

Technical Overview

Microsoft Dynamics 365 CRM



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Overview

Experlogix offers industry-leading configure, price, quote (CPQ) software. Our platform, collectively called, "Experlogix CPQ," is designed to handle all configuration and quoting needs, regardless of complexity, while seamlessly integrating with your customer relationship management (CRM) and enterprise resource planning (ERP) systems.

The Experlogix platform is an integrated set of applications, tools and services. The entire platform is micro-service oriented and can be automated. Most users will interact with the Configurator to generate a quote for a product or service. Modelers, designers, and administrators will utilize the available tools to create, publish, and administer the Configurator.



CE/CRM Solution Contents

You must import the following solutions before setting up and using the Cloud Connect in Microsoft Dynamics 365 CE:

Solution	Contains
CPQCore	The solution contains: • The entity Settings • The logic to start the Configurator from a button • The processor to save data into Microsoft Dynamics 365 CE • The Plug-in Trace Log Viewer, a viewer on the Plug-in Trace Log data that can be started via Settings in Microsoft Dynamics 365 CE
CPQButtons	The solution contains the Configurator buttons for the following entities: • Quote • SalesOrder • Opportunity • Invoice
Experlogix CPQ Buttons Field Service	The solution contains the Configurator buttons for the following entities: • Field service - customer asset  Install this only if you want to start to the Configurator from a customer asset.
Experlogix CPQ Buttons Project Operations	The solution contains the Configurator buttons for the following entities: • Project operations - project  Install this only if you want to start to the Configurator from a project .

Standard Supported Entities

The following entities are available for configuration in Cloud Connect CPQ:

Integration	Configure	Outbound
Microsoft Dynamics 365 CE	• Opportunity • Quote • Sales order • Invoice • Customer asset • Project	Any table or entity

User Roles

The Microsoft Dynamics 365 CE integration has the following user roles for Experlogix:

- Experlogix CPQ Modeler
- Experlogix CPQ User
- Experlogix CPQ View User Role
- Experlogix CPQ User Field Service
- Experlogix CPQ User Project Operations

The following table provides details about the Microsoft Dynamics 365 CE roles:

Role Name	Permissions	Description
Experlogix CPQ Modeler	• Configure quote, opportunity, sales order, and invoice • Read settings	A user with this role can configure a quote, opportunity, sales order, and invoice. The user can also view the Microsoft Dynamics 365 CE settings but cannot modify them.
Experlogix CPQ User	• Configure quote, opportunity, sales order, and invoice • Read settings • Edit settings	A user with this role can configure a quote, opportunity, sales order, and invoice. The user can also view and edit the Microsoft Dynamics 365 CE settings.
Experlogix CPQ View User Role	Read Settings: The user can view the settings for Microsoft Dynamics 365 CE related to Experlogix CPQ. This ensures that they have visibility into how the system is configured without making any changes. View Entities: Users with this role can view critical business entities such as: • Invoices • Orders • Quotes • Opportunities	The Experlogix CPQ View User role in Microsoft Dynamics 365 CE allows users to access and view specific settings and entities without the ability to modify or configure them.  Ensure that the role is properly assigned to individuals who require visibility into system operations but not direct interaction with configurations or setup. Assigning

Role Name	Permissions	Description
		 this role can restrict access if other roles do not supercede it. restricts access to view-only functionality.
Experlogix CPQ User Field Service	• Read settings • Configure field service (customer asset)	A user with this role can view the Microsoft Dynamics 365 CE settings and configure field service.
Experlogix CPQ User Project Operations	• Configure project operations (project)	A user with this role can configure project operations for Microsoft Dynamics 365 CE projects.

Configuration Website

The Configuration Website is the web page that opens when the Configurator is launched from the integrating system. This site hosts the Configurator application and data structure.

Configurator

The Configurator is the heart and soul of the CPQ end-user experience, providing the user a hierarchy of choices that respond to business rules and perform pricing calculations in real time. The Configurator's user interface layout, theme and composition is fully customizable, giving modelers complete control over the end-user experience. Each time a configuration is saved, it is written back to the host integration CRM or ERP platform.

Runtime Database

The complete design of the Configurator is published to a Runtime Database. It is the underlying data structure that users interact with when using the Configurator. It also holds all the integration information with the integrating system.

Publisher Service

The Publisher Service is a standalone **WCF**¹ service that allows a publisher user to submit an archive package for publication. When a client does not have direct access to the Web Configurator, the Publisher Service enables the client to submit changes to the database and directories.

¹Windows Communication Foundation (WCF) is a unified programming model for building service-oriented applications.

Design Center

The Design Center is a development platform designed to enable non-programmers to build and maintain a fully functional product/service Configurator built to your organizations specifications. No two Experlogix configurators are alike as they are custom built to meet specific needs. Product modelers, those team members that will be building and maintaining the Experlogix CPQ, will need access to the Design Center and the ability to publish changes. Generally, product modelers access the Design Center on the server where Experlogix is installed or from their local machine.

From the Design Center, you will be able to:

- Enter or Import Products/Services
- Enter or Import Pricing
- Create Custom Pricing/Discount Calculations
- Create Custom Calculations, Store Product Data, and Query Data from other systems
- Create Product Selection and Exclusion Rules
- Create a Custom Interface to select, configure, and price products.
- Customize User Interface and Usability
- Create different paths of configuration for different audiences
- Integration directly with the metadata of the tables in the ERP/CRM systems.

The following features, functions, and resources are available assist in the creation of your Experlogix Configurator.

- **Experlogix Implementation Engineer** - Every customer is assigned an implementation engineer that will manage all business analysis, training, and provide implementation support either remotely or on-site as needed. We like to say, "We work shoulder-to-shoulder with you to build your system."
- **Product Modeling and Design** - Easy to create products and custom configuration fields.
- **Formula Designer** - Writing formulas in Experlogix utilizes similar syntax to writing formulas in Excel.
- **Visual Rule Designer** - Create different types of rules that require, exclude, suggest, or give a user a message or error based on product selection or a condition in the configuration.
- Standard Integration to ERP/CRM
- **Experlogix Customer Portal** - Our customer portal gives you access to forums, knowledge base articles, webinars, and online training.

Design Center Database

This is the complete data model that is defined by interacting and designing within the Design Center. It also holds the Cloud Connect Integrator Data.

Experlogix Cloud CPQ Apps

This document provides an overview of the Experlogix Cloud CPQ Apps, a modern family of cloud-based tools designed to streamline configuration, pricing, and quoting processes. These applications enable seamless integration with host systems, support efficient data management, and enhance user functionality. The following sections detail the primary components, their purposes, and key functionality.

Admin Center

A browser-based management tool that enables an administrator to set up and manage environments, sites, integrations with their connection details to specific host instances, and security.

Cloud Connect

Process Designer

The Process Designer is a tool that enables a user to populate a template from the host entity using data from an Experlogix Configurator. Users can establish a connection to a host system, set up a process map that creates relationships between a host entity to Configurator Categories and Options and apply a template to combine host data fields with Configurator data fields. Finally, the tool enables writing records back to the Microsoft Dynamics 365 CRM data table.

Integration API

The Integration API is a microservice that contains the Integration Database. It handles the communication between client (either a person or an application) and the host system. The Integration Database contains the following sets of data:

- Configuration XML
- Metadata Cache
- Integrator Data
- Process State

Managed Apps

Managed Apps are applications installed in the integrating system. This is the code that allows the Process Designer access to the underlying metadata and data structure. It also contains the code to launch the configurator, perform logging, and enable other functionality necessary for the use of the Cloud Connect integration.

Cloud Connect Connector

Plug-in on the Configuration Website that sends and receives data through the Integration API.

APIs

This document provides an overview of the APIs included in the Experlogix platform, focusing on their purpose, functionality, and integration capabilities. These APIs enable seamless interaction between various system components, supporting essential processes such as authentication, data validation, and integration management. The following sections will detail the available APIs and their respective roles within the system.

Discover API

The Discover API is a microservice that validates all those that are accessing services have the proper authorization to do so. The data saved to the Discovery Database contains integration and connection information. It is accessed through the Admin Center.

Identity API

The Identity API is a microservice where the Identity of those who can use the system are stored. This includes the Org, Users, User Orgs, Teams and User Teams. Access to the Identity API is through the Admin Center.

