Microsoft Dynamics 365 Business Central – Key Usage Scenarios

Introduction

Lucy is an automated sales order processing solution. She turns emailed PDF purchase orders into sales orders in Microsoft Dynamics 365 Business Central, eliminating the need for Customer Service staff to perform manual data entry tasks.

When a PDF purchase order is emailed from a customer to the business, Lucy opens the attachment and reads the order data (order number, stock codes, prices, quantities). Lucy assigns the order to the correct Customer Code, uses a document map to identify critical order fields, and uses full integration to Dynamics Business Central to validate the data before creating a sales order in the ERP.

When validation errors arise, Lucy notifies the business to have the data corrected. Lucy remembers stock code translations and can store multiple document maps for each customer.

Setup

To make Lucy Business Central testing as straightforward as possible, we've created some CRONUS test data and 3 PDF purchase orders for you to use. Processing these orders will run you through the main user scenarios in order to test Lucy's major functions.

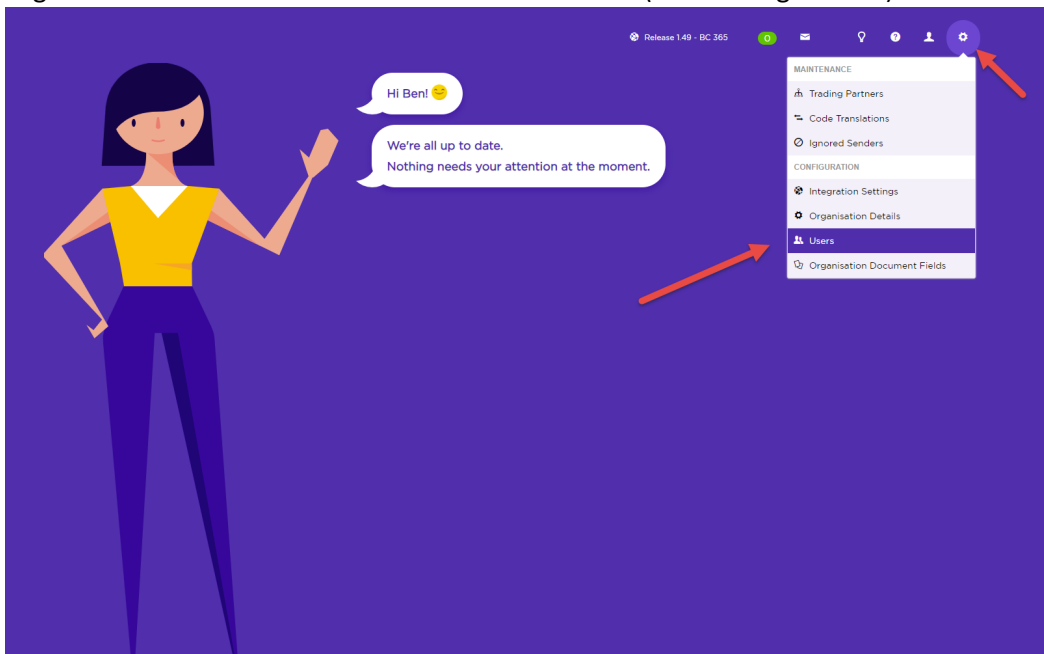**Save these 3 documents** somewhere you can access them later.

Your **Lucy credentials** to login to the application at https://go.letlucy.com:

> **Username:** mslucytest@outlook.com

> **Password:** 5QkZDEnP%;9~N/?Y

1. First you need to create a user for testing.

   I.   Login and select '**Users**' from the Maintenance menu (under the gear icon).

   II.   Click **Add New User**

   III. Enter a **First Name**, **Surname**, and **valid Email Address** (as this mailbox will receive email notifications from Lucy)

IV. Toggle the following settings ON:
- Active (user status)
- Admin User
- Customer Service User
- Notify on error
- Notify on success
- Notify when attention required
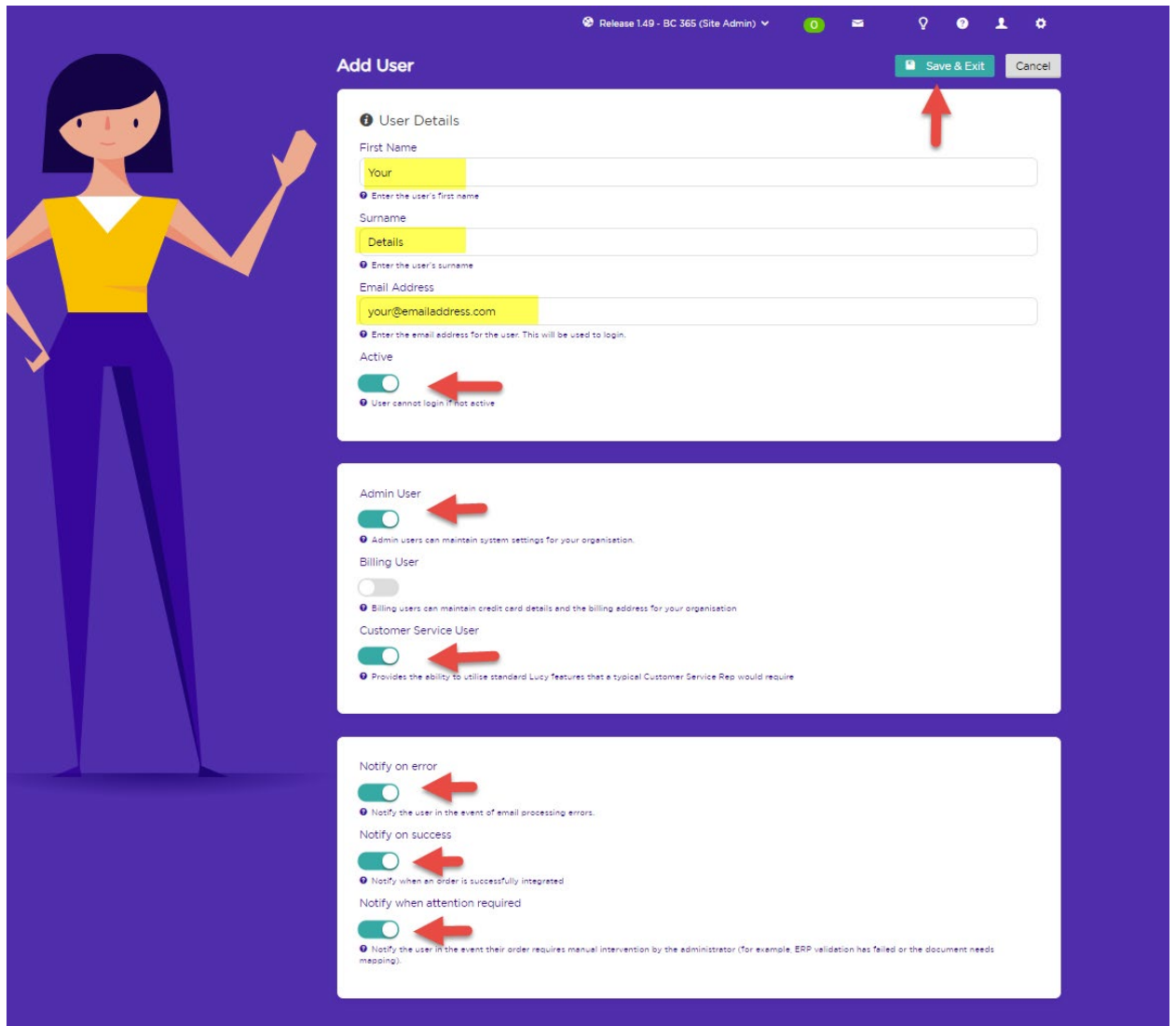
V. Click **Save & Exit**.

The user you just added will receive an email with a link to set the password. Follow the prompts to set the password and login to Lucy.
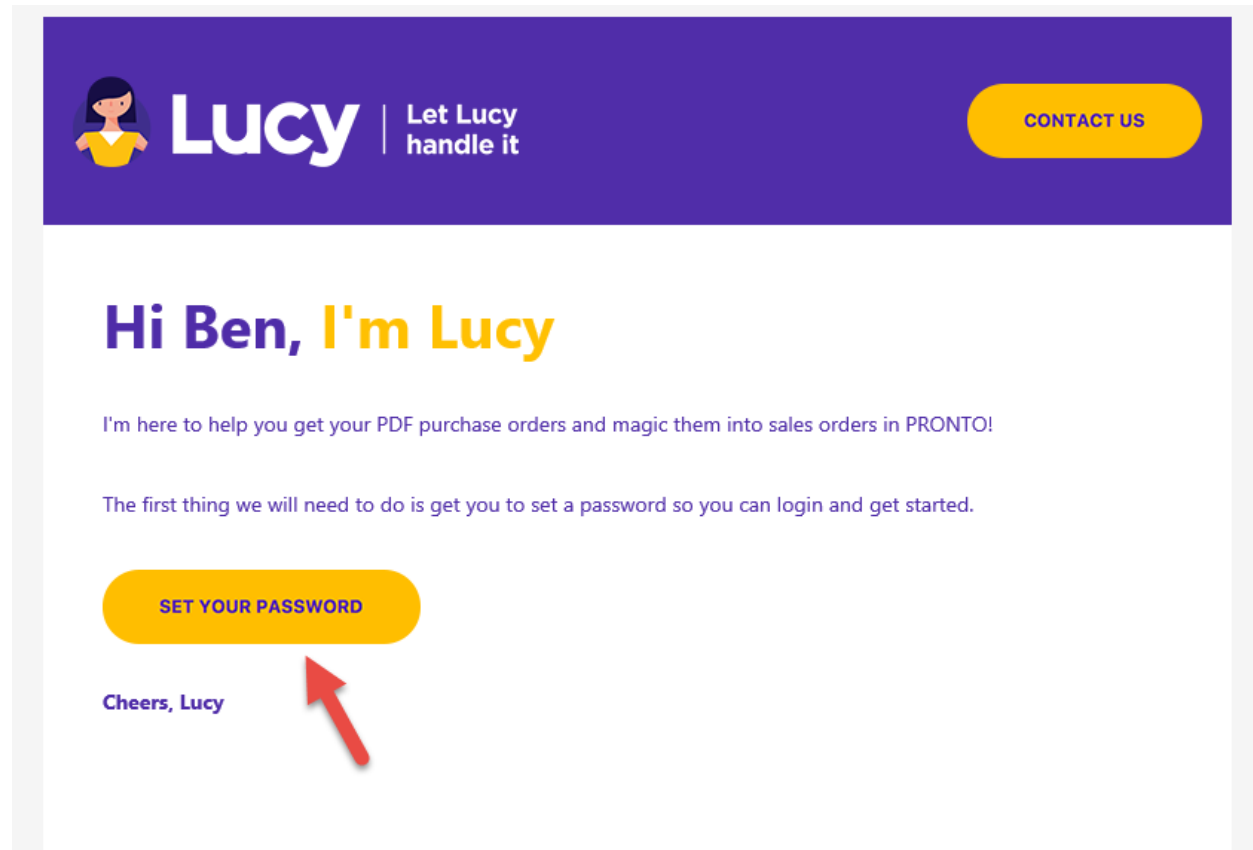

Note - The 'Set Password' link contains a token that is valid for 24hrs once requested. If you attempt to set your password after 24hrs and receive an error due to an expired token, you will need to use the 'Forgot Your Password'? link on the login page (https://go.letlucy.com). We'll email you a fresh link so that you can reset it.

2. Next, please install the Lucy integration package that has been provided to you.

3. Now, login to Dynamics Business Central and navigate to 'Web Services'.
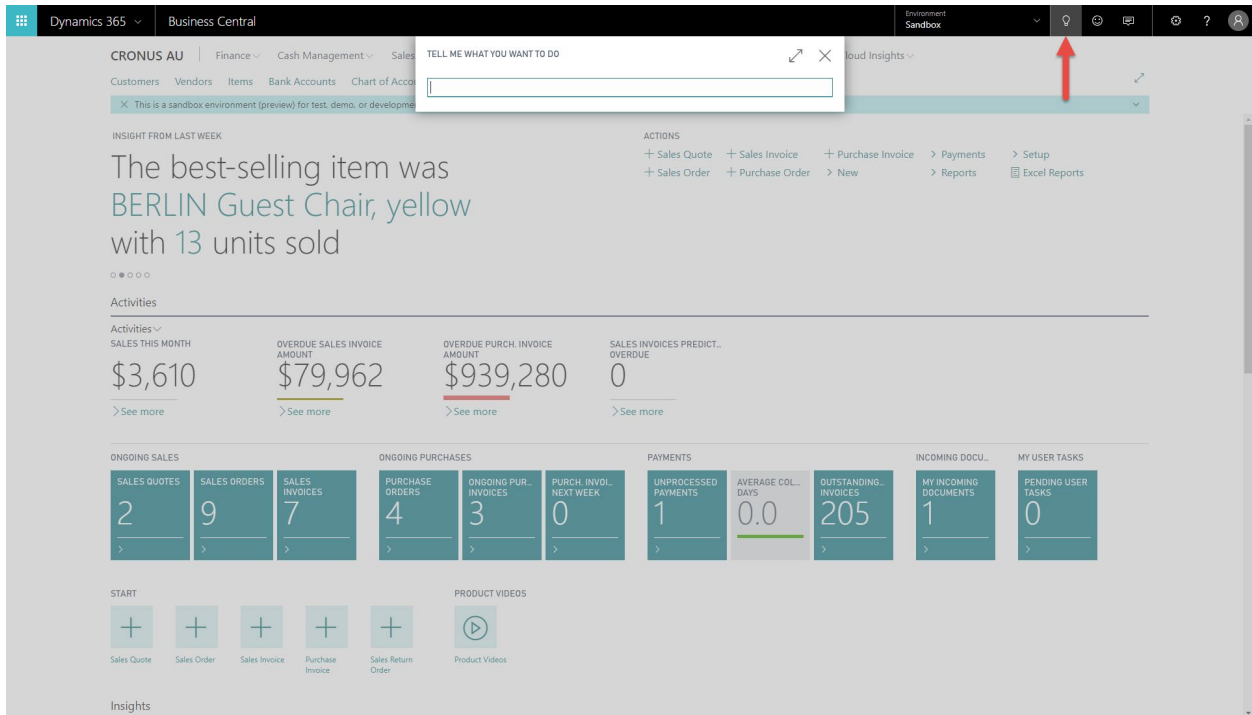
4. Search for the Lucy Integration Codeunit and copy the Soap URL.
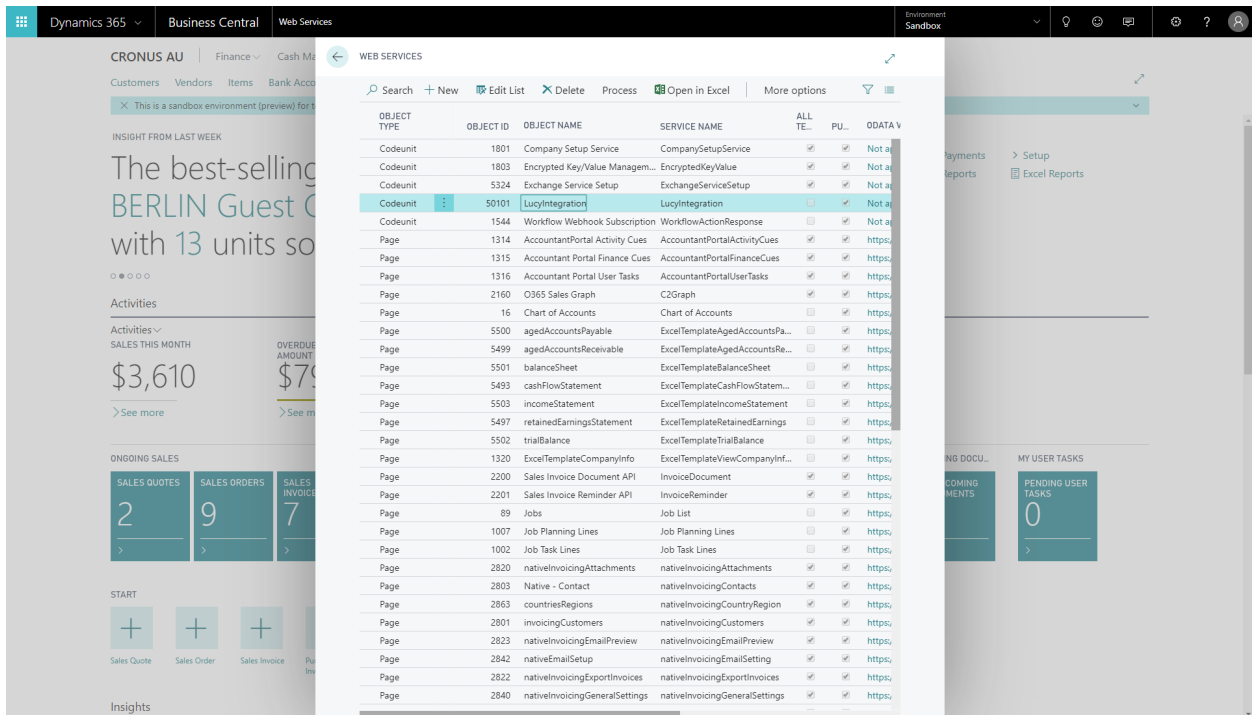
5. In the Lucy application, navigate to the Integration Settings page and enter the Soap URL (i.e. https://api.businesscentral.dynamics.com/v1.0/d9832bec-98df-4f9c-ac90-f459d86cbd96/sandbox/WS/CRONUS%20AU/Codeunit/LucyIntegration)
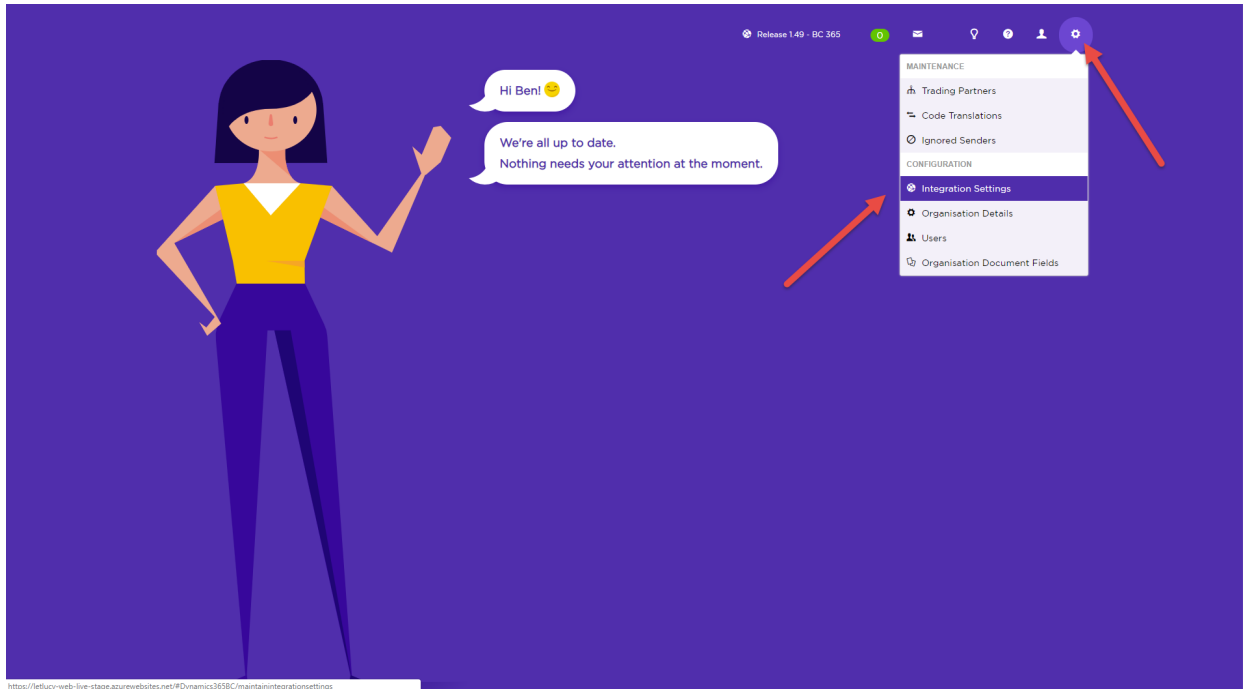
6. It's here that you'll also enter your Dynamics Business Central username and password, then click Test Connection.
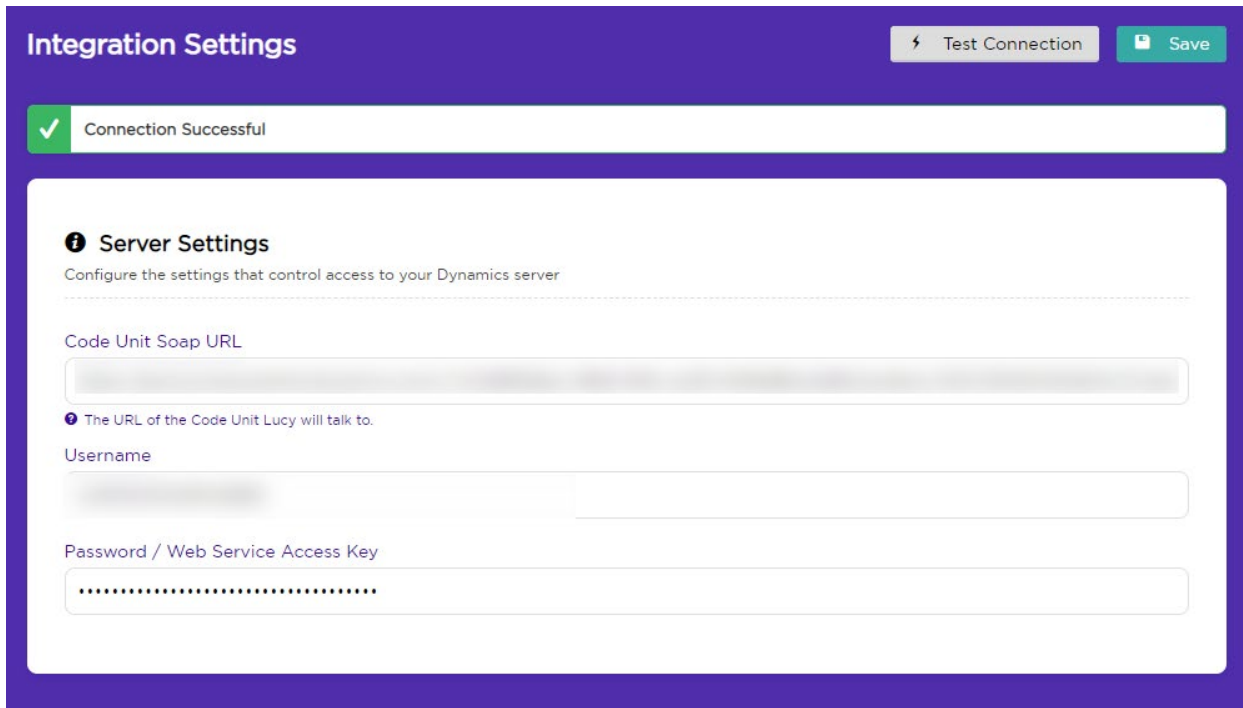
7. Once you've received the "Connection Successful" message, click Save and navigate back Home by clicking anywhere on the Lucy character.

Order Processing

The email address to send all orders to will be *MSLucyTest@letlucy.biz* – Lucy will be monitoring this inbox.

Example 1 – First order, all data correct

1. When you're ready to start, attach PDF 1 (**44256_BC_Perfect.pdf**) to an email and send it to Lucy at the address above.

2. When Lucy receives that email, she won't recognize you as an existing customer. So you need to follow the prompts to **link your sender to a Trading Partner**.
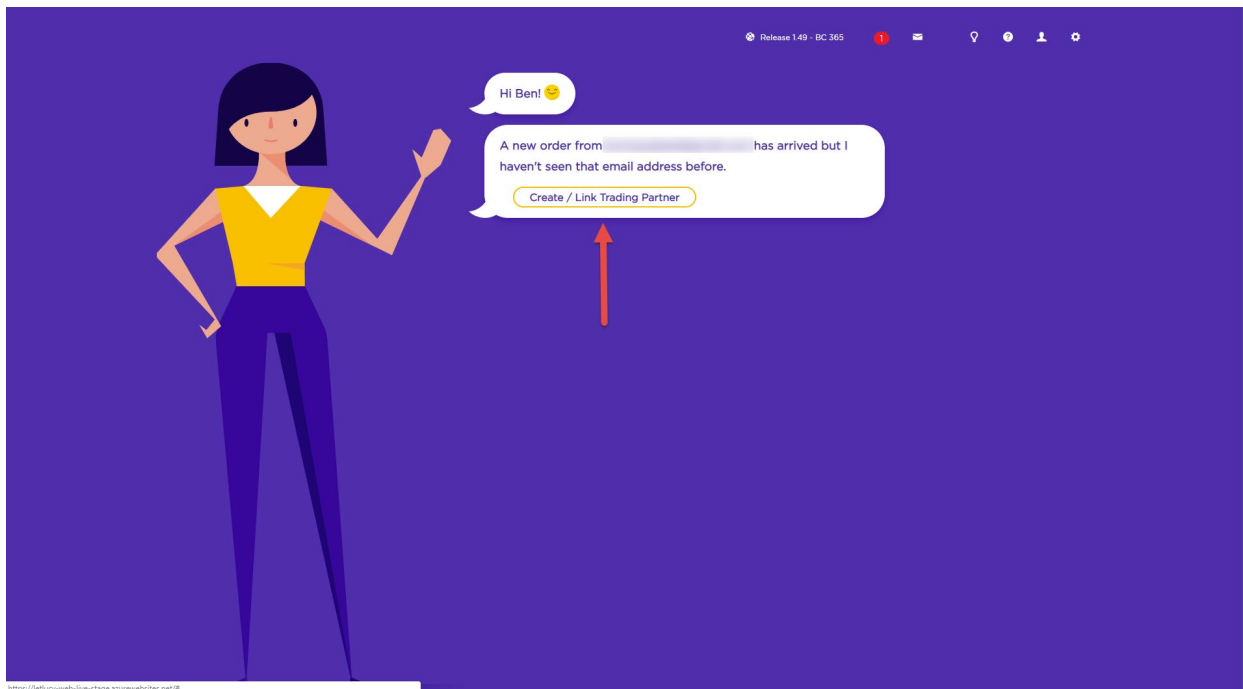
3. Create a new Trading Partner. Tick the **Create New Trading Partner** option and enter the School of Fine Art's account code (3000) into the **Default Erp Customer Code** field. Alternatively, you can select this customer from the drop down menu. Your PDFs contain data for CRONUS customer 'School of Fine Art', which is why you need to be linked to this customer in order for the data to match.

4. Lucy needs to link an email address to the trading partner so that she can determine who an order is from, so you can **either link your single email address or entire domain** for this test. Click **Save & Exit** and Lucy will attempt to process the order.
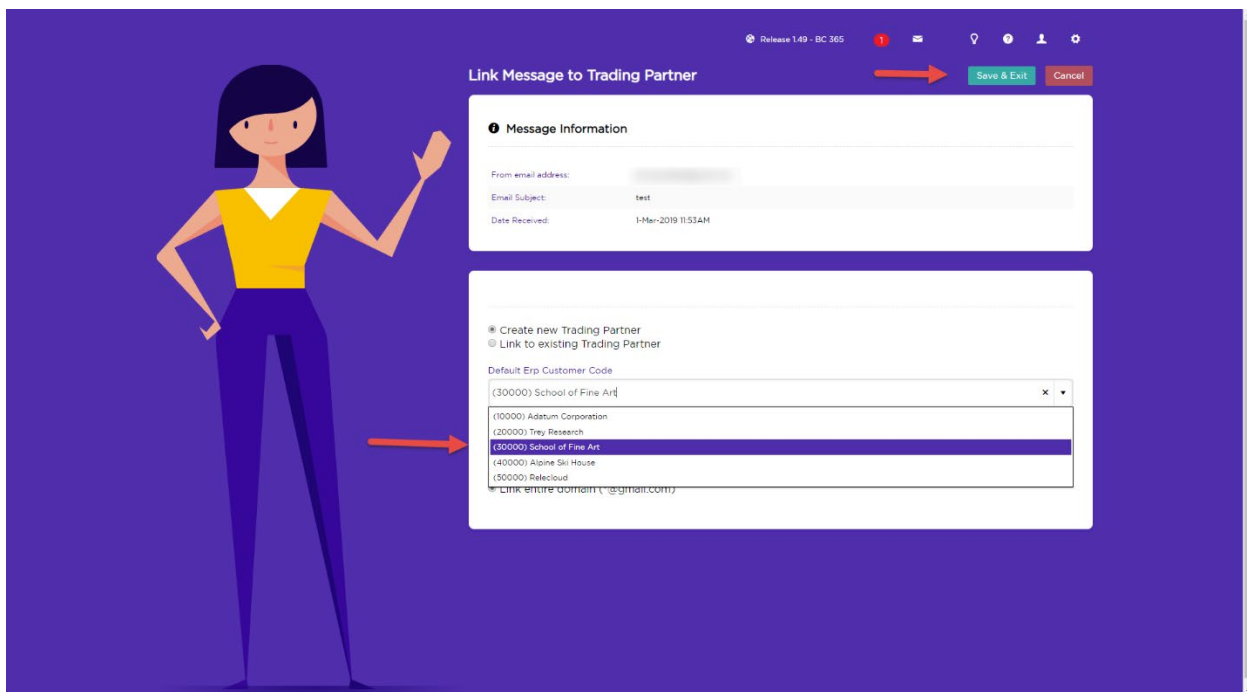
5. **Mapping**. The first order from any customer is going to require a document map. Lucy will ask you to identify the important information on a purchase order such as: Order Number, Product Code, Price, and Quantity.

All you need to do is click the **Map** button for the field you want to map, and then use the mouse to **drag and highlight** that field. Click the grey square to verify that Lucy's found the data you want her to. Repeat this process for each of the required fields to create the document map. (*Please refresh the page if the mapping screen does not load*).

Here's an example of what it looks like:

a. Click Map for the Order Number field on the right side of the page.

b. Locate the purchase order number on the PDF, then use the mouse to click, drag and release to highlight the field for Lucy. You can also click on the grey square of the mapped field to see what data Lucy has found.

c. If nothing has been found, highlight a larger area to ensure that Lucy can access all the data.
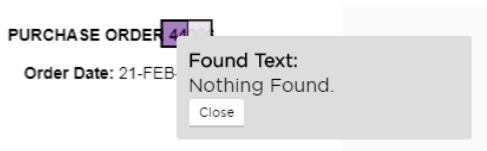
6. Once you have mapped the Purchase order number, Delivery Address, Stock Code, Price and Quantity, click **Reprocess**. It should only take a few seconds for Lucy to go through and validate every line of the order against the ERP data, and integrate it.

7. The timeline will show the sequence of events and a timestamp for each. You'll see that the status has been marked as complete and you'll see that the document has been successfully integrated.
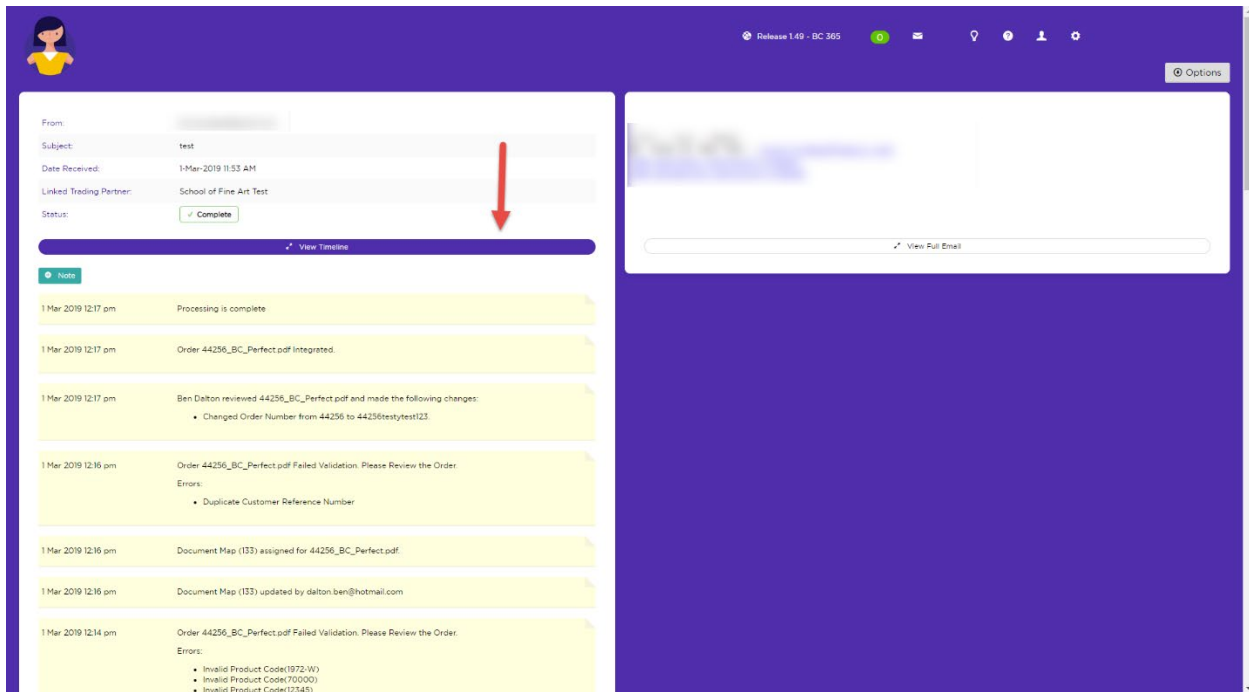
(Note - If ever you need to refer back to a particular email or purchase order, click the envelope icon to get to the Message Enquiry page. Every message that Lucy receives is stored here so if you are looking for an email or purchase order, here's where to find it.)
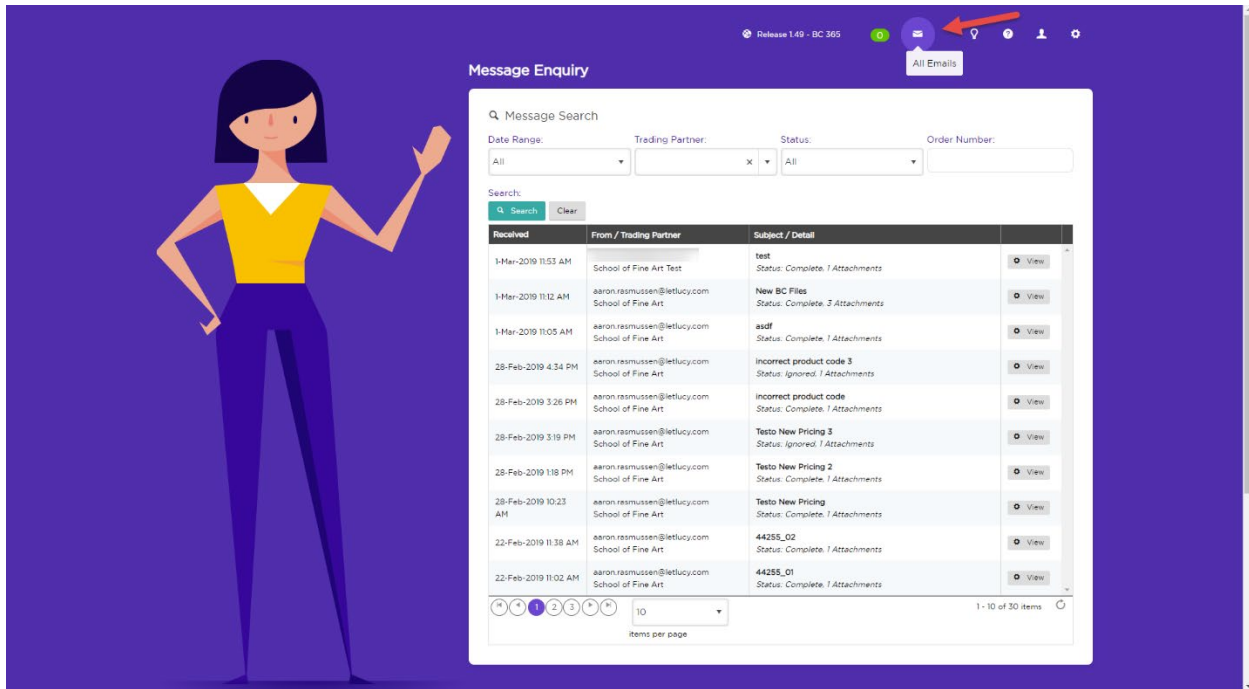
Now we'll proceed to Example 2, where we'll handle an order with incorrect data.

Example 2 – Customer sends an order with an incorrect product code

1. Attach PDF 2 (**44255_BC_IncorrectProductCode.pdf**) to an email and send it through to the Lucy email address.

2. Lucy will notify you via email (and on screen if you're logged in) that she's found something interesting that requires attention. Check that you have received this email.

3. View the order by either clicking the **Read More** link on the email…
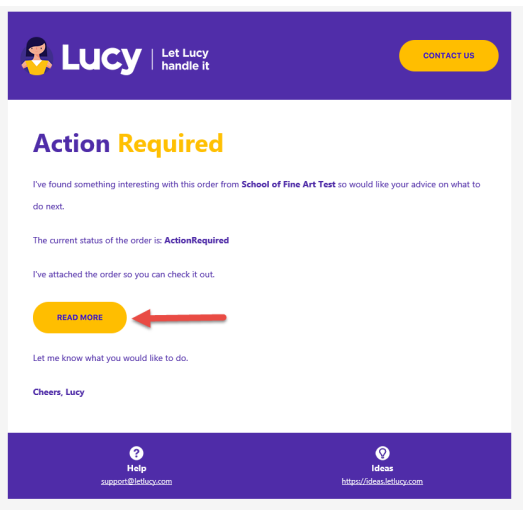
…or you can access it via the Lucy home page. On logging in, you'll see Lucy has reviewed an order and needs your help completing it. Click **Review Email** to view the order.
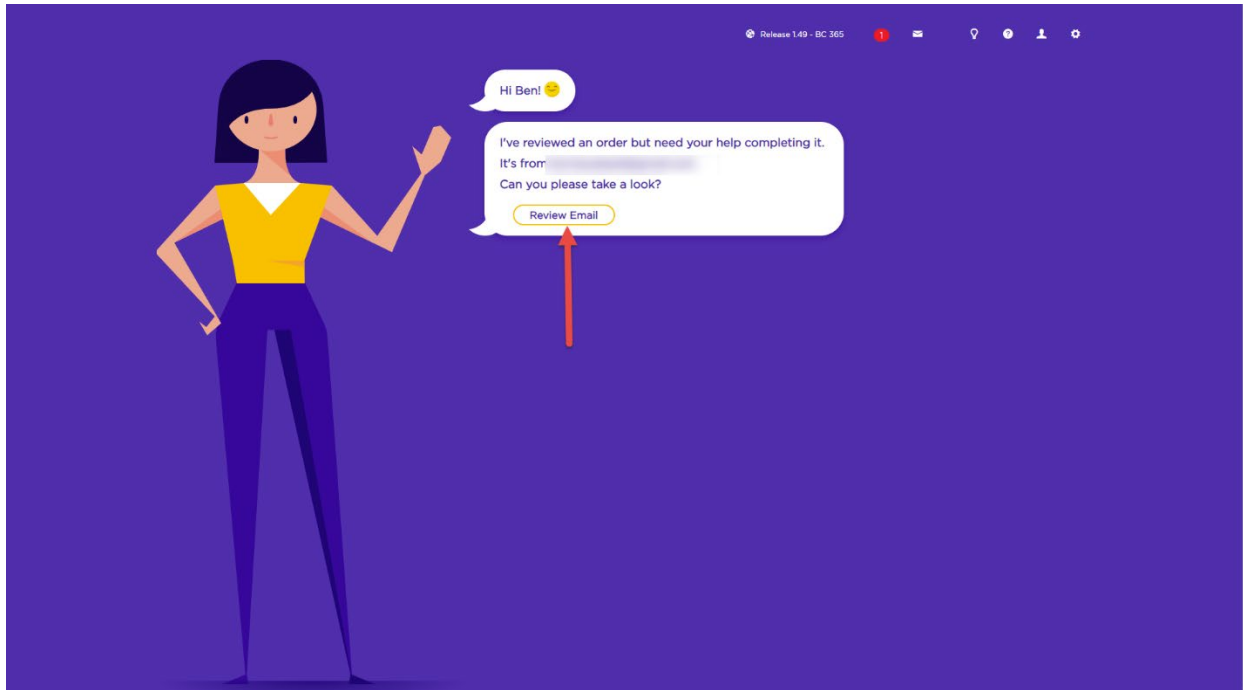
4. On the Message review screen you'll see that Lucy has highlighted an incorrect product code. For this example, just focus on fixing the incorrect product (stock) code.
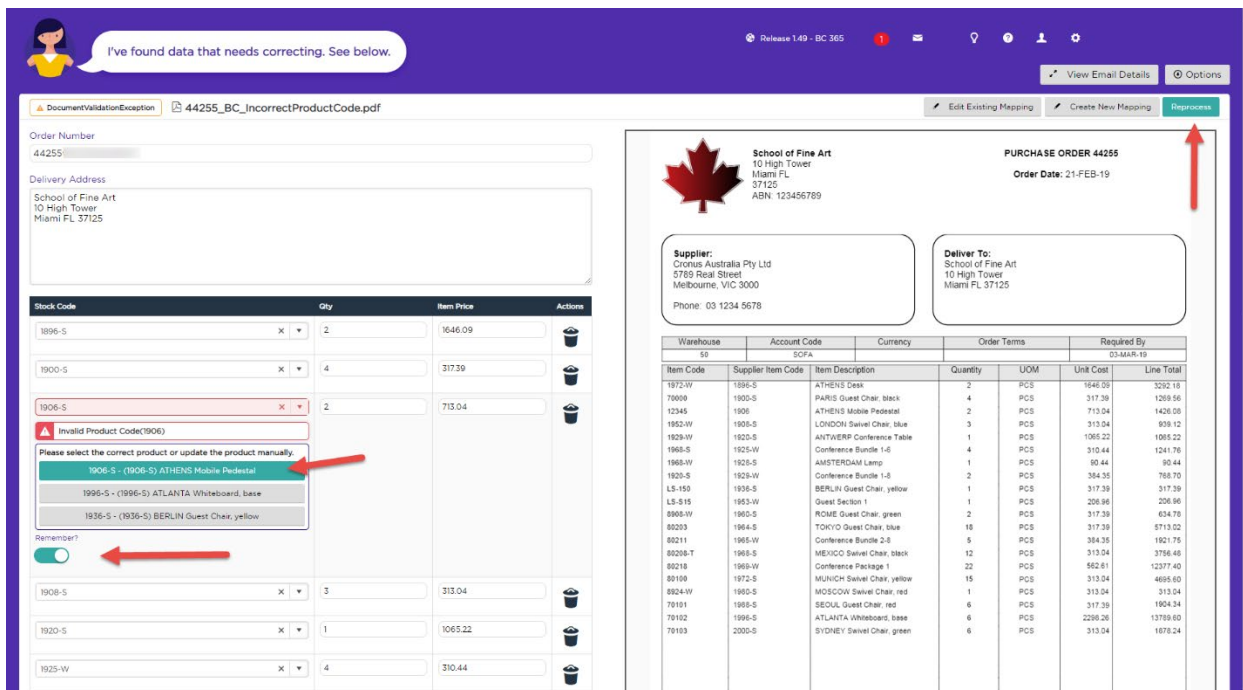
What was on the Purchase order as stock code (1906) should have been (1906-S).

5. **Enter the correct code** into the stock code field - the lookup will start populating with all possible products and you can simply select the correct one.

Or, select the correct stock code from the list of suggestions that Lucy has provided.

6. Directly below the stock code field is a toggle to remember what you've done. If you toggle that on, Lucy will remember for next time that Product 1906 for Customer 'School of Fine Art' should be product 1906-S**.** Feel free to toggle that on and then click the **Reprocess** button.

7. Lucy will now finalize the order. The status should now be **Complete** and the order integrated to Dynamics Business Central.

Example 3 - Customer sends an order with an incorrect price

1. Attach PDF 3 (**44257_BC_IncorrectPrice.pdf**) and send it to Lucy.

2. Click the **Read More** link on the email Lucy sends you, or select the order within the Lucy application.

In the message review screen, you'll see that Lucy has highlighted an incorrect price.

Lucy gives you a few options here:

- You can either update the price to use whatever is listed in the ERP
- You can override the ERP price and accept the customer's purchase order price
- Or you can enter a completely different value in the field.

3. In this case we'll say the customer's purchase order is incorrect and toggle the **Update to ERP Price** option on.

4. Click the **Reprocess** button and Lucy will complete the order.

With this last order integrated successfully, Lucy testing is now complete.