Magento®
An Adobe Company

Better Together: Microsoft Dynamics and Magento Commerce.

Discover the keys to a successful integration that can transform your customer experience while adding efficiency.

# Today's customers expect more from merchants.

They want to be able to buy wherever they want and manage all their purchases in one place. In other words, today's customers want an omnichannel experience, whether they are shopping for themselves or their business.

Moreover, they want consistent and virtually seamless omnichannel experiences. Nearly three out of four (73 percent) retail consumers want the ability to track orders across all points of interaction.[1] And the same is true for B2B. They want the flexibility to buy online or through an account representative. And 86 percent of B2B buyers prefer to use self-service tools to reorder products.[2]

To create this kind of on-demand, omnichannel experience, it is critical to integrate your Microsoft Dynamics ERP with your Magento Commerce platform.

This eBook series, which features advice from Magento partners, will help you get the most from your integration and avoid common mistakes.

73%
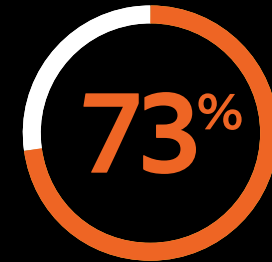
Nearly 3 out of 4 retail customers want the ability to track orders across all points of interaction. And 86 percent of B2B buyers prefer to use self-service tools to reorder products.

[1]BRP Consulting, 2018. [2]McKinsey, 2017.

Integration benefits from 50,000 feet.

If you're a Microsoft Dynamics user, integration with Magento can offer a wide variety of benefits, depending on your business model. At a high level, it gives you and your customers access to more timely and more accurate information. Common benefits include:

1. **More visibility for your customers.** With integration, Magento Commerce has access to critical information stored in Microsoft Dynamics, such as order status and onsite sales. This means you can give customers access to all their interactions with your brand in one place. You'll also get fewer "where is my order" or (WISMO) calls.

2. **More visibility for your business.** Because integration gives Microsoft Dynamics access to online sales and customer data, you can get a more complete picture of how your business is performing overall.

3. **Fewer mistakes.** With integration, your Magento store will display the latest product pricing and availability information. This means customers will not be charged the wrong price— or order products that are actually out of stock.

4. **Improved efficiency.** Connecting Microsoft Dynamics and Magento Commerce helps you automate workflows—including fulfillment and restocking inventory—and accelerate business processes, such as new product introductions.

MAGENTO: BUILT FOR INTEGRATION WITH MICROSOFT DYNAMICS

Magento Commerce is a uniquely flexible platform that is designed to play well with ERPs, including Microsoft Dynamics. Its integration-friendly features include:

- **Modern APIs.** With its modern, well-documented APIs and new support for GraphQL, Magento is compatible with a wide variety of platforms.

- **A clean and flexible data model.** Magento data is structured for easy input/output and can be customized for different business and integration needs.

- **A global network of solution partners and systems integrators.** Magento partners have experience with Microsoft Dynamics and Magento Commerce. Many also offer pre-packaged connectors that can give your integration a head start.

To learn more, visit:
magento.com/solutions/ erp-system-integrations

PREPARE FOR A SMOOTH INTEGRATION.

Of course, no systems integration project is without risk. Cost overruns, delays, and poor user adoption can be issues any time two software platforms are connected. But following best practices can virtually eliminate these risks.

This eBook highlights best practices for integrating Microsoft Dynamics and Magento. It includes time-tested advice for:

· Establishing integration requirements

· Choosing the right partners

· Creating a workable integration plan

Want to learn more about integrating Magento with your ERP system?

Visit: magento.com/solutions/ erp-system-integrations

Absolunet.

Omnichannel starts with ERP and platform integration.

8 essential omnichannel features and how to choose the right integration partner to make it happen.

>80 projects

Absolunet is a systems integrator with more than 80 completed Magento projects and 14 dedicated Magento project teams.

Today's consumers and business buyers expect a consistent brand experience across touchpoints. No matter how they interact with you (in-store, online, through mobile, or most likely all of the above), connecting with your brand should feel comfortable and familiar.

By integrating your Microsoft Dynamics 365 system with your Magento Commerce platform, you will avoid running a standalone online store that feels disjointed and off-brand. To succeed, you must do one critical thing up front: pick the right integration partner.

This content was written based on Absolunet's in-depth experience creating omnichannel interactions through Microsoft Dynamics 365 Business Central and Magento Commerce integrations.

8 essential omnichannel features that work better with ERP-eCommerce integration.

Integrating Microsoft Dynamics and Magento can make it much easier for your business to offer these eight essential omnichannel features:

1. Buying online for pick up in a store or warehouse
2. Shipping from stores to online customers
3. Pooling inventory from multiple stores for efficient fulfillment
4. Omnichannel gift cards that can be used across channels
5. Omnichannel loyalty programs that reward cross-channel shopping
6. In-store returns for online buyers
7. A store locator and selector that lets customers browse local store inventory online
8. The ability to manage multiple branded marketing assets tailored to multiple channels from one administrative interface

How to pick the right integration partner for omnichannel.

Choosing the right integration partner is the first step on your omnichannel journey. When you are evaluating partners to help you connect Business Central and Magento, consider the following criteria:

1. **Experience with Business Central, Magento, and your industry.** You do not want to be any systems integrator's "test case." Instead, you should look for an integration partner that has extensive experience with Business Central and Magento as well as similarly sized companies in your industry. They should have at least 10-20 case studies to share, not one or two.

2. **A proven, extensively tested connector.** Connectors are packaged software frameworks that can dramatically accelerate your integration. Many systems integrators have their own connectors for Business Central and Magento. In general, the more often a connector has been successfully used, the better. Absolunet only uses proven connectors that have succeeded in hundreds of deployments.

3. **Omnichannel expertise.** Your integration partner should be knowledgeable about omnichannel features like channel-less gift cards, ship-from-store, and more.

4. **Experts in your time zone.** Managing an integration project requires seamless communications between your team, your integration partner, and your Business Central solutions partner. An integrator with a presence in your time zone will be able to chat with your team in real time and resolve issues faster than one 8-12 hours or more away.

About Absolunet

With offices in Montreal, Toronto, and Kansas City, Absolunet is a systems integrator with more than 80 completed Magento projects and 14 dedicated Magento project teams. Absolunet specializes in digital transformations for manufacturers, distributors, and retailers and has 7 case studies of successful Magento and Microsoft Dynamics/LS Nav integrations.

Absolunet is a Magento and Microsoft Dynamics partner, won Magento's North American Spirit of Excellence Award in 2019, and has received Magento's North American Shooting Star recognition twice.

Visit www.absolunet.com

It begins and ends with your data.

A detailed plan for managing data and data flows between Microsoft Dynamics and Magento is essential to a successful integration.

25+ years

Since 1993, eBridge Connections has had a universal integration platform that connects a wide variety of proven integration adapters.

When your Microsoft Dynamics and Magento Commerce platforms aren't connected, you can find yourself spending hours getting them in sync. This typically involves manually entering product data into Magento and entering new orders into Microsoft Dynamics. Even worse, you may end up dealing with orders that can't be fulfilled because Magento didn't have the latest inventory or product data information.

However, integrating the two platforms can save you time while delivering a better experience for your customers. The key is to understand your data and where it needs to go.

Learn about planning an integration that gets the right data to the right people. >

4 reasons to integrate Microsoft Dynamics and Magento.

Integrating your ERP and Commerce platforms is critical to growing your business. A successful integration can help you:

1. **Eliminate manual data entry—and costly human error.** Manual data entry takes staff away from other, more strategic activities. It's also error prone. Roughly one percent of all manual entries contain an error. Some analysts suggest the US economy loses as much as $27 billion per year to data entry errors. With integration, you eliminate the need for data entry and the resulting errors.

2. **Get to market faster.** When the most up-to-date product information from Microsoft Dynamics automatically appears in Magento, you can launch new products faster and have confidence that you'll always meet seasonal demand.

3. **Avoid erroneous orders.** Integrating Microsoft Dynamics and Magento means inventory and product data in your Magento store is always up to date. As a result, customers see accurate product, pricing, and availability information as well as accurate order information and when they expect to receive it.

4. **Accelerate productivity.** By automating data-driven workflows across platforms, integrating Microsoft Dynamics and Magento lets your people do more in less time. They can focus on important things like customer priorities rather than moving data around.

How to plan a successful integration.

Once you have decided to integrate, it's time to develop a plan that will work for your business:

1. **Assess your data.** For most retail businesses, the four types of data you need to consider syncing between your Microsoft Dynamics ERP and Magento platform are **inventory, product descriptions and specs, pricing, and order tracking.**

   For each key piece of data, you'll need to determine where it should reside (e.g., the system of record), how frequently it should be updated, and how it will be managed and cleaned.

2. **Document your workflows.** Your workflows will clarify where data needs to go and when. Every merchant's workflows are different. B2B companies and drop shippers have workflows that are more complex than the "typical" retailer.

3. **Involve the right stakeholders.** Working with right stakeholders will ensure your integration supports your actual business processes and delivers a better experience to everyone using your ERP and commerce platforms. These stakeholders may include your CIO, CFO or other finance person, marketing, and sales—and potentially your customers and suppliers, too.

4. **Use proven adapters.** Integration can be accelerated if you use pre-built adapters rather than building them from scratch. eBridge offers packaged, Microsoft-certified adapters for Magento that cover inventory, product descriptions and specs, pricing, and order tracking. These adapters can be adjusted to fit specific workflows and business needs.

About eBridge Connections

eBridge Connections has been in the integration business since 1993 and offers a wide variety of proven integration adapters that connect to the "conical" eBridge Integration Platform (hosted on MS Azure). Their integration solutions are built, maintained, and supported in house with no reliance on third-party software or developers.

Learn more at:
www.ebridgeconnections.com
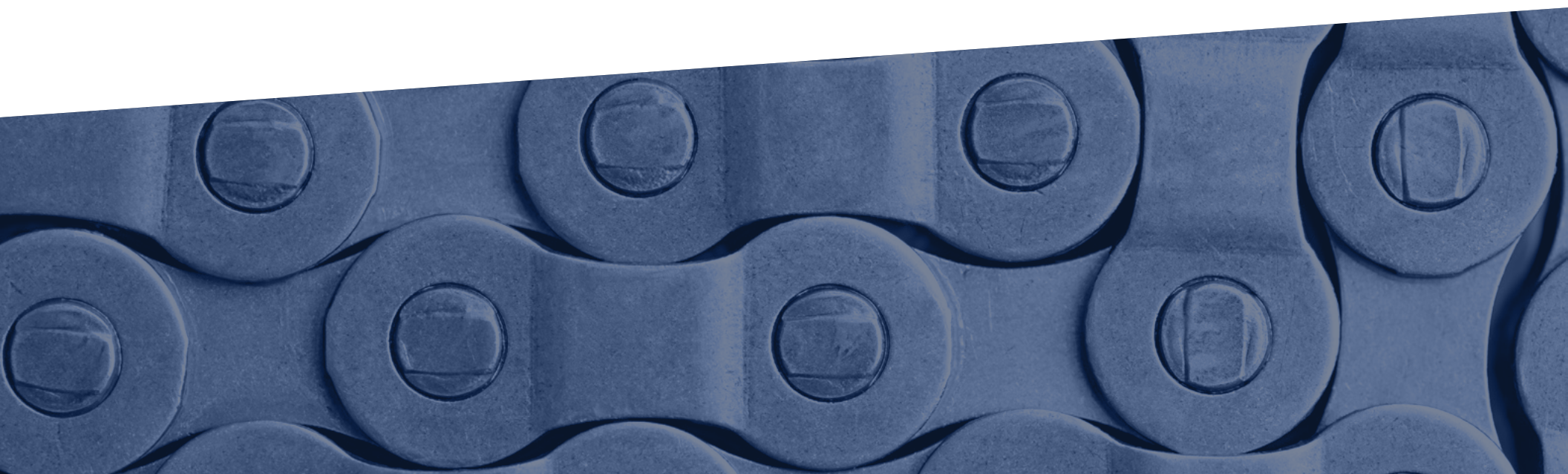
Your integration is only as good as your requirements.

Thoughtful, forward-looking requirements are the key to a successful, high-ROI integration.

180+

i95Dev has helped 180+ customers, who swear by their expertise and support, integrate Magento with Dynamics ERP systems.

Many businesses think of ERP-eCommerce integration as a purely operational function. They want to get data that's in Microsoft Dynamics Microsoft Dynamics into Magento Commerce (and vice versa) and minimize manual data entry.

But this narrow view of integration can be limiting. Adopting a more holistic perspective on how

Microsoft Dynamics and Magento Commerce support your long-term business goals can help you develop integration requirements that deliver measurable growth and high ROI.

Learn about defining integration requirements that support your business goals. >

3 reasons to integrate Microsoft Dynamics and Magento Commerce.

Integrating Microsoft Dynamics with Magento Commerce can transform your business, whether you're a wholesaler or retailer. Operational benefits like reduced costs and losses due to manual data entry errors, improved product information and inventory management, etc. are common. However, with a forward-looking mindset you can also experience benefits like:

1. **Making it easier for customers to pay.** When your eCommerce platform has access to credit limits and pending invoices in Microsoft Dynamics, you can better manage your accounts receivable by letting your customers pay online instead of the traditional offline channel.

2. **Letting customers buy online and pick up in store or at the warehouse.** By allowing your eCommerce platform to access inventory data and fulfillment logic in Microsoft Dynamics, you can give customers flexible options for pickup and delivery, which is a key part of the omnichannel experience.

3. **Automating cross-platform workflows—a.k.a. doing everything faster.** When Magento Commerce and Microsoft Dynamics work together, you can accelerate fulfillment, inventory replenishment, and other functions while adding efficiency.

How to develop high-value integration requirements.

To get the most out of your integration, your requirements must support both short- and long-term business goals. Strategies for developing forward-looking requirements include:

1. **Don't jump the gun.** If you have just installed Microsoft Dynamics or Magento Commerce, consider waiting a few months. After some operational experience with both systems, you'll better understand how your teams use them—and which gaps integration could address.

2. **Think beyond the now.** Your longer-term business goals may include providing an omnichannel experience, giving customers more self-service options, streamlining fulfillment, or entering new markets. Ask yourself which data you should synchronize and which workflows you should automate to support those goals.

   You should also consider whether you'll need to include platforms beyond Microsoft Dynamics and Magento Commerce into your integration plan.

   Moreover, you should look at your Microsoft Dynamics technology roadmap and flag any upcoming upgrades and extensions. Your integration plan should account for these changes.

3. **Talk to your stakeholders—including customers and suppliers.** Integrating Microsoft Dynamics and Magento Commerce affects sales, marketing, and IT as well as customers and suppliers. It is important to work with all of your stakeholders to understand what they want from the integration, manage their expectations, and estimate ROI.

About i95Dev

i95Dev specializes in designing, developing, and maintaining B2B/B2C integrated omnichannel eCommerce solutions powered by Magento. Their Magento integration products for Microsoft Dynamics ERP (Dynamics 365, GP, AX, and NAV) are globally recognized. 180+ customers swear by their expertise, support, and willingness to go the extra mile.

Learn more:

www.i95dev.com

Learn about the eCommerce Growth Engine >

ARE YOU READY FOR INTEGRATION?

Here are 5 signs you are ready to integrate Microsoft Dynamics and Magento Commerce:

1. Order volumes are consistently rising.
2. You're regularly introducing new products and SKUs, which means you spend a lot of time manually adding product data to your Magento Commerce platform.
3. Orders are often delayed because customers buy products that are out of stock or fulfillment is inefficient.
4. Your customer service team is getting a lot of "where is my order" (WISMO) calls.
5. You're losing ground to competitors.

VISIONET DIGITAL

Closing the loop between ERP and commerce.

A successful integration can help you fill functional gaps while improving the customer experience.

300+

Visionet brings digital transformation expertise and leadership to more than 300 global clients.

Microsoft Dynamics is the lifeblood of many retail and manufacturing firms, including both B2B and B2C companies. It provides supply chain, fulfillment, finance, and operations management. But it can't do everything. For example, it doesn't include an eCommerce storefront module.

Adding Magento Commerce as your online commerce platform can help you reach new customers. Integrating Magento Commerce with Microsoft Dynamics can help you retain those customers and grow your business fast.

Get helpful tips for planning your integration, no matter what your business model looks like. >

4 reasons to integrate Microsoft Dynamics and Magento Commerce.

Connecting Microsoft Dynamics and Magento Commerce is important to the overall health of your business. Here are 4 reasons to integrate:

1. **Understand your overall business performance.** When Microsoft Dynamics has access to orders and customer behavioral data stored in Magento, it can provide better and more comprehensive business intelligence reporting.

2. **Give customers easy access to self-service reporting.** Both B2B and B2C customers want to see their order status at any time. And B2B customers need insights into buying patterns, credit limits, and more. When Magento can access Microsoft Dynamics data, it can provide richer self-service reporting for all customers.

3. **Launch products in less time.** Manually moving product information from Microsoft Dynamics to Magento can slow down your product launches. When both systems are connected, new product information automatically appears in Magento, so launches are faster and easier.

4. **Improve customer loyalty.** When Microsoft Dynamics and Magento Commerce communicate, orders can be fulfilled as soon as they are received, and you prevent shipping delays from delayed synchronization. By eliminating these delays, you dramatically boost the likelihood customers will buy from you again.

5 helpful hints for a successful integration.

Every integration, just like every business, is unique. These tips can help you build a plan that's right for you:

1. **Find out if your online payment models work with Microsoft Dynamics—and plan accordingly.** Microsoft Dynamics currently does not support some kinds of region- and customer-based pricing models and installment payments. If you offer these payment models through Magento, they will need to be factored into your integration plan, as well as any third-party software you use to manage them.

2. **Account for fraud management in your integration workflows.** When transactions are captured in Magento, they may be routed through a fraud detection service. Once they are approved, they should be visible to Microsoft Dynamics. (And customer service reps should know roughly how long transactions may be in the fraud queue—see #3.)

3. **Make sure call center and live chat functions can access all the data they need.** When customers contact your call center or use live chat, the representative (or algorithm) they talk with typically gets information from Microsoft Dynamics. Your integration plan should identify which data points from Magento your service reps will need to see in Microsoft Dynamics.

4. **Define SLAs for your integration.** Your integration plan should include service-level agreement (SLAs) data flows. Your SLAs should consider the typical latency of your Microsoft Dynamics implementation, including planned maintenance and unplanned slowdowns that may happen during major reporting cycles.

5. **Embrace the cloud.** Running Microsoft Dynamics and Magento in the cloud can offer both cost and performance benefits. This is especially true when you run both platforms on the same cloud service.

About Visionet

With more than 300 global clients, Visionet brings digital transformation expertise and leadership to its customers by envisioning, designing and implementing state of the art unified digital solutions across customer engagement and operations. Visionet is a Gold Microsoft Dynamics partner and Magento Partner.

Visit www.visionet.com

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Magento
An Adobe Company

ABOUT MAGENTO

Magento, an Adobe company, is a leading provider of commerce innovation to merchants and brands across B2C and B2B industries and was named a leader in the 2018 Gartner Magic Quadrant for Digital Commerce. In addition to its flagship digital commerce platform, Magento boasts a strong portfolio of omnichannel solutions that empower merchants to successfully integrate digital and physical shopping experiences. Magento is the #1 provider to the Internet Retailer Top 1000, the B2B 300, and the Top 500 Guides for Europe and Latin America. Magento is supported by a vast global network of solution and technology partners, a highly active global developer community, and the Magento Marketplace— the largest eCommerce marketplace for downloadable extensions. More information can be found at

www.magento.com

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