



Configuring Profit Analytics for Finance & Operations

Megan De Freitas - 2024-12-03 - Profit Analytics Documentation

Overview

This document provides a step-by-step guide for provisioning Profit Analytics with Microsoft Finance and Operations. Please note that after completing the steps below, there will be a period of downtime until the newly created Profit Analytics company is fully operational. You will receive an email notification once the company data synchronization is complete.

Step by Step Guide:

Follow the below steps to configure Profit Analytics for Microsoft F&O:

1. Connect F&O to Power Apps

Before configuring table data, Power Apps must first be set up in the F&O environment being onboarded to Profit Analytics. Please refer to the following Microsoft documentation to complete this step, and then return to proceed with step 2.

[Configuring Power Apps](#)

The screenshot shows the Power Platform admin center interface. The left sidebar contains a navigation menu with options: Environments, Analytics, Resources, Help + support, Data integration, Data (preview), Policies, and Admin centers. The main content area displays the configuration for the 'msp-sf-jpwest' environment. The 'Details' section shows the following information:

Type	Region
Sandbox	Japan

Refresh cadence	Purpose
Frequent	Not specified

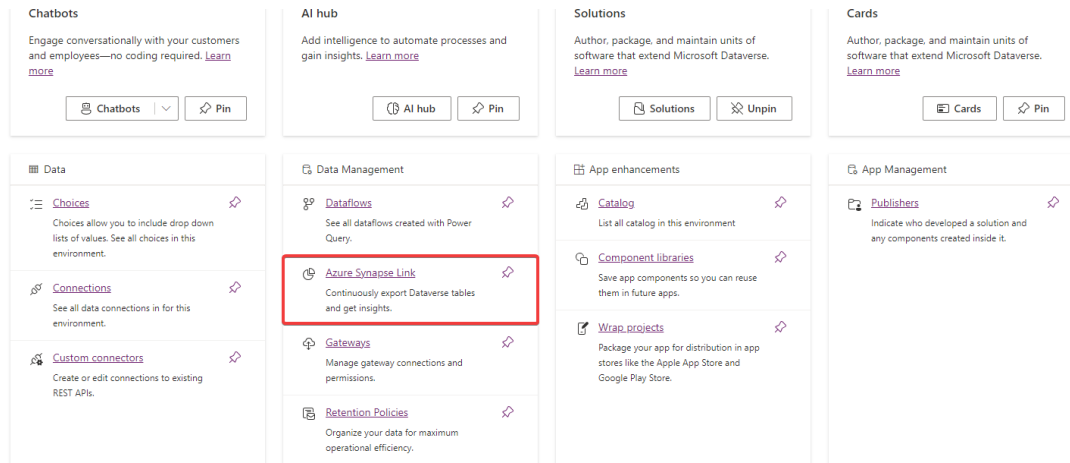
Finance and Operations URL
https://msp-sf-jpwest.sandbox.operations.dynamics...

Below the details section, there is an 'Add database' section with a '+ Add database' button. At the bottom, there is a message: 'Collect, store, and share your data. Create database for this environment. [Learn more about databases](#)'.

2. Connect to Synapse Link

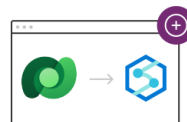
Once Power Apps is successfully integrated, the next step is to connect Azure Synapse Link. To find Synapse Link, navigate to make.powerapps.com and log in. On the left side, locate "more" and then click "discover all". As seen in the below screenshot, Synapse Link can be

located towards the bottom/middle of the page under "Data Management"



Click into Azure Synapse Link and then create a new link to connect Dataverse to the new Synapse Link Workspace.

Azure Synapse Link for Dataverse

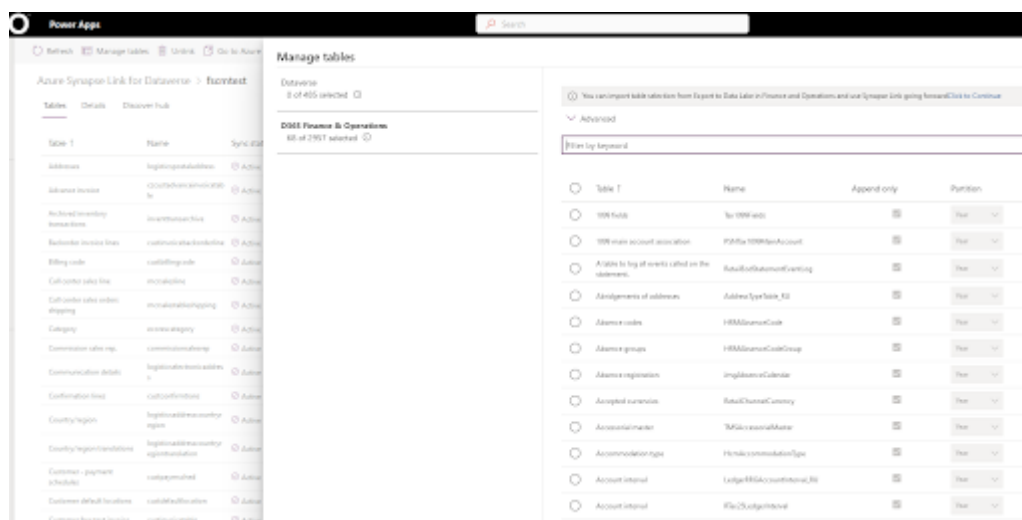


You have not linked the Dataverse environment to Azure Synapse Analytics.

Before you can export, link the Dataverse environment to an Azure Synapse Analytics workspace.



Once the connection is successful, table data can be added. Profit Analytics requires read access to a specific set of FSCM tables in order to populate charts. Navigate to the "Manage Tables" and "D365 Finance and Operations" to view all tables.



Note: The filter bar allows for comma delimited searching

Copy the below list of tables and paste it into the filter search:

custinvoicejour, custinvoicetrans, custgroup, custtable, dirpartylocation, dirpartytable, dirperson, dirpersonname, dlvmode, ecorescategory, ecoresproduct, ecoresproducttranslation, hcmemployment, hcmemploymentdetail, hcmworker, inventdim, inventitemgroupitem, inventlocation, inventtable, inventtrans, inventtransorigin, inventtablemodule, logisticsaddresscountryregion, logisticsaddresscountryregiontranslation, logisticselectronicaddress, logisticslocation, logisticspostaladdress, paymterm, pricediscgroup, smmbusrelsalesdistrictgroup, taxgroupheading

After the tables are added, they will be visible within Azure Synapse Link. Please note that there are 2 statuses that can appear in the Synapse Link "Status" column. This column will always show "error" at first, but as tables are added this will change to "active". This process can take upto several hours.

Table	Name	Sync status	Last synchronized on	Count	Partitions	Entity source	Fabric status
Address	logisticpostaladdress	Active	8/25/2024, 4:07:06 PM	1827	Year	FxOTables	Not created
Advances invoice	custadvancesinvoicetable	Active	8/7/2024, 2:13:11 PM	8	Year	FxOTables	Not created
Archived inventory transactions	inventtransarchive	Active	8/14/2024, 10:06:04 PM	8	Year	FxOTables	Not created
Backorder invoice lines	custinvoicebackorderline	Active	8/7/2024, 2:13:06 PM	37	Year	FxOTables	Not created
Billing code	custbillcode	Active	8/7/2024, 2:13:06 PM	8	Year	FxOTables	Not created
Call center sales line	invoiceline	Active	8/21/2024, 10:05:49 PM	88	Year	FxOTables	Not created
Call center sales orders shipping	invoicelineshipping	Active	8/21/2024, 10:07:05 PM	25	Year	FxOTables	Not created
Category	ecorecategory	Active	8/21/2024, 10:07:05 PM	745	Year	FxOTables	Not created
Commission sales rep.	commissionalsarep	Active	8/13/2024, 4:11:51 PM	28	Year	FxOTables	Not created
Communication details	logisticselectronicaddress	Active	8/21/2024, 10:06:09 PM	1846	Year	FxOTables	Not created
Confirmation lines	custorderconfirmations	Active	8/16/2024, 6:06:17 PM	768	Year	FxOTables	Not created
Country/region	logisticaddresscountryregion	Active	8/21/2024, 10:05:49 PM	293	Year	FxOTables	Not created
Country/region translations	logisticaddresscountryregiontranslation	Active	8/21/2024, 10:06:17 PM	18764	Year	FxOTables	Not created
Customer - payment schedules	custpaymentchedule	Active	8/7/2024, 2:13:11 PM	14	Year	FxOTables	Not created
Customer default locations	custdefaultlocation	Active	8/26/2024, 8:06:55 PM	188	Year	FxOTables	Not created
Customer fleet text invoice	custinvoicetable	Active	10/9/2024, 2:07:31 PM	53	Year	FxOTables	Not created

For more information on Synapse Link please visit their [documentation here!](#)

3. Configure Azure Portal

After Azure Synapse Link setup is completed, a workspace storage account and spark pool will be available within the Azure Portal. Navigate to "Storage" and double check that with the Data Lake Storage a folder was created within Azure.

The last portion of setup is to retrieve the access key, storage name and container name. Below are images to show where these can be located within Azure

Storage Name and Access Key:



Welcome To Cavallo

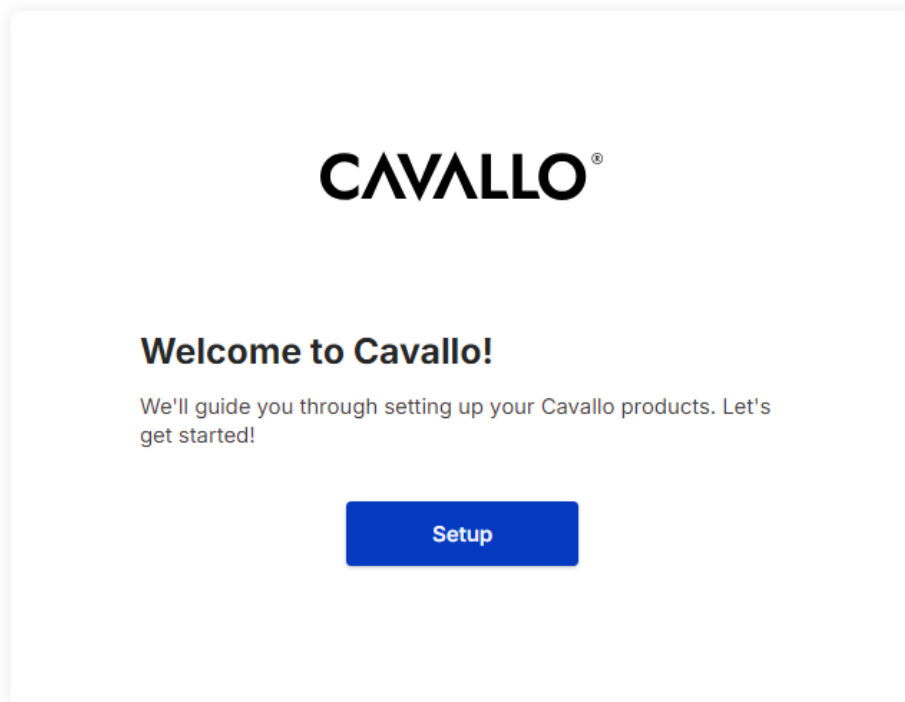
You have been invited to join an organization using Cavallo!

[Accept Invite](#)

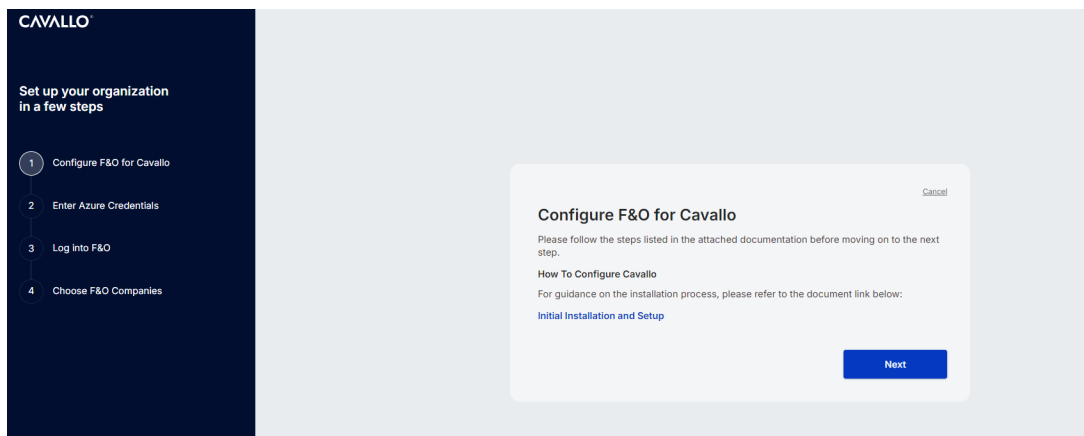
Follow the link to create your Cavallo login.



Clicking on the button in the email will bring the user into the Cavallo onboarding flow.



In the initial step of the onboarding flow, users are provided with information on how to complete the process, along with a link to this document. Please note that the three sections outlined above are prerequisites for successfully completing the Cavallo onboarding process.



Step two of the onboarding process requires users to enter their pre-configured Azure credentials. All three fields must be filled out to proceed. Please note that Cavallo will validate the credentials upon clicking the "Next" button to ensure they are correct.

This screenshot shows a web form titled "Enter Azure Credentials" with a "Cancel" link in the top right corner. The form contains three input fields: "Name of Storage", "Client Access Key", and "Container Name", each with a placeholder text "Value". At the bottom right, there are two buttons: a blue "Back" button and a greyed-out "Next" button.

[Cancel](#)

Enter Azure Credentials

Fill out your Azure details below so we can get your account connected.

Name of Storage

Client Access Key

Container Name

[Back](#) [Next](#)

If the credentials provided are correct, users will proceed to step 3. In this step, they are required to copy and paste the F&O ERP URL they use daily to access the product. This allows Cavallo to redirect the user to Microsoft for login and retrieve all available companies for onboarding to Profit Analytics.

This screenshot shows a web form titled "Log into F&O to continue" with a "Cancel" link in the top right corner. The form includes a text instruction, a "Uri" label, and a text input field containing the URL "https://developmentfscm.operations.dynamics.com/". At the bottom right, there are two buttons: a blue "Back" button and a dark blue "Log In" button.

[Cancel](#)

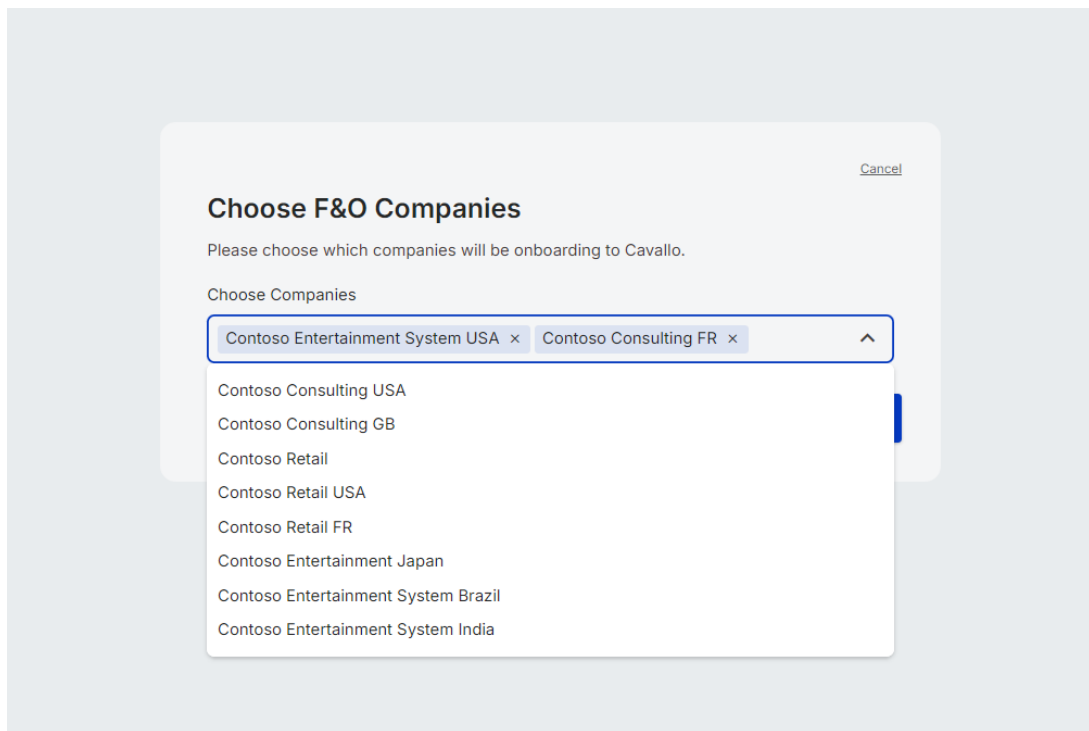
Log into F&O to continue

Log into F&O by clicking the button below. This step is required in order to connect F&O companies to Profit Analytics.

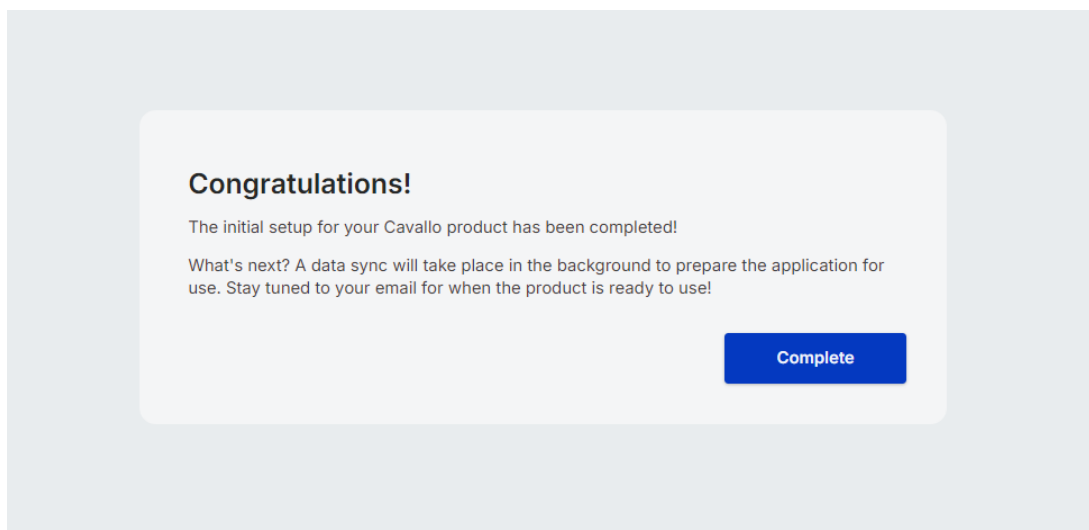
Uri

[Back](#) [Log In](#)

Once successfully logged into F&O, the next step will require users to select the companies they wish to onboard. This step is a multi-select and for each F&O company selected, a unique Profit Analytics company will be created.



The onboarding flow concludes by informing users that a data sync will occur before they can begin using the product. This ensures all widgets are populated with data from the newly selected company. An email will be sent to the user who completed the onboarding to notify them when the product is ready for use. Please note that this process may take anywhere from a few hours to a few days, depending on the size of the data set. For any questions or concerns regarding this process, please contact support at support@cavallo.com.



FAQs

Q: What happens in the event my Azure Access Key changes?

A: In the event the key is cycled, please reach out to Support@Cavallo.com. We can assist

with changing this in all related F&O organizations.