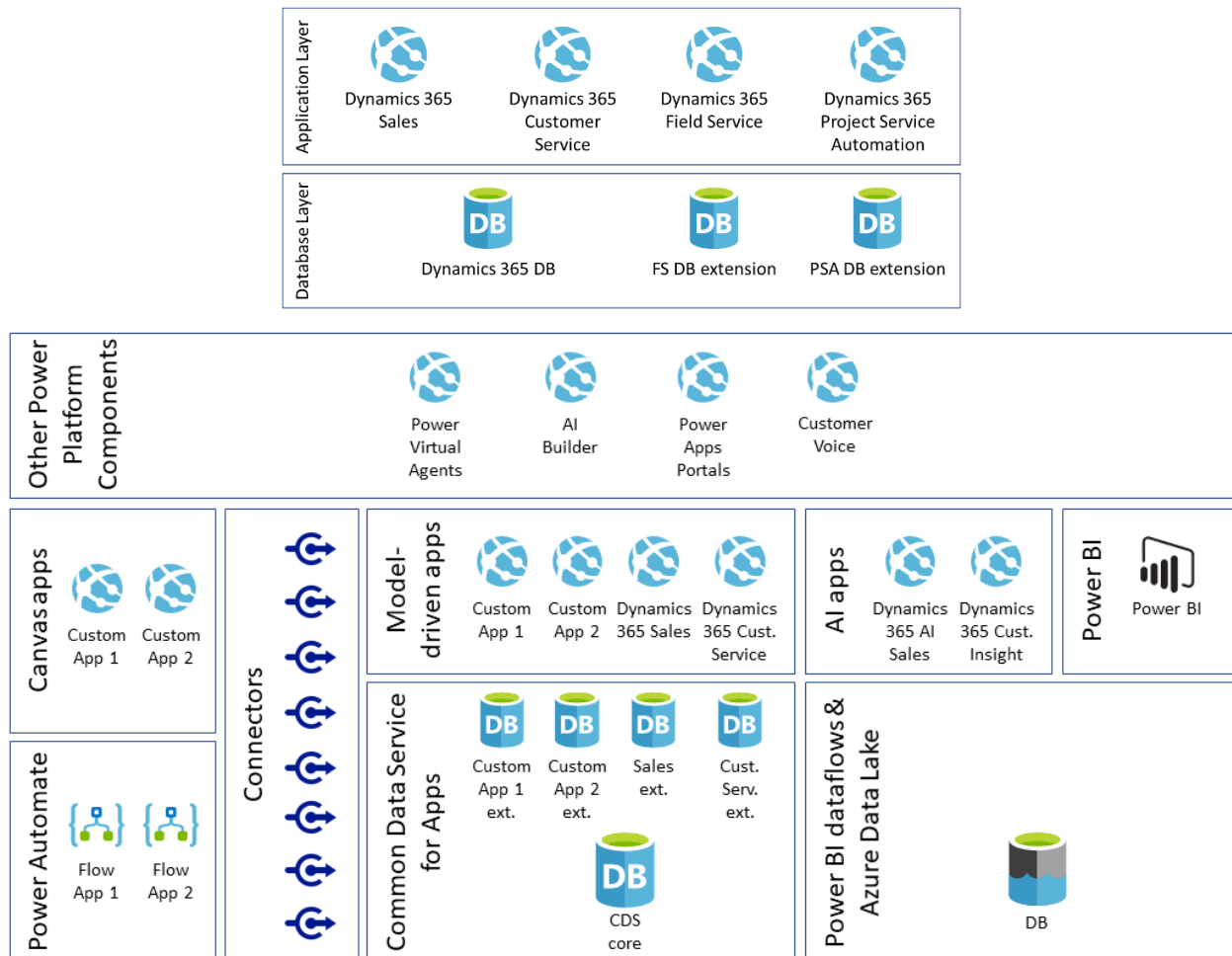


Chapter 1: Microsoft Power Platform and Microsoft Dynamics

365 Overview



Free with Dynamics 365 Sales	Advanced features for Dynamics 365 Sales	Dynamics 365 Sales Insights App
• (Relationship) Assistant • Auto Capture • Email Engagement	• Advanced Assistant • Relationship Analytics • Predictive Lead Scoring • Predictive Opportunity Scoring • Notes Analysis • Who Knows Whom • Talking Points • Assistant App for Teams	• Sales Analytics Overview • Team Analytics Overview • Seller Analytics Overview • Natural language Q&A

Licensing	Description	Price
Trials	For almost all Microsoft Power Platform components there is a possibility to provision a free trial usually limited to 30 days	Free
Power Apps Community Plan	Specific free of charge permanent license dedicated to learning and individual development, only 1 single user is supported	Free
Power Apps / Power Automate for Office 365	These licenses are included in most Office 365 subscriptions and allow the creation of Power Apps and Power Automate flows based on Office 365 services	Included in Office 365
Power Apps / Power Automate for Dynamics 365	These licenses are included in most Dynamics 365 subscriptions and allow the creation of Power Apps and Power Automate flows based on the Dynamics 365 licensed products	Included in Dynamics 365
Power Apps standalone plans	These licenses contain Common Data Service and allow the creation of Power Apps beyond Office 365	\$10 - \$40 / user / month
Power Automate standalone plans	These licenses contain Common Data Service and allow the creation of Power Automate flows beyond Office 365	\$15 / user / month or \$500 / 5 flows
Power Virtual Agents	Power Virtual Agents are licensed per tenant and the price is based on bot sessions	\$1,000 / 2,000 sessions
Power Apps Portals	Power Apps portals are licensed based on a consumption model per login and per page view	
AI Builder	AI Builder is licensed based on units of 1 million service credits. Service credits are consumed when AI models are trained or used in Power Platform solutions	\$500 / unit

Power BI	Power BI has three licensing options: • Power BI Free is free of charge • Power BI Pro is licensed based on user / month • Power BI Premium is licensed based on dedicated resource	\$10 / user / month \$5,000 / resource / month
Forms Pro for Office 365	Forms Pro is licensed as an upgrade for Office 365 users	\$100 / 2,000 survey responses
Forms Pro for Dynamics 365	Forms Pro is included in selected Dynamics 365 licenses	Free / 2,000 survey responses
Dynamics 365	Most Dynamics 365 products (Sales, Sales Insights, Customer Service, Customer Service Insights, Field Service, Remote Assist, Guides, Finance, Supply Chain Management, Project Service Automation, Retail, Business Central) are licensed per user / per month	\$20 - \$180 / user / month
Dynamics 365	Some Dynamics 365 products (Marketing, Customer Insights, Fraud Protection) are licensed per tenant / per month	\$750 – \$10,000 / tenant / month
Capacity	Every Microsoft Power Platform product includes a certain amount of free database storage capacity. When exceeded, additional storage capacity can be purchased.	

	Dynamics 365 Sales license	Power Apps single-app license
License costs 3 years for 100 users	\$234,000	\$36,000
Implementation	\$12,000	\$48,000
Total cost	\$246,000	\$84,000
Monthly cost	\$6,830	\$2,330

	Dynamics 365 Marketing license	Power Apps single-app license
License costs 3 years for 100 users	\$54,000 (licensed per instance not user)	\$36,000 (licensed per user)
Implementation	\$24,000	\$750,000
Total cost	\$78,000	\$786,000
Monthly cost	\$2,170	\$21,830

Component	Usage Scenario
Dynamics 365 Sales, Sales Insights, Product Visualize	Contoso Inc. sales departments managing B2B sales processes and insights
Dynamics 365 Marketing, Power Apps Portals	Contoso Inc. marketing department running product campaigns and product presentation and conferences
Dynamics 365 Customer Service, Customer Service Insights, Unified Service Desk, Power Apps Portals, Power Virtual Agents	Contoso Inc. customer service departments managing service inquiries and providing remote help and support
Dynamics 365 Field Service, Connected Field Service, Remote Assist	Contoso Inc. field service department managing maintenance and repair onsite visits and proactive maintenance for customer's installed machinery equipped with IoT connected sensors
Dynamics 365 Project Service Automation	Contoso Inc. project implementation department managing onsite installation projects of sold machinery and factories
Dynamics 365 Finance	Contoso Inc. finance department managing finance accounting of every legal entity in the group.
Dynamics 365 Supply Chain management	Contoso Inc. production, procurement, logistics, and finance departments managing the respective business workloads.
Dynamics 365 Commerce, Connected Store, Fraud Protection	Contoso Inc. retail department managing retail stores and e-commerce sales.
Dynamics 365 Human Resources, Guides	Contoso Inc. human resources department managing all aspects of hiring, people management, benefits, training, readiness, and so on.

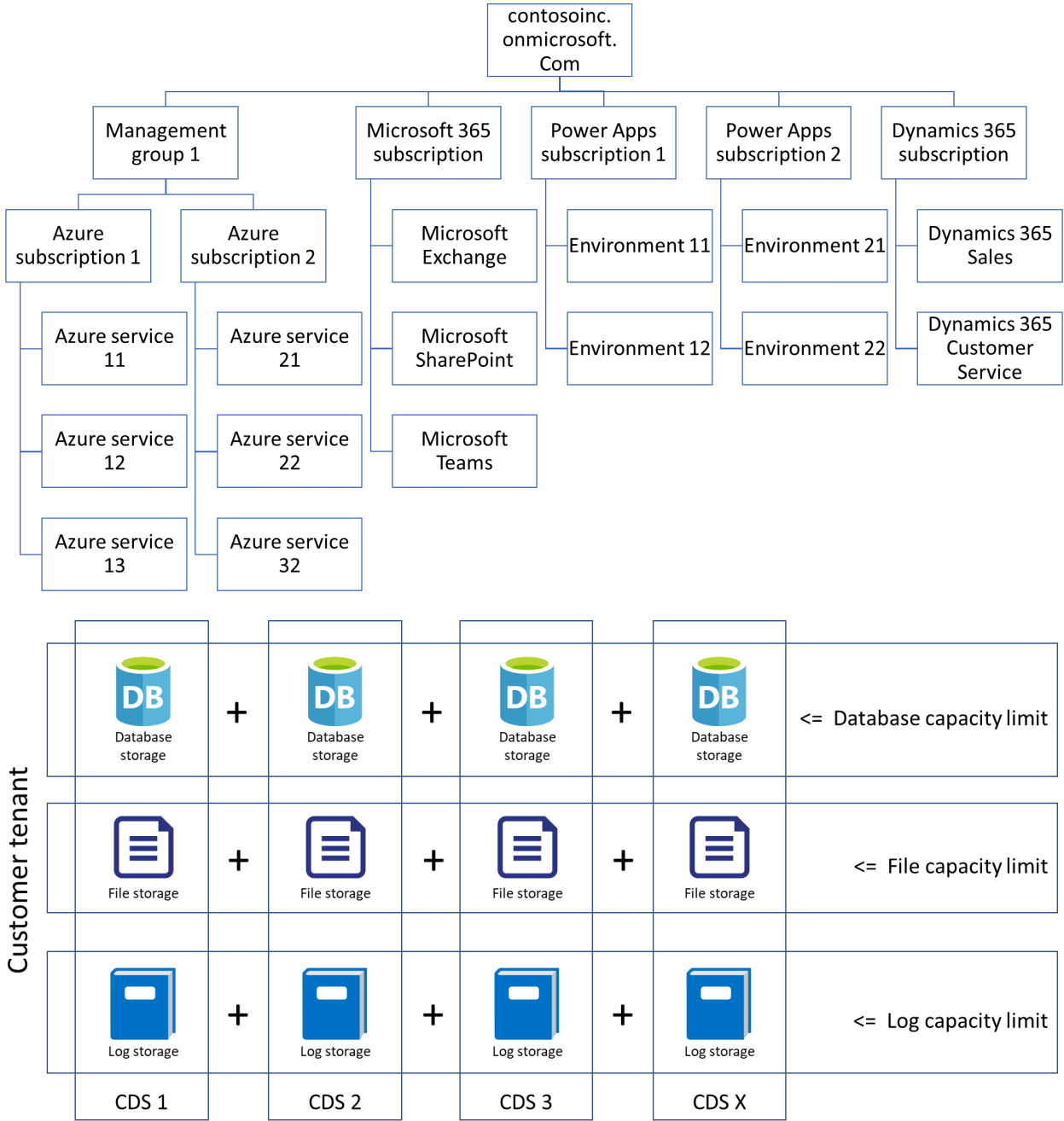
Dynamics 365 Customer Insights & Market Insights	Contoso Inc. sales organization managing 360° customer and competitor view including all external and internal information sources
Dynamic 365 Product Insights	Contoso Inc. managing analytical view on sold products for early recognizing trends and developments leading to continuous product improvement.
Canvas Apps	Contoso Inc. power users and citizen developers developing small single-purpose mobile apps
Power Automate	Contoso Inc. power users and citizen developers developing automations across the solution components
Power BI Premium	Contoso Inc. power users and citizen developers developing analytical and reporting solutions. To achieve advanced capabilities, Contoso Inc. will purchase Power BI Premium with appropriate premium capacity
Dynamics 365 Customer Voice	Contoso Inc. sales, customer service, and field service departments running surveys to improve customer satisfaction

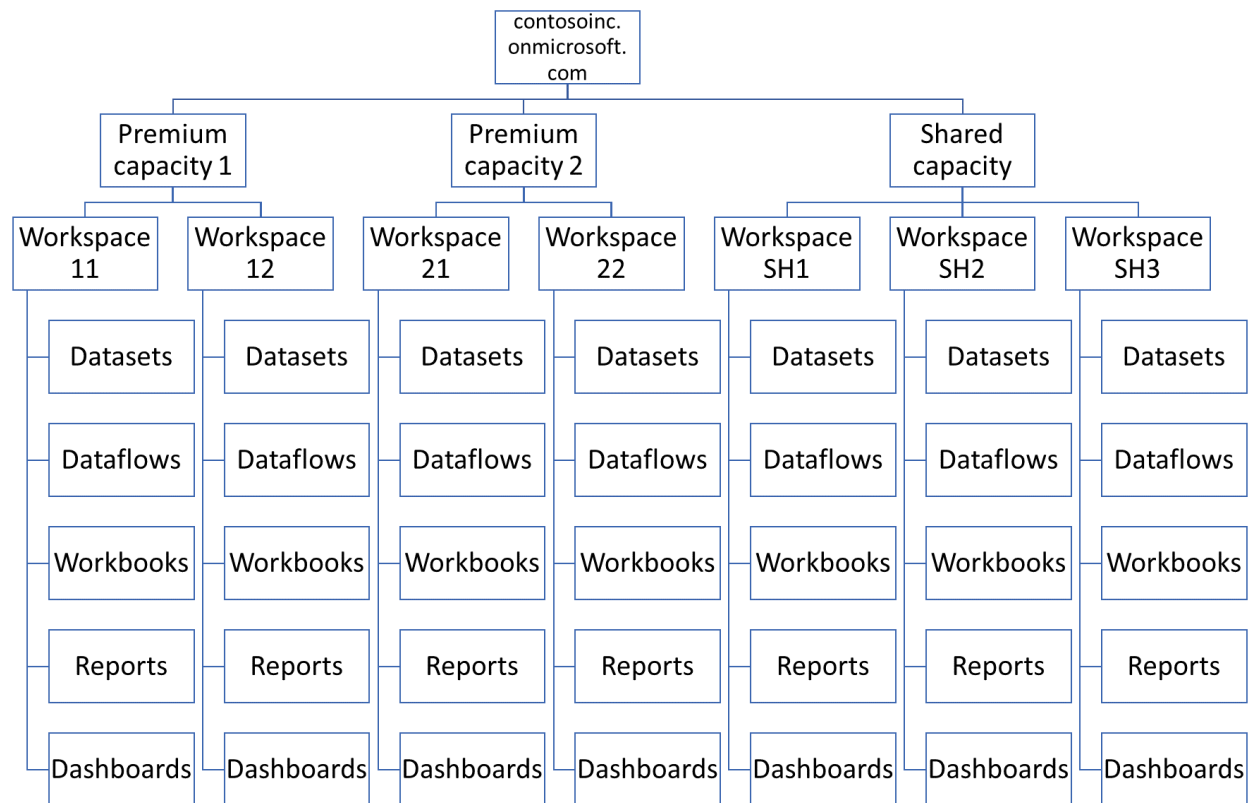
Chapter 2: Microsoft 365 and Microsoft Azure Overview

No images...

Chapter 3: Understanding Microsoft's Power Platform

Architecture





 Manually trigger a flow ...

 First name

Please enter your input

...

 Last name

Please enter your input

...

 Email address /
User name

Please enter an e-mail address

...

 Temporary
Password

Please enter your input

...

 Nickname

Please enter your input

...

[+ Add an input](#)



 Create user ...

* Account Enabled

Yes 

* Display Name

 First name ×  Last name ×

* Mail Nickname

 Nickname ×

* Password

 Temporary Pa... ×

* User Principal Name

 Email address... ×

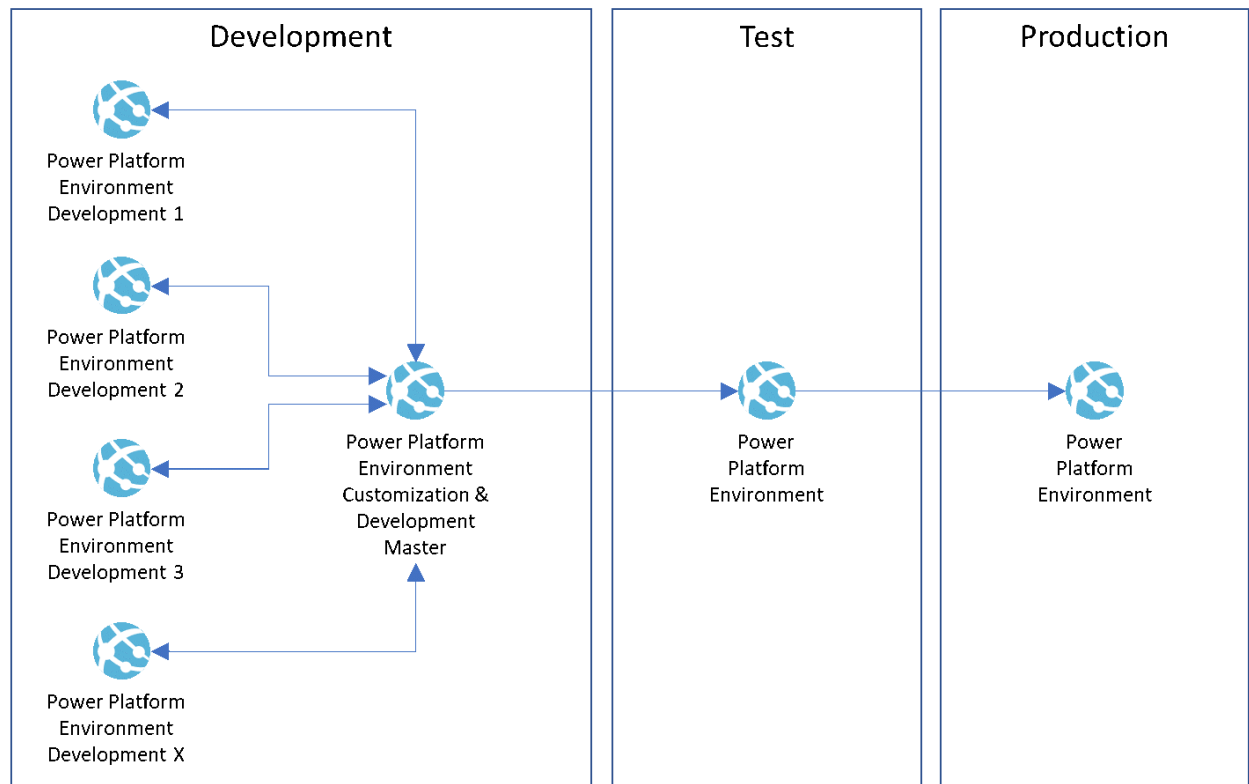
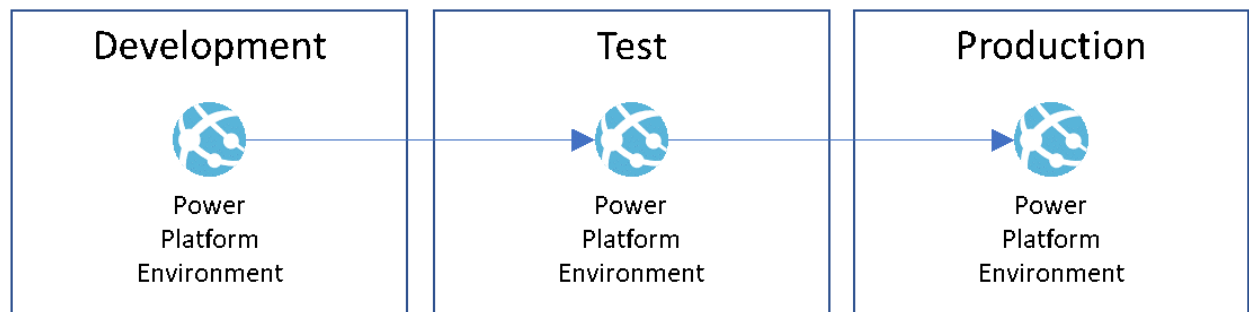
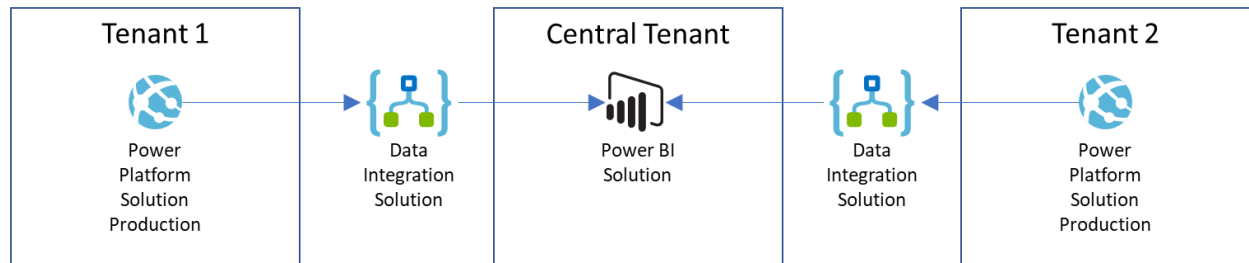
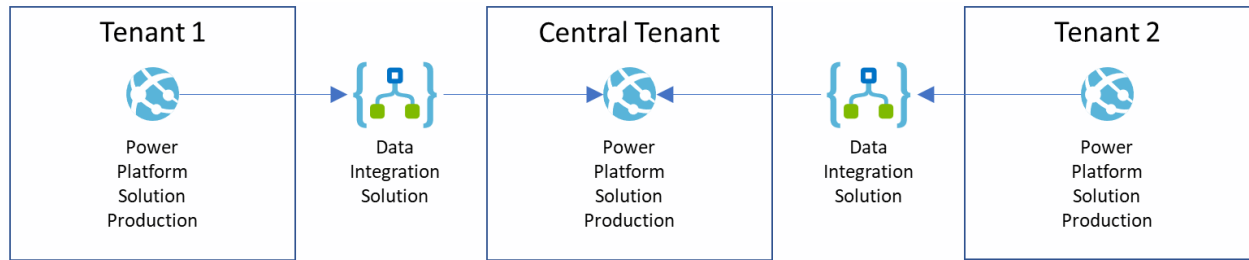
Given Name

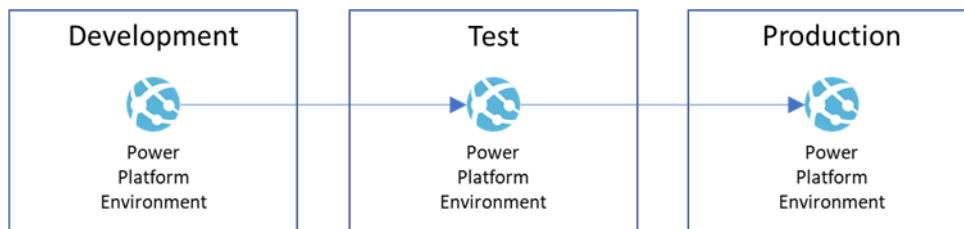
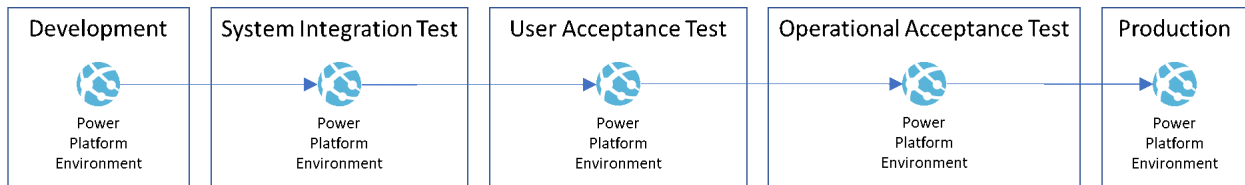
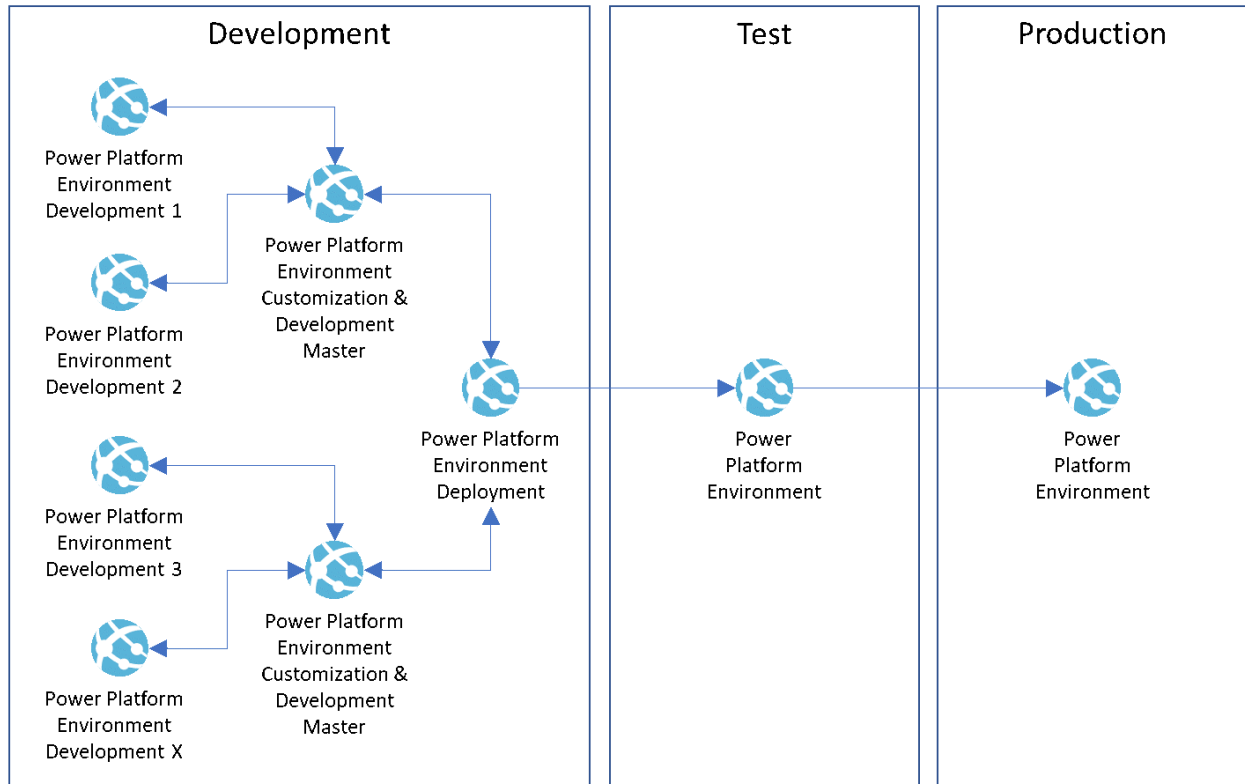
The user's given name (first name).

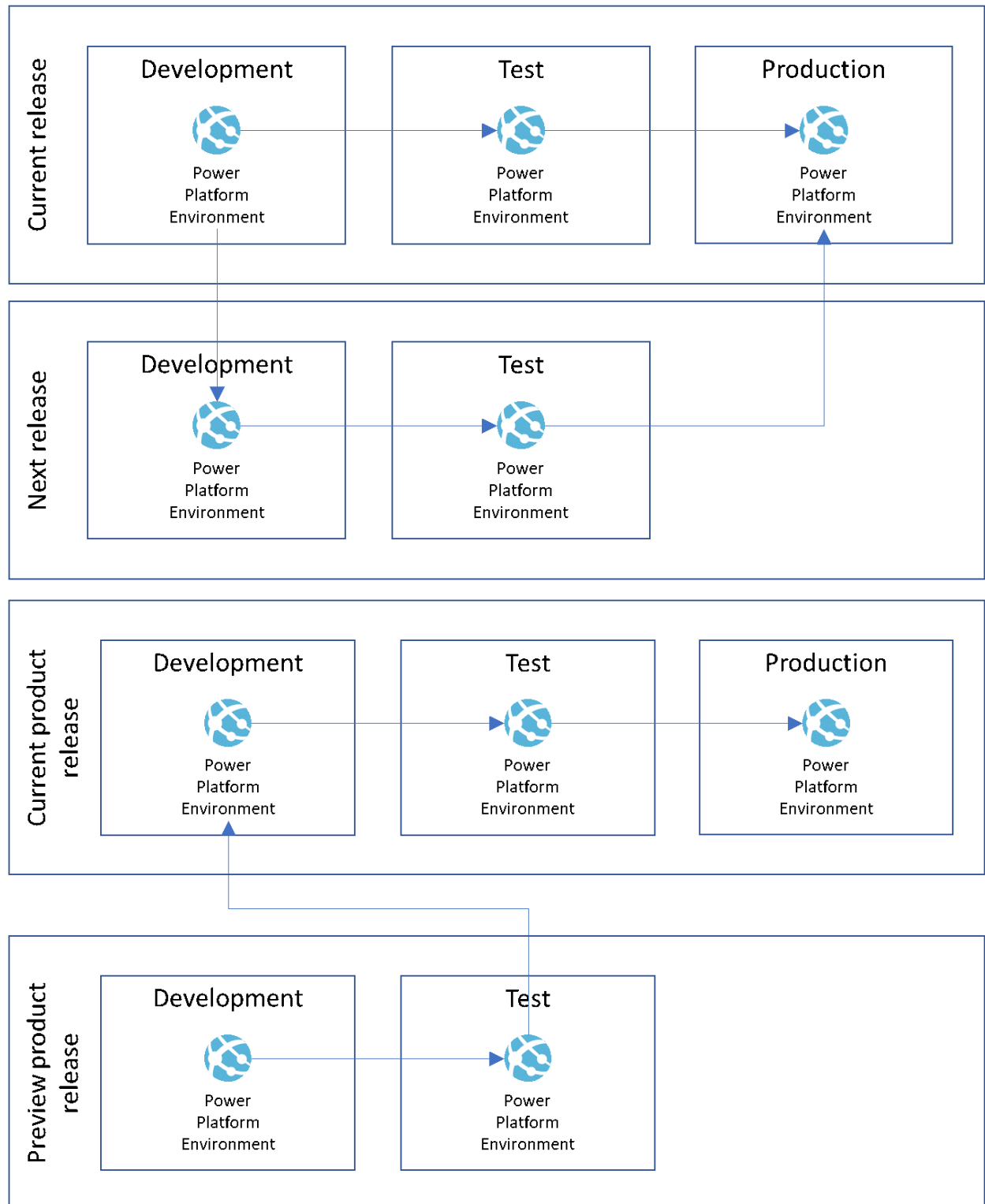
Surname

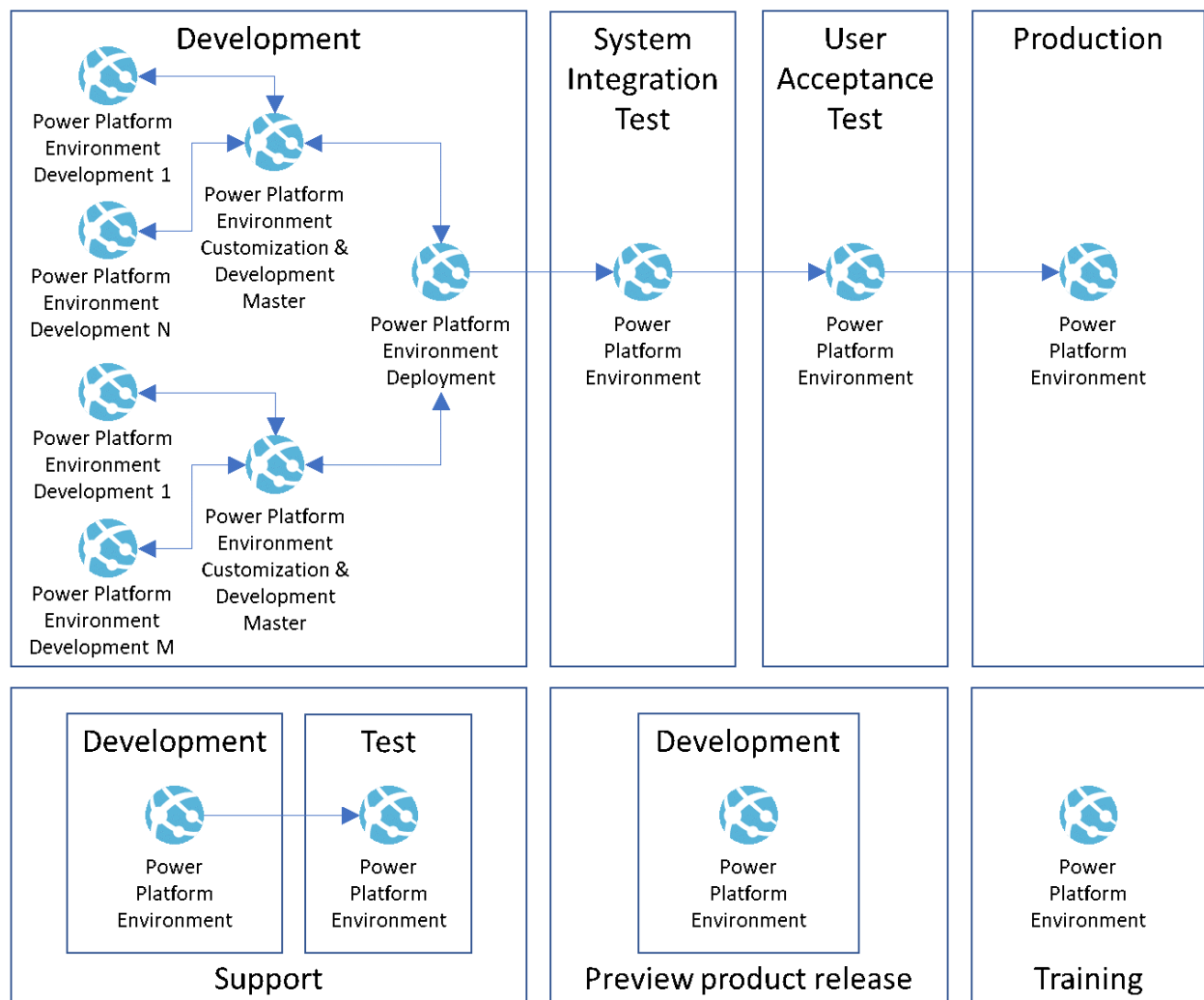
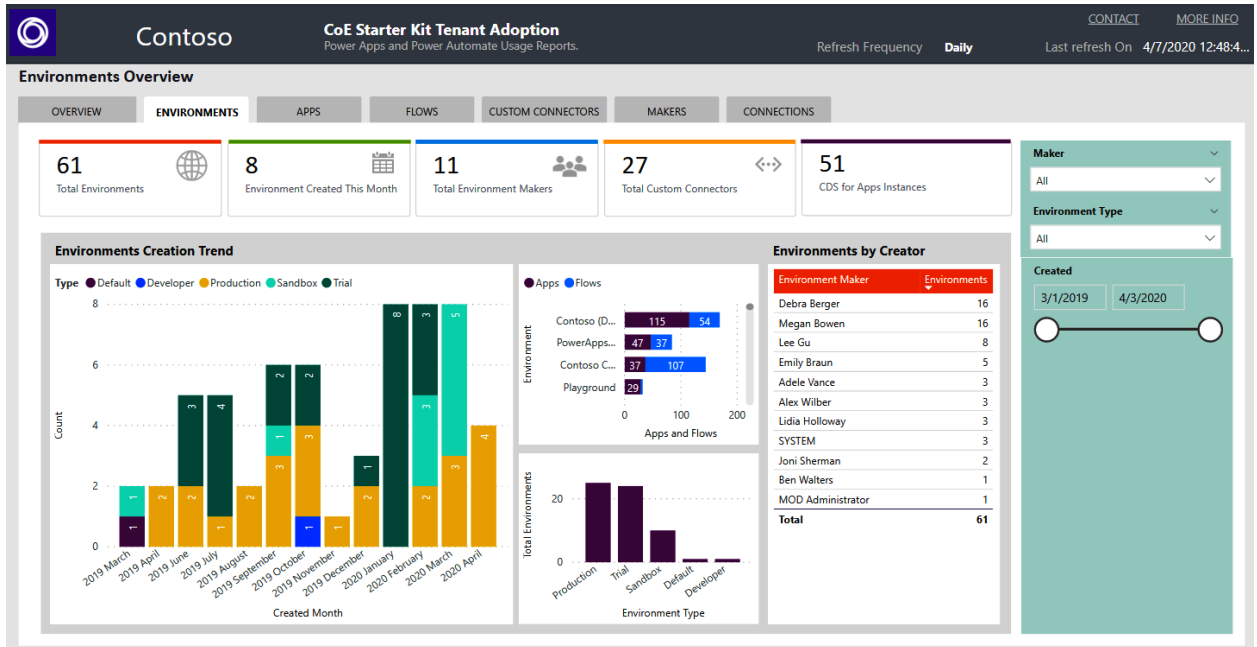
The user's surname (family name or last name).

[Show advanced options](#) 









Chapter 4: Tools and Techniques

Power Apps

Environment
Sandbox





Home

Learn

Apps

Create

Data

Entities

Option Sets

Dataflows

Export to data lake

Connections

Custom Connectors

Gateways

Flows

Chatbots

AI Builder

Solutions

New entity

Get data

Export data

Export to data lake

Default

Search

Entities

Entity ↑	Name	Type	Customiza...
Account	account	Standard	✓
Address	customeraddress	Standard	✓
Appointment	appointment	Standard	✓
Attachment	activymimeattachment	Standard	✓
Business Unit	businessunit	Standard	✓
Contact	contact	Standard	✓
Currency	transactioncurrency	Standard	✓
Email	email	Standard	✓
Email Template	template	Standard	✓
Fax	fax	Standard	✓
Feedback	feedback	Standard	✓
Knowledge Article	knowledgearticle	Standard	✓
Letter	letter	Standard	✓
Mailbox	mailbox	Standard	✓
Organization	organization	Standard	✓
Phone Call	phonecall	Standard	✓
Position	position	Standard	✓
Product	product	Standard	✓

App Designer
Customer Service Hub *

Save
Save And Close
Validate
Publish
Play

Add
Edit
Remove
Search Canvas

Site Map
Site Map

Dashboards
Dashboards
10
Business Process Flows
Business P...
5

Entity View (45)

Account

Forms1

ViewsAll

ChartsAll

DashboardsAll

Activity

FormsAll

ViewsAll

ChartsAll

DashboardsAll

Appoint...

Forms1

ViewsAll

ChartsAll

DashboardsAll

Attachment

FormsAll

ViewsAll

ChartsAll

DashboardsAll

Components

Properties

ARTIFACTS

Entities
Model and manage business ...

Dashboards
Provide an insightful and gra...

Business Process Flow
Define a sequence of steps re...

ENTITY ASSETS

Forms
Define how users will see an...

Views
Create a list view of records f...

Charts
Show data in a meaningful a...

Dashboards
Provide an insightful and gra...

App Designer > Sitemap Designer
Customer Service Hub

Save
Save And Close
Publish

Add
Cut
Copy
Paste
Clone
Delete

Service

Service Management

Scheduling

Help and Support

My Work

Customers

Service

Analytics and Insights

Dashboards

Accounts

Cases

Reports (Preview)

Activities

Contacts

Queues

Social Profiles

Components

Properties

Area

Drag a new area

Group

Drag a new group

Subarea

Drag a new subarea

Power Apps | Portal

Environment
Sandbox



New pageDelete

Sync ConfigurationBrowse website

Components

Section layout

One column section

Two columns section

Three columns section

Portal components

Text

Image

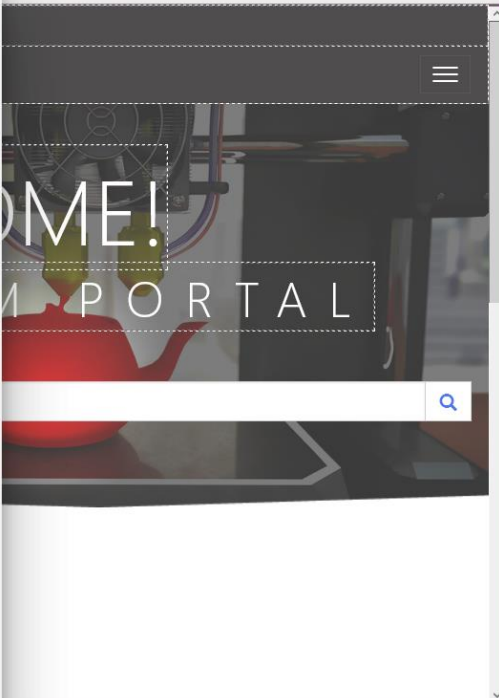
IFrame

Form

List

Breadcrumb

Power BI



Component
Webpage

Display

Name

Home

Partial URL

/

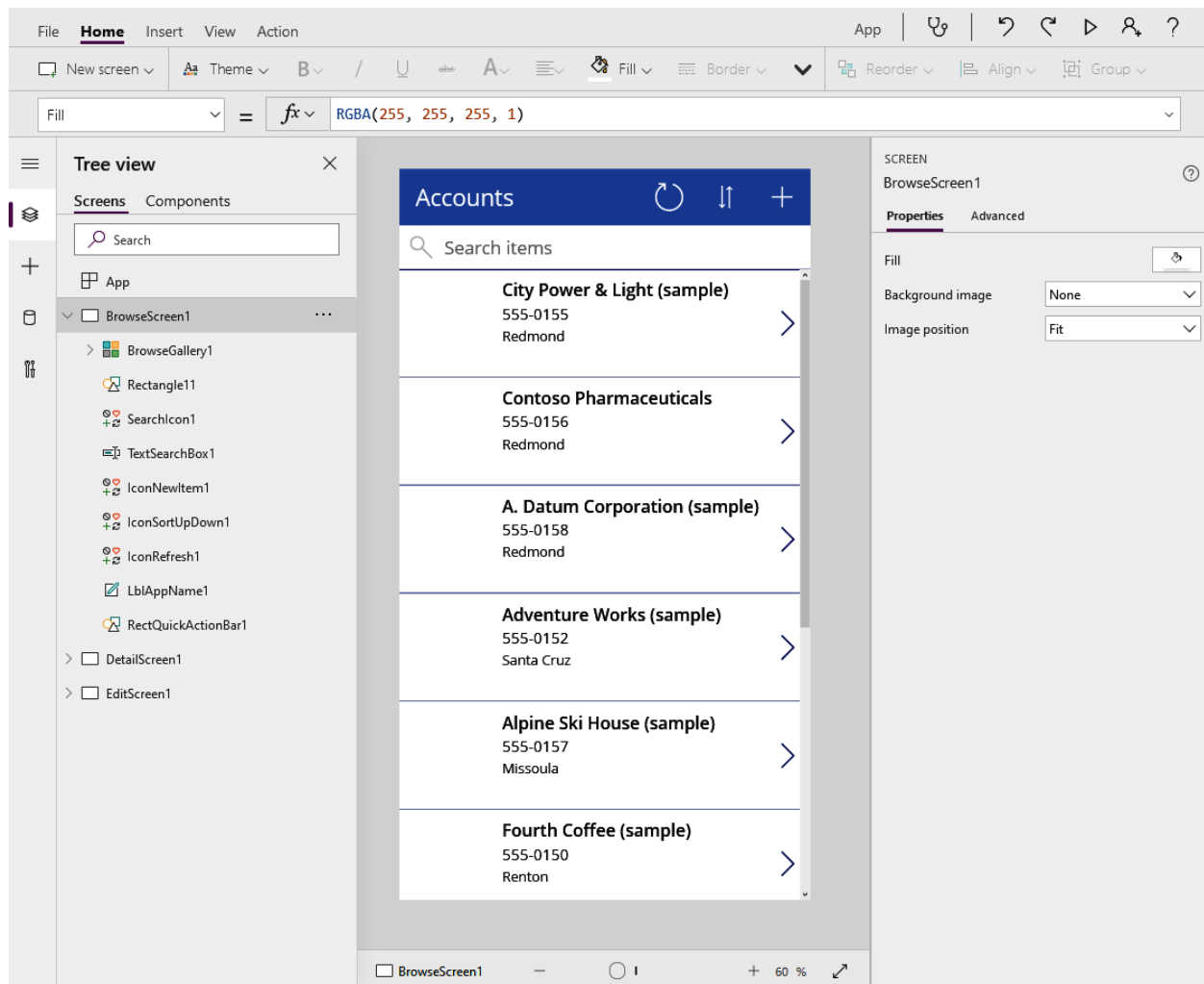
Formatting

Template

Home

✓ Saved

</>





PowerApps



Start an approval



* Approval type

Approve/Reject - First to respond



* Title

Approval Request

* Assigned to



Sendapprove... x

Details

Markdown supported (see <https://aka.ms/approvaldetails>)

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Requestor

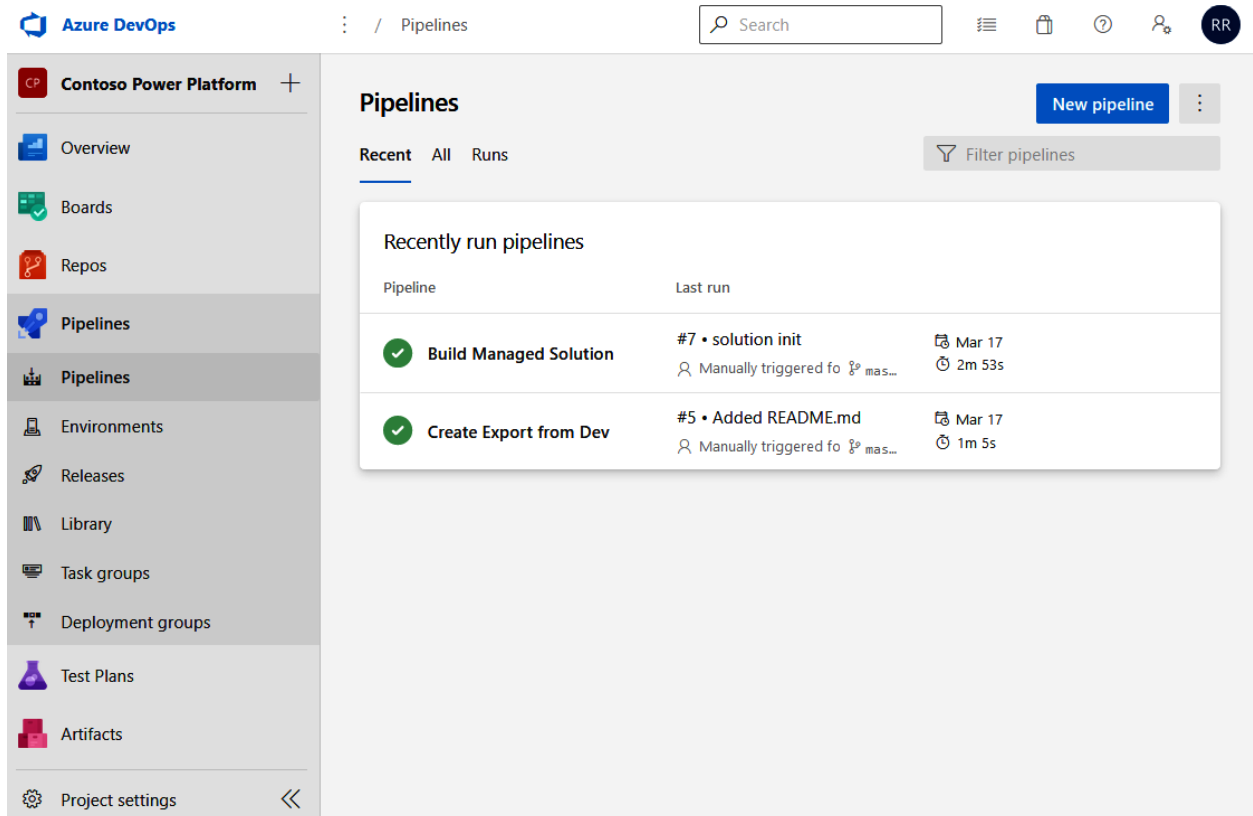
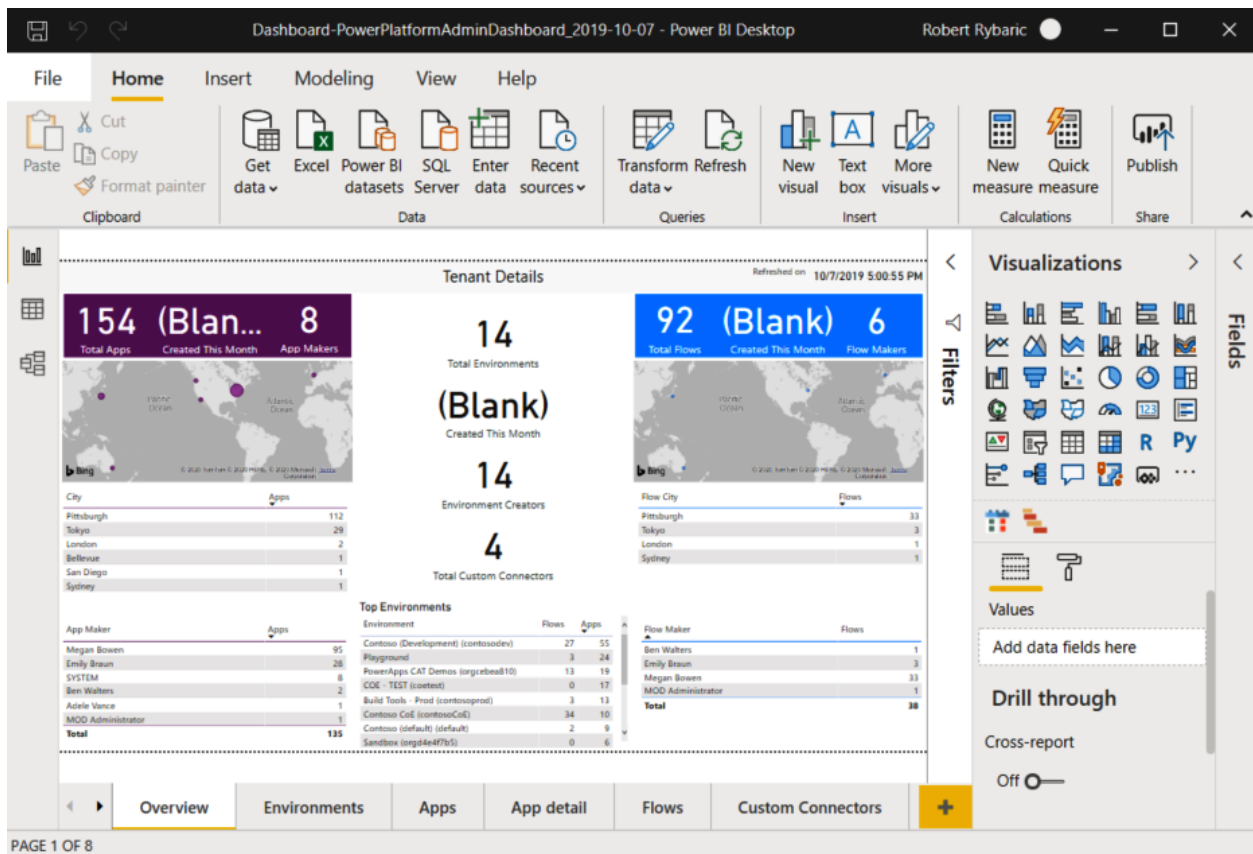
Add the email of the person generating this request

Enable notifications

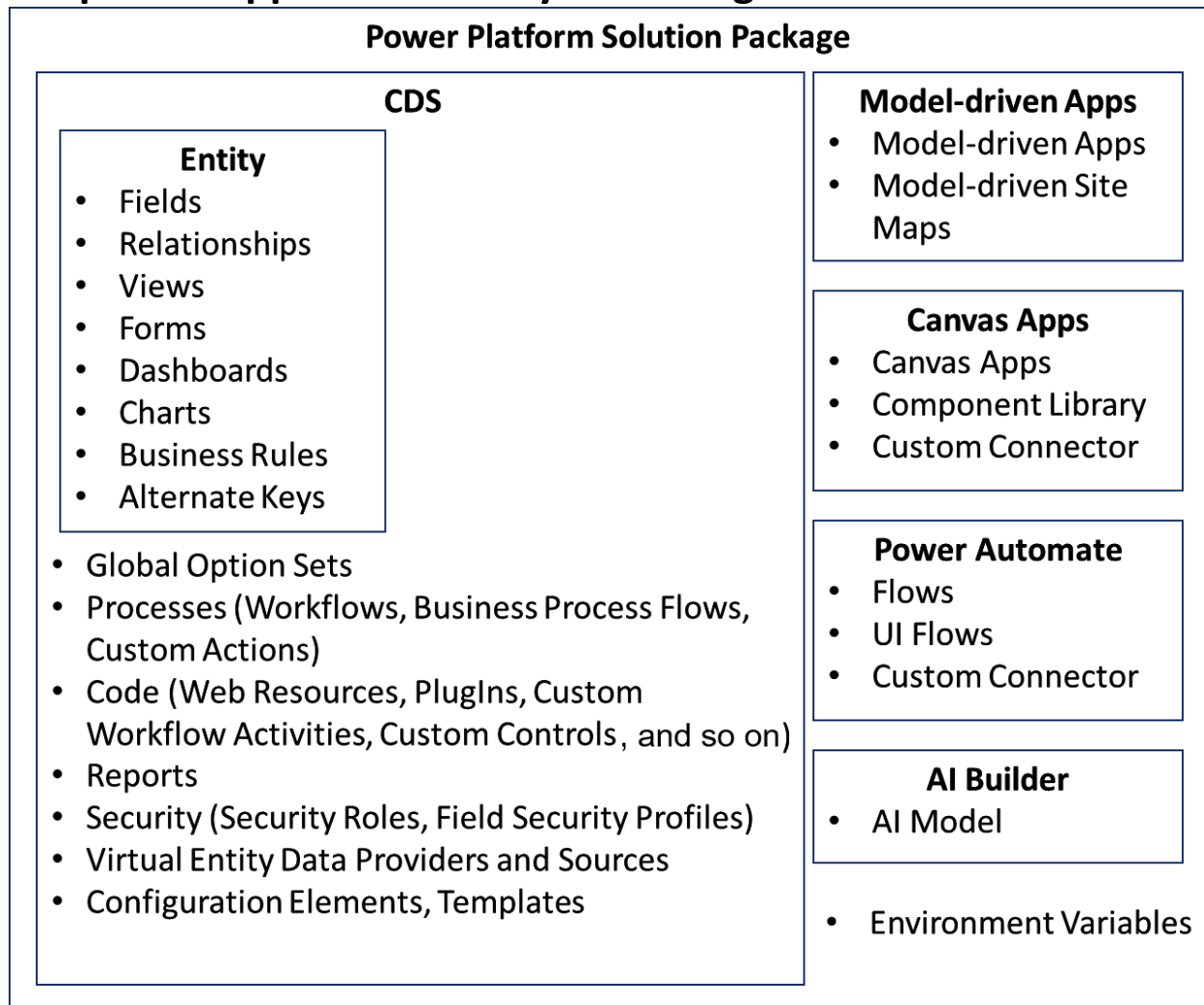
Enable email and push notifications

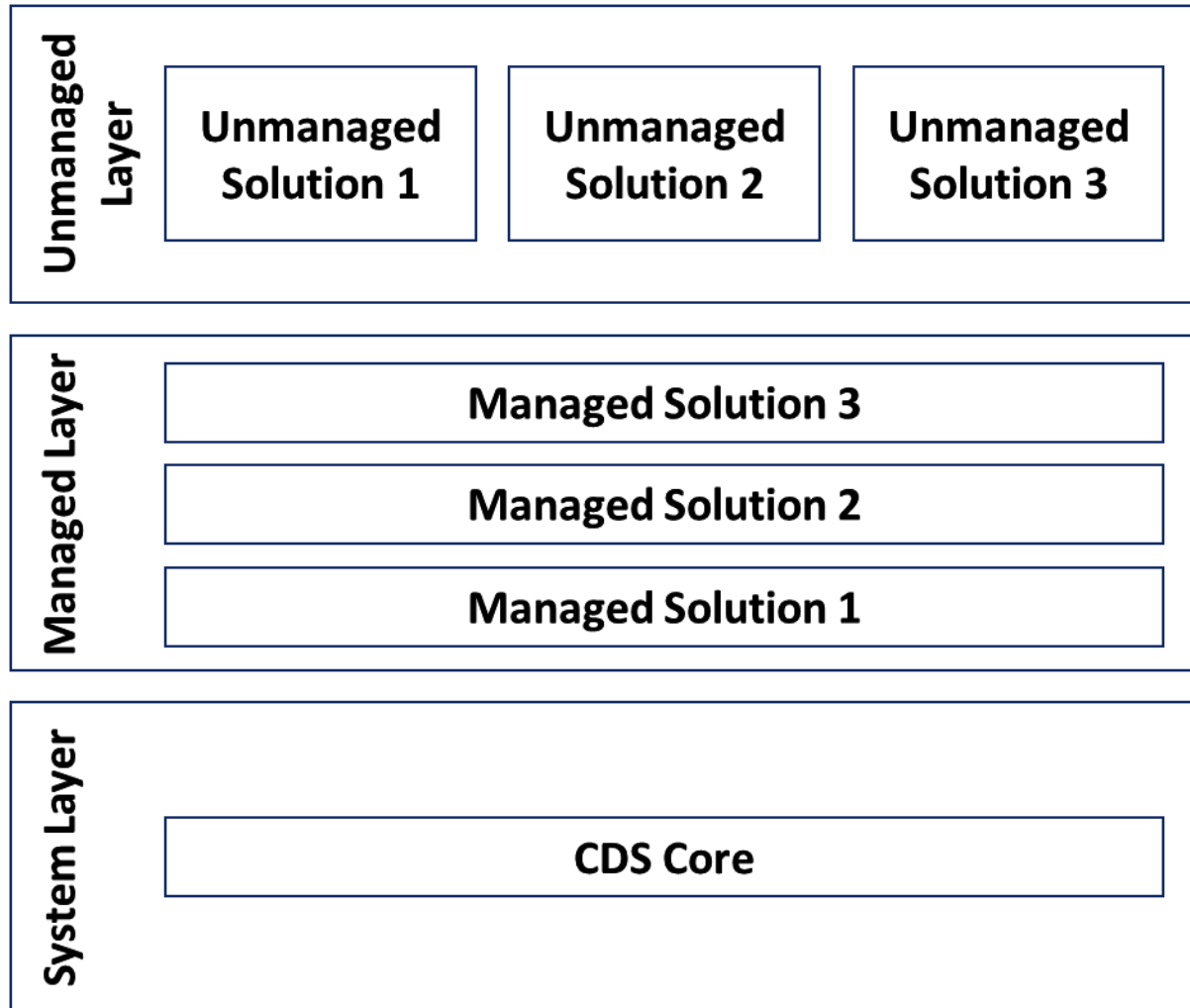


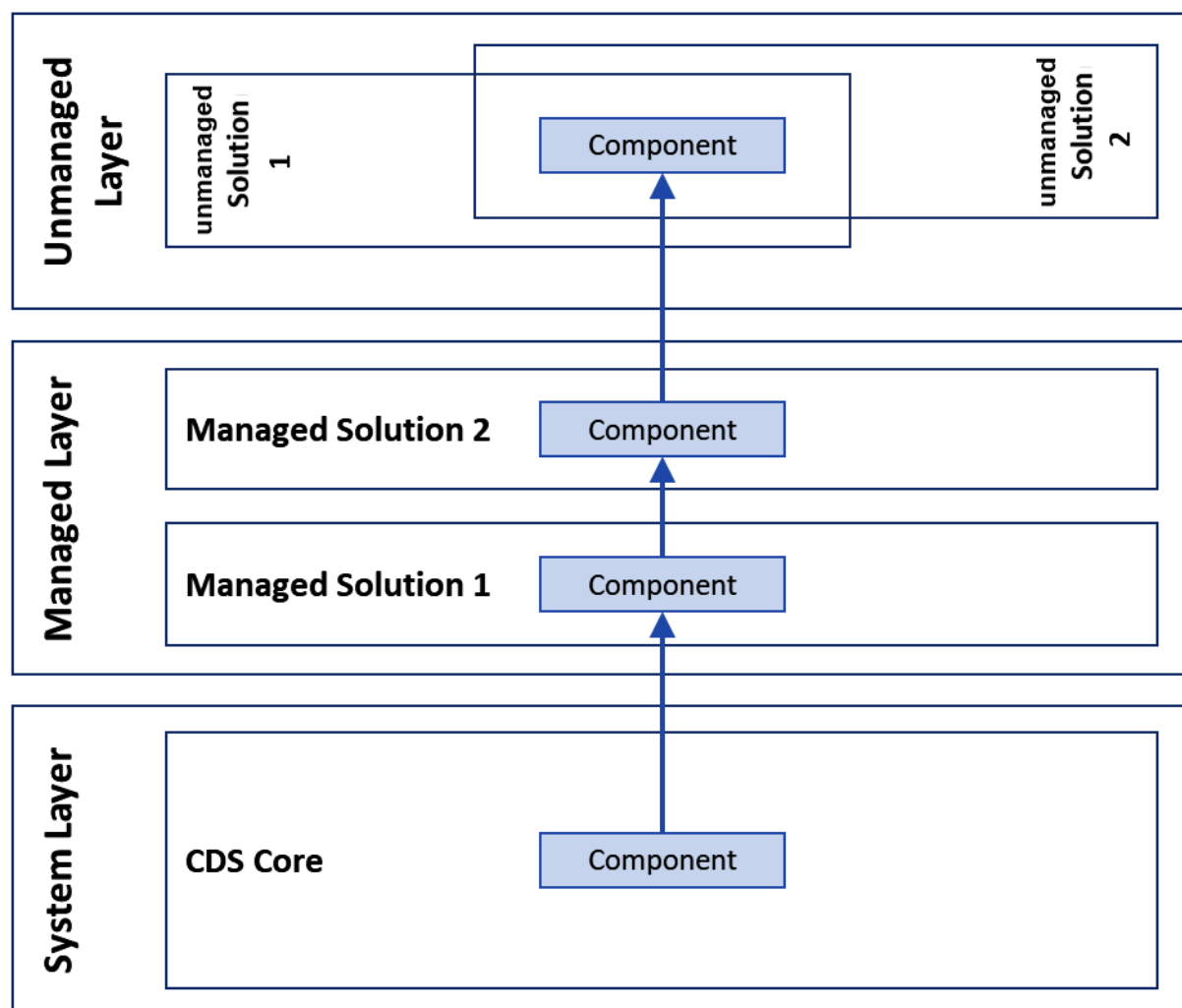
Hide advanced options ^



Chapter 5: Application Lifecycle Management







Import Options



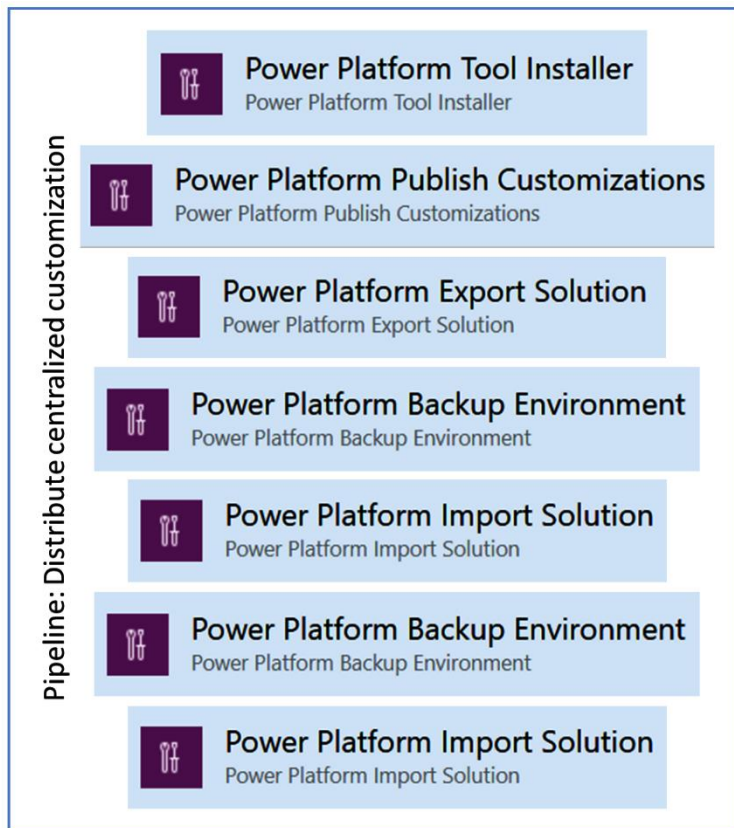
! This solution package contains an update for a solution that is already installed.

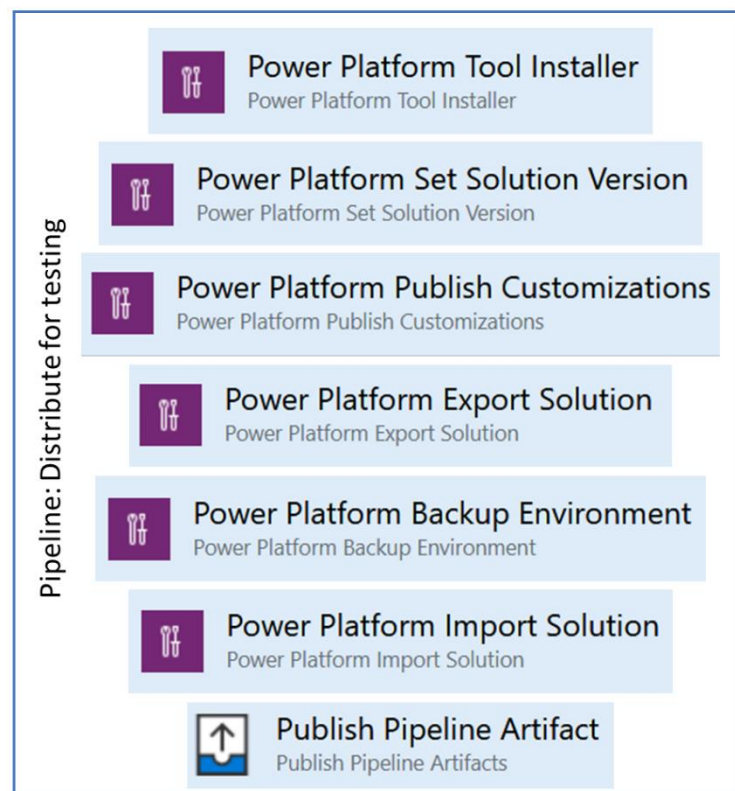
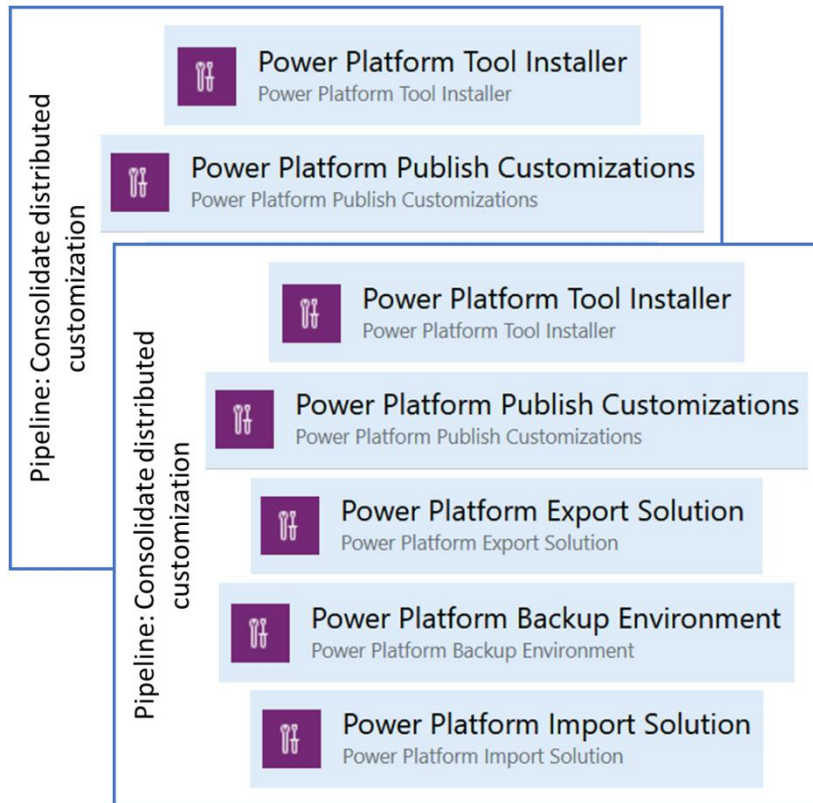
Solution Action [Learn more](#)

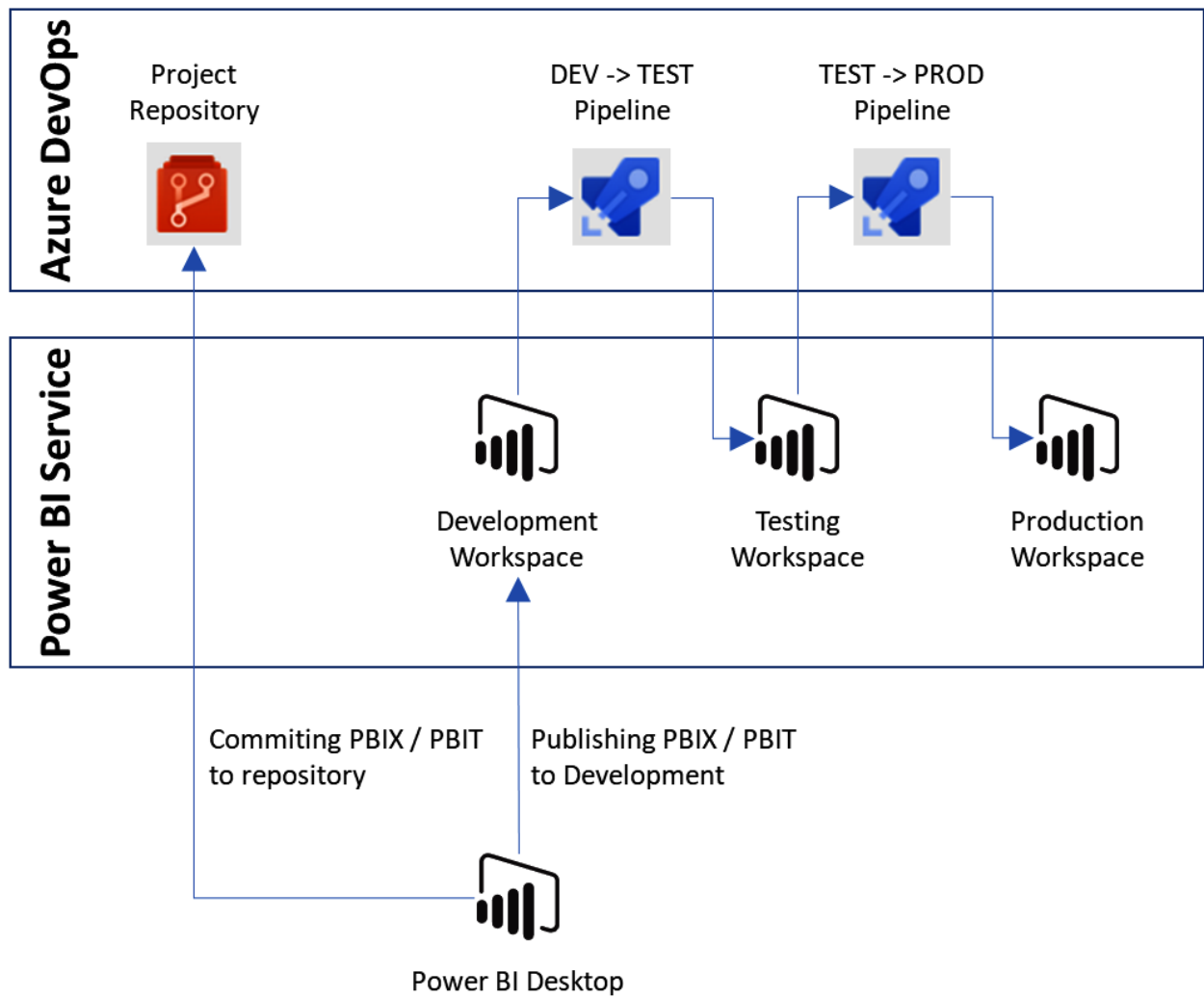
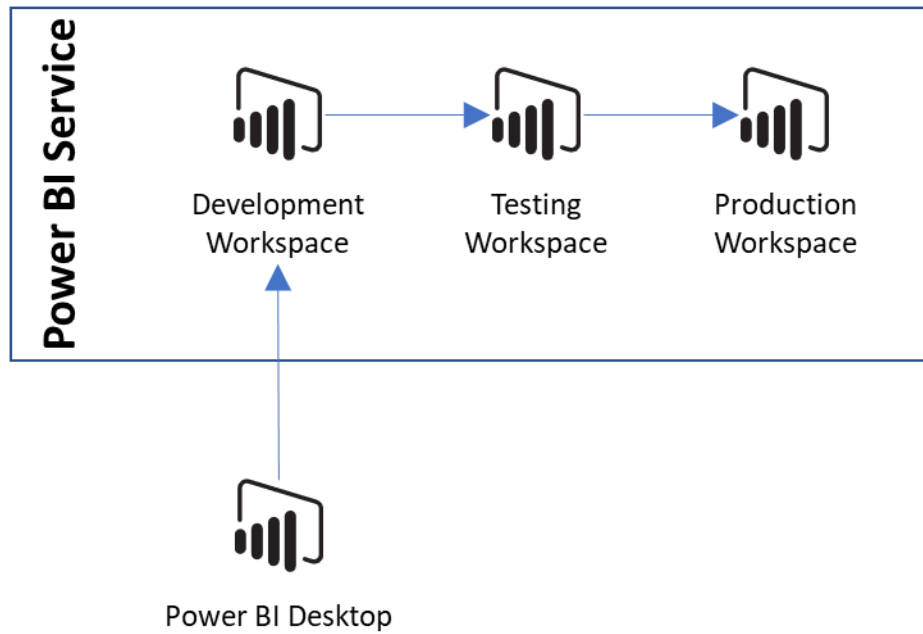
- ☒ **Upgrade (recommended)**
This option upgrades your solution to the latest version and rolls up all previous patches in one step. Any components associated to the previous solution version that are not in the newer solution version will be deleted.
- ☐ **Stage for Upgrade**
This option upgrades your solution to the higher version, but defers the deletion of the previous version and any related patches until you apply a solution upgrade later.
- ☐ **Update (not recommended)**
This option replaces your solution with this version. Components that are not in the newer solution will not be deleted and will remain in the system.

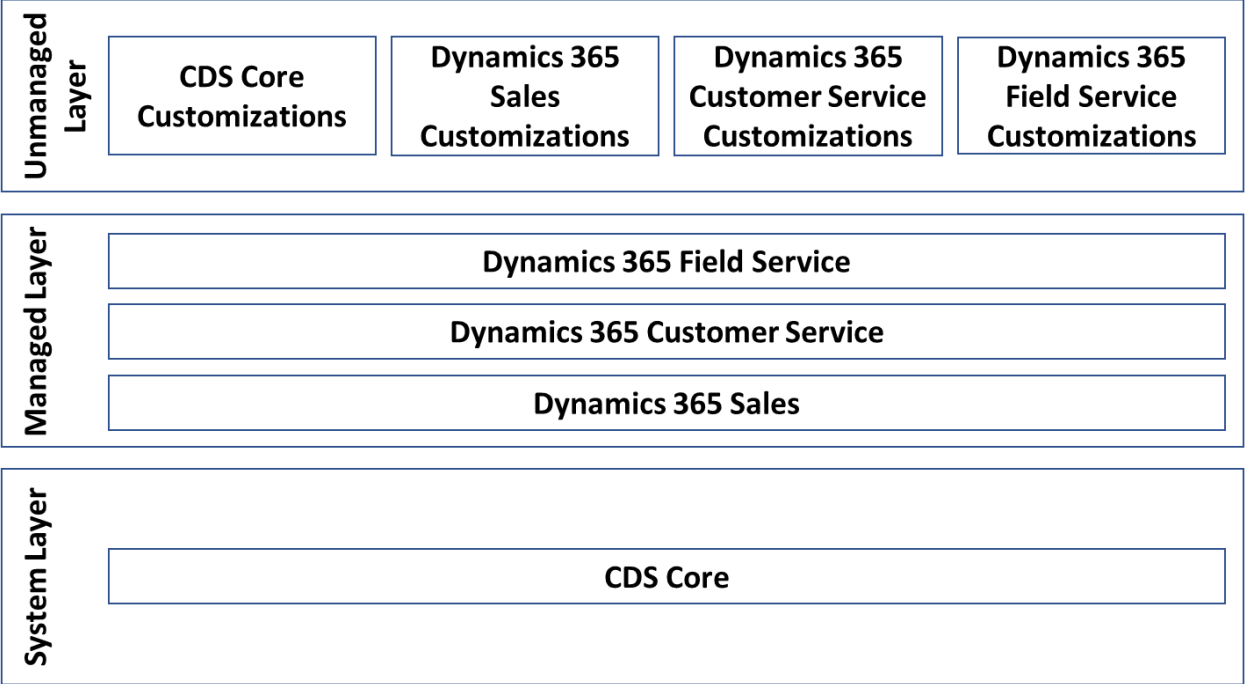
Previous customizations on components included in this solution [Learn more](#)

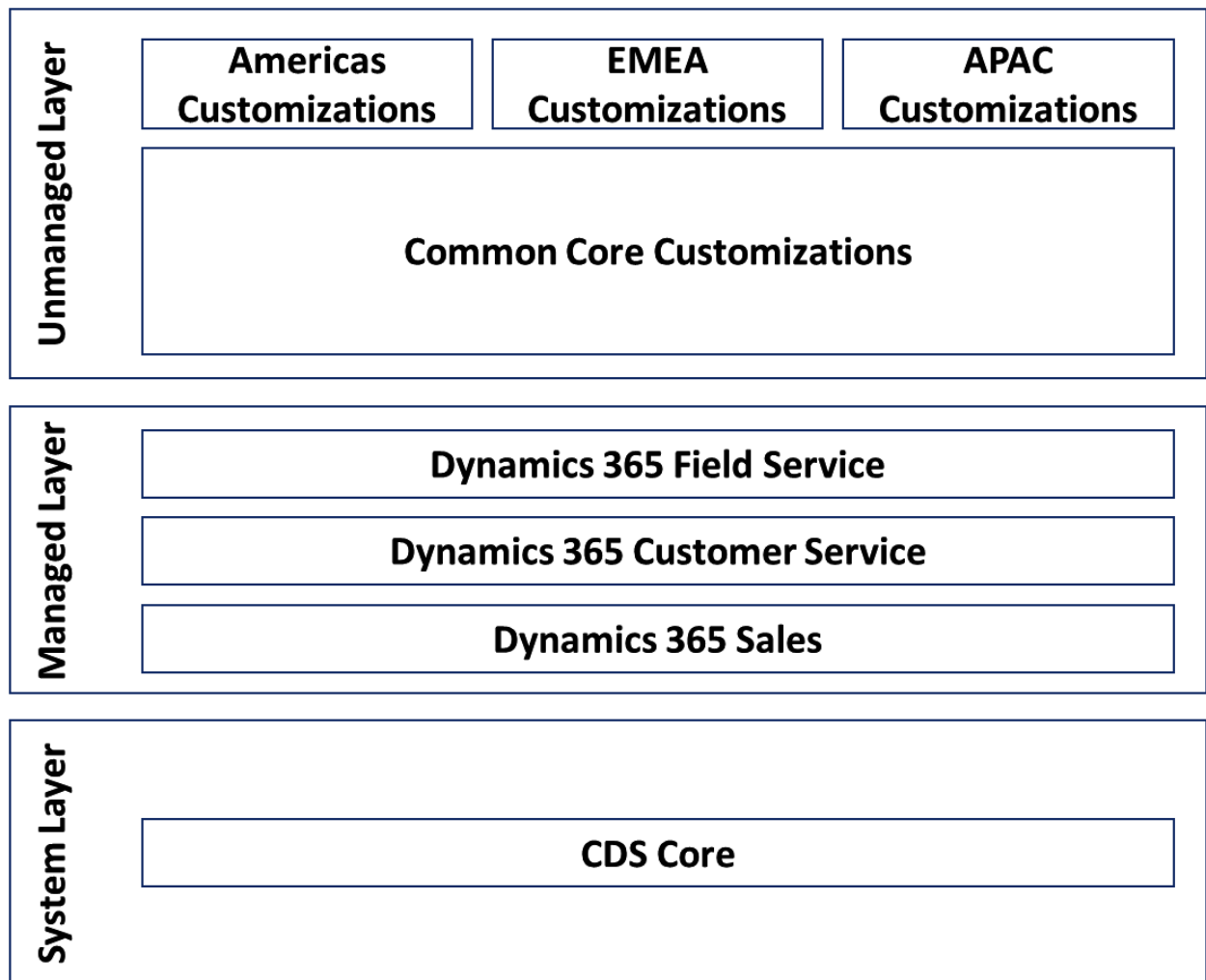
- ☒ **Maintain customizations (recommended)**
This option maintains any unmanaged customizations performed on components, but also implies that some of the updates included in this solution will not take effect.
- ☐ **Overwrite customizations (not recommended)**
This option overwrites or removes any unmanaged customizations previously performed on components in this solution. This option does not affect components that support merge behavior (forms, sitemap, ribbon, app modules). Components that have other managed solutions on top of the existing solution you are replacing do also still remain on top and are not affected by this option.











← Selected entities ×

Select components to your selected entities.

1 entities will be added to your project

Account

No components selected

☐

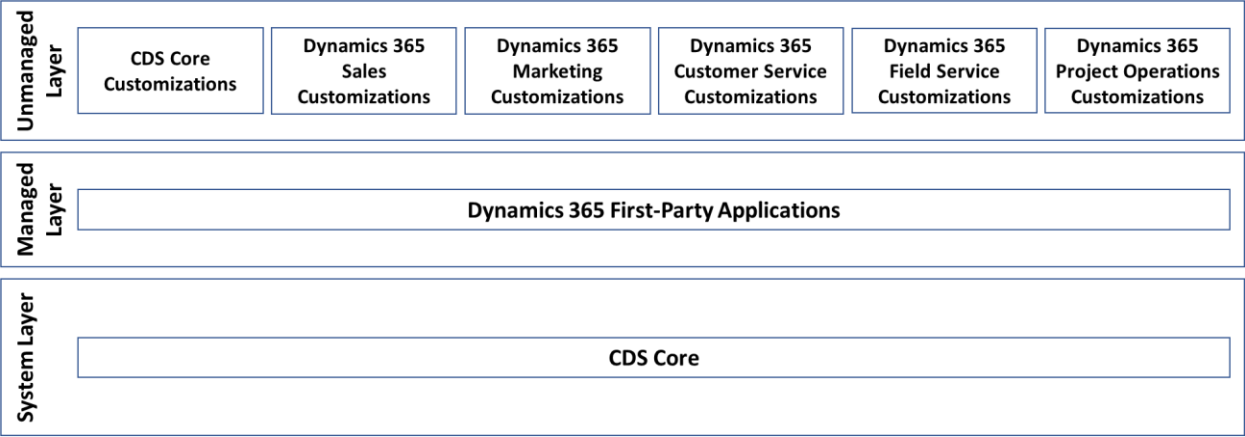
Include all components

☐

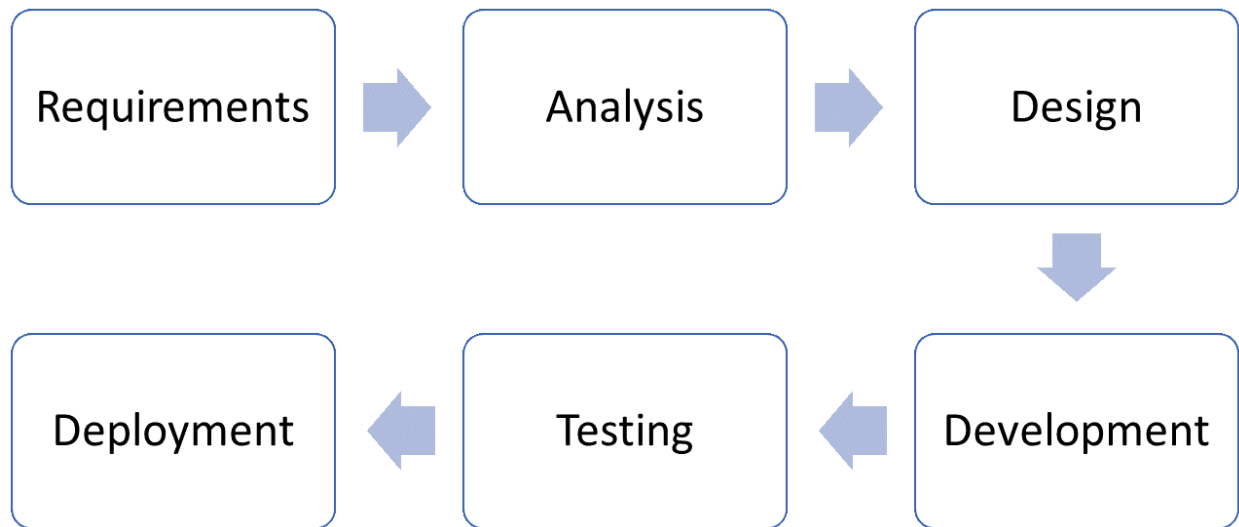
Include entity metadata

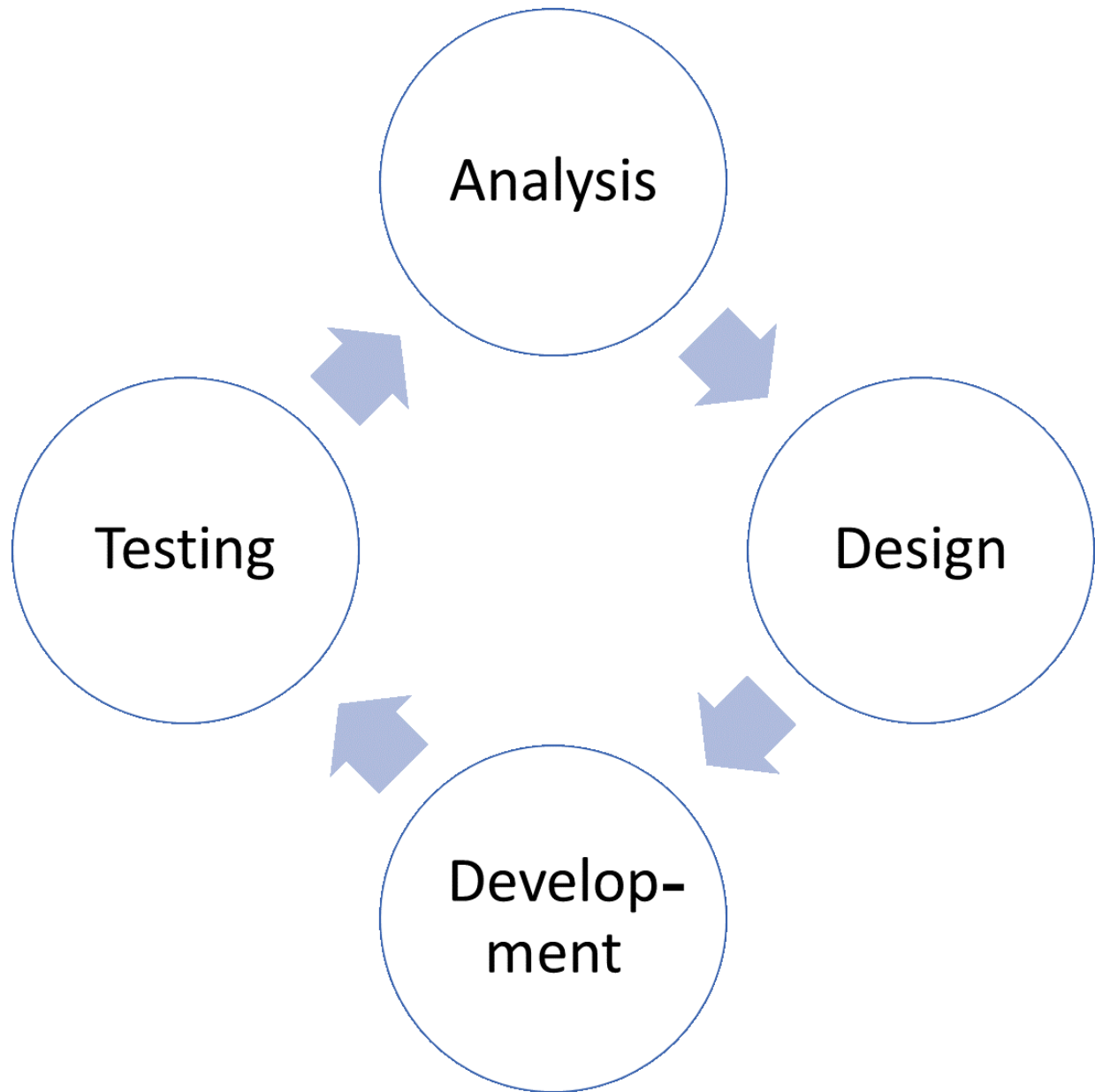


[Select components](#)

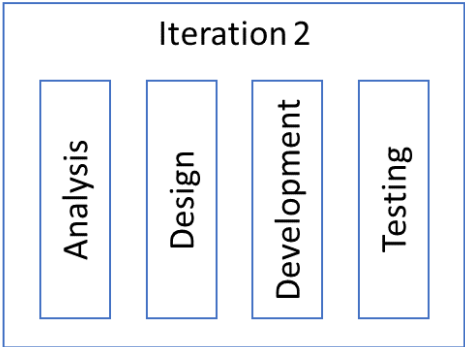
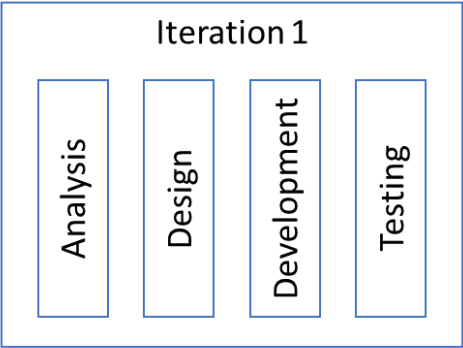


Chapter 6: Implementation Approach and Methodologies



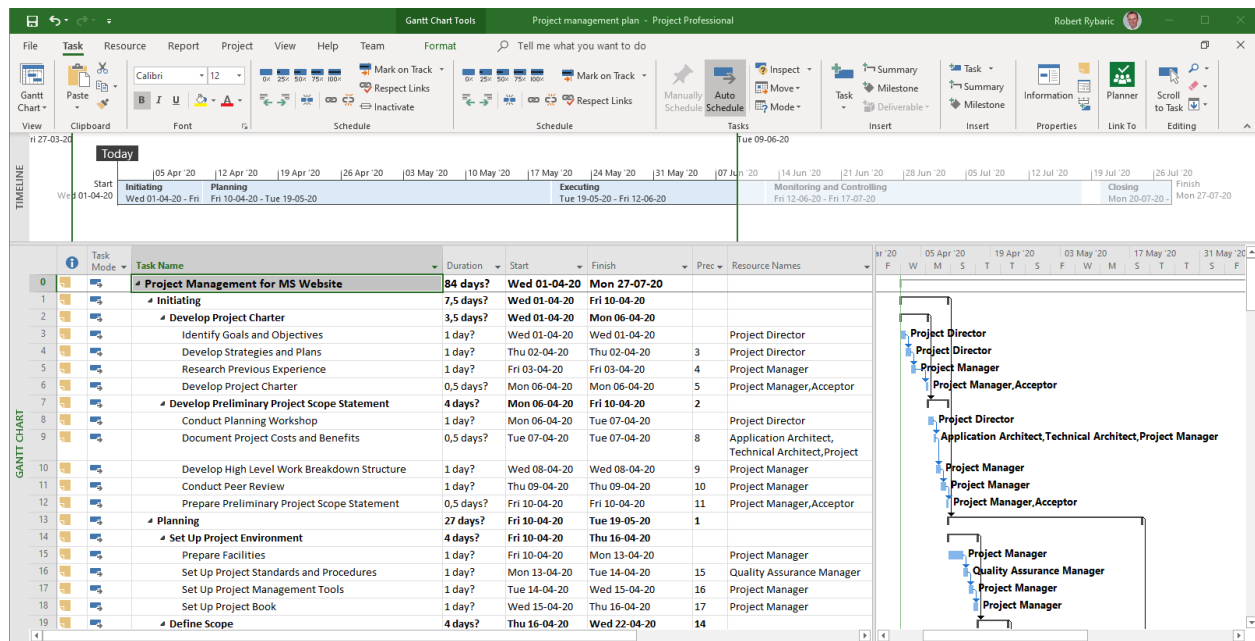


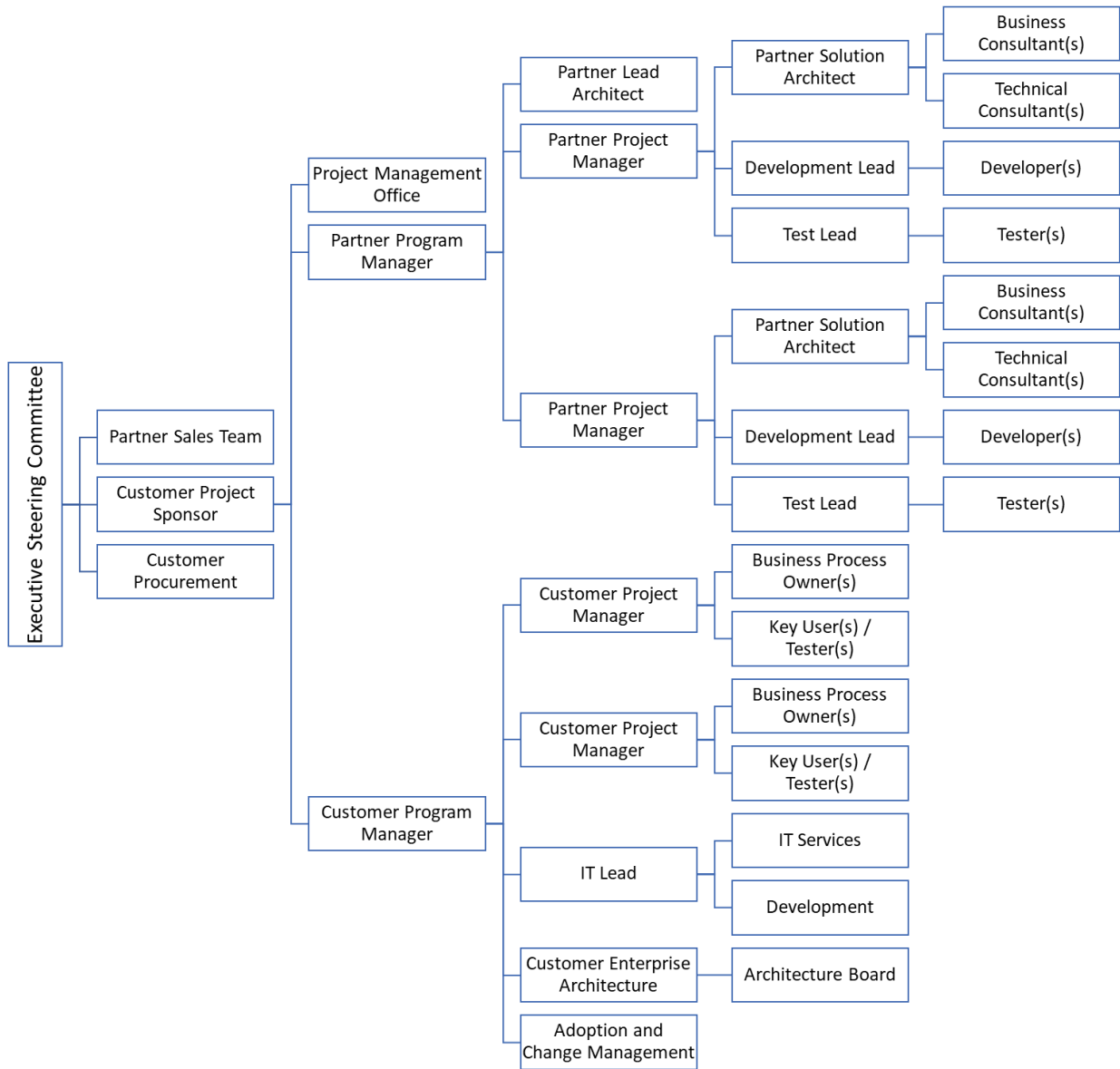
Requirements

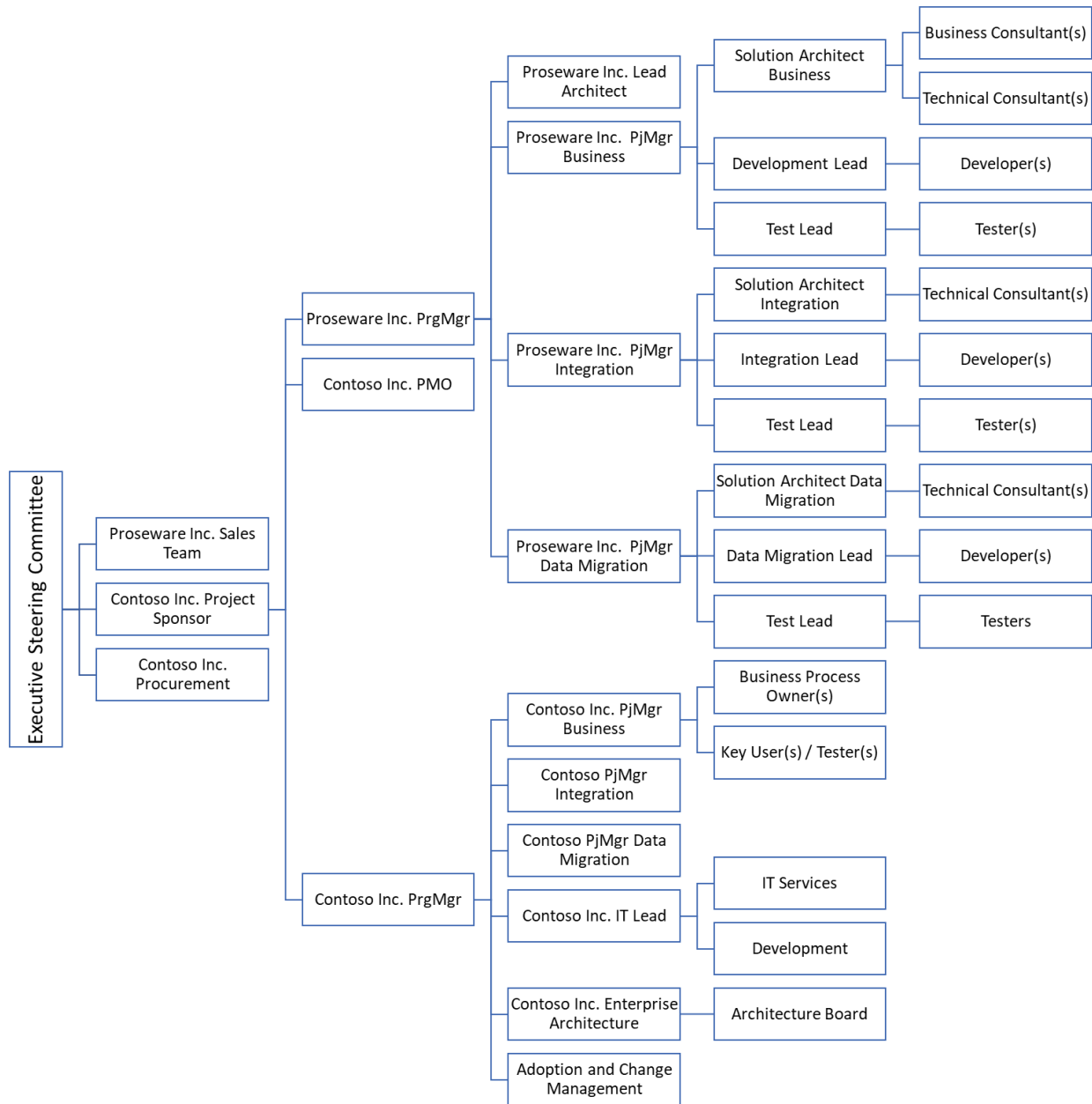


Deployment

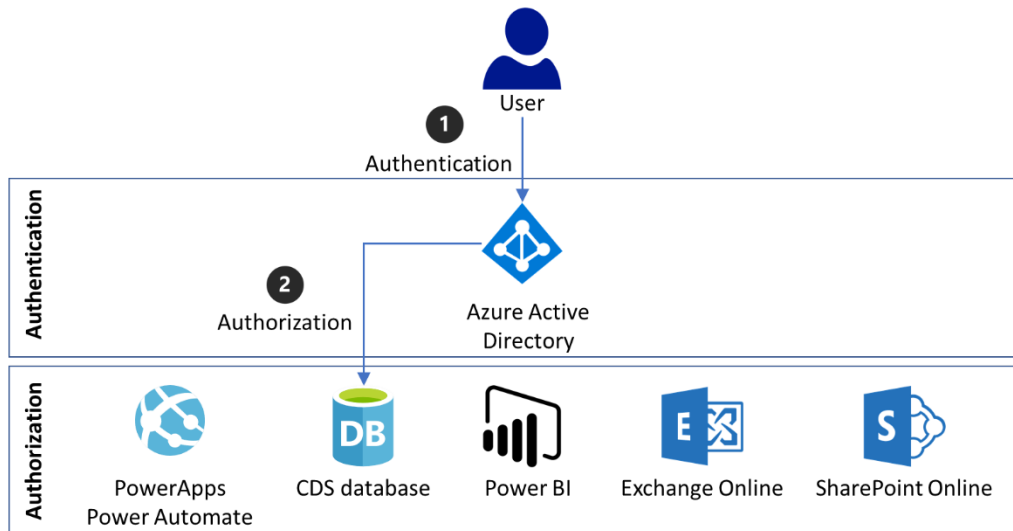
Requirement	Complexity	Total hours	Analysis	Design	Development	Testing
			15%	20%	40%	25%
REQ-01	Simple	40	6	8	16	10
REQ-02	Complex	120	18	24	48	30

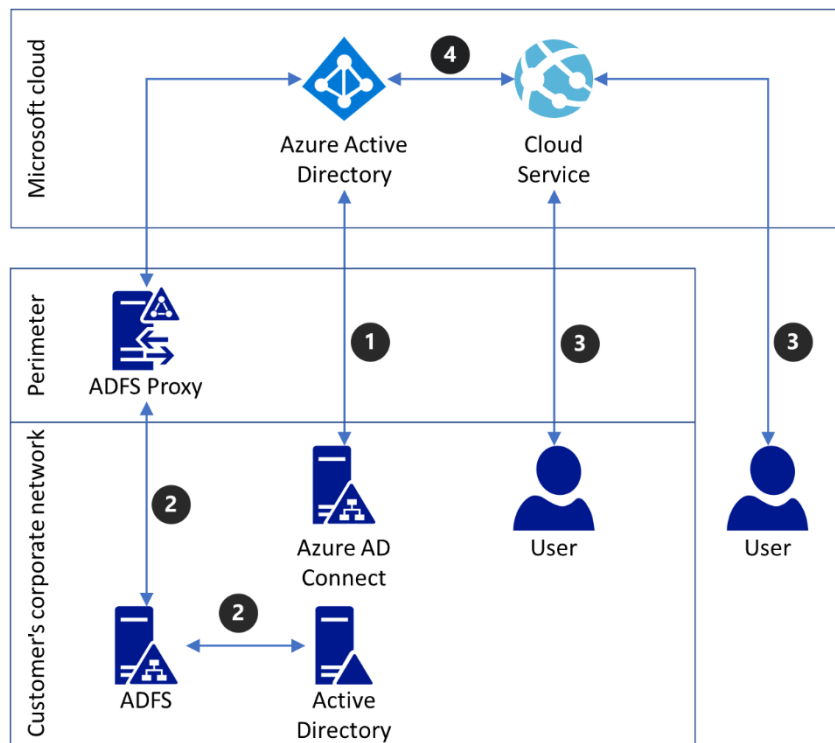
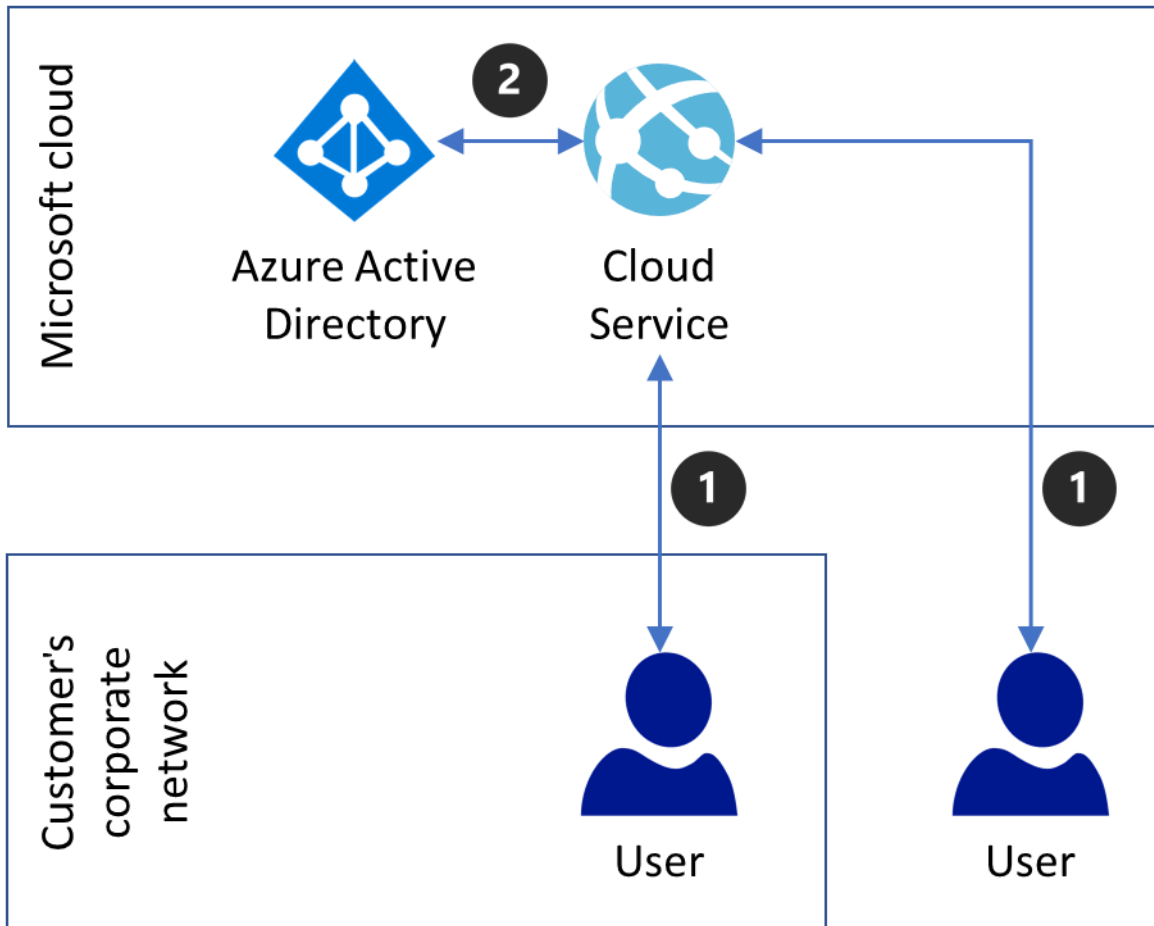


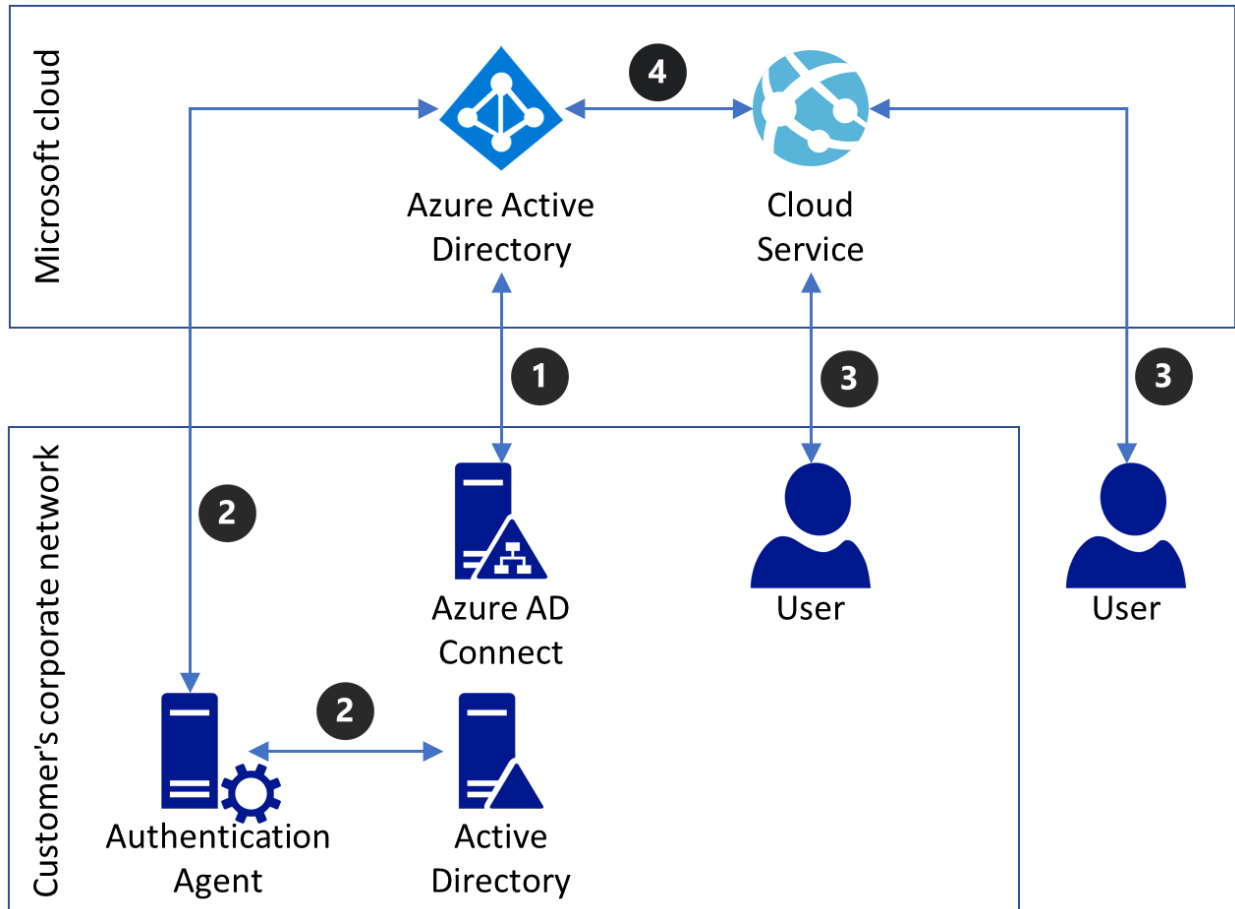


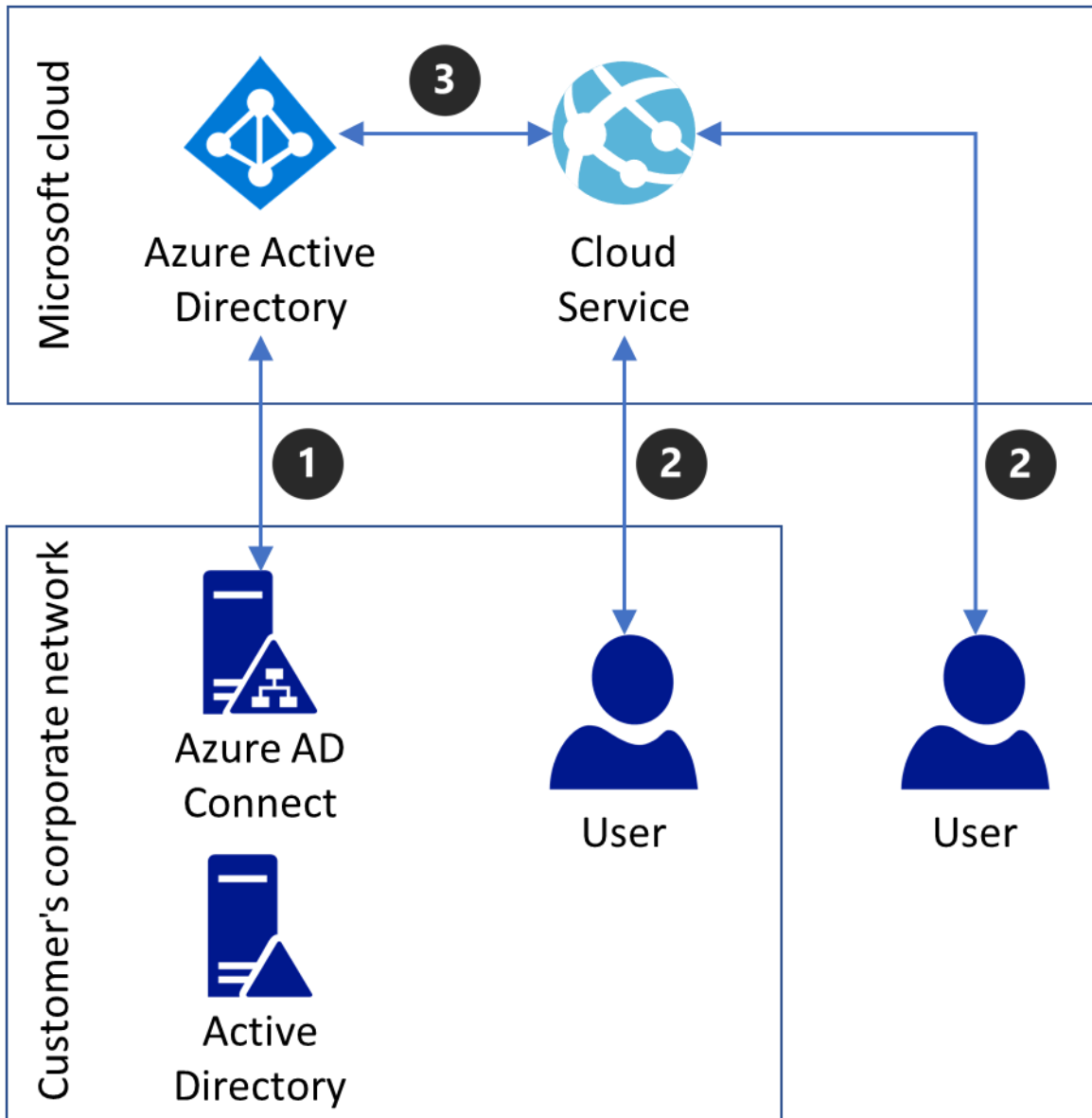


Chapter 7: Microsoft Power Platform Security









Home

[Sign in](#)

[Register](#)

[Redeem invitation](#)

Email *

Azure AD

Microsoft

Username *

Password *

Confirm password *

Register

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PowerApps

No CDS database



PowerApps
+
CDS



CDS database



Dynamics 365



CDS database

Key

None Selected

User

Business Unit

Parent: Child Business Units

Organization

Create

Read

Write

Delete

Append

Append To

Assign

Share



Field Service

Field Service allows organizations to deliver intelligent, world class field

Dynamics 365

UNIFIED INTERFACE



Resource Scheduling

Provides access to the Resource Scheduling solution

Dynamics 365

UNIFIED INTERFACE

Manage Roles - Field Service

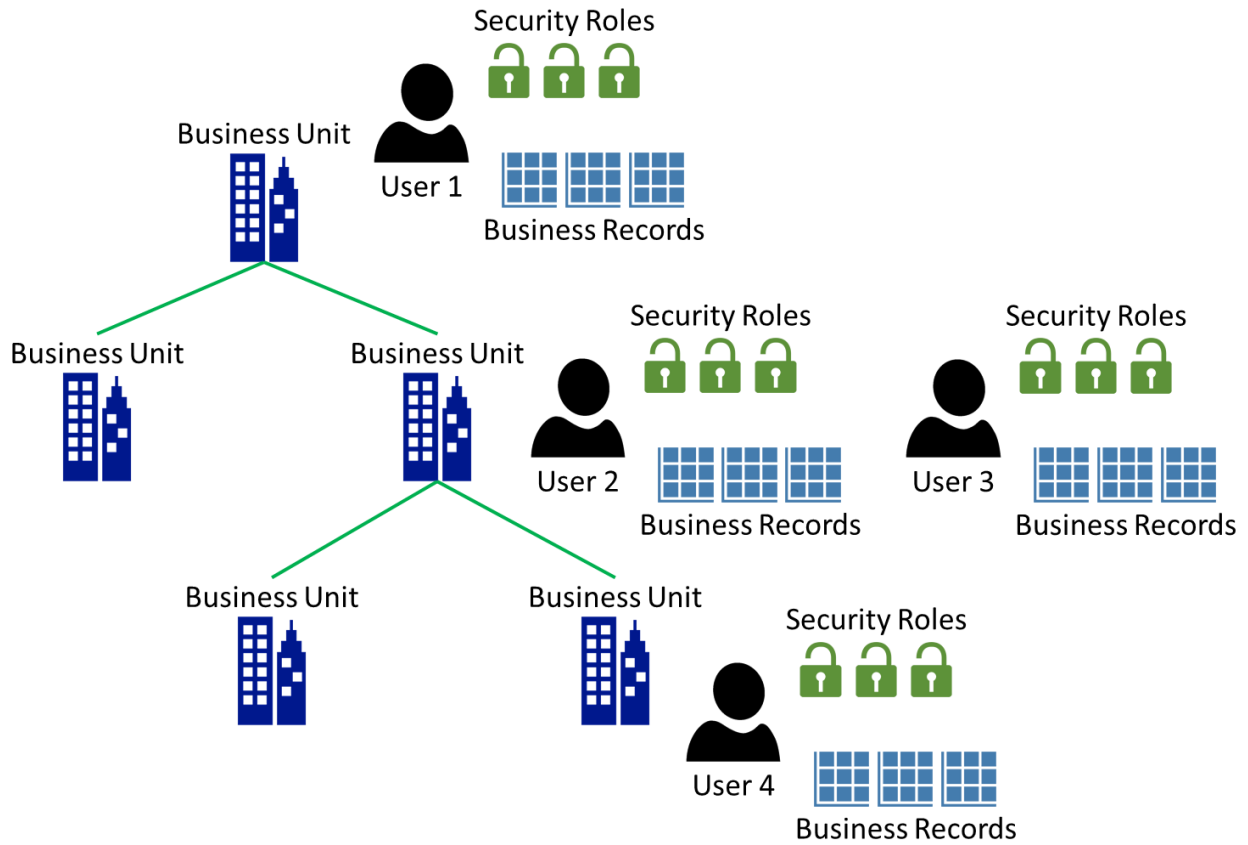
Choose an app URL that is easy to remember and then select which roles can access it.

> App URL Suffix

✓ Roles

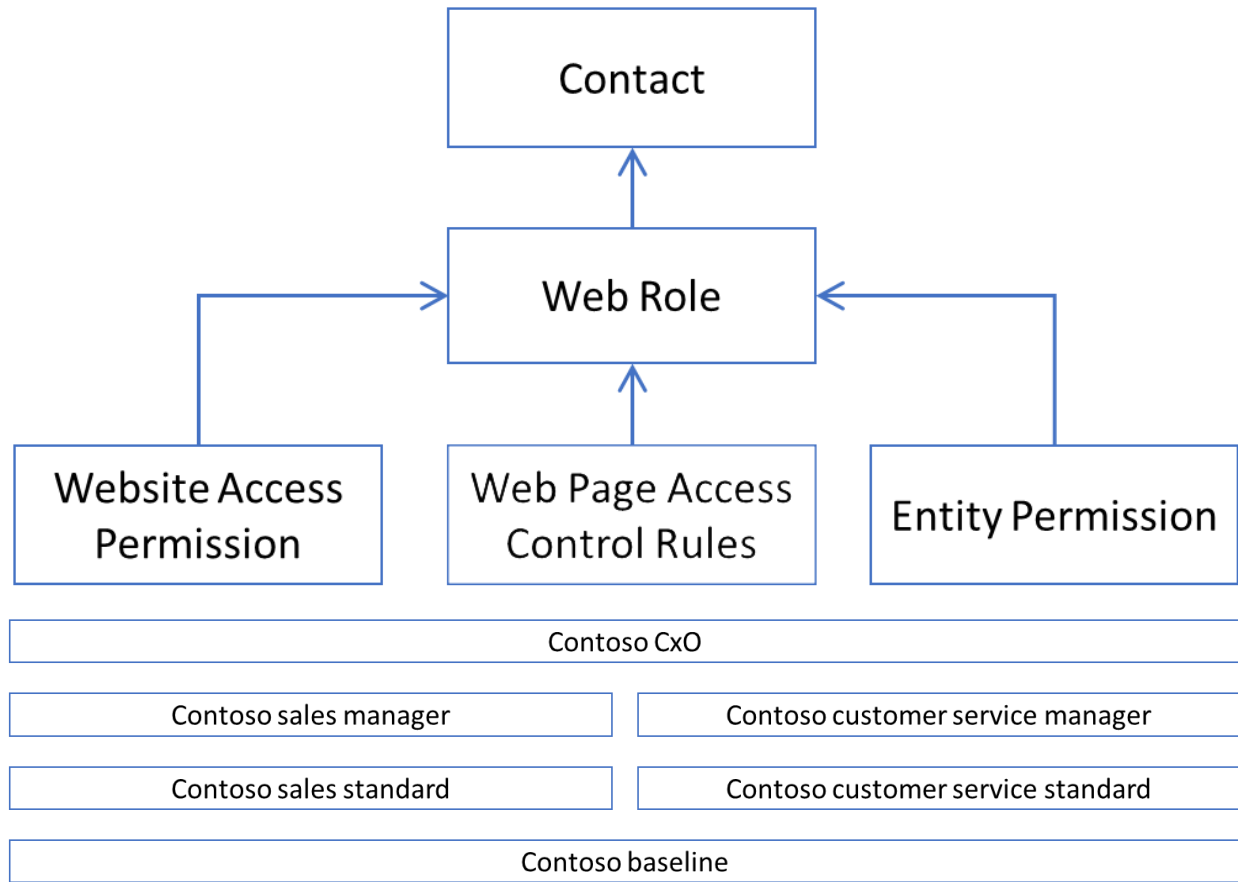
✓	Name	Business U...
✓	Event Planner	robert-ryb...
✓	EventManagement S2SInb...	robert-ryb...
✓	Export Customizations (So...	robert-ryb...
✓	Field Service - Administrator	robert-ryb...
✓	Field Service - Dispatcher	robert-ryb...
✓	Field Service - Inventory P...	robert-ryb...
✓	Field Service - Resource	robert-ryb...
✓	Field Service - Salesperson	robert-ryb...
✓	Finalize Registration Service	robert-ryb...
✓	Forecast manager	robert-ryb...
✓	Forecast user	robert-ryb...
✓	Help Page Author	robert-ryb...
✓	Help Page Consumer	robert-ryb...
✓	IoT - Administrator	robert-ryb...

7 of 85 selected



Manage roles

Roles	Tables	Table filter DAX expression
Seattle	account	[address1_city] = "Seattle"
	contact	
	incident	
	opportunity	





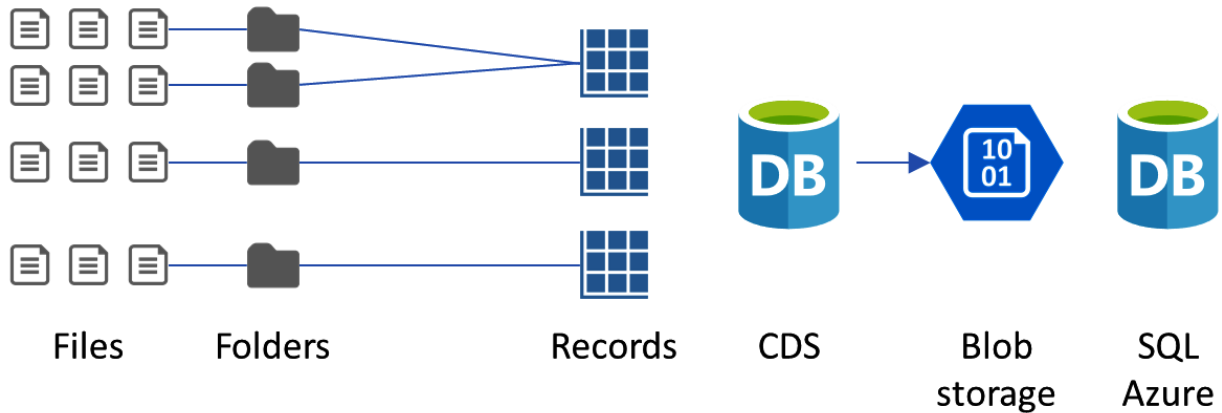
SharePoint



CDS / model-driven app



Power BI

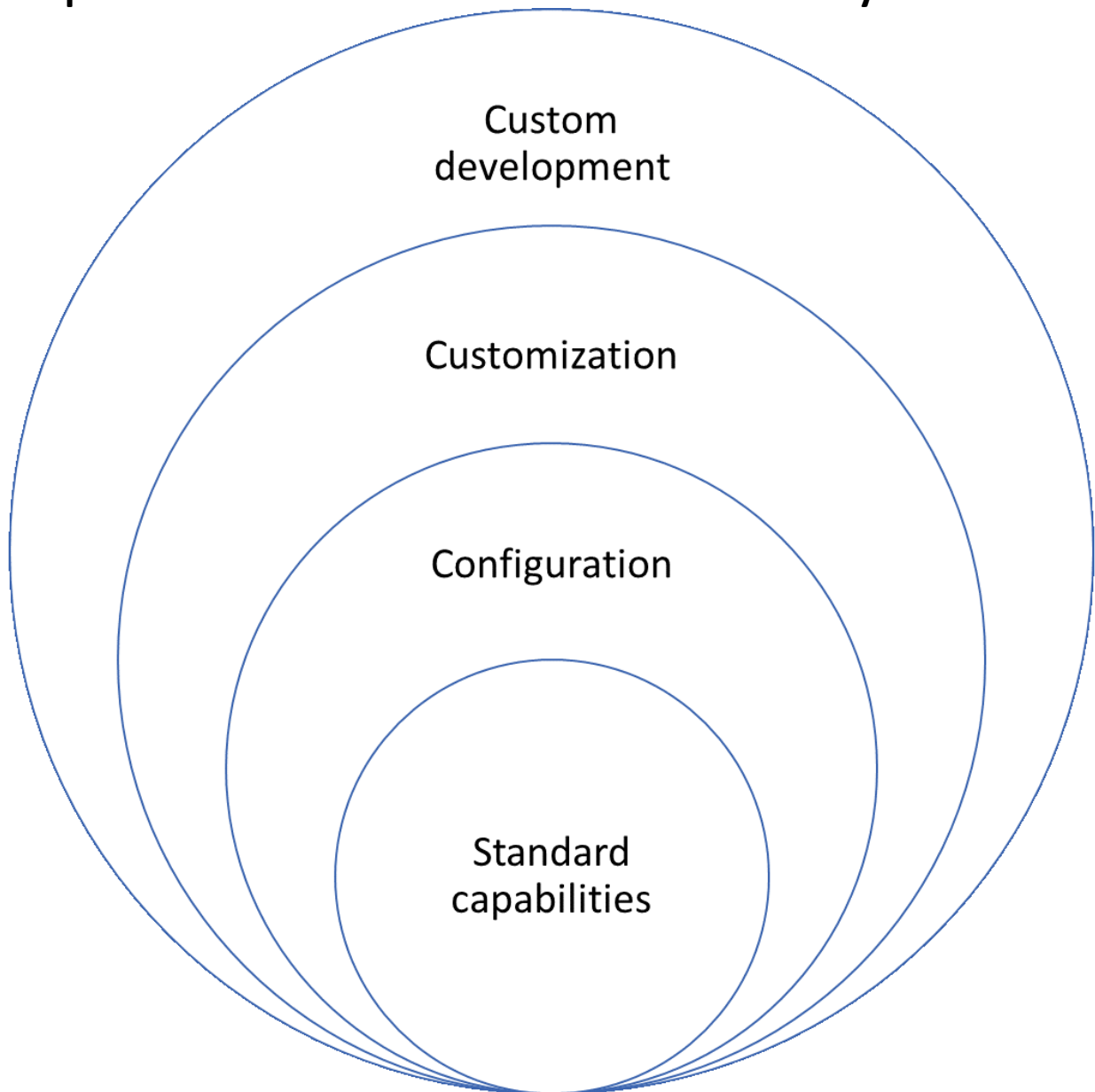


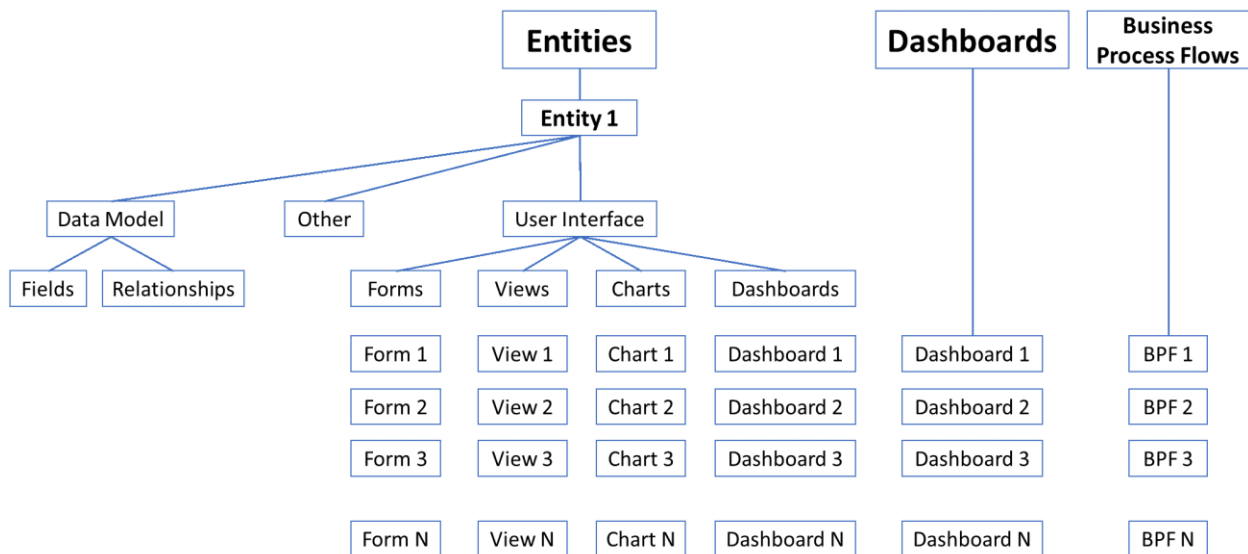
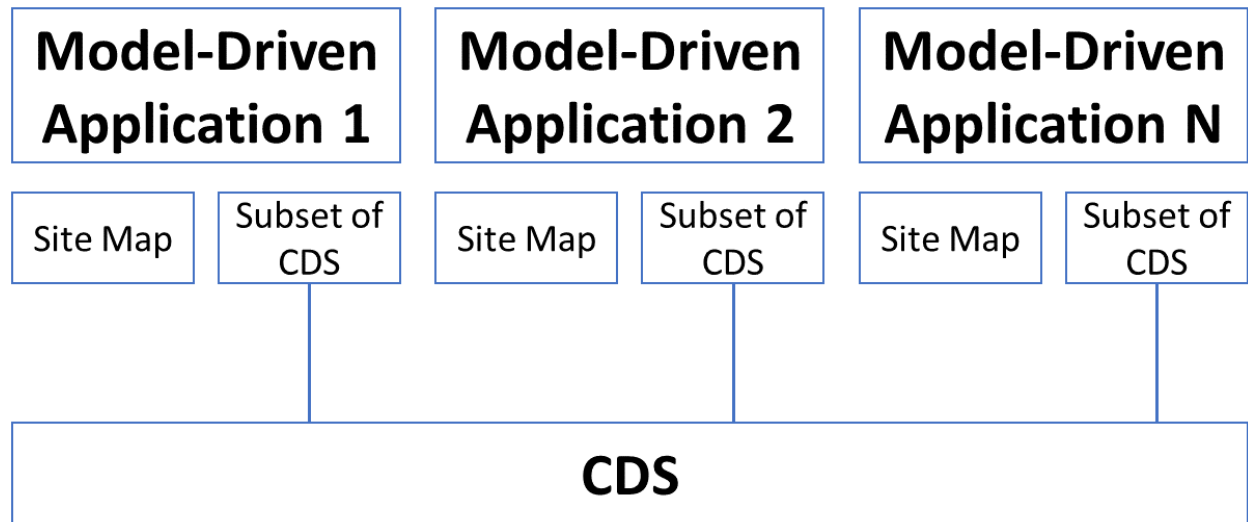
Azure Active Directory Tenant

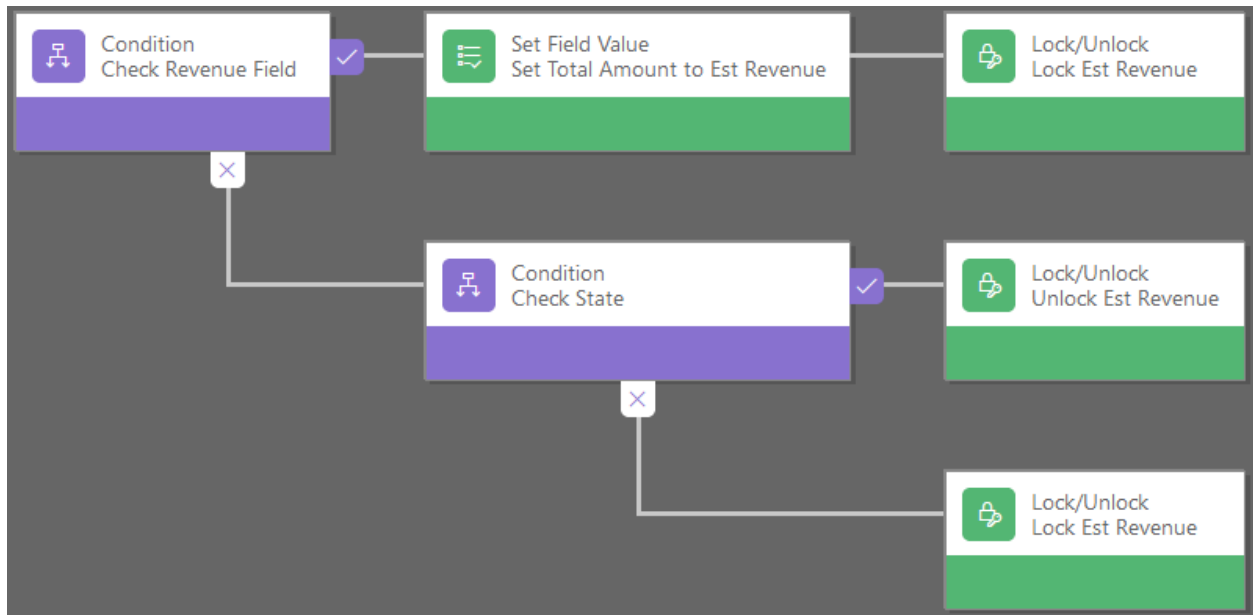
- Conditional Access
- Active Directory Integration
- Multi-Factor Authentication
- Data Loss Prevention Policies
- Cross-Tenant Inbound and Outbound Restrictions

Power Platform Environment without CDS	Power Platform Environment with CDS	Power Apps Portals	Power BI
• Environment Roles • Data Loss Prevention Policies • Canvas Apps Sharing • Power Automate Flows Sharing • Connector Permissions	• Model-Driven Apps Access Authorization • User Accounts Provisioning Governance • Session Governance • Service Authentication • CDS Authorization	• Portal Authentication • Portal Authorization	• Power BI Authorization • Row-Level Security • DirectQuery Security

Chapter 8: Microsoft Power Platform Extensibility







Purchase Order Business Process ▾

⊕ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

🔍 🔍 📄

Purchase Order
Purchase Order Draft

📄 4 🔄 0 Details ^

▲ Steps (4) ↑↓

- 📄 Data Step #1
Vendor
- 📄 Data Step #2
Purchase Order Date
- 📄 Data Step #3
Work Order
- 📄 Data Step #4
Receive to Warehouse

▲ Triggered Process (0)

Purchase Order
Purchase Order Approval

📄 2 🔄 0 Details ▾

📄 📄 📄 📄 📄 📄

🔄 Global Workflow (0) ^

Components Properties

▲ Flow

- 📄 Stage
- 📄 Condition

▲ Composition

- 📄 Data Step
- 🔄 Workflow
- 📄 Action Step
- 📄 Flow Step (Preview)

BILLING

Currency  US Dollar

Credit Limit

Credit Hold **No**

Payment Terms ---

SHIPPING

Shipping Method ---

Freight Terms ---

Add component

Search

Radial Knob

Number Input

Linear Gauge

Arc Knob

Linear Slider

Field label *

Credit Limit

Hide label

Read-only field

Lock field ⓘ

Hide field ⓘ

15303

Modes

Edit and Read

Description

Use this control for whole number input and display for any numeric and money fields.

Data types

Whole Number, Currency, Floating Point Number, Decimal

Show Chart

+ New

Delete

Refresh

Collaborate

Email a Link

Flow

All Accounts

Search this view

Account Name	Main Phone	Address 1: ...	Primary Contact	Email (Primary Contact)	Status
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)	someone_a@example.	Active
Litware, Inc	555-0151	Dallas	Susanna Stubberod (sampl	someone_b@example.	Active
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.	Active
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.	Active
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.	Active

Field Properties

? X

Modify this field's properties.

Display

Formatting

Details

Events

Business Rules

Controls

Control	Web	Phone	Tablet
Text Box (default)	☒	☒	☒
Canvas app	☐	☐	☐

Add Control...

Canvas app

Property	Value
Entity name	Account (SingleLine.Text)
App name	
App ID *	

Entity name
Compatible types: SingleLine.Text
This entity will provide data for your canvas app.

Select Customize to create or edit your canvas app in PowerApps Studio

Customize

☐ Hide Default Control

OK

Cancel

Assemblies to interact with the organization and discovery service

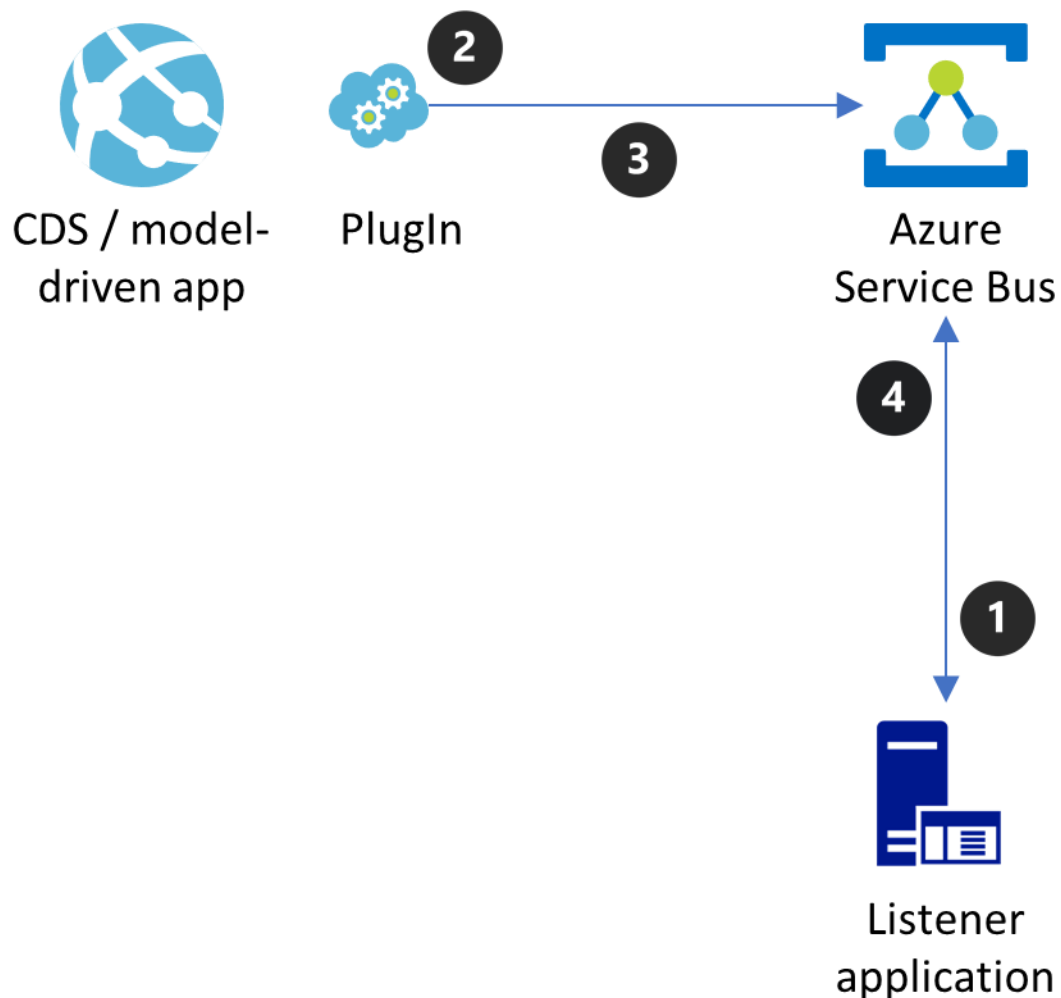
- Microsoft.Crm.Sdk.Proxy.dll
- Microsoft.Xrm.Sdk.dll

Assembly to develop custom workflow actions

- Microsoft.Xrm.Sdk.Workflow.dll

XRM Tooling to build external .NET-based applications

- Microsoft.Xrm.Tooling.Connector.dll
- Microsoft.Xrm.Tooling.CrmConnectControl.dll
- Microsoft.Xrm.Tooling.WebResourceUtility.dll



Service Endpoint Registration



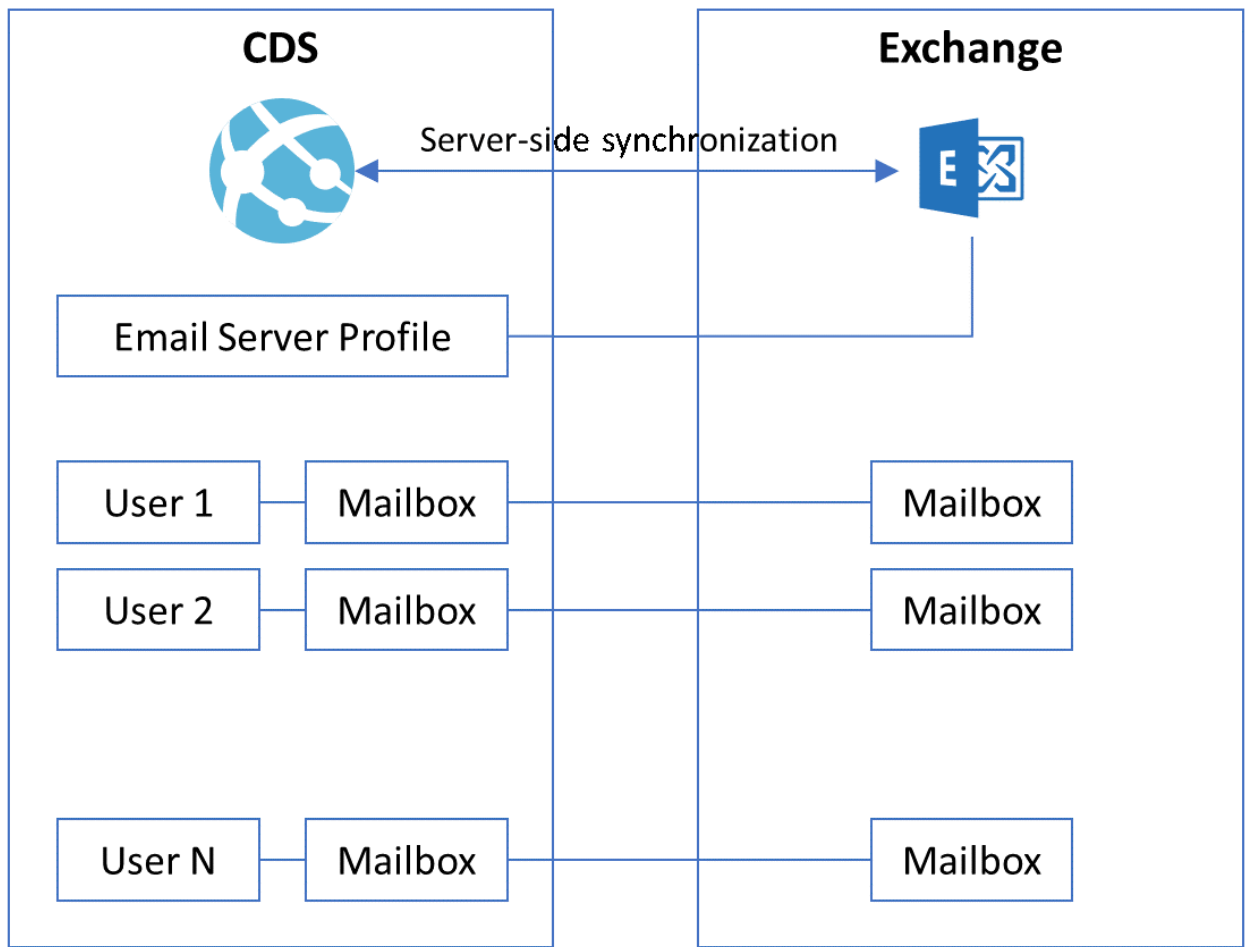
Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	Contoso Azure Service Bus
NameSpace Address	sb://<your namespace>
Designation Type	Topic
Topic Name	
Message Format	.NETBinary
Authorization Type	SASKey
SAS Key Name	
SAS Key	*****
User Information Sent	UserId
Description	

Save

Cancel

Chapter 9: Microsoft Power Platform Integration



4G Enabled Tablets

Opportunity · Opportunity ▾

06.03.2017

Est. Close Date

Opportunity Sales Process

Active for 9 months

<

Qualify

Develop

Propose (9 Mo)

Summary

Product Line Items

Quotes

Field Service

Files

Documents

Related

Show Chart

Document Location ▾

Open Location ▾

Add Location

Edit Location ▾

Refresh

Document Associated Grid ▾

✓	Name ▾	Modified ▾	Modified by ▾	Path ↑ ▾	Source ▾
	Confidential Opportunity Background.pptx	31.07.2020 15:33	Robert Rybaric	personal/admin_robertrybaric_o...	OneDrive
	Opportunity Calculation.xlsx	31.07.2020 15:32	Robert Rybaric	sites/Dynamics365/opportunity...	SharePoint
	Opportunity Summary.docx	31.07.2020 15:32	Robert Rybaric	sites/Dynamics365/opportunity...	SharePoint









Robert Rybaric
Owner

Purchase Timeframe	This Quarter
--------------------	--------------

✎ 📎 😊 📺 🗒️ 📩 ... ➤

4G Enabled Tablets

Opportunity · Opportunity ▾

06.03.2017

Est. Close Date

3.257.500,00 EUR

Est. Revenue

In Progress

Status

Robert Rybaric

Owner



Opportunity Sales Process

Active for 9 months



Qualify

Develop

Propose (9 Mo)

Summary

Product Line Items

Quotes

Field Service

Files

Related

Topic*

4G Enabled Tablets

Contact

Vincent Lauriant

Account

Southridge Video

Purchase Timeframe

This Quarter

Currency*

euro

Budget Amount

6.922.000,00 EUR

Purchase Process

Individual

Timeline

Search

Enter a note...

RR

Send
Follow
Closed

AS

Review
Active

Activity

Appointment

Email

Phone Call

Task

Alert Subscription

☐ Booking Alert

Invite Redemption

Portal Comment

Project Service Approval

☐ Survey Activity

Note

OneNote

Post

7



1.10.2019 10:02

1.10.2019 10:00

Sales Hub Sales > Contacts > Humberto Acevedo

Save Save & Close + New Deactivate

Humberto Acevedo
Contact · Contact ▾

Summary Details Insights Events attended

CONTACT INFORMATION

First Name*
Humberto

Last Name*
Acevedo

Job Title

Account Name
Trey Research

Email
info@treyresearch.net

Business Phone
789-741-8565

Quick Create: Phone Call

Owner * **Robert Rybaric**

Subject * **Verify purchase interest**

Call From * **Robert Rybaric**

Call To * **Humberto Acevedo**

Direction **Outgoing**

DESCRIPTION

Phone Number **789-741-8565**

Description **Quick call with Humberto to verify, whether he is still interested in the**

Duration **30 minutes**

Due ---

Priority **Normal**

Save and Close ▾ **Cancel**

Dynamics 365 ▾ Sales Hub **SANDBOX**

Home Recent Pinned

My Work

Sales accelerator (...)

Dashboards

Activities

Auto capture (preview)

Activity suggestions

Contact suggestions

Customers

6 orders of Product SKU JJ202 (sample)
Opportunity · Opportunity ▾

Project Service - Opport...
Active for 11 months

Qualify

Summary Product Line Items Quotes Field S

Topic*
6 orders of Product SKU JJ202 (sample)

Contact
 Maria Campbell (sample)

Account
 Fabrikam, Inc. (sample)

Purchase Timeframe
This Year

Yammer Conversation

What are you working on?

All Company

Robert Rybaric
1 minute ago

Hi team, this is the latest opportunity for Fabrikam Inc. Please go ahead and verify the opportunity and provide suggestions for the details of the offered products and services.

6 orders of Product SKU JJ202 (sample)

robertrybaric.crm4.dynamics.com

Write a reply

Power Automate

- Does not need an Azure license
- Cannot easily integrate with Microsoft Azure services
- Native integration with canvas apps
- Provides options for human interactions
- Can be deployed with CDS solutions
- Approval process
- Provides an app for mobile devices

Logic Apps

- Requires an Azure license
- Can be easily integrated with other Azure services to build complex solutions
- Enterprise scalability
- Can be developed using code with Visual Studio

IFRAME Properties



Modify this IFRAME's properties.

General

Formatting

Dependencies

Events

Name

Specify a unique name.

Name *IFRAME_Contoso

URL *<https://www.contoso.com>

☒ Pass record object-type code and unique identifier as parameters.

Label

Specify the label for this field in forms.

Label *Contoso

☐ Display label on the Form

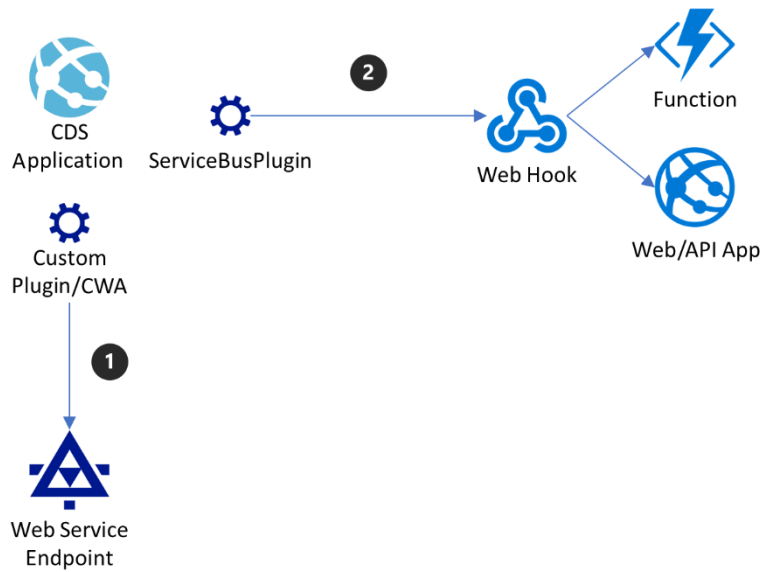
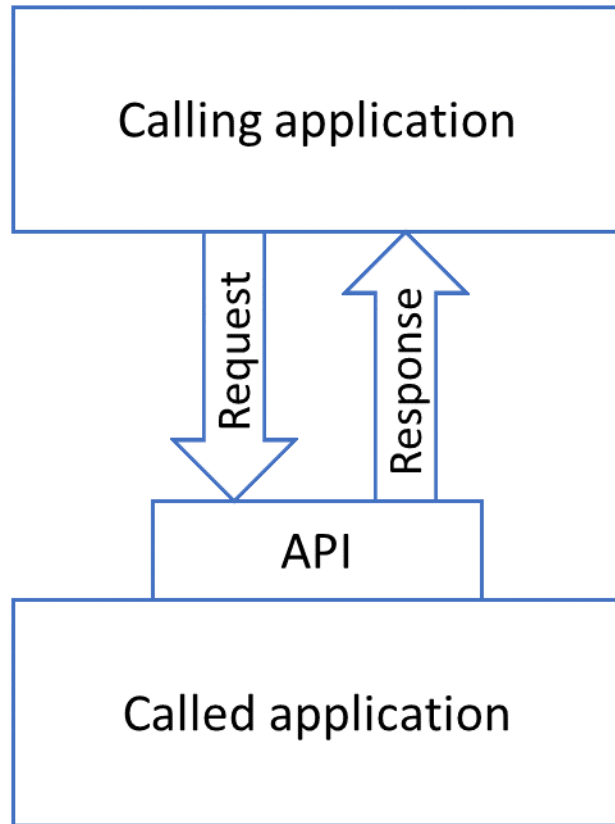
Security

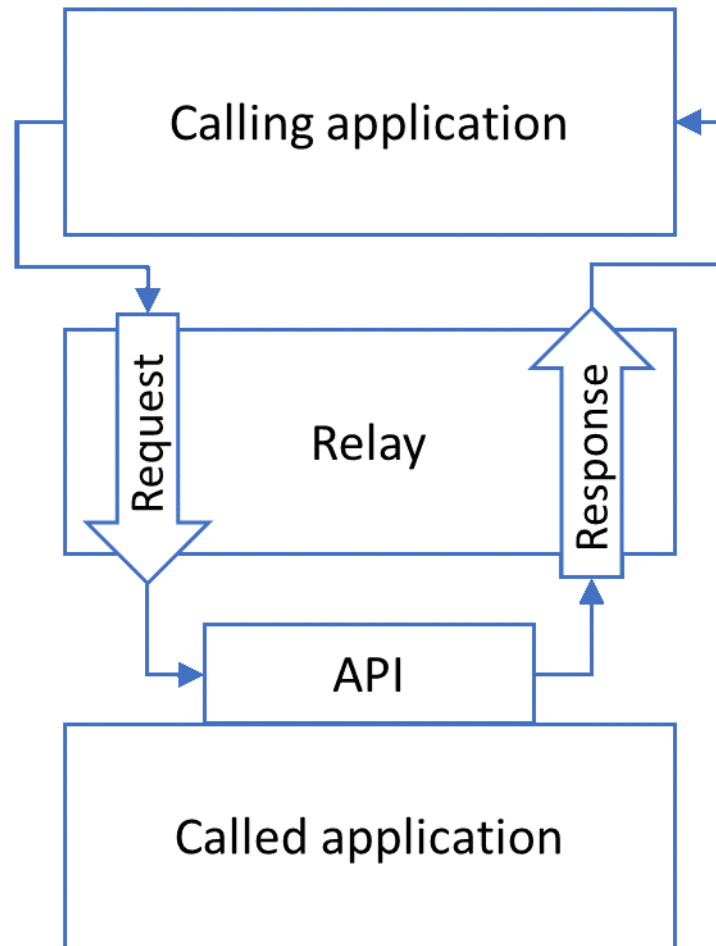
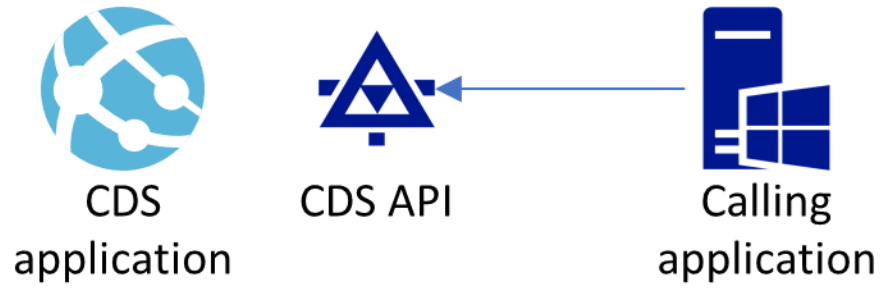
Select whether to restrict cross-frame scripting.

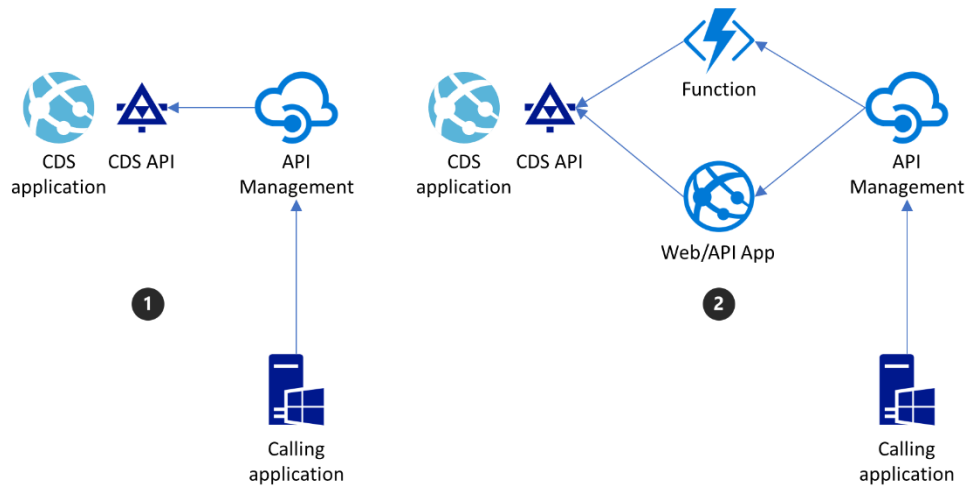
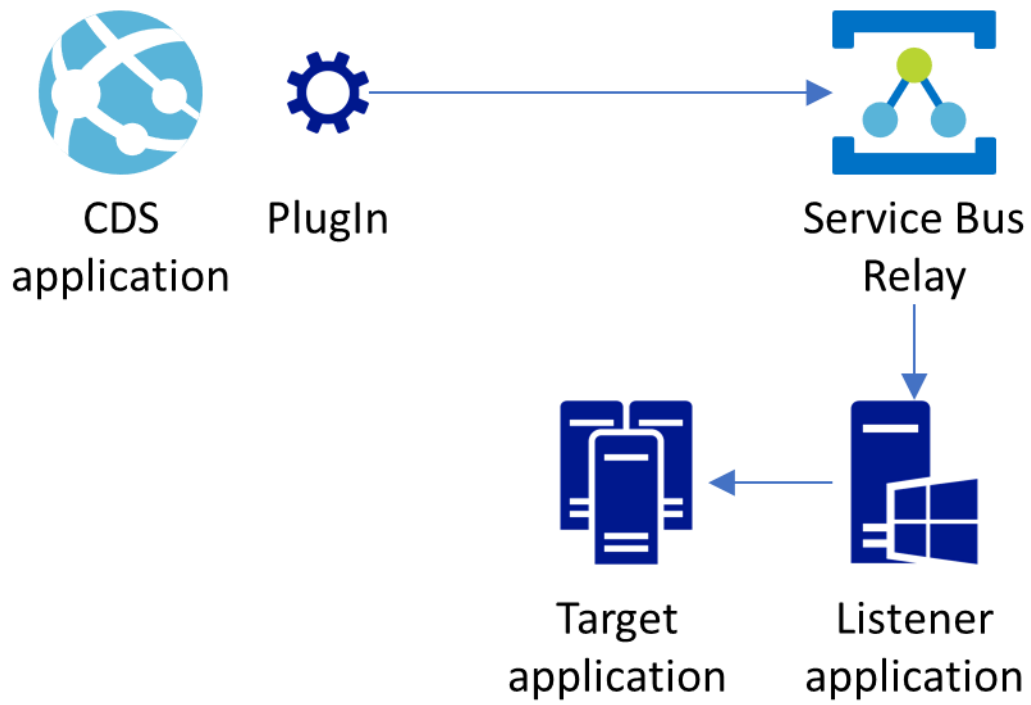
☒ Restrict cross-frame scripting, where supported.
[For more information, click here.](#)

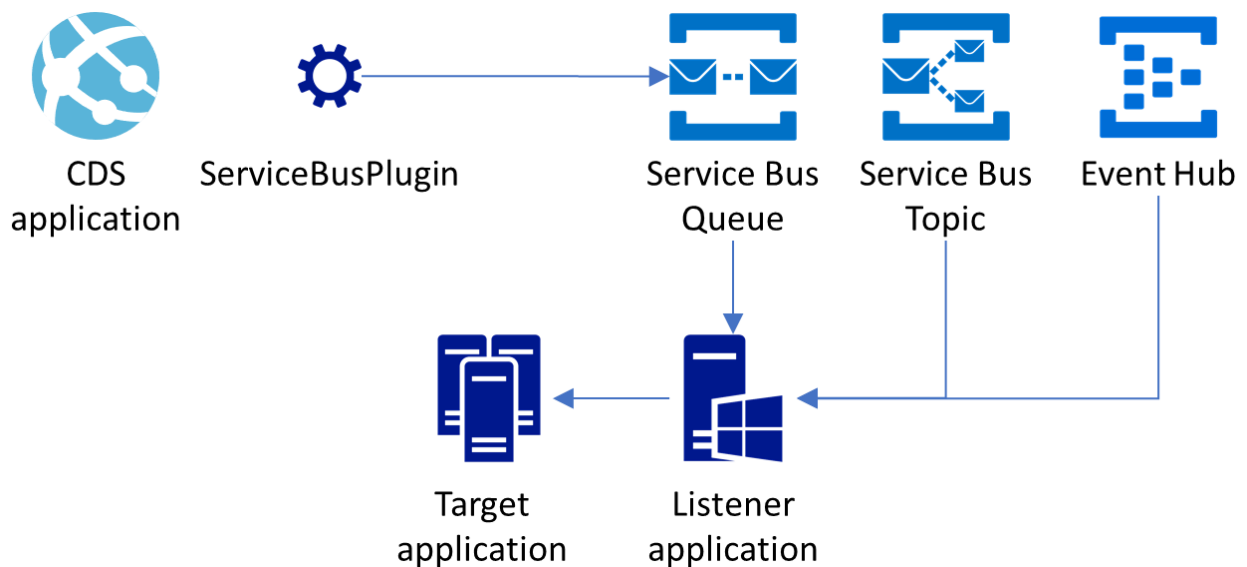
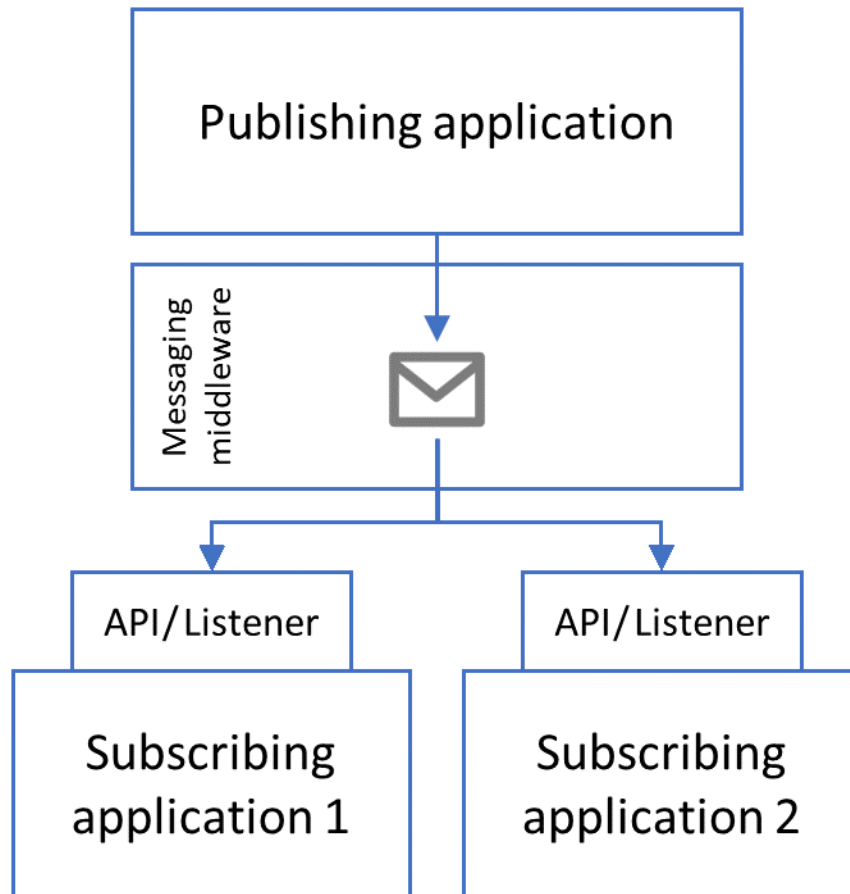
OK

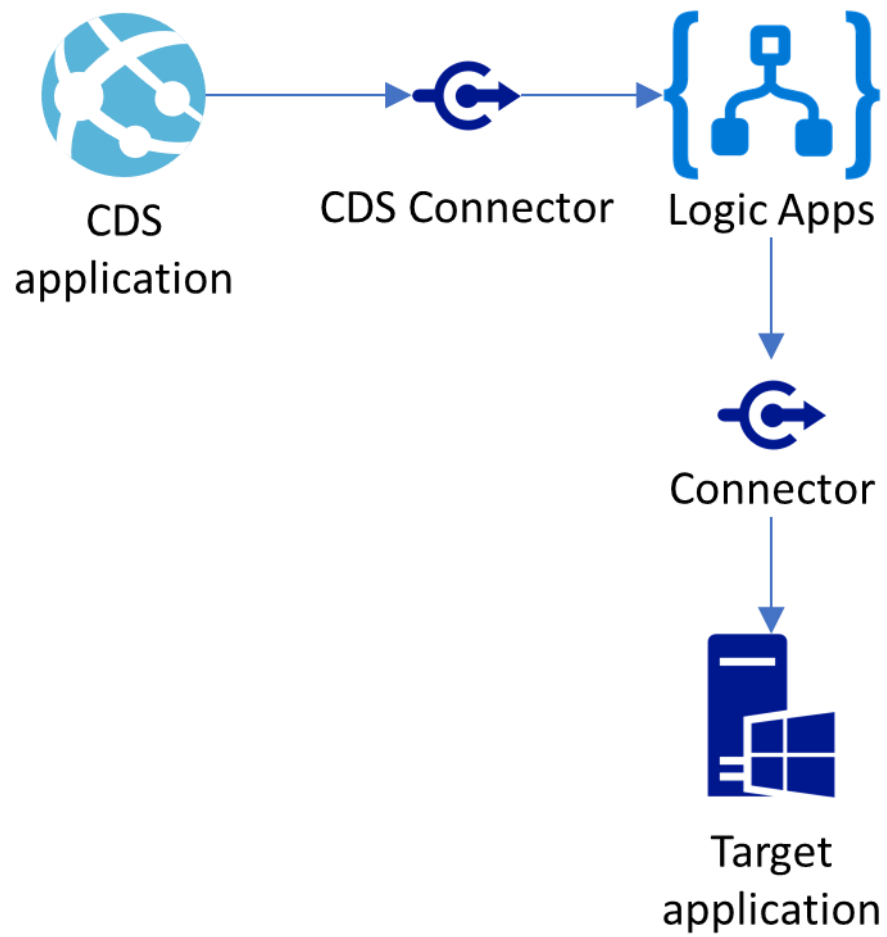
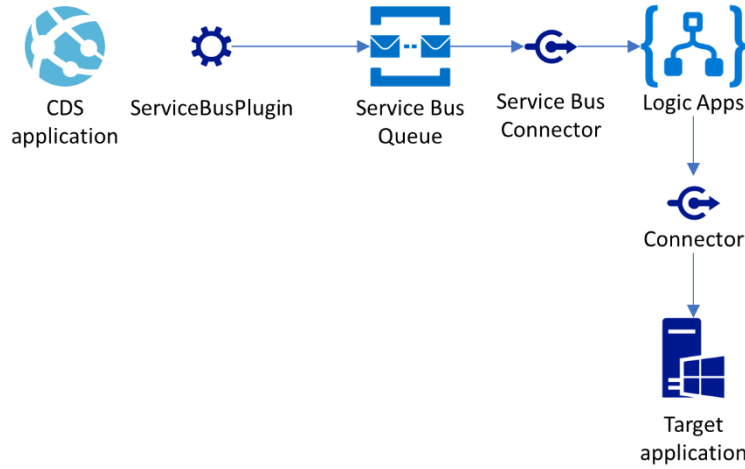
Cancel

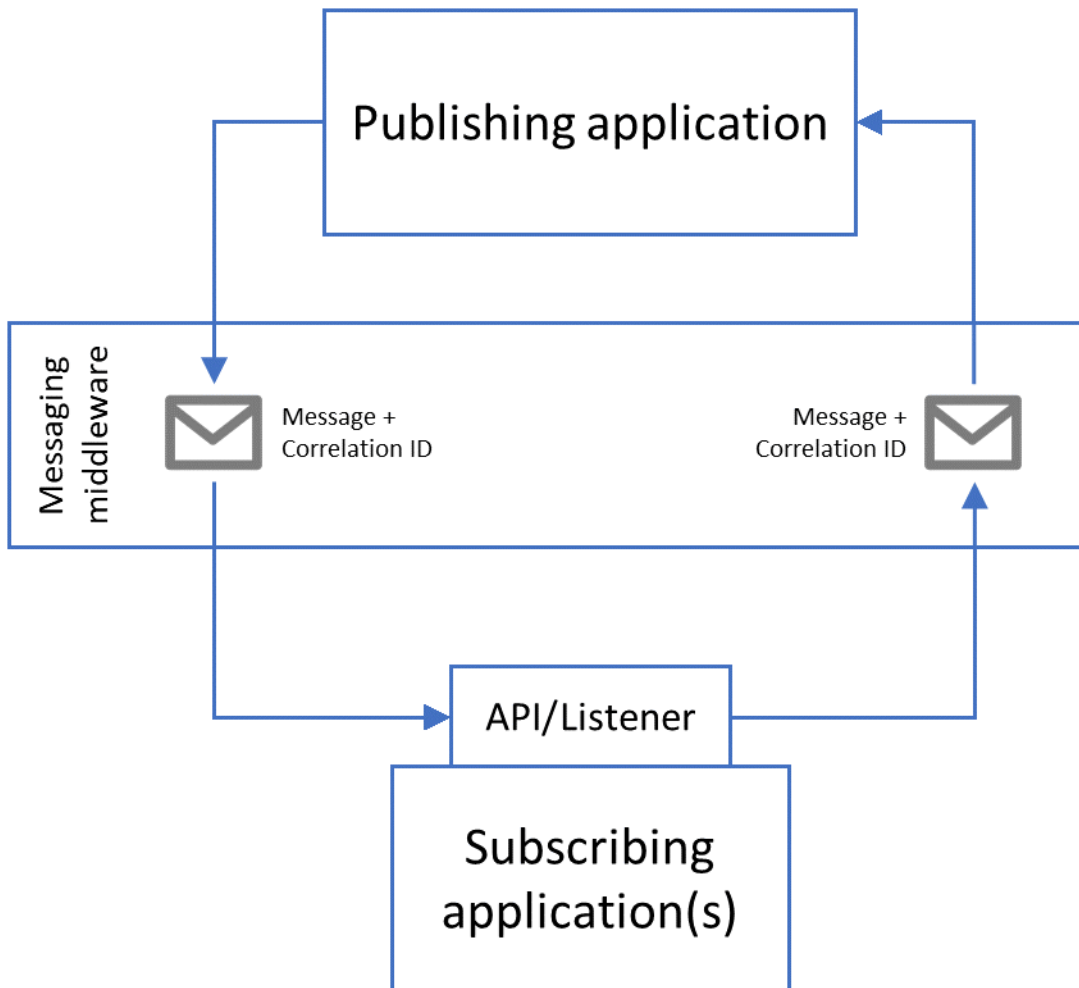
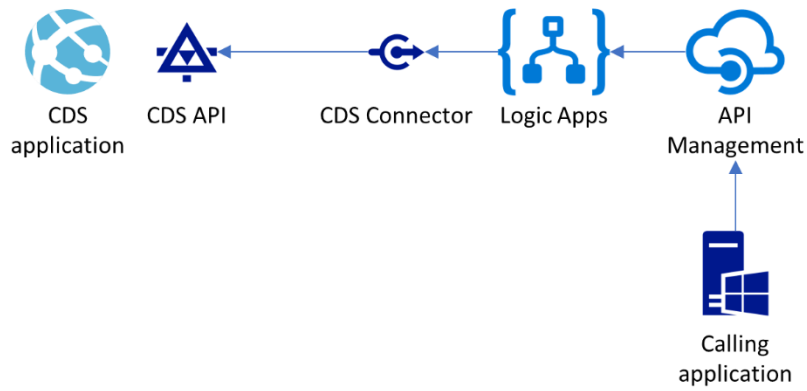


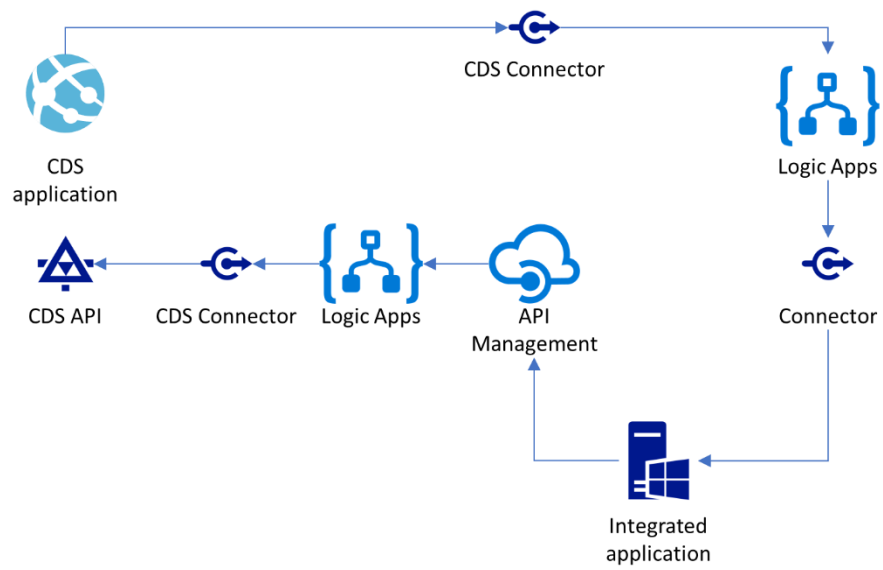
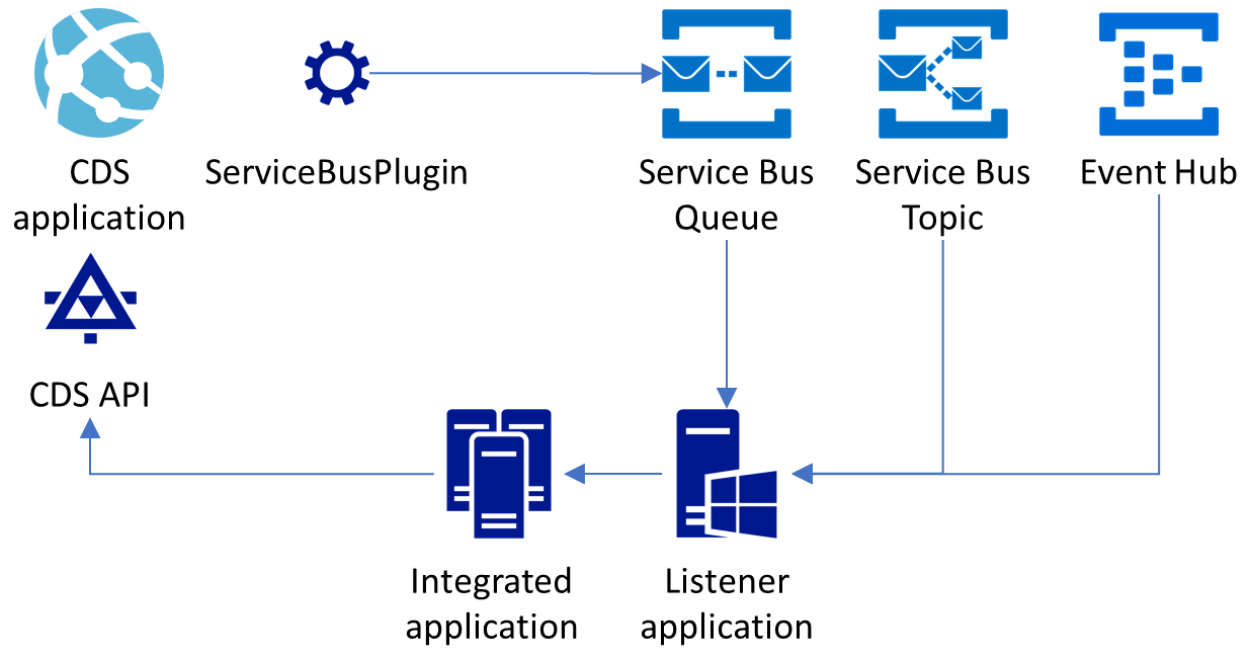


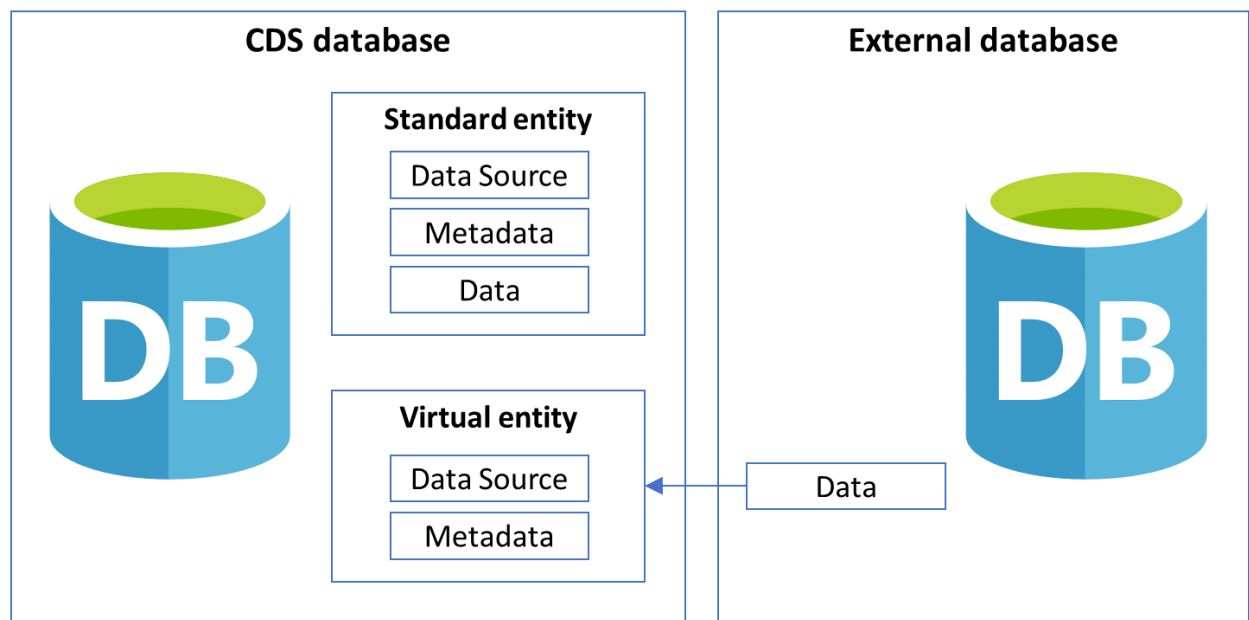
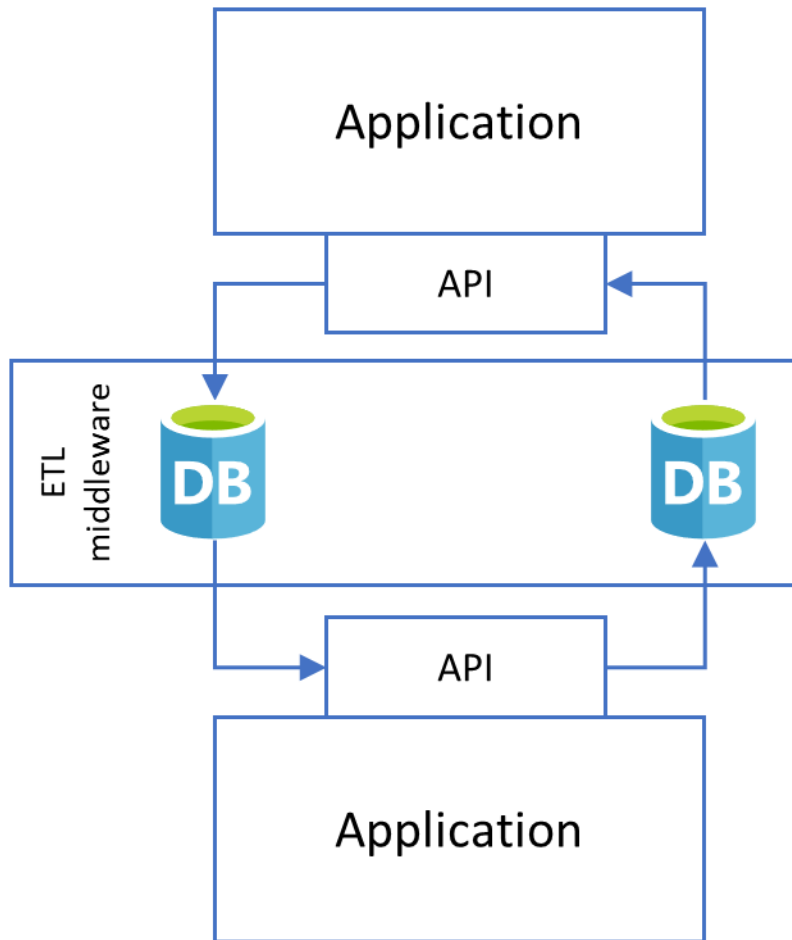




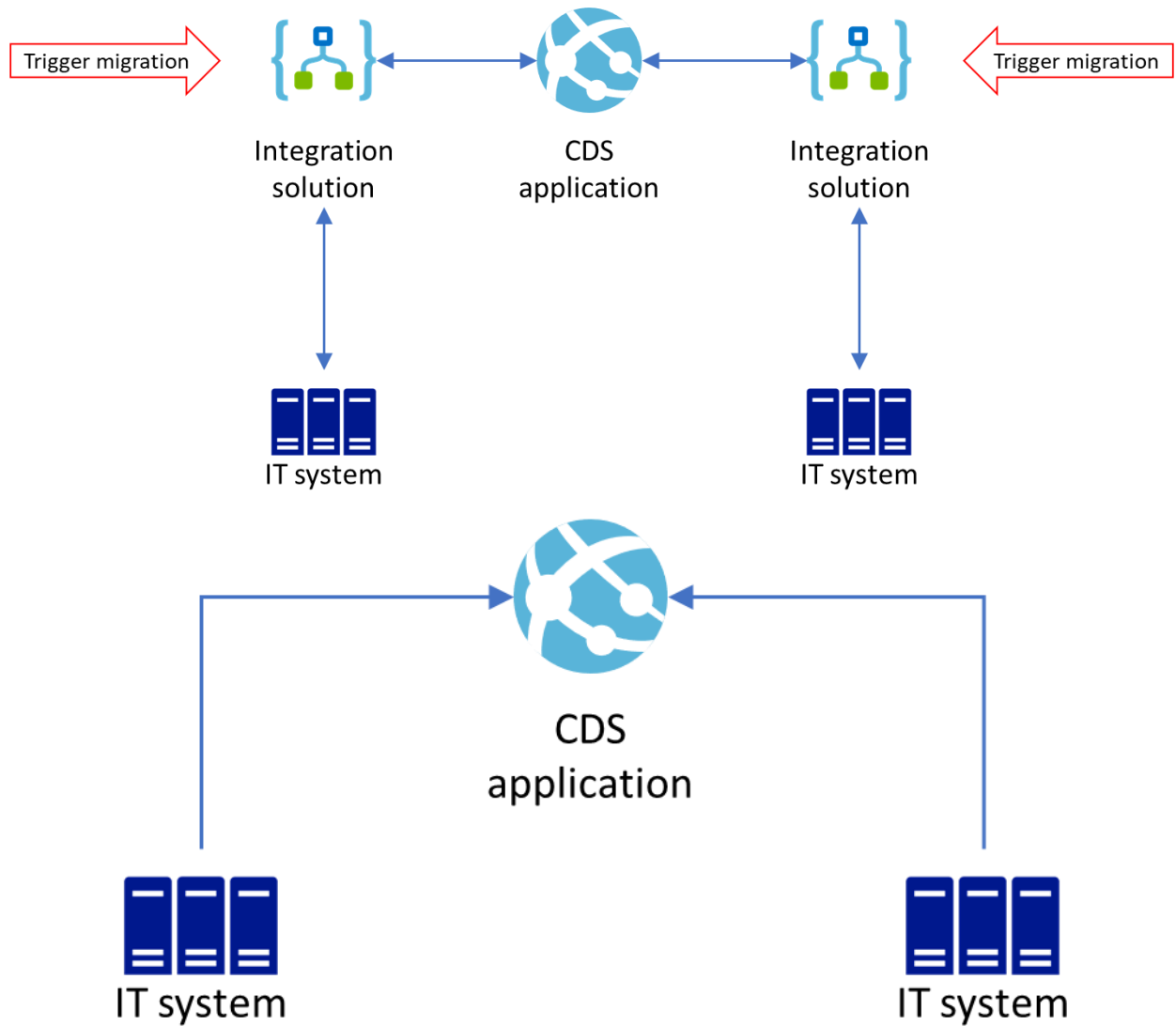


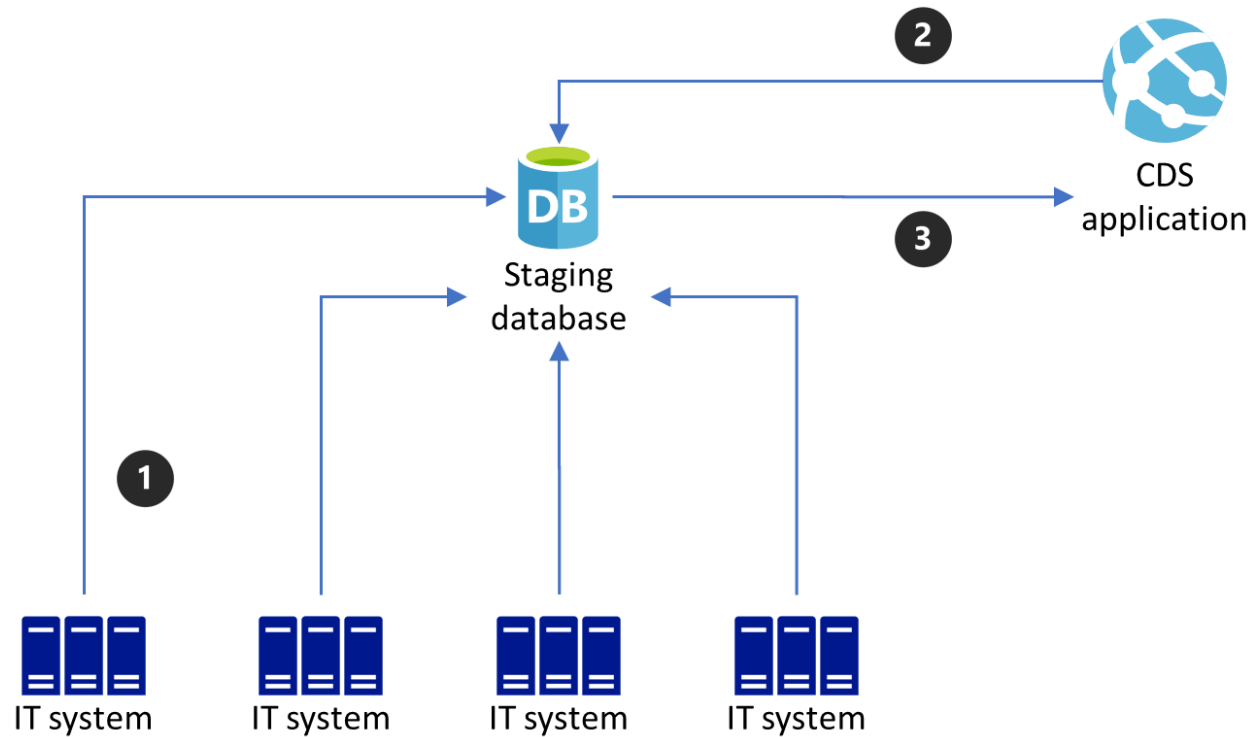






Chapter 10: Microsoft Power Platform Data Migration





A1 (Do Not Modify) Account			
A	B	C	D
1 (Do Not Modify) Account	(Do Not Modify) Row Checksum	(Do Not Modify)	Account Name
2 7bf0c988-20bd-e911-a82e-000d3ab0842d	aec4ChfHhwJI/feuhcqLvq7MI7NXp2T	24-10-19 20:34	A. Datum Corporation (sample)
3 6ff0c988-20bd-e911-a82e-000d3ab0842d	IG9c5d9iE9krNQTOwS1ij8LrChrtJ8vfH	24-10-19 20:34	Adventure Works (sample)
4 79f0c988-20bd-e911-a82e-000d3ab0842d	kTvh77HwMs8vduelDbkI55op3dDjG	24-10-19 20:34	Alpine Ski House (sample)
5 73f0c988-20bd-e911-a82e-000d3ab0842d	5tL8mRMVfxrhyn8VnvFdTH20zxKQkt	24-10-19 20:34	Blue Yonder Airlines (sample)
6 75f0c988-20bd-e911-a82e-000d3ab0842d	6H0jQWmw46QwhVHxvWZk8omzDr	14-07-20 10:04	City Power & Light (sample)
7 7df0c988-20bd-e911-a82e-000d3ab0842d	WyZAnpcpVTI7AK3S1n5JaCfto9pYXP	24-10-19 20:34	Coho Winery (sample)
8 77f0c988-20bd-e911-a82e-000d3ab0842d	mL6nLbOkK6LZXUu92hVq+PckB/vCgb	24-10-19 20:34	Contoso Pharmaceuticals (sample)
9 71f0c988-20bd-e911-a82e-000d3ab0842d	l1kJMct2HGGBu4LhywWBEnPVJiRwB	24-10-19 20:34	Fabrikam, Inc. (sample)
10 6bf0c988-20bd-e911-a82e-000d3ab0842d	rQpOMrTEVmZLGeCPmYc9GiPwGUpj	19-07-20 06:38	Fourth Coffee (sample)
11 6df0c988-20bd-e911-a82e-000d3ab0842d	gvSGB0B3TDCEscAVury3i4WVHYmv5	02-07-20 11:35	Litware, Inc

Map Fields



Select the Microsoft Dynamics 365 record type and map each source field to a target Microsoft Dynamics 365 field. We suggest that you map all the required fields before you click Next.

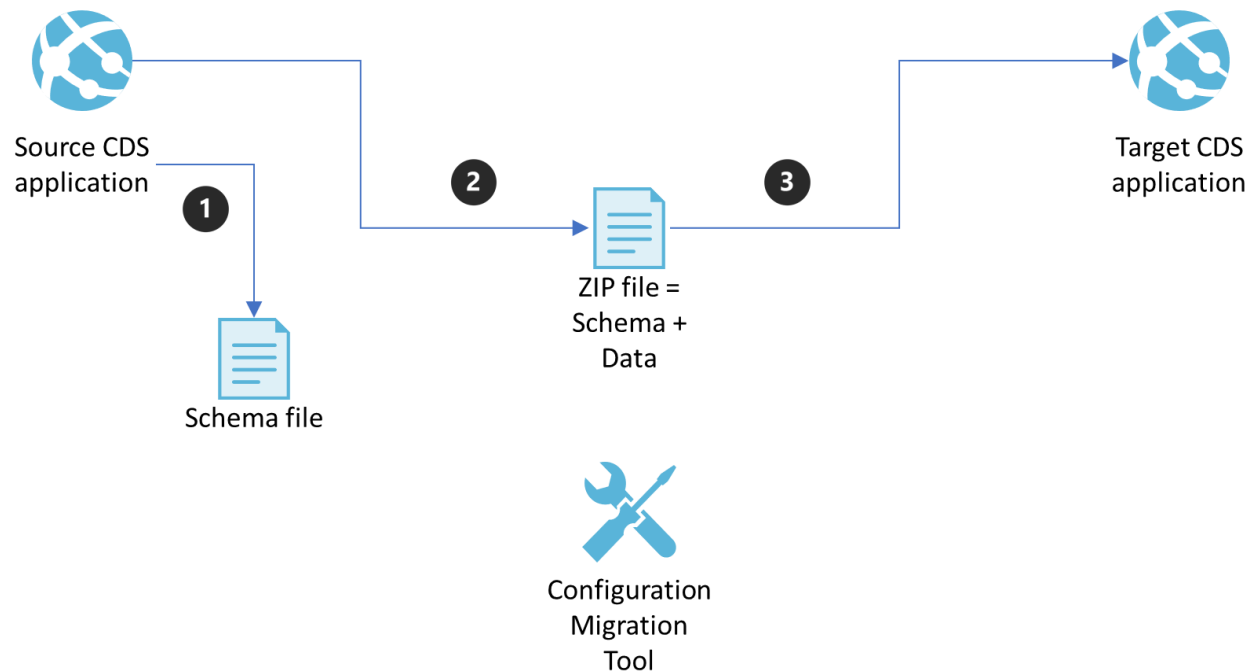
Map the unmapped fields, and then continue.

Dynamics 365 Record Types	Source Fields	Dynamics	Show All																						
Account	Required Fields <table><tbody><tr><td>Account Name</td><td>Account Name</td></tr><tr><td>Account Number</td><td>Account Number</td></tr><tr><td>Not Mapped (Use Defa</td><td> Company (Lookup)</td></tr></tbody></table> Optional Fields <table><tbody><tr><td>Address 1: Address Type</td><td> Address 1: Address Ty</td></tr><tr><td>Address 1: City</td><td>Address 1: City</td></tr><tr><td>Address 1: Country/Region</td><td>Address 1: Country/Re</td></tr><tr><td>Address 1: Latitude</td><td>Address 1: Latitude</td></tr><tr><td>Address 1: Longitude</td><td>Address 1: Longitude</td></tr><tr><td>Address 1: State/Province</td><td>Address 1: State/Provi</td></tr><tr><td>Address 1: Street 1</td><td>Address 1: Street 1</td></tr><tr><td>Address 1: Street 2</td><td>Address 1: Street 2</td></tr></tbody></table>			Account Name	Account Name	Account Number	Account Number	Not Mapped (Use Defa	Company (Lookup)	Address 1: Address Type	Address 1: Address Ty	Address 1: City	Address 1: City	Address 1: Country/Region	Address 1: Country/Re	Address 1: Latitude	Address 1: Latitude	Address 1: Longitude	Address 1: Longitude	Address 1: State/Province	Address 1: State/Provi	Address 1: Street 1	Address 1: Street 1	Address 1: Street 2	Address 1: Street 2
Account Name	Account Name																								
Account Number	Account Number																								
Not Mapped (Use Defa	Company (Lookup)																								
Address 1: Address Type	Address 1: Address Ty																								
Address 1: City	Address 1: City																								
Address 1: Country/Region	Address 1: Country/Re																								
Address 1: Latitude	Address 1: Latitude																								
Address 1: Longitude	Address 1: Longitude																								
Address 1: State/Province	Address 1: State/Provi																								
Address 1: Street 1	Address 1: Street 1																								
Address 1: Street 2	Address 1: Street 2																								

Back

Next

Cancel



All categories

File

Database

Power Platform

Azure

Online services

Other

Search

Data sources

Excel

File

Folder

File

JSON

File

PDF

File

Parquet

File

SharePoint folder

File

Text/CSV

File

XML

File

Access

Database

Amazon Redshift

Database

Google BigQuery

Database

IBM Db2 database

Database

Impala

Database

MySQL database

Database

Oracle database

Database

PostgreSQL database

Database

Power Platform dataflows

Power Platform

SAP BW Application Server

Database

SAP BW Message Server

Database

SAP HANA database

Database

SQL Server database

Database

Snowflake

Database

Teradata database

Database

Azure Blobs

Azure

Azure Data Explorer (Kusto)

Azure

Azure Data Lake Storage Gen2

Azure

Azure HDInsight Spark

Azure

Azure SQL database

Azure

Azure Synapse Analytics (SQL)

Azure

Azure Tables

Azure

Salesforce objects

Online services

Salesforce reports

Online services

SharePoint Online list

Online services

OData

Other

Odbc

Other

SharePoint list

Other

Spark

Other

Web API

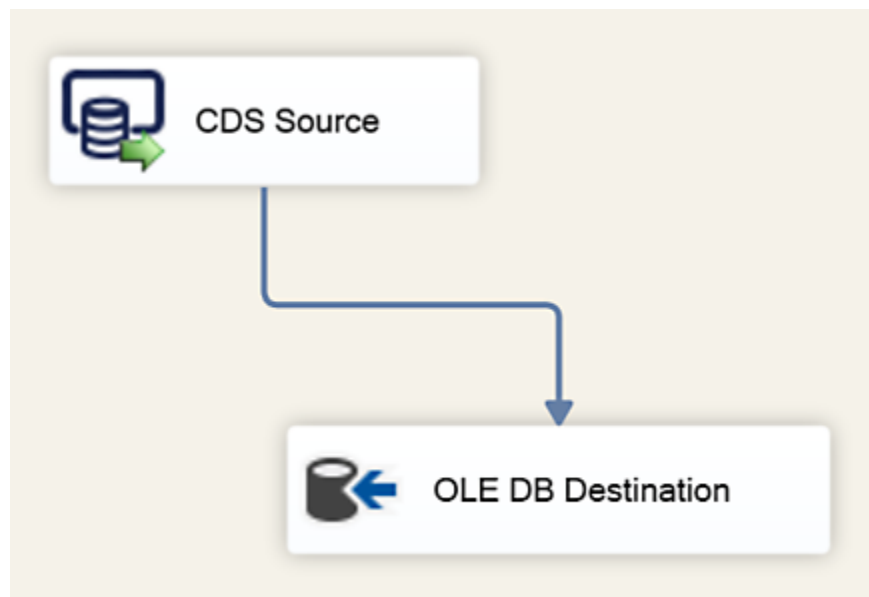
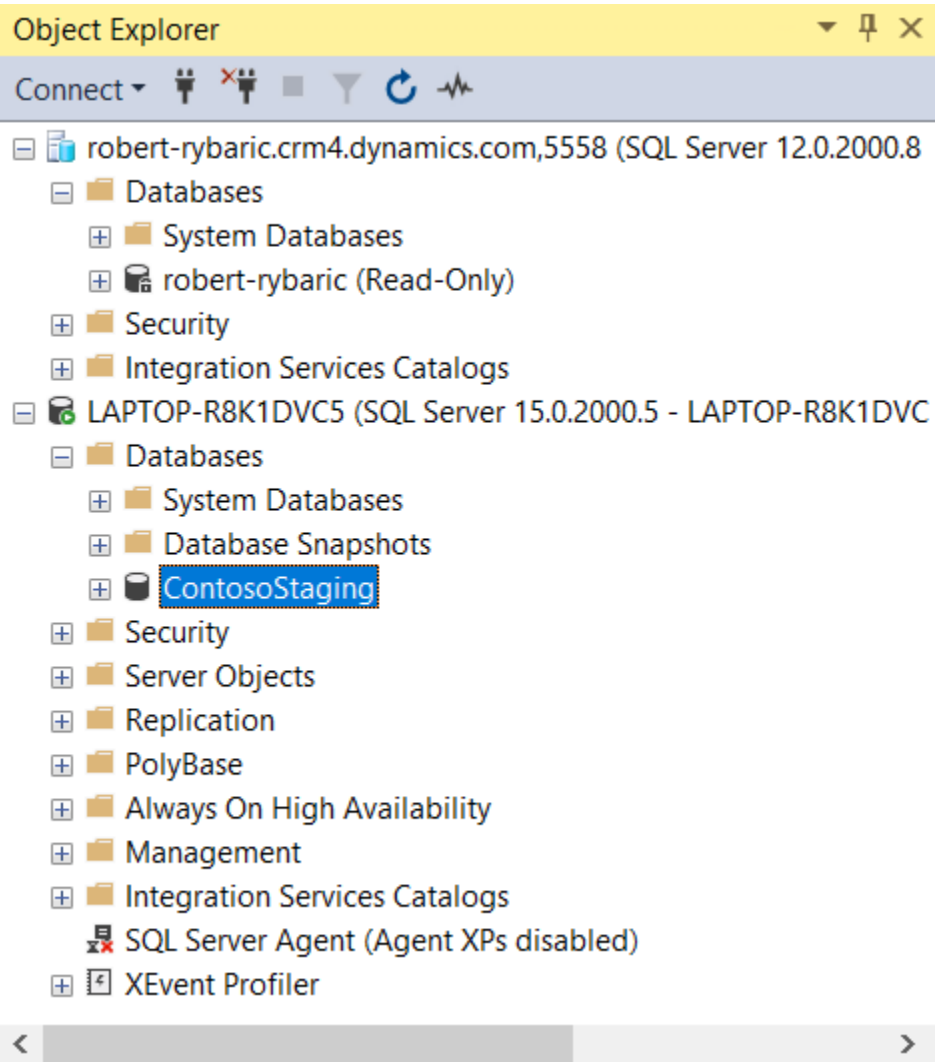
Other

Web page

Other

Blank table

Other



Connection Manage

Mappings

Error Output

Available Input Columns

Name
accountid
accountnumber
accountratingcode
accountratingcodename
address1_addressid
address1_addresstypecode
address1_addresstypecoden...
address1_city
address1_composite

Available Destination Colu...

Name
CompanyNumber
CompanyName

Input Column	Destination Column
accountnumber	CompanyNumber
name	CompanyName

Multithreading and Batch Settings

Batch Size: 100

☒ Enable Multithreaded Writing

Use up to 20 threads in total

