



MS Dynamics AX

Overview – MS Dynamics AX

QXchange is a powerful and easy to use data integration tool to access, integrate and manage large volumes of data from various systems. Extraction, transformation and loading of data are powered by QXchange with source and target database support.

QXchange helps organizations to bond together all enterprise data and ensures accuracy of data in a timely manner. QXchange is a simple stand-alone application that can be used by novice users with ease.

QXchange can quickly and easily transfer data between many standard data formats and applications, including MS Access, Excel, Comma delimited flat file, MS SQL Server, QuickBooks, Salesforce.com, MS Dynamics AX, MS Dynamics GP and others. It allows simple and clear setup of extraction, transformation and loading instructions to exchange data between different formats.

Microsoft Dynamics AX is the ERP solution for enterprises. Microsoft Dynamics AX combines a rich set of core capabilities with an innovative approach to enterprise resource planning (ERP).

Technology

MS Dynamics AX SDK

Microsoft supplies the MS Dynamics AX SDK to allow third party products to work with MS Dynamics AX. The SDK ensures that

- the third-party software complies with security access to the data
- provides strong error recovery and data logging to make sure data is protected

SDK uses .Net libraries to access various AX objects.

QXchange uses the AX SDK to access MS Dynamics AX objects

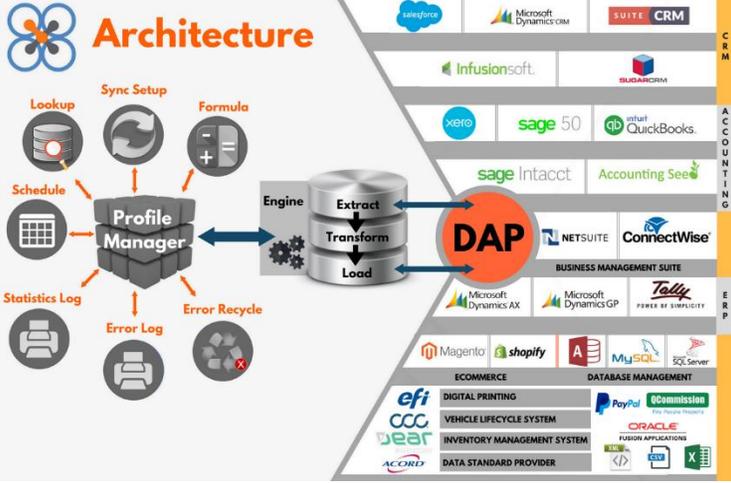
Authentication and Authorization

QXchange uses the configuration file for sign-on. The configuration file will be generated by AX. Each company will have separate configuration file. The application uses the configuration information to authenticate with AX.

Data Access Plug-in

QXchange integration engine uses Data Access Plug-ins (DAPs) for individual application and data format integration. All the DAPs are called using a standard Application Program Interface (API). The AX API (AX SDK) is wrapped inside one of these DAPs. This allows for a smooth and standard operation across all the various DAPs.

QXchange is installed locally at the customer site where AX installed. QXchange sends a message request to AX and AX sends back a response message; the communication is managed synchronously.



MS Dynamics AX Data

The AX SDK exposes all the data objects available in the AX. Some of the various objects available are listed here and there are more objects accessible. Data formats including notes and activities can be accessed using QXchange.

Objects

The following lists are available for access:

Lists	Objects
Entity	Customer, Vendor, Products and other master objects
Transactions	Sales Order, Payments etc....

Using QXchange

The QXchange engine works the same for all different DAPs. Every data transfer is set up as a profile, with a source and target data file, which can be of different data formats. Data transfer between specific objects and the mapping of source to target fields are also set up in the profile.

The profile can be executed directly or can be scheduled to be executed later. The process can be run on a local desktop or on a server.

Source Data

MS Dynamics AX can be defined as source data and the various objects can be accessed. Field level data from the objects can be extracted and mapped to destination objects and fields in different data formats. Data from multiple objects can be extracted. Multiple profiles can be set up to extract data from various objects.

Source data can also be filtered using various expressions. Prior to executing extract the source data can be viewed to make sure the right records are getting selected.

Target Data

MS Dynamics AX can be defined as target data and the various objects can be updated. Data can be updated to multiple objects. In some cases update may have to affect multiple data



objects at the same time, for example: Invoice Header and Line.

Data can be updated in various modes: Insert, Update and Upsert. Insert expects the record being updated to be new and unique. Update expects the record to already exist. Upsert, tries to insert first and if that fails tries to update.

Unique Features

QXchange offers a number of unique features that particularly helps MS Dynamics AX integration:

- Sales Order number is automatically generated based on AX configuration (SalesID format) if SalesID is not mapped in the profile.
- Exporting customers and vendors without County information even though County is mandatory in Address fields to populate in the address block. So no more address block issues.
- Able to link Sales – Blanket Orders and Sales – Release Orders via QXchange. While creating a new Sales - Release order, the Sales – blanket quantity will be automatically reduced.
- Able to insert Dimensions values in Sales Orders. Dimension is an array field and value cannot be directly inserted. It needs to be inserted as array.
- Able to update custom fields.

Scenarios

The QXchange ability to integrate with AX allows many uses.

- Extract Customer, Vendor and master data to other application, Excel or flat files
- Extract Customer information with company names starting with “A”
- Extract Opportunity from Sales Force and create as a Sales Order in AX

Contact Us

To learn more about QXchange, please visit our website and fill out information at the Inquiry link.

www.qxchange.com/inquiry-about-qxchange.html

“The QXchange product was able to take care of my integration needs right out of the box. And the QXchange team solved all the other usual data issues that come up in such a project, very quickly. They worked very closely with me and solved every issue. I am very happy I found QXchange.”

- Rich Bartels. Goose Island Corporation