

TO INCREASE 

Release Notes for Business Integration Solutions 10.0.36.55 for Microsoft Dynamics 365 Finance and Operations

Release Notes

Contents

1	Business Integration Solutions.....	5
1.1	General.....	5
1.1.1	Purpose	5
1.1.2	Audience	5
1.1.3	Installation Notes.....	5
1.1.4	Delivered models	5
1.1.5	Software Requirements	5
1.1.6	Product release information	6
1.1.7	Documentation	6
1.1.8	Support.....	7
1.1.9	Labels	7
1.1.10	Common features	8
1.2	Build changes	8
1.3	Fixes/Changes	9
1.4	Functionality New and Changed	11
1.4.1	Limit the number of processed data synchronization logs	11
1.4.2	Transaction scoping	11
1.4.3	Showing EDI order data per company	12
1.4.4	Ledger journal name setup for different companies.....	13
1.4.5	MDM Pull strategy improvements.....	15
1.4.6	Store last run date time (for synchronization) per company.....	16
1.5	Known issues.....	18
1.5.1	An issue with the form mapping recorder	18
1.5.2	D365 new grid functionality affects navigation between our forms.....	18
1.5.3	AS2 not able to send UTF8 format.....	18
1.5.4	Feature management.....	18
2	Environment Comparison Studio	19
2.1	Introduction	19
2.1.1	Purpose	19
2.1.2	Audience	19
2.1.3	Deliverables.....	19
2.1.4	Software requirements.....	19
2.1.5	Documentation	19
2.1.6	Support.....	20
2.2	What's New.....	20
2.2.1	Current release	20
2.3	Functionality	20
2.3.1	Setup parameters.....	20
2.3.2	Creation of a message in Business integration Studio.....	22
2.3.3	Creation of a data file using Connectivity Studio.....	23

2.3.4	Importing Data file Environment Comparison Studio.....	26
2.3.5	Compare functionality	27
2.3.6	Import data to D365.....	31

Document information

Title	Release Notes for Business Integration Solutions 10.0 for Microsoft Dynamics 365 Finance and Operations
Subtitle (Subject)	Release Notes
Solution Suite	BIS; Connectivity, EDI, and MDM
Category	Release Notes
Author	BIS team
Published Date	10 October 2023
Status	Final
Comments	

© Copyright To-Increase 2023. All rights reserved.

The information in this document is subject to change without notice. No part of this document may be reproduced, stored, or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of To-Increase B.V. To-Increase B.V. assumes no liability for any damages incurred, directly or indirectly, from any errors, omissions, or discrepancies between the software and the information contained in this document.

1 Business Integration Solutions

1.1 General

1.1.1 Purpose

This document describes the new releases of To-Increase Business Integration Solutions for Microsoft Dynamics 365 for Operations. Please read this document carefully before installing it. If you are interested in the practical how-to information, we provide on the To-Increase blog, you can follow the links we provide in some sections of the document. You find our blog at www.to-increase.com/blog/.

1.1.2 Audience

The document audiences are consultants and customer end-users.

1.1.3 Installation Notes

To install 'Business Integration Solutions' you need a valid license key. The following licenses are available:

- Business Integration Solutions
- Connectivity
- EDI
- MDM Master data management

1.1.4 Delivered models

Models are no longer delivered via LCS. If you still need the code, please reach out to our support team.

1.1.5 Software Requirements

Business Integration Solutions components are released on the following kernel build. This means that this version installs on Update 10.0.30 and higher.

Version	Kernel build	Application version
Microsoft Dynamics 365 for Operations – Update 54	10.0.30.0	7.0.6592.33

1.1.6 Product release information

Business Integration Solutions 10.0.36.55 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.30. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365 version 10.0.30 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.36, we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarized in the following table.

Release date	Version number	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
25/05/2023	10.0.33.53	10.0.25	10.0.33	10.0.25 and above
04/07/2023	10.0.34.54	10.0.30	10.0.34	10.0.30 and above
10/10/2023	10.0.36.55	10.0.30	10.0.36	10.0.30 and above

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase cannot be obliged to provide Hotfixes if Client has not deployed the latest Release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.

To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : [Knowledge Base - Support - To-Increase](#)

1.1.7 Documentation

Help documentation for Business Integration Solutions is available at [Connectivity studio \(to-increase.com\)](#).

1.1.8 Support

In case of any question or query, please reach out to your Microsoft Partner or To-Increase directly. You can contact To-Increase via our support portal (<https://support.to-increase.com/ticsm>), or send an email to customeroperations@to-increase.com

1.1.9 Labels

To-Increase is using the Microsoft Dynamics 365 Translation Service for automated translations of user interface elements. In our solutions we use standard labels and new solution specific labels. The standard labels are already provided with translations done by Microsoft. The solution specific labels are now also available to users in more languages.

As we used automated translations and reused existing labels it might be the case that some translations are wrongly translated. With a single translation unit the AI powered translation service is not aware if it should be translated as noun or verb. Some words do have multiple meanings, like “application”. It could be related to recruitment or a software solution. If you come across such issue, please use the in-app feedback or create a support case, so we can improve the translations for future releases.

The next label files are part of this release:

BIS.en-us.label.txt

BIS.da.label.txt

~~BIS.de.label.txt~~ (This translation is removed because of too many incorrect translations).

BIS.es.label.txt

BIS.fr.label.txt

BIS.it.label.txt

BIS.nb-NO.label.txt

BIS.nl.label.txt

BIS.pt-PT.label.txt

BIS.sv.label.txt

Excluded from our translations:

- To-Increase will continue to offer its services to customers and partners in English.
- Our website, product documentation, release notes, and any other updates will be available in English only.

1.1.10 Common features

If multiple solutions provided by the To-Increase are used, always pick the latest version of the Common library.

The Common library version included in the current release is 10.0.0.50.

1.2 Build changes

No changes.

1.3 Fixes/Changes

- EDI Error Message. – The delete actions from the Pseudohistory for sales, purchase, inventory etc. were removed. Deletion of the standard objects is always possible but it will not delete the Pseudohistory. To clean the history, a separate available process should be executed.
- Custom Form views on BIS History form not working from Workspace tiles and lists. – When opening from the tiles, the default form data source ranges won't be applied.
- Connectivity studio creates empty files on errors. – Execute write transformation only if data exists. The error handling was improved.
- We cannot setup the message status field into the custom alert dialog. – The standard alert framework was changed that led to BIS alerts failure. The BIS alerts were fixed to support a new standard framework.
- Issue with batch job processing. – The file filtering and file lookup were fixed for the blob storage.
- Unable to move file to archive or error path when I use blob connection with SAS. – When we were using SAS token and blob container was private, it was required to add the SAS token to the URI to read the file. This issue was only with copy because the copy blob operation is a server side async operation.
- "General journal line creation - not possible to set Ledger dimension field". – The Account type field lookup was fixed to show values from the ledger journal document if it exists.
- Clean up Service Bus data. – The service bus tables were added to the Clean up BIS history procedure.

Internal

- Error with Initialize/ Test Document with Blob Storage Connector. – The initialize option on the document did not support the files from Blob or SharePoint. Fixed this for initialize and test document functionalities.
- New EDI validation rules:
 - BisEdiCheckExternalItem – Checks in D365 FO if the external item ID exists for the item.
 - BisEdiCheckItemRestrictedForCountry – Checks if the item is restricted for sale to the country of the delivery address. This validation rule uses the Restricted products setup as defined for the Released products.
 - BisEdiCheckSalesLinePriceUnitConversion – Checks and calculates the expected sales line amount and compares it with the EDI sales line amount. It checks if the EDI sales line amount is different from the calculated amount, taking into account unit conversions. You can allow a difference between the calculated amount and the EDI sales line amount. To do so, on the Journal validation setup, in the Validation parameter field, define the desired percentage. This percentage

indicates the maximum allowed difference between the EDI sales line amount and the calculated amount.

- While Testing document with wrong Root name, the file is moving to another folder when the connector is Azure blob storage. – The testing process of the document for the files from the Blob and SharePoint was fixed to not move files anywhere.
- Application must support space in the JSON file while performing Initialize or Test operation on the Document page. – The support of spaces in the JSON document was added.
- While filtering the records in Master data Inbox, getting Errors. – The empty ranges were fixed on the Master data Inbox form.
- File are not getting displayed in the file Explorer of the connector type blob storage. – The files were not shown for the Blob storage root folder.
- The initialization of JSON was not working in case using stream option (like Blob storage). – The possibility to initialize from the JSON files located in Blob storage or SharePoint was added.
- Security is missing for show staging validation. – The security for staging line validation was added. Also reviewed other missed security objects.

1.4 Functionality New and Changed

1.4.1 Limit the number of processed data synchronization logs

A new parameter 'Limit records' was added to the Process data synchronization log dialog. If a parameter is turned on, the maximum number of records is limited by the 'Number of pages' * 'Page size'.

Process data synchronization log ?

Parameters ^

Number of pages

Page size

Oldest set of

Limit records Yes

Run in the background ^

[Recurrence](#) [Alerts](#)

Batch processing No

Task description

Batch group

Private No

Critical Job No

Monitoring category

Start date: 9/25/2023 (11:34:02 am) (GMT) Coordinated Universal Time

1.4.2 Transaction scoping

The possibility to automatically rerun the message in case on failure was added. It's possible to turn this on the message header.

Message | Standard view ▾

CustGroup_import

General

Message: CustGroup_import

Project: Hello_personal

Source connector: Blob External ▾

Target connector: D365FO D365fO ▾

Source document: CustGroup_Excel ▾

Target document: CustGroup_FO ▾

History

History type: Record history ▾

Transaction level: Root record ▾

Create history report: No

Store history: No

Log changes: No

Change company

Source field: ▾

Transformation: ▾

Update source status

Performance

Type: Parallel ▾

File selection sort order: None

RETRY

Automatic retry: Rerun ▾

Max. automatic retry attempts fo...: 5

If an error occurs the message will be automatically rerun. The retry applies only for import messages from file, database, service bus or staging journals. The maximum attempts for auto retry is limited to 5.

The options are:

- No – Default. No rerun.
- Rerun - Rerun the message based on the full set of data provide. For example, reread the file again.
- Rerun from history - Rerun the data stored in the message history.

The retry will only start in case if one of the following errors occurs:

- TransientSqlError
- Deadlock
- Update conflict

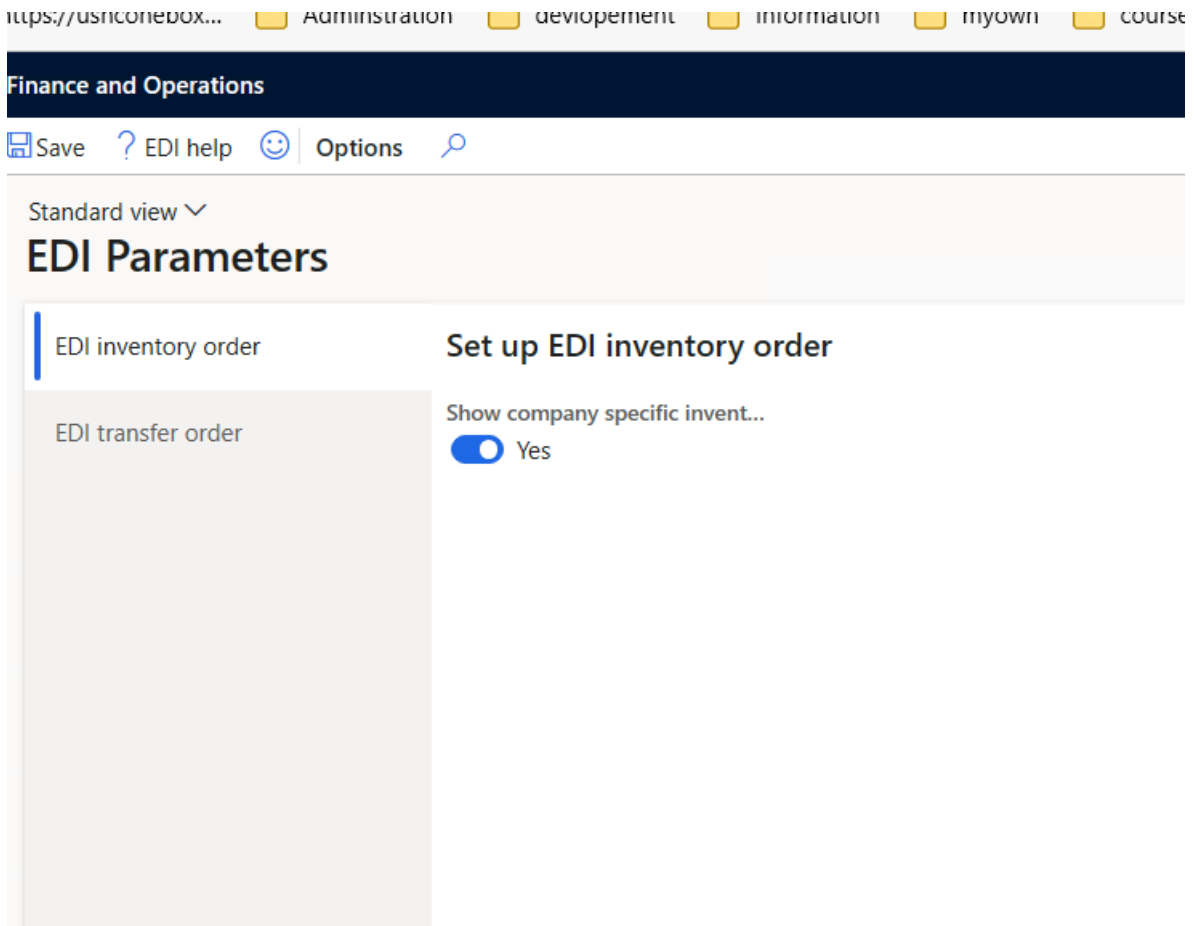
All other errors will not trigger the retry.

1.4.3 Showing EDI order data per company

In the current EDI orders for inventory, transfer order and sales all data for all companies are shown. However, it should be possible to show data only per company.

The issue is caused by the fact the table is shared and not company specific. To be backward compatible the table was not changed to company specific.

A new parameter setup is defined in the EDI parameters form.

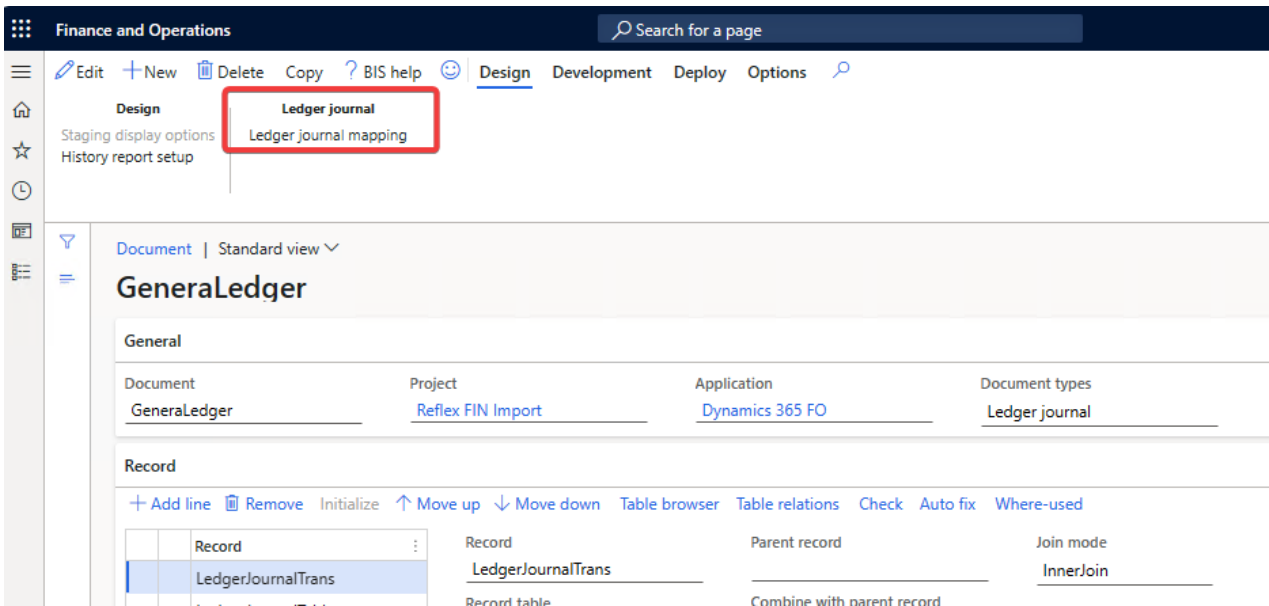


Enabling the option will trigger the filter option to show only the data for the current company.

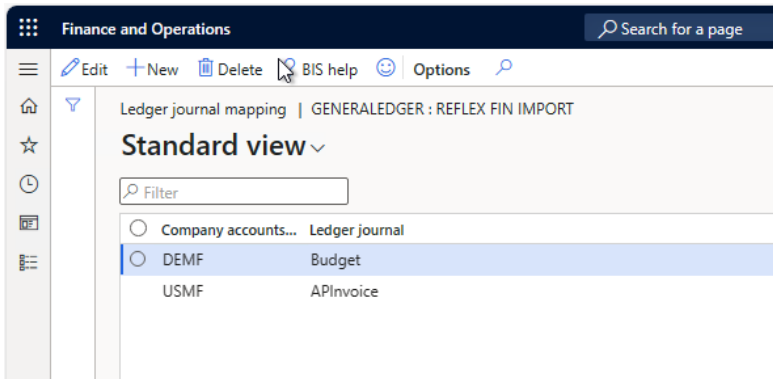
1.4.4 Ledger journal name setup for different companies

The case CS00225759.

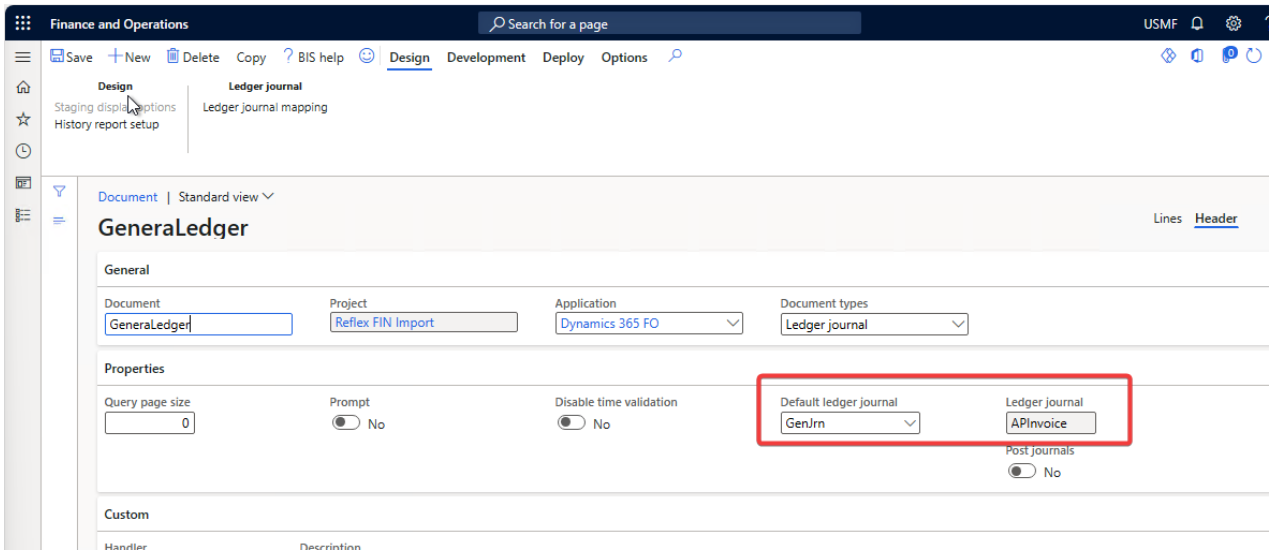
Previously, the Ledger journal name was configured on the document header and it was applied for all companies. But the ledger journal names are per company and different companies might require the different journal names. To make a configuration more flexible, a new form was introduced. The form is accessible from the document with the document type 'Ledger journal'.



A new form provides the functionality to setup the different journal names per company.

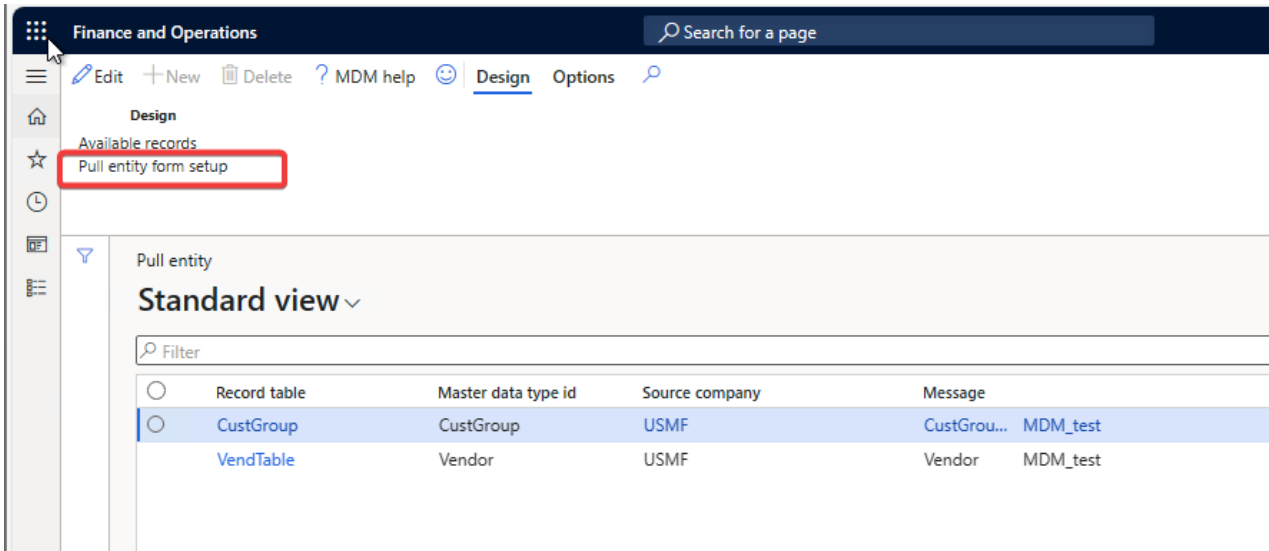


If company is not specified, the default ledger journal name will be applied. It's possible to configure it on the document header. Also, the Ledger journal for current company is shown next to it.

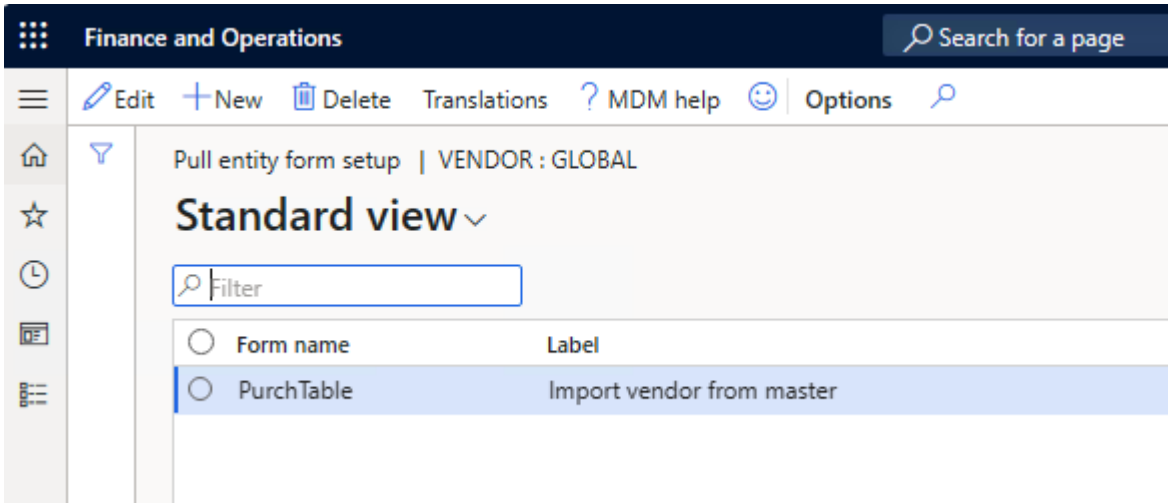


1.4.5 MDM Pull strategy improvements

It will be possible to have a button with the Pull entity functionality on different forms. To achieve this, a new setup was added to the Pull entity form.

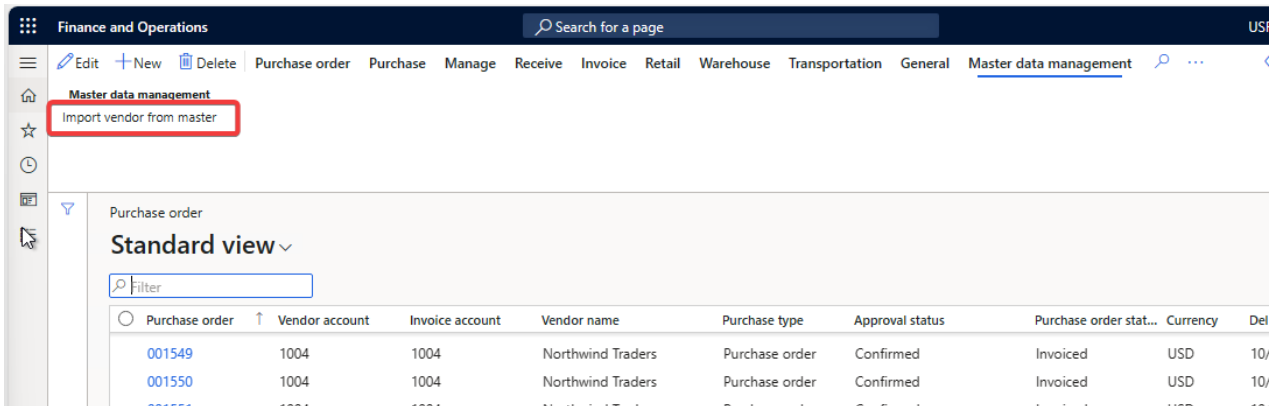


This form provides the configuration of the Pull entity button for the current legal entity and selected pull entity flow.



After completing the configuration, a button appears on the specified form.

A possibility to send master data to the target company was added to a Pull entity process. A new parameter was added to the dialog. It's enabled only if the status is set to Release.



1.4.6 Store last run date time (for synchronization) per company

The case CS00224296.

For the Date range synchronization type the last run date was stored across companies. In this case it was not possible to track which company specific data were sent.

A new parameter was added to the message and webservice header to store the last run date per company. This parameter is available only for the synchronization type 'Date range'.

When the parameter is enabled, the last run field shows the date for current legal entity.

Finance and Operations USRT

Search for a page

[Edit](#) [+ New](#) [Delete](#) [Copy](#) [BIS help](#) [Design](#) [Deploy](#) [Operation](#) [Options](#)

Execute | **History** | **Test** | **Standard batch** | **Service Bus queue**
 Run | History | Tracer | Batch jobs | Received data
 File history | Test case run | Batch tasks | Received dead letter data
 Show changes | | | Sent data

Message | Standard view

CustGroup_Export

Lines [Header](#)

General

Message	Project	Source connector	Target connector
CustGroup_Export	Hello_personal	D365FO D365FO	WinFolder External
		Source document	Target document
		CustGroup_FO	CustGroup_XML

History

- Change company
- Update source status

Performance

Custom

Owner

EDI

Split target per root record

Split quantity: 0.00 Next message: _____

Setup for data synchronization

Synchronization type	Record field	Depends on message	Bundle outbound queue by m...	Redirect event
Date range	DelDateTime		<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes

Store last run per company

Yes

Last run in company usrt

9/14/2023 09:48:03 AM

+ New [Delete](#) [Initialize](#) [Create SQL triggers](#) [SQL trigger](#) [Check](#) [Auto fix](#)

1.5 Known issues

1.5.1 An issue with the form mapping recorder

When starting the recorder for the form mapping a fatal error can occur. This mainly happens if the message is opened via the workspace of BIS. If the message is opened via the BIS menu the error does not occur.

1.5.2 D365 new grid functionality affects navigation between our forms

Remark: **The AS2 Option in the webservice setup is obsolete. Use the new AS2 app to send and retrieve the data to TIE kinetics. Contact To-Increase to retrieve the app installer and manual.**

Microsoft has introduced a new grid control, currently in public preview (feature management), and will be made generally available in future releases. We are currently testing new control and found a few issues which are reported to Microsoft. Once the feature is enabled at the customer end and in case of any issues kindly report to Microsoft. If the issue is related to To-Increase solutions kindly report it to us as well.

1.5.3 AS2 not able to send UTF8 format

This option will be replaced by the new App service which can send and receive data.

Due to a mismatch with third party DLL, which are also added by Microsoft, the sending of encrypted data is done in Unicode and not in UTF8 format. To send the correct encoding a newer version is needed.

1.5.4 Feature management

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public previews and will be made generally available in future releases, in other cases, they are already generally available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled in the customer environment and any issues or questions related to new standard features and our solutions emerge, kindly contact us via To-Increase support.

2 Environment Comparison Studio

2.1 Introduction

2.1.1 Purpose

This document highlights a feature of Connectivity studio named as Environment Comparison Studio (ECS), bug fixes and improvements in this release of environment comparison studio 10.0.36.1 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.30 and higher.

2.1.2 Audience

This document is intended for new users, partners and customers of Environment Comparison Studio. Some knowledge of Dynamics 365 for Finance and Operations and Connectivity studio is assumed.

2.1.3 Deliverables

Deliverable	Description
Solution package	Environment Comparison Studio is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Environment Comparison Studio 10.0.36.1
Release notes	This document is provided with the Environment Comparison Studio product deliverables.
Documentation BPM library	We are working on the documentation for <i>Environment Comparison Studio</i> . This is not published as BPM library on the moment of this release.

2.1.4 Software requirements

Connectivity Studio license is required to use Environment Comparison Studio.

2.1.5 Documentation

Help documentation for Business Integration Solutions is available at [Connectivity studio \(to-increase.com\)](https://connectivitystudio.to-increase.com).

2.1.6 Support

In case of any question or query, please reach out to your Microsoft Partner or To-Increase directly. You can contact To-Increase via our support portal (<https://support.to-increase.com/ticsm>), or send an email to customeroperations@to-increase.com

2.2 What's New

The new feature Environment Comparison Studio (ECS) enables a user to compare the data (Configuration and base data) between two Environments or Legal entities in two different data files. This has the ability to synchronize data from source and target or vice versa after the comparison of two data files. The Environment comparison studio maintains the comparison history within it.

2.2.1 Current release

Note: We released the Environment Comparison Studio (ECS) solution as a preview. This implies that you can use it in non-production environments and try the solution. If you decide to install it on a production environment, keep in mind that we will not prioritize defects reported at this moment.

2.3 Functionality

In ECS you can compare two data files from different environments or different legal entities. A user can create two different data files by using connectivity studio and these files will be stored at Azure storage location. Then these data files will be imported to ECS for comparison. In ECS a user can select one data file as source and other data file as target. After making a comparison the user can select data which he/she would like to deploy in the selected environment. The XML will be generated after the comparison which contains all the data exported after the comparison. A user needs to run an import message to update the data in target table(s) of selected environment. The complete process is explained below.

2.3.1 Setup parameters

As a first step to use Environment comparison studio you should Specify the location where the BIS generated files are stored.

1. Click on Modules → Environment comparison studio → Environment Comparison Studio parameters under the setup tab.

Finance and Operations Preview

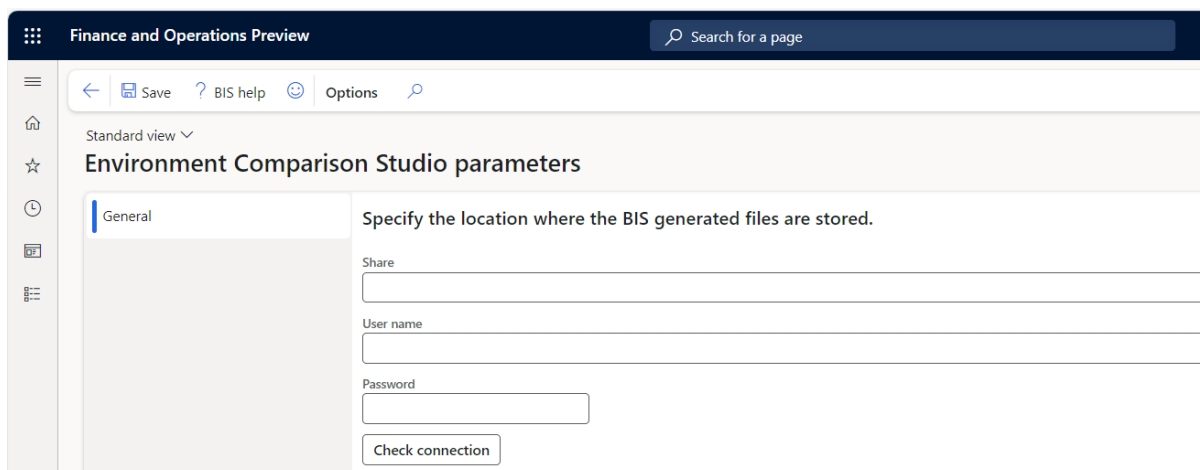
Expand all Collapse all

- Setup
 - Environment Comparison Studio parameters
- Inquires
 - Content packages
 - Compare history

Modules

- Accounts payable
- Accounts receivable
- Asset management
- Audit workbench
- Budgeting
- Business integration solutions
- Cash and bank management
- Common
- Consolidations
- Cost accounting
- Cost management
- Credit and collections
- Demo data
- EDI
- Environment Comparison Studio**
- Expense management
- Fixed assets

2. Fill all the details for storage location, User name and Password than click on save.
3. You can check a connection status by clicking on Check connection.



2.3.2 Creation of a message in Business integration Studio

It is assumed that the user has knowledge of connectivity studio. For creation of a message a user must follow following steps. Create a project for environment comparison and add following connectors, documents, messages as per the requirements for the data comparison.

1. **Setup Connector:** Use a connector to set up a connection to a data source. A connector defines the type of connection and how to connect to the relevant data source. You can use a connector for both incoming and outgoing messages.

Connector type	Description
D365 FO	Directly connects to a D365 FO database.
Folder	Exchanges data files using Azure file storage

For Exporting data from environments:

- Use Source Connector as D365 FO & Target Connector as Folder connector.

For Importing data in respective environments:

- Use Source Connector as Folder connector & Target Connector as D365 FO.

2. **Setup document:** Use documents to define which data you want to exchange and in which format and structure. User has to define a set of documents (Export and Import) for exporting the data from the desired table and importing data back to D365 after comparison.
3. **Setup Message:** Use messages as the carriers that transport data from a source to a target, based on the mapping as defined on the message. User needs to define correct mapping for the data that he/ she wants to sync.

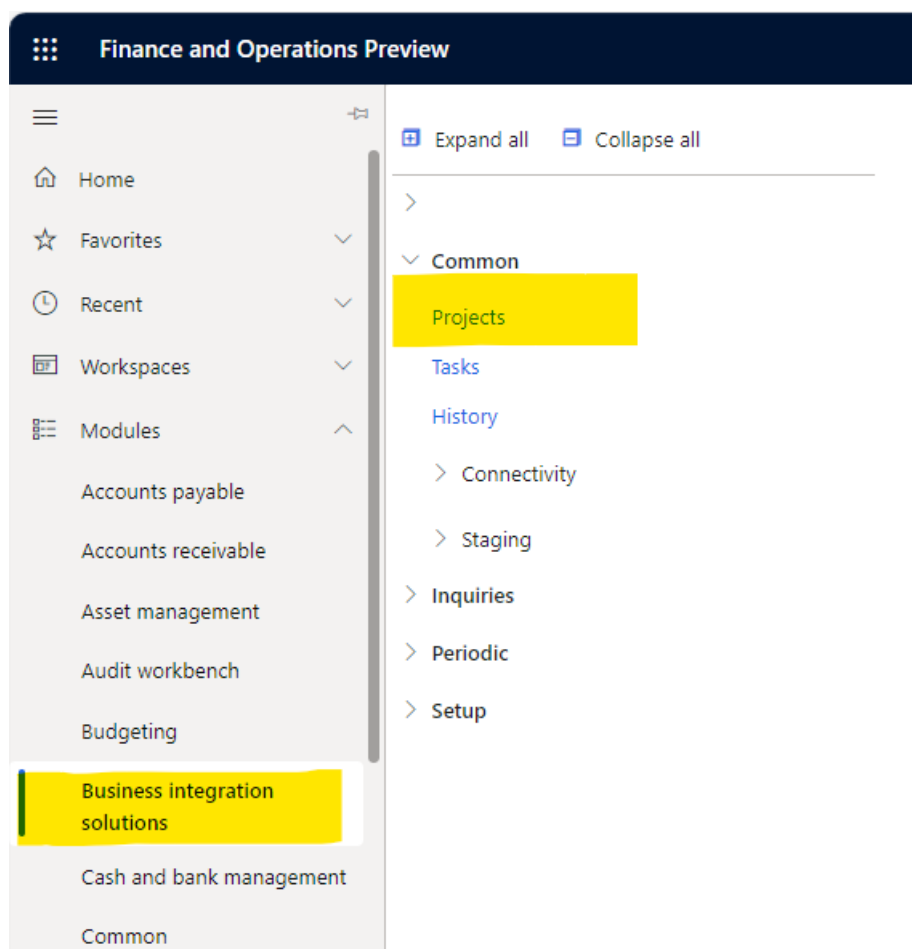
On a message you define:

- The source information: the connector and document that is used for the data source.
- The target information: the connector and document that is used for the data target.

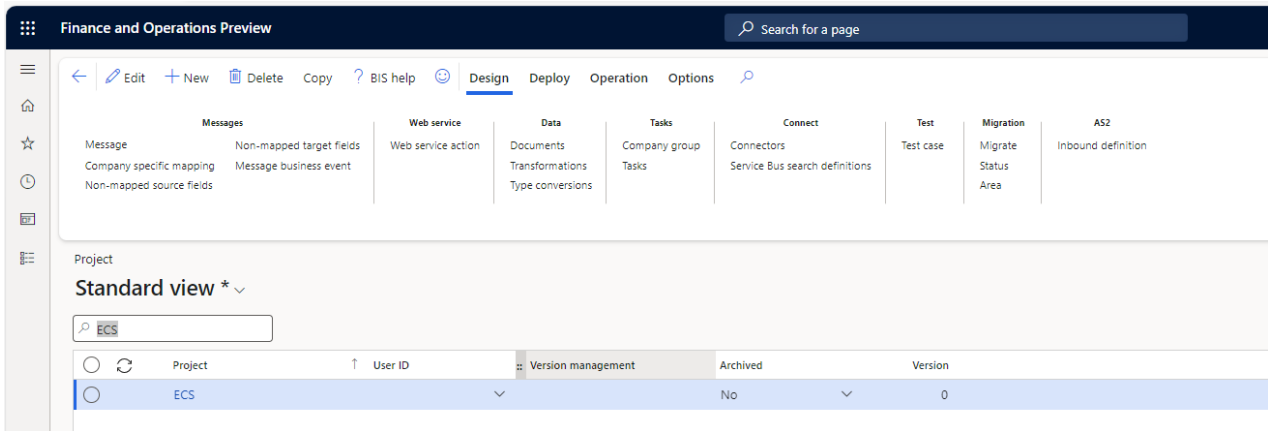
2.3.3 Creation of a data file using Connectivity Studio

For creation of a data file user needs to run a message which will be available in specific project in BIS (Business Integration Solutions).

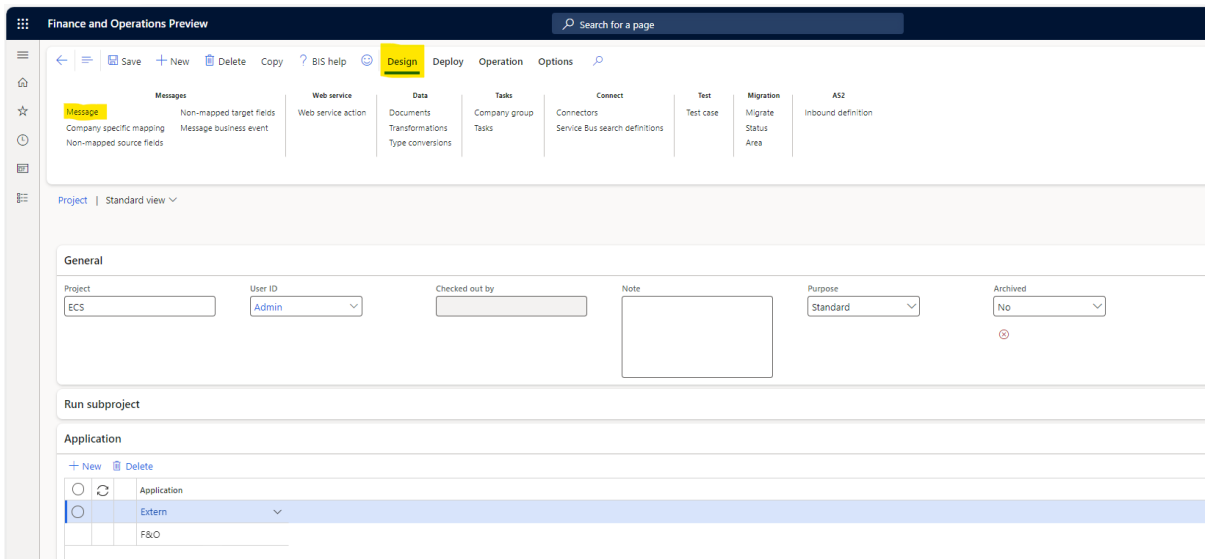
1. Open an environment in which connectivity studio is installed → Business integration solutions → Common → Project.



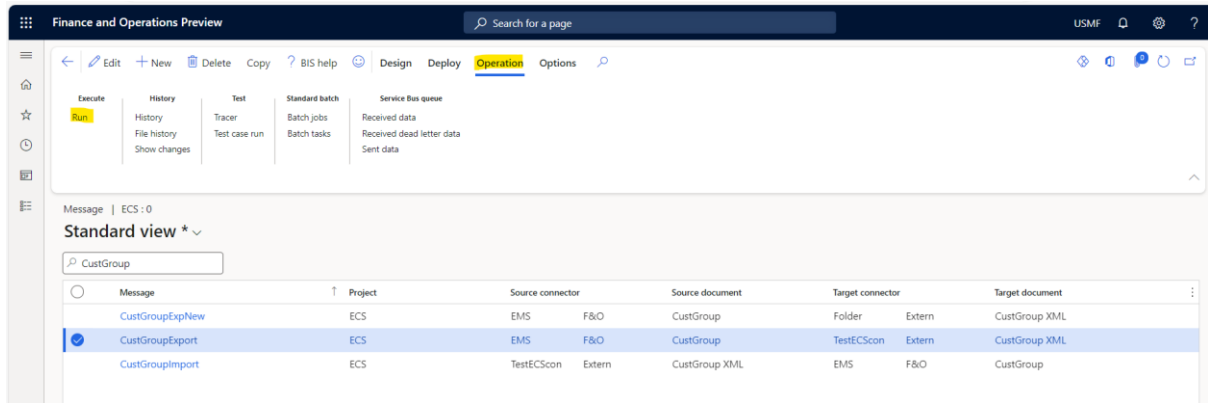
2. Select the project in which the messages are available to export the XML file.



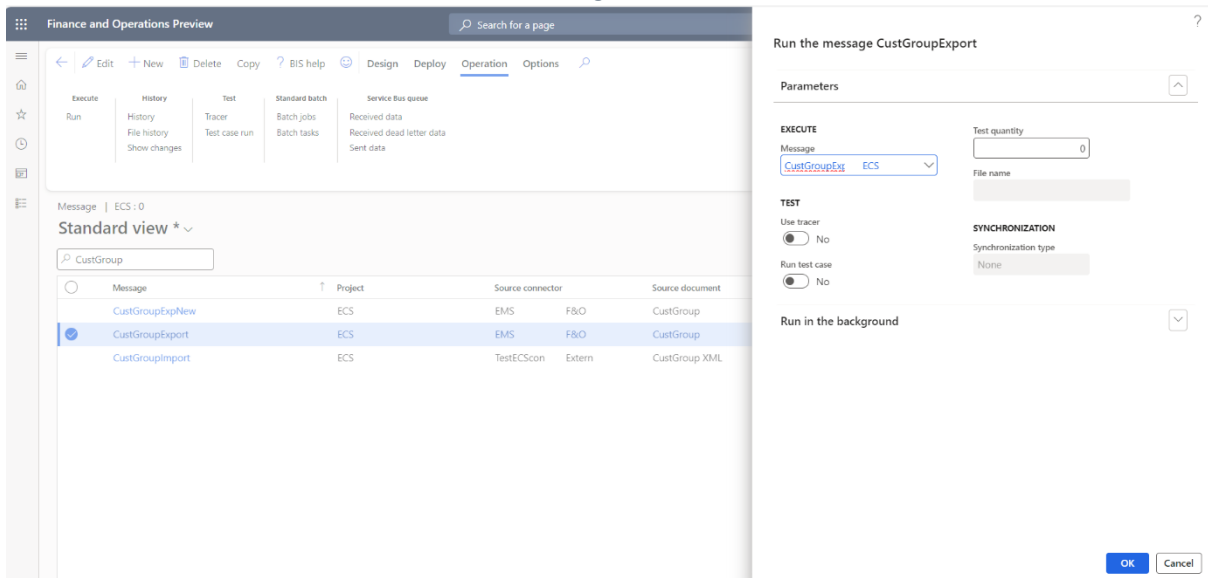
3. Click on design and then click on Message. You can see the list of all available messages.



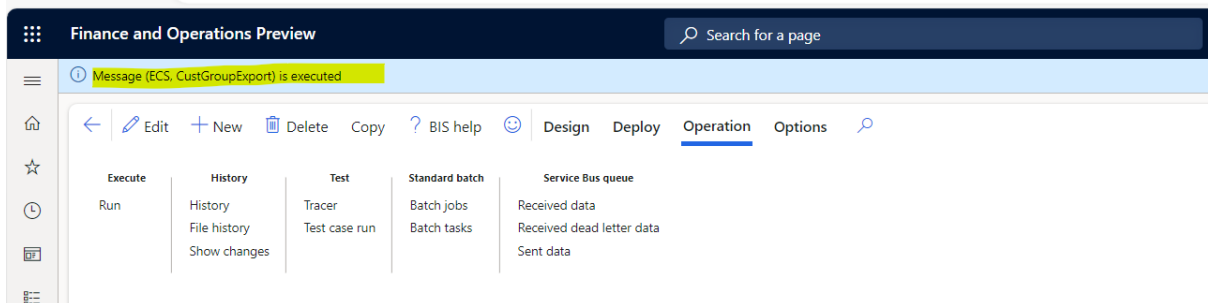
4. Select a message you want to run, Click on operation case tab from the toolbar and click on run option.



5. Click on OK button to run the selected message.



6. After the execution of the message, you will get a success message.



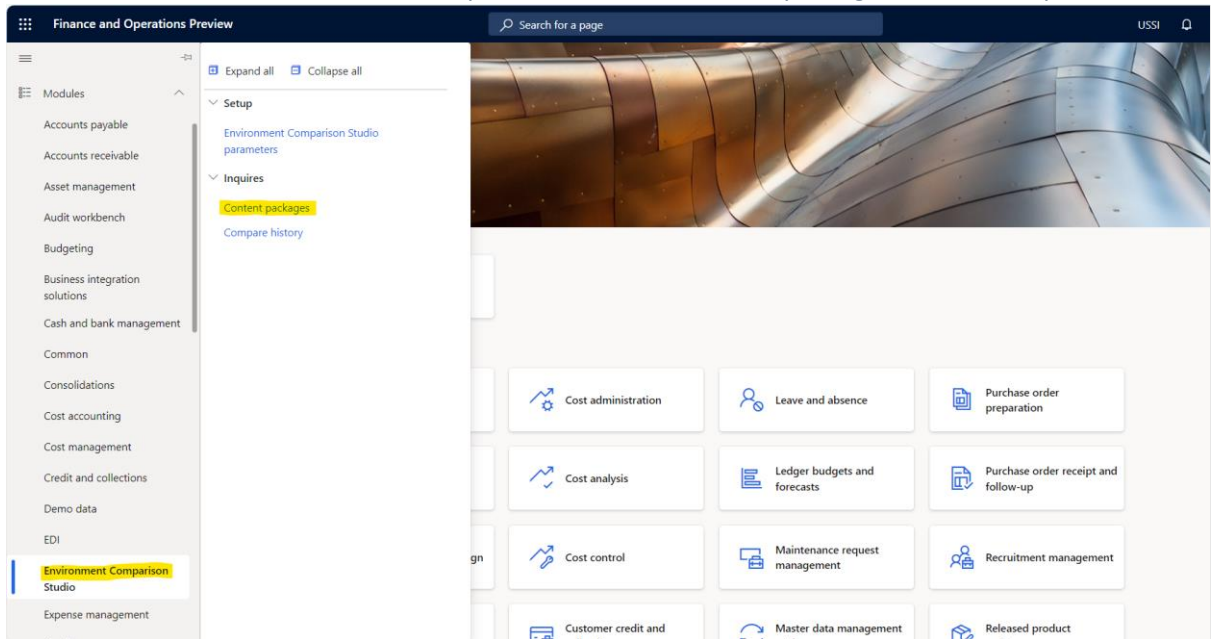
7. The Export file will get stored at azure location in export folder of respective legal entity.

By using all above mentioned steps a user can create two data files for comparison.

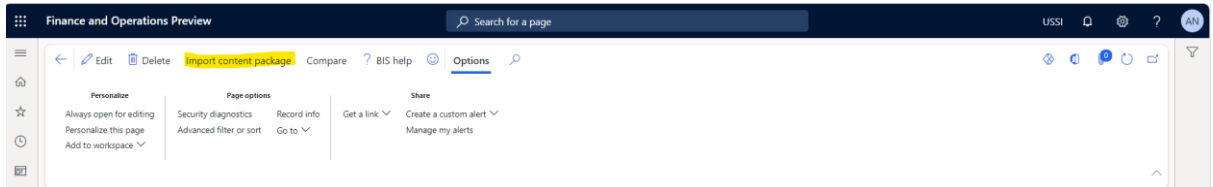
2.3.4 Importing Data file Environment Comparison Studio

After exporting XML files to azure storage, A user needs to create a data package using ECS. Step are mentioned below.

1. Click on modules → Environment Comparison Studio → Content package under the inquires tab.



2. Click on Import content package option.



3. Fill the details in message.
 - a. Folder: Provide path for the XML file
 - b. Content package: Data content package name
 - c. Environment type: Environment Type
 - d. Environment URL: Environment URL
 - e. Company: Name of legal entity.

Then click on OK button.

By using above mentioned steps, you can import different data files in Environment comparison studio for comparison. You can see a complete list of data files under this section.

Standard view ∨ ?

Import data files

Import data files from the specified location. The files will be stored in a new content package.

Folder
BIS-DEV-TST4-1-D3C34BAF\usmf\EcsWorkFolder\Export ∨

Content package
Data_File1

Environment name
Test

Environment URL
https://bis-dev-tst4095631731c88ffaadevaos.cloudax.dynamics.com/

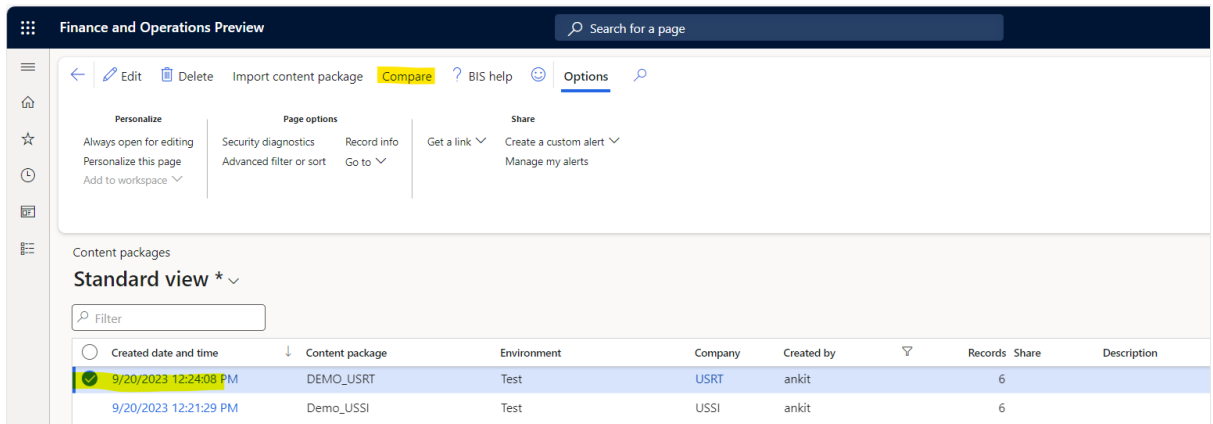
Company
USMF ∨

OK Cancel

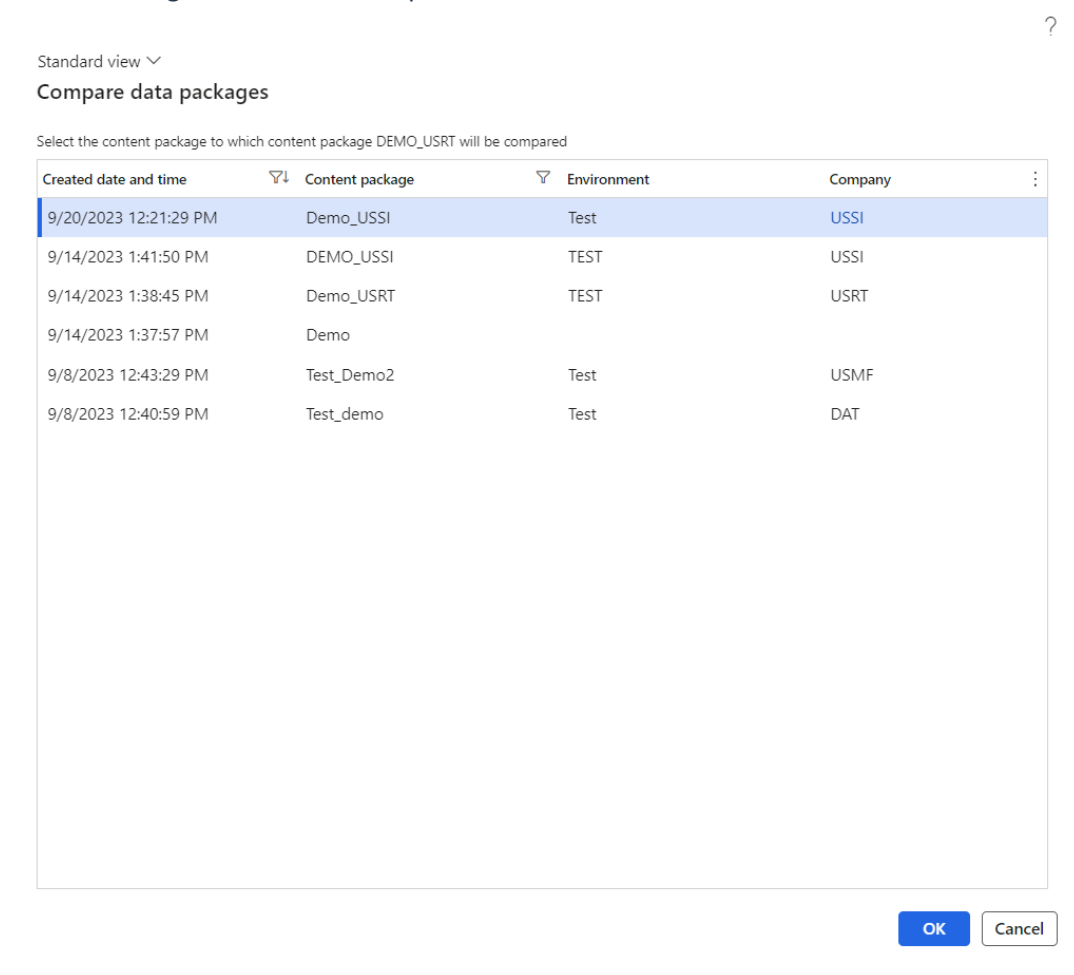
2.3.5 Compare functionality

A list of data files will be available after the importing the XML file. Now you can chose a file as source document (Data file1) and select other file as a Target document (Data file 2). Steps are mentioned below.

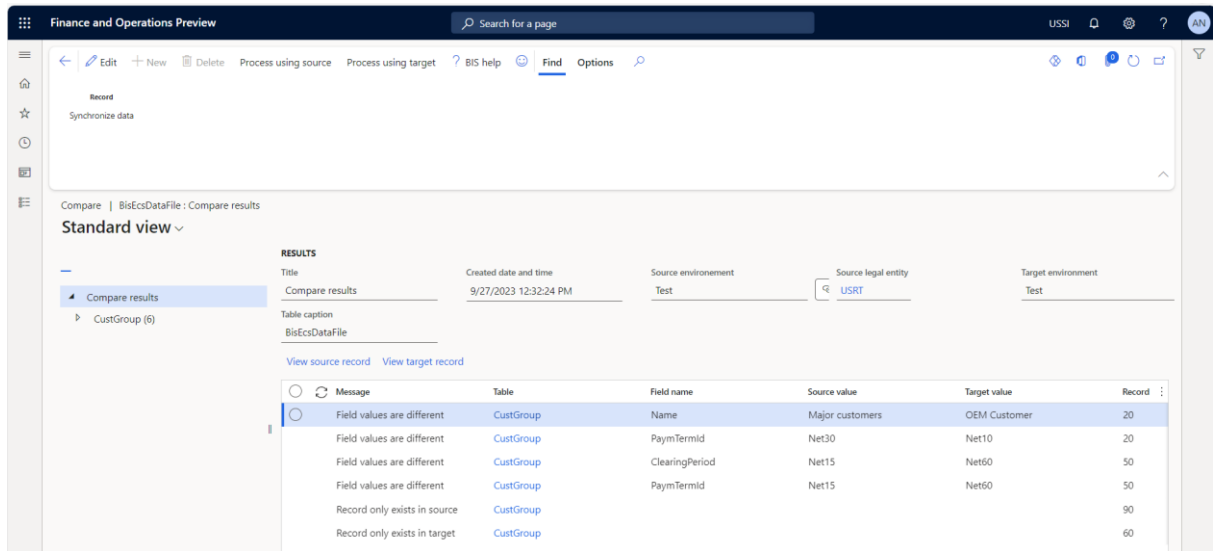
1. Open the module list and select Environment comparison studio →Content package.
2. Select a file which needs to be compared with another file and click on compare.



3. Select the target date file for comparison and then click on OK button.



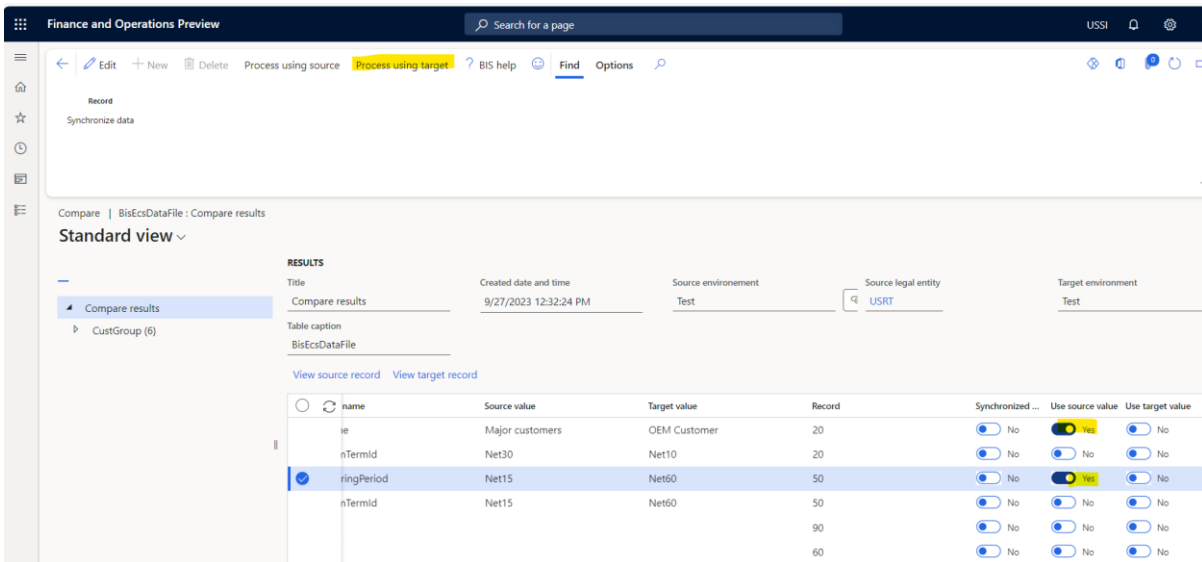
4. The compare results will be displayed on your screen.



5. You can see the Field name and field value available in source document and target document against respective record.


6. After comparison a user can select values from source or target by selecting button available in compare window.

7. If a customer wishes to have some value from the source document and rest from the target document. You can process the data by clicking Process using Target button.



8. Select storage location path to store exported XML file and click OK.

9. You will have a success message.


Standard view 

Compile XML file

Please review the information below before proceeding

You are about to create a new XML file, using the previously selected setup. Please verify the folder path and confirm to proceed.

Folder

BIS-DEV-TST4-1-D3C34BAF\uss\EcsWorkFolder\Im 

OK

Cancel

2.3.6 Import data to D365

To import data from XML file to D365 a user needs to run an import message using connectivity studio.

1. Click on Business Integration Studio → Projects → Message → click on Operation → Select a message → Click on Run.

The screenshot shows the 'Operation' menu in the Business Integration Studio interface. The menu options are: Run, History, Tracer, Standard batch, and Service Bus queue. The 'Run' option is highlighted. Below the menu, a table lists messages for the 'ECS' project.

Message	Project	Source connector	Source document	Target connector	Target document
CustGroupExpNew	ECS	EMS F&O	CustGroup	Folder Extern	CustGroup XML
CustGroupExport	ECS	EMS F&O	CustGroup	TestECScon Extern	CustGroup XML
CustGroupImport	ECS	TestECScon Extern	CustGroup XML	EMS F&O	CustGroup

2. Click on OK and this message will fetch the xml file from azure storage folder and update respective table of D365.

The screenshot shows the 'Run the message CustGroupImport' dialog box. It contains the following fields and options:

- Parameters:**
 - Message: CustGroupImp ECS (dropdown)
 - Test quantity: 0 (input field)
 - File name: (input field)
- TEST:**
 - Use tracer: No (radio button)
 - Run test case: No (radio button)
- SYNCHRONIZATION:**
 - Synchronization type: None (input field)
- Run in the background:** (checkbox)

Buttons: OK, Cancel