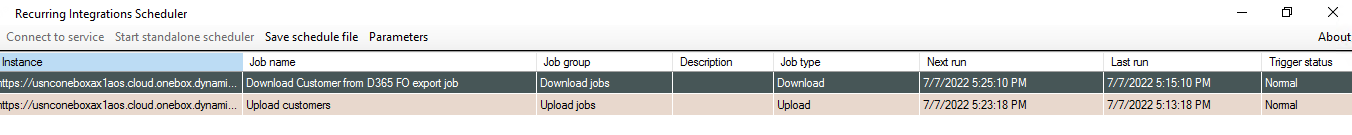
Description automatically generated

Have added customer data to import as shown in the file below:

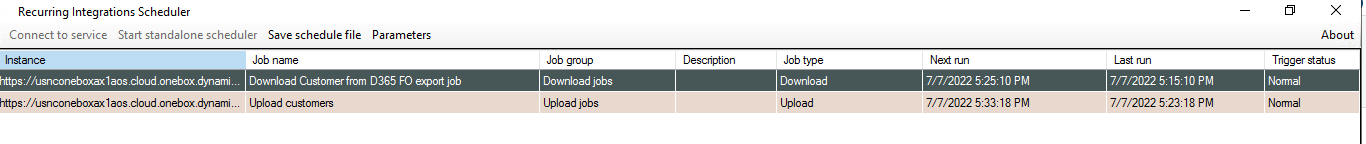
Graphical user interface, text, application

Description automatically generated

The job will run at 5:23 as shown below:



Once job run, refresh the grid



Verify input folder and uploadsuccess folder, you will find input folder file moved to uploadsuccess folder

Graphical user interface, text, application

Description automatically generated

After this, you will have to wait to run the Manage recurring data jobs in D365 FO.

Once it runs, verify All customers, you will find the imported customer as below:

