

INTEGRATE ANYTHING IN DYNAMICS

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Presenter

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Steve and his team serves clients in several capacities, providing customizations and integrations for Dynamics GP. Steve has been with RSM for 13 years and developing for Dynamics GP for 23 years.



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SMARTCONNECT
THE NO-CODE
INTEGRATION
MIGRATION &
AUTOMATION
PLATFORM

Connect ANY SOURCE with ANY DESTINATION at ANY TIME via ANY TRANSFORMATION path.



Learning Objectives

By the end of this presentation, you will learn the following:

- Understand how to leverage SmartConnect for Certify Integrations
- Understand how data from Certify will integrate into GP
- Understand how data from GP will integrate into Certify
- Understand how system integration eliminates data integrity issues

INTEGRATIONS

SmartConnect for Certify

SmartConnect for Certify

- Setting up automated download and upload of files
- Building maps to import Certify data into GP as payables transactions
- Building maps to export GP data into Certify (Vendors, Accounts)
- Data validation and error handling
- Eliminating the need for manual entry

CERTIFY DATA

How to import data from Certify

How to import data from Certify

- Pre map task to execute SFTP download
- Moving files to folder data source location
- Building map to import data from folder data source as payables transactions
- Data validation and error handling

GP DATA

How to export data from GP

How to export data from GP

- Using SQL script or stored procedure
- Extract data in format Certify is requesting
- Creating files on schedule
- Post map task to execute SFTP upload

DATA INTEGRITY

How integration eliminates data integrity issues

How integration eliminates data integrity issues

- Files are imported and exported on schedule with no interaction
- Processes are repeated as needed
- Users don't need to enter Certify transactions into GP
- Same data in GP will exist in Certify (Vendors, Accounts, etc)

QUESTIONS AND ANSWERS



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