

3.5.4. How to Import Data from Dynamics NAV

Dynamics NAV connection is bi-directional: on one hand, it uses the functionality of the [Database connector](#) to import data from the NAV database, on the other hand, it can export purchase orders through NAV web-services [created](#) beforehand.

To use the export capability of this connection, you will need a NAV developer license and Microsoft Dynamics NAV 2013 or higher.

Below, we describe:

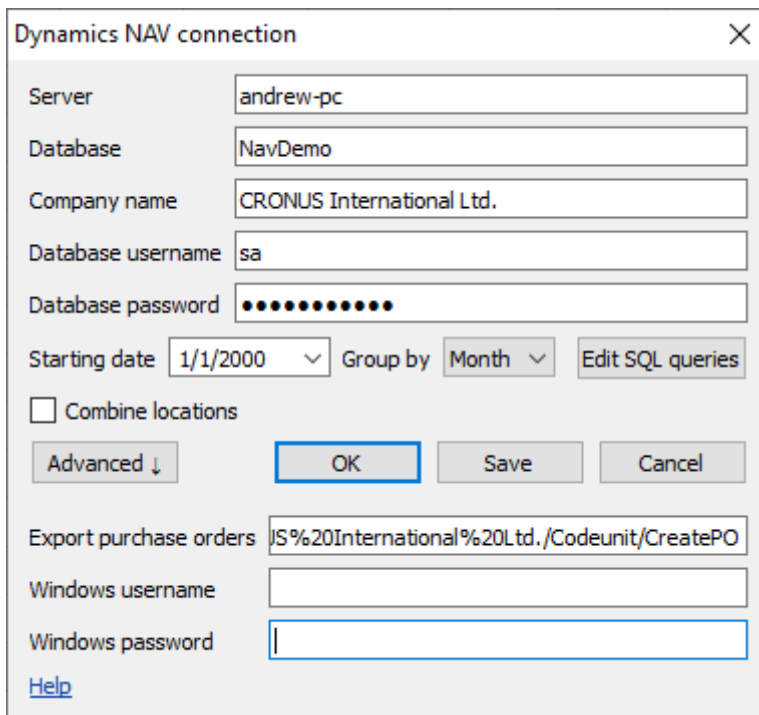
- [imported data](#);
- [data import workflow](#);
- [advanced options of this connection](#);
- [how to create a web-service that is used to export POs](#).

Imported data

This connector utilizes several predefined SQL-queries which you can [customize](#) to meet your needs. Data that is imported by the SQL-queries is described on the [Inventory management systems page](#).

Data import workflow

1. Go to the menu **File > New > Dynamics NAV connection**. The **Dynamics NAV connection** dialog appears (see figure below).



2. Enter the LAN name or IP-address of the computer running Dynamics NAV Server in the **Server** field.

You should [allow remote connections](#) to the SQL Server if you connect remotely.

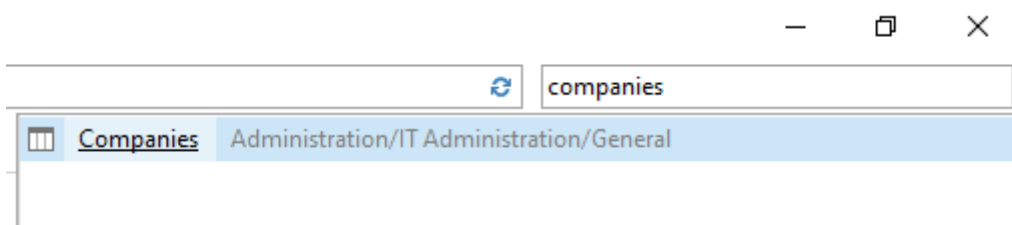
3. Enter the name of your company database into the **Database** field.

4. Enter the name of your company into the **Company name** field.

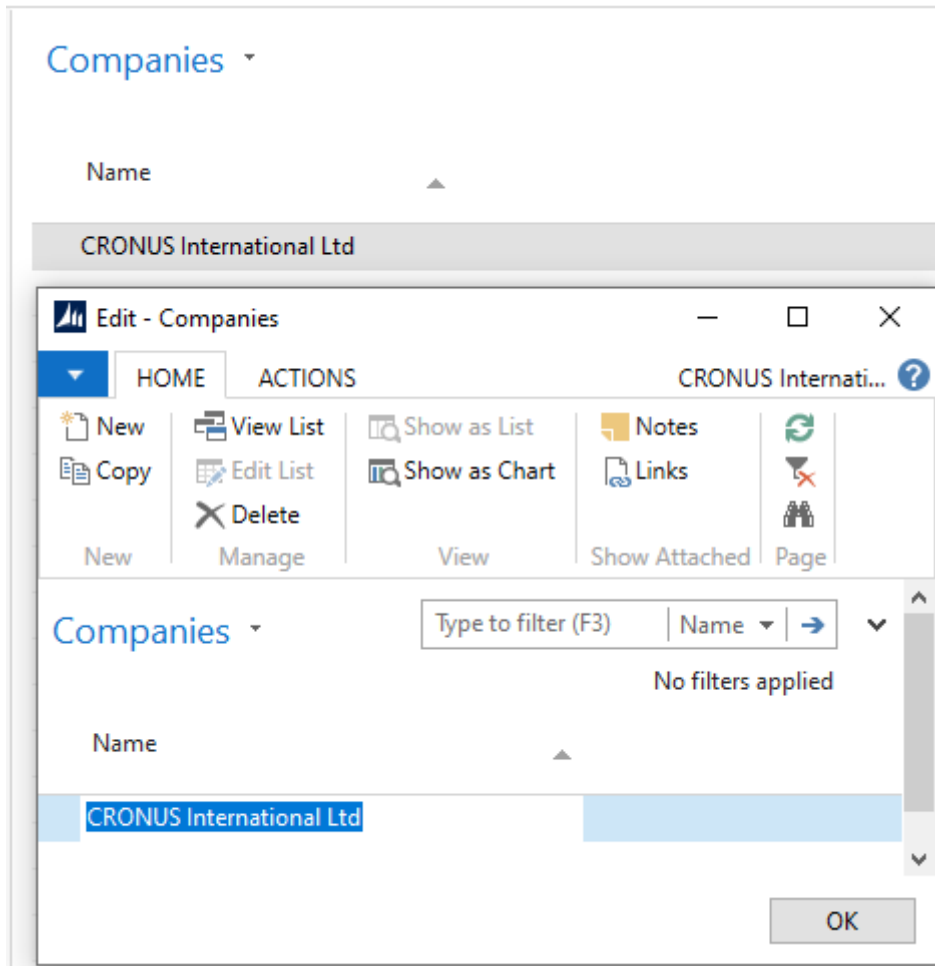
To find out the name of your company:

4.1 Open NAV client.

4.2 Enter 'companies' into the search bar and click on the appeared link (see figure below).



4.3 Double click on the company name in the list of companies. The **Edit - Companies** dialog appears.



4.4 Copy the name and paste it into the field in the Streamline dialog.

5. Enter the credentials of a SQL Server login having permissions to read data from your database into the **Username** and **Password** fields. Streamline requires using only SQL Server logins (not Windows logins). If you don't know how to create one, please learn [this guide](#).

6. Enter or choose the date to start the import from in the **Starting date** control.

To get accurate forecasts, we recommend providing Streamline with at least 24 months of sales history.

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7. Choose the data aggregation period in the **Group by** control. Streamline automatically aggregates your data in the given periods (days, weeks, or months). For example, if you want to see the forecasts, replenishment plans, and other reports in months, group the data by months.

8. Click **OK** to start the import.

Import Options

- The **Combine locations** option allows you to merge all your locations into a single one. This is useful when your warehouses are located next to each other, so they can be planned as a single

aggregated warehouse.

- The **Edit SQL queries** opens the [Database connection dialog](#) where you can customize default SQL-queries to meet your requirements.

Advanced Options

Advanced options of the dialog allow you to configure exporting capabilities of this connection. To do this:

1. Click the **Advanced** button of the dialog.
2. Insert the web-service SOAP URL that is used to create purchase orders into the **Export purchase orders** field. Below, we [describe](#) how to create such a web-service and generate this URL.
3. Enter credentials of the Windows account that has permissions to start NAV into the **Windows username** and **Windows password** fields.

Creating NAV Web-service Used to Export POs

To complete the steps in this section, you will need a NAV developer license and Microsoft Dynamics NAV 2013 or higher.

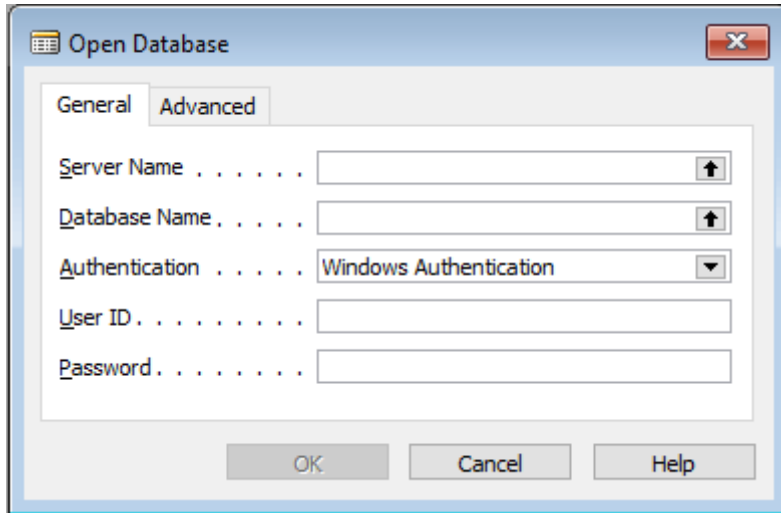
This web-service will be used to create purchase orders in NAV and will be based on a NAV codeunit. First, open NAV Development Environment. To create the web-service, you should accomplish the following steps:

- [open your database](#);
- [create a codeunit](#);
- [publish the web-service based on the codeunit](#).

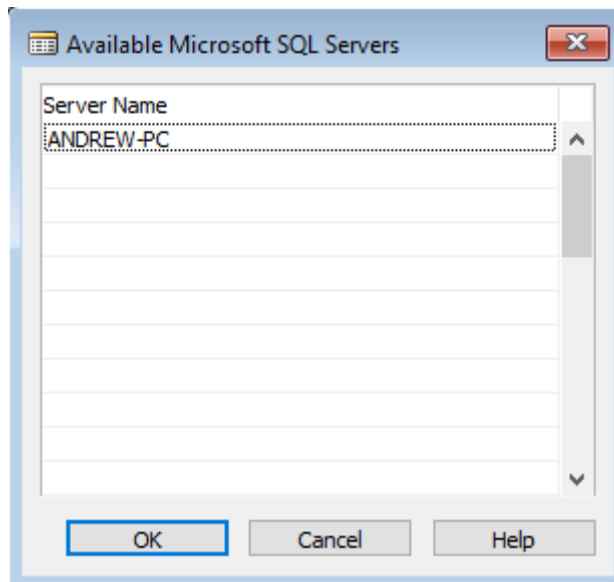
Open NAV Database

To open your database:

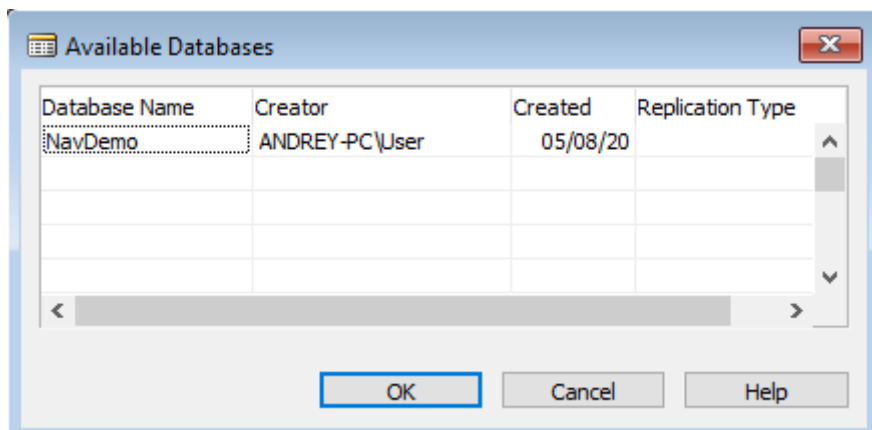
1. Go to **File > Database > Open**. **Open Database** window appears (see figure below).



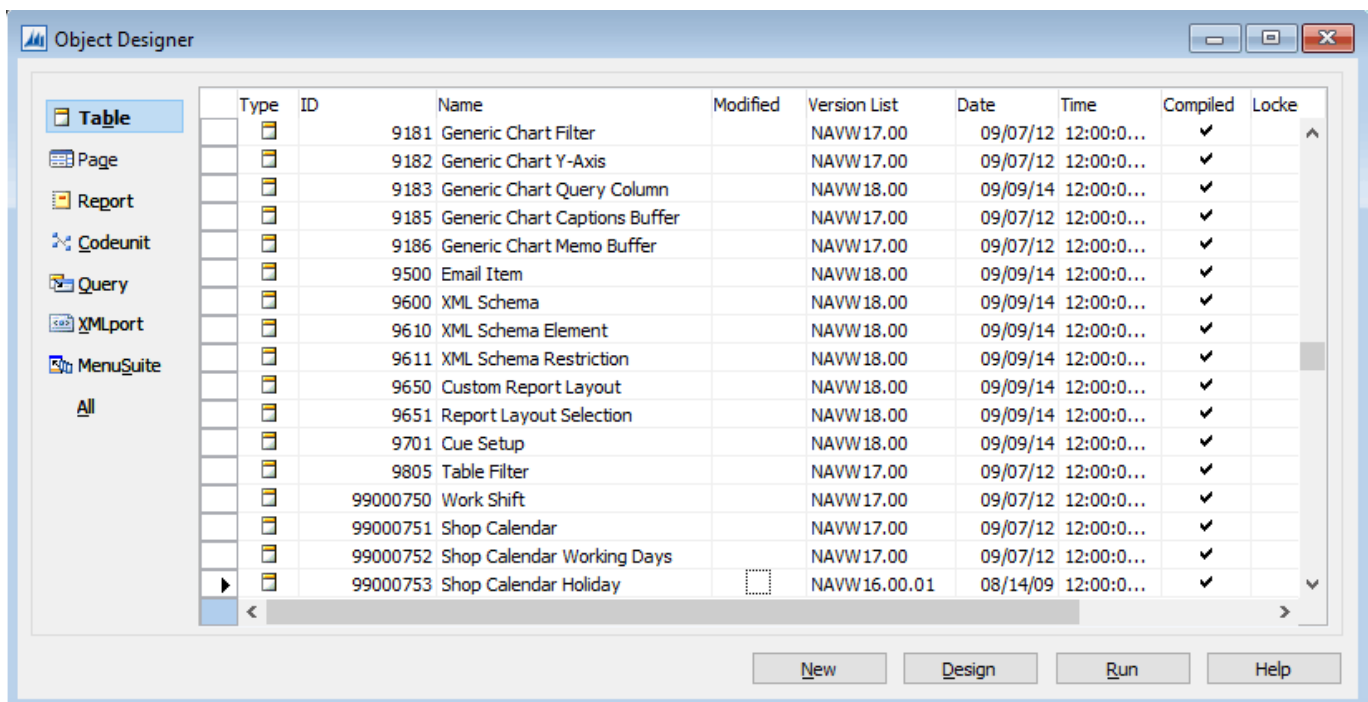
2. Click the black arrow next to the **Server Name** field, select your SQL Server from the list and click **OK** (see figure below).



3. Click the black arrow next to the **Database Name** field, select your database from the list and click **OK** (see figure below).



4. Click **OK** in the **Open Database** window. The **Object Designer** window appears (see figure below)



Create a Codeunit

As we said above, our web-service will be based on a codeunit. Codeunit is a container for the programmer's code written in a special NAV language called C/AL. In our case, the codeunit will accept several parameters that describe a purchase order and create a purchase order in NAV.

To create a codeunit:

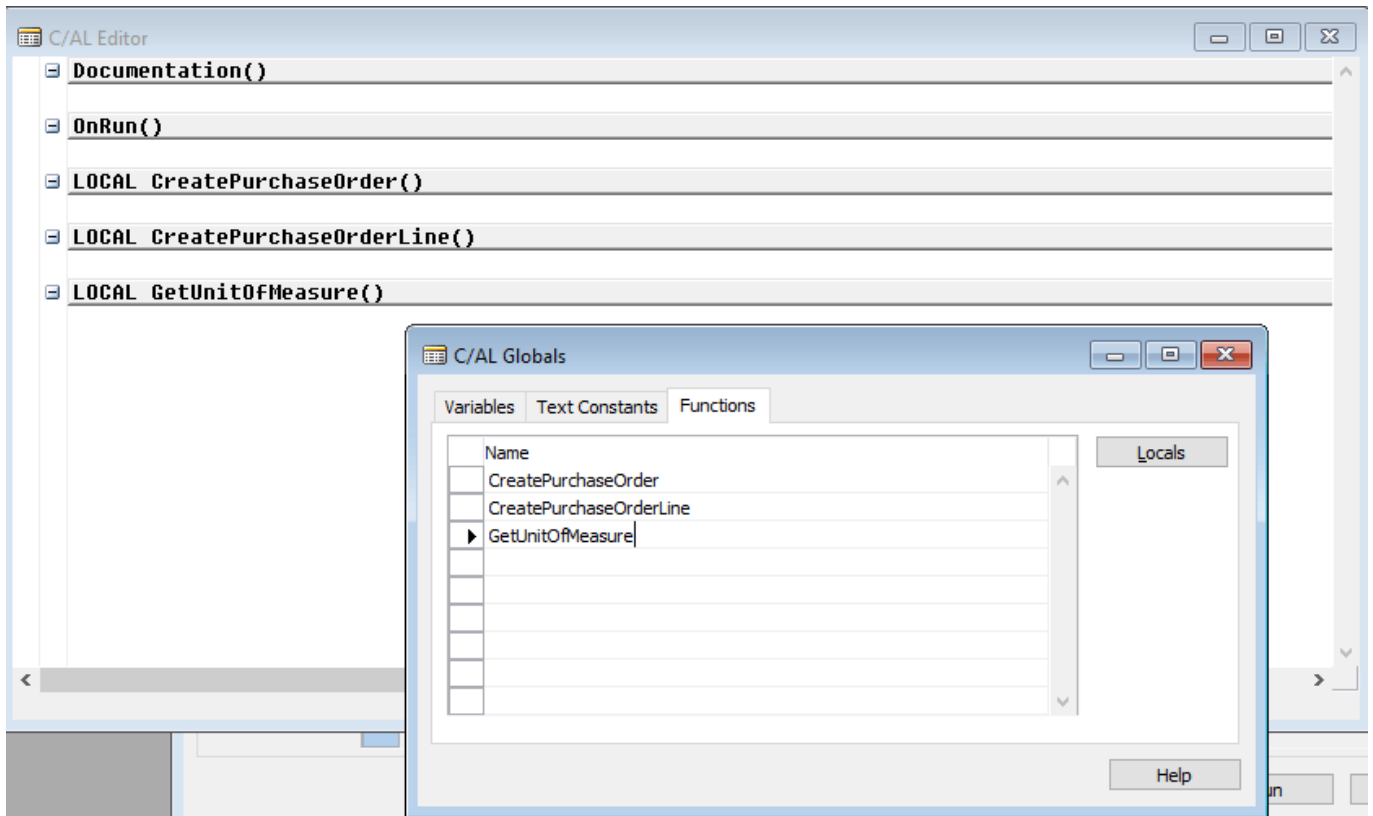
1. Click on the **Codeunit** button on the left side of the **Object Designer** window, and then click the **New** button. **C/AL Editor** window appears.

To create a PO, our codeunit will use three functions:

- *CreatePurchaseOrder* – creates a PO and returns the newly generated PO number;
- *CreatePurchaseLine* – adds a new line into a PO by the given PO number;
- *GetUnitOfMeasure* – finds and returns the base unit of measure for the given **ItemCode**.

Since Streamline operates in the base unit of measure of NAV items, we must export ordered quantities using them, regardless of the **Purch. Unit of Measure** set for items in the NAV Item Card.

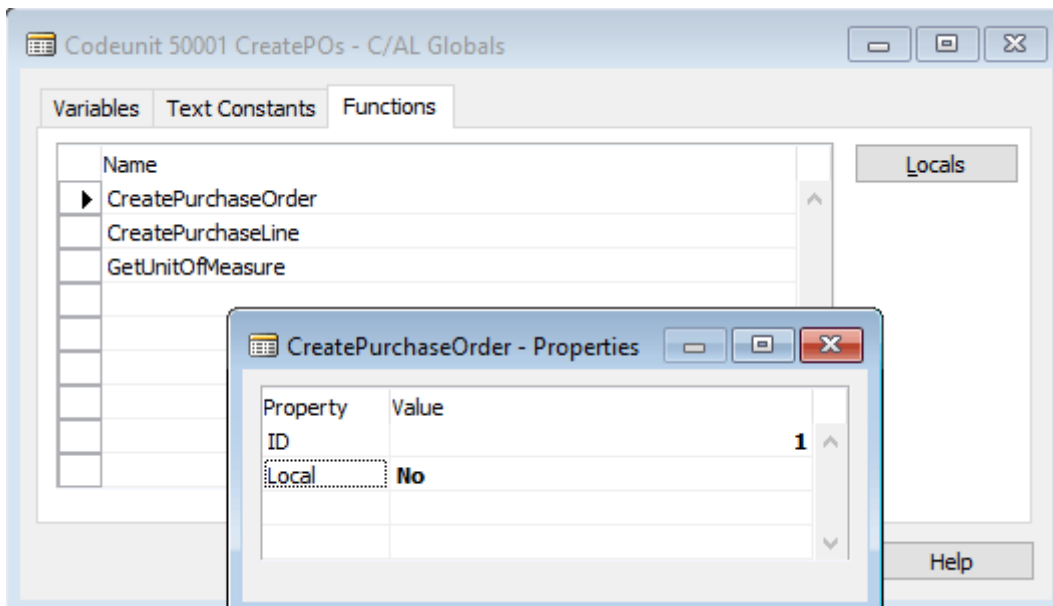
2. The next step is to declare these functions. To do this, click the menu **View > C/AL Globals**. **C/AL Globals** window appears. Now, go to the **Functions** tab of the window and put the functions' names in the list (see figure below).



By default, all created functions are local. You can see that by the “LOCAL” prefix before each function name in the **C/AL Editor** window (see figure above). A web-service that is based on a codeunit doesn't expose local functions, thus they can't be called by an external application, like Streamline. Despite of that, Streamline will use the *CreatePurchaseOrder* and *CreatePurchaseLine* functions to push orders into NAV.

To make these functions exposable, we need to set them as global. To do this:

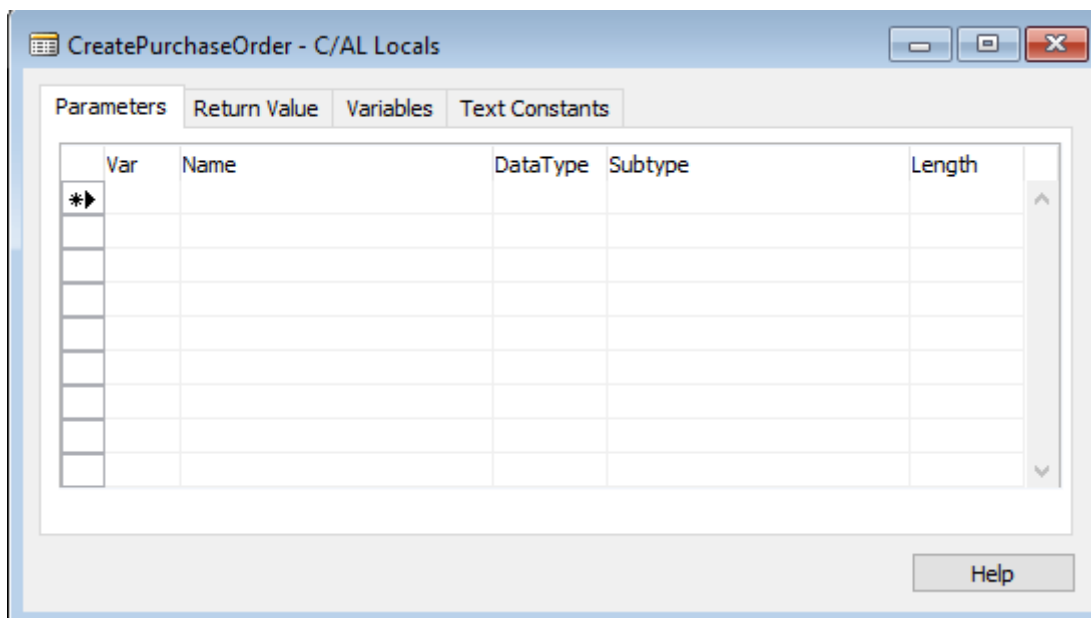
3. Set the cursor on the line with the function name, click menu **View > Properties**, and set **Local** property to **No** (see figure below).



Do this for the first two functions.

Now, let's specify the declaration of the functions by adding their input and output parameters, and local variables. To do this:

3. Set the cursor on the line with the *CreatePurchaseOrder* function, and click on the **Locals** button found on the right of the **C/AL Globals** window. The **C/AL Locals** window appears (see figure below).

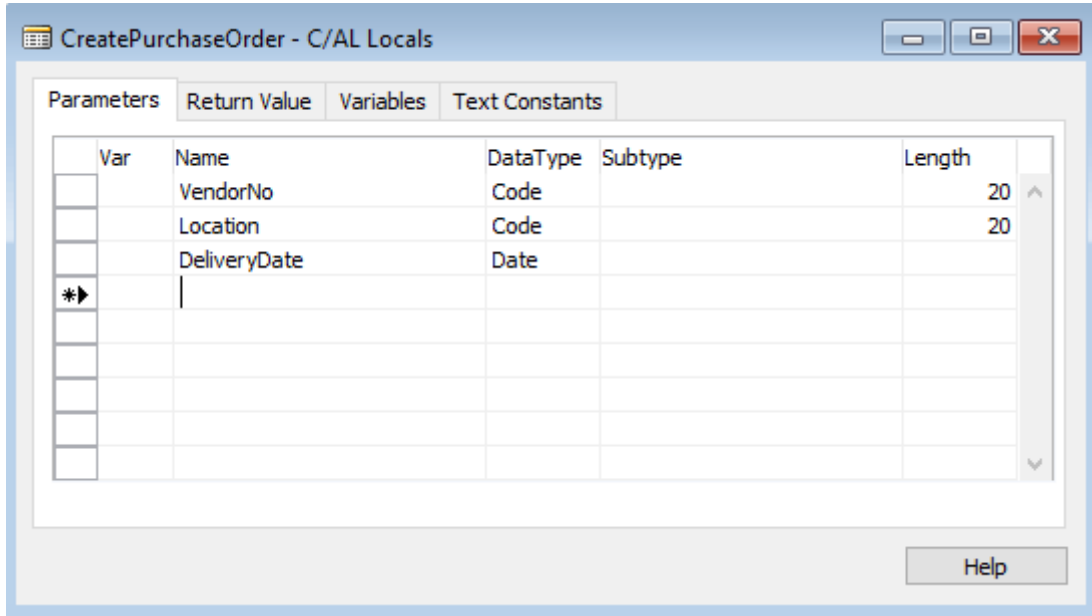


- **Parameters** tab is used to specify input parameters of the function;
- **Return value** tab specifies variables that will be returned by the function;
- **Variables** tab is used to declare local variables of the function.

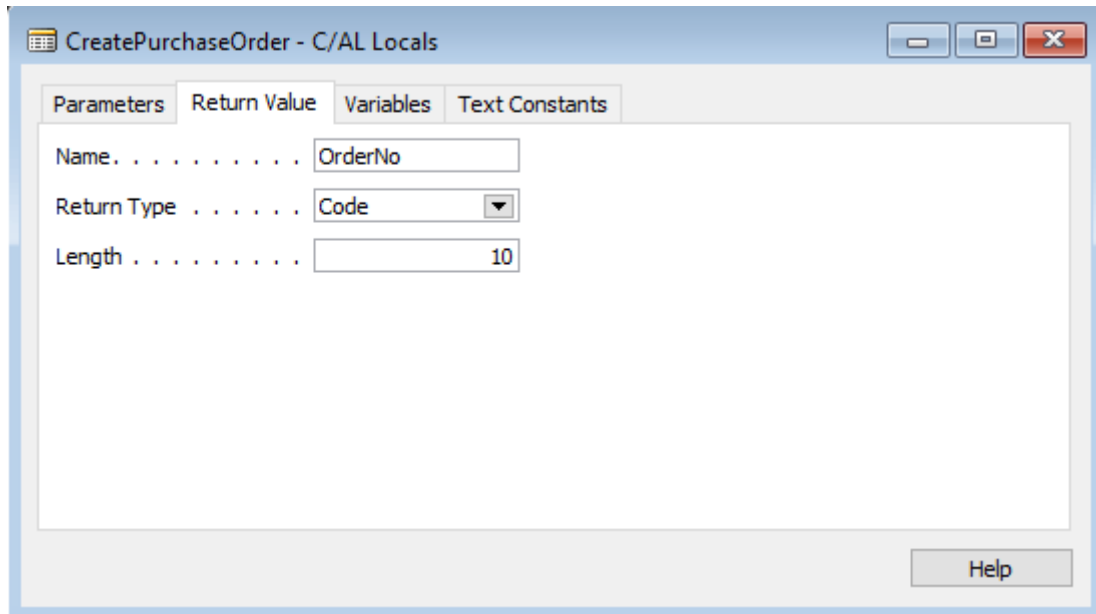
3.1. Our *CreatePurchaseOrder* function will accept three parameters, **VendorNo**, **Location** and **Delivery Date**. To declare them, populate the **Parameters** tab using the information from the table below.

Name	Data Type	Length
VendorNo	Code	20
Location	Code	20
DeliveryDate	Date	

See the result in the figure below.

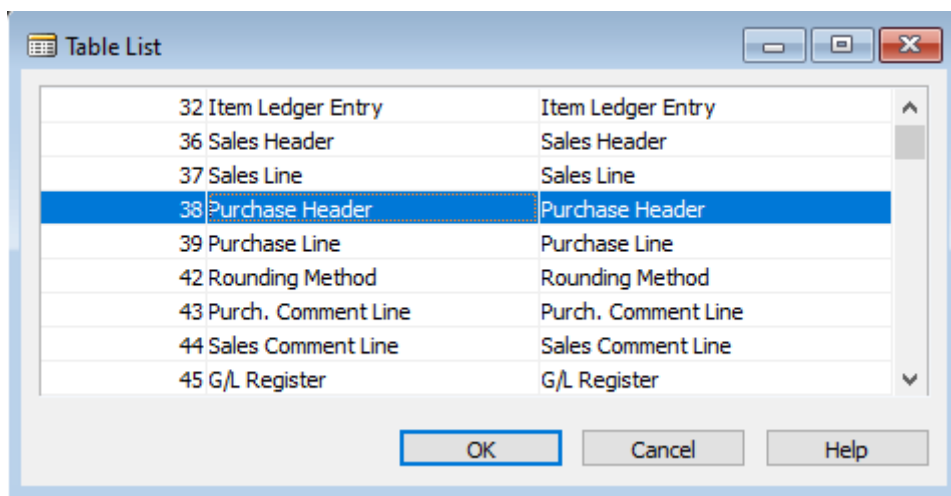
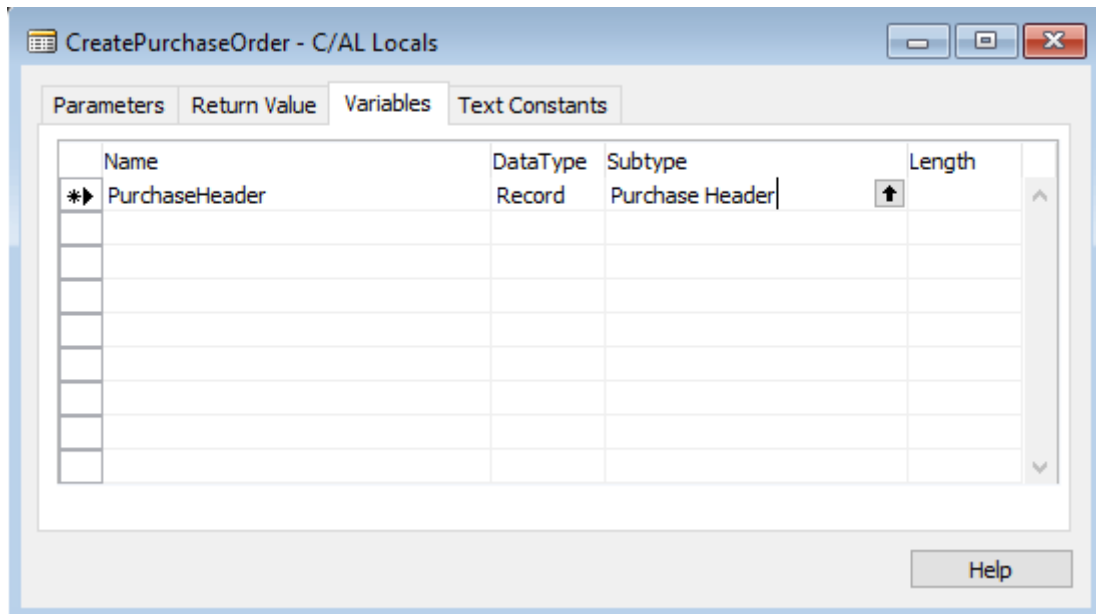


3.2. Now, let's proceed to the **Return value** tab. As we said above, our function should return the automatically generated PO number. Let's name this variable as **OrderNo**. Set its return type to **Code**. (see figure below).



In the body of the function, we will use a local variable that is linked to the record of the NAV PurchaseHeader table. To declare this variable:

3.3. Go to the **Variables** tab. Add a variable named **PurchaseHeader** with **DataType** of **Record**. To set the **Subtype**, click on the black arrow next to the field and choose the 38th line which is **Purchase Header** (see figures below).

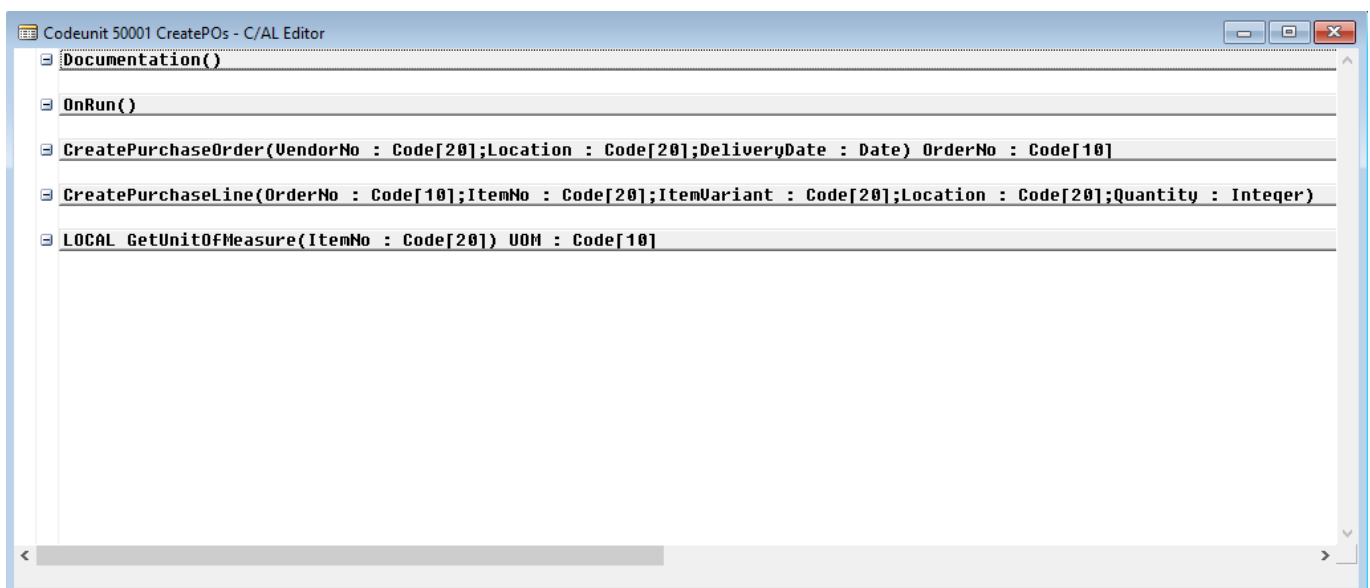


Do the same actions for the *CreatePurchaseLine* and *GetUnitOfMeasure* functions using the information from the table below.

Name	DataType	Subtype	Length
CreatePurchaseLine			
<i>Parameters</i>			
OrderNo	Code		10
ItemNo	Code		20
ItemVariant	Code		20
Location	Code		20
Quantity	Integer		
<i>Variables</i>			
PurchaseLine	Record	Purchase Line	
PurchaseHeader	Record	Purchase Header	

Name	DataType	Subtype	Length
NextLineNo	Integer		
GetUnitOfMeasure			
<i>Parameters</i>			
ItemNo	Code		20
<i>Return Value</i>			
UOM	Code		10
<i>Variables</i>			
Item	Record	Item	

After completing all of this, you should have the functions declarations shown in the figure below.



Now, let's write the functions' bodies.

4. Set the cursor on the next empty line after the declaration of the *CreatePurchaseOrder* function and copy-paste the following code:

```
PurchaseHeader.INIT;
PurchaseHeader.VALIDATE("Document Type",PurchaseHeader."Document
Type"::Order);
PurchaseHeader.VALIDATE("Buy-from Vendor No.",VendorNo);
PurchaseHeader.VALIDATE("Location Code", Location);
PurchaseHeader.VALIDATE("Expected Receipt Date", DeliveryDate);
PurchaseHeader.INSERT(TRUE);
EXIT(PurchaseHeader."No.");
```

5. Add the following body for the *CreatePurchaseLine* function:

```
PurchaseLine.RESET;
PurchaseLine.SETRANGE("Document Type",PurchaseHeader."Document
```

```
Type"::Order);
PurchaseLine.SETRANGE("Document No.",OrderNo);

IF PurchaseLine.FIND('+') THEN
    NextLineNo := PurchaseLine."Line No." + 10000
ELSE
    NextLineNo := 10000;
IF NextLineNo = 10000 THEN

CLEAR(PurchaseLine);
PurchaseLine.INIT;
PurchaseLine."Document Type" := PurchaseHeader."Document Type"::Order;
PurchaseLine."Document No." := OrderNo;
PurchaseLine."Line No." := NextLineNo;
PurchaseLine.INSERT(TRUE);
PurchaseLine.VALIDATE(Type,PurchaseLine.Type::Item);
PurchaseLine.VALIDATE("No.", ItemNo);
PurchaseLine.VALIDATE("Unit of Measure Code", GetUnitOfMeasure(ItemNo) );

IF ItemVariant <> '' THEN
    PurchaseLine.VALIDATE("Variant Code", ItemVariant);
PurchaseLine.VALIDATE("Location Code", Location);
PurchaseLine.VALIDATE(Quantity,Quantity);
PurchaseLine.MODIFY(TRUE);
```

6. Add the following body for the *GetUnitOfMeasure* function:

```
Item.RESET;
IF (Item.GET(ItemNo)) THEN BEGIN
    EXIT( Item."Base Unit of Measure" );
END
```

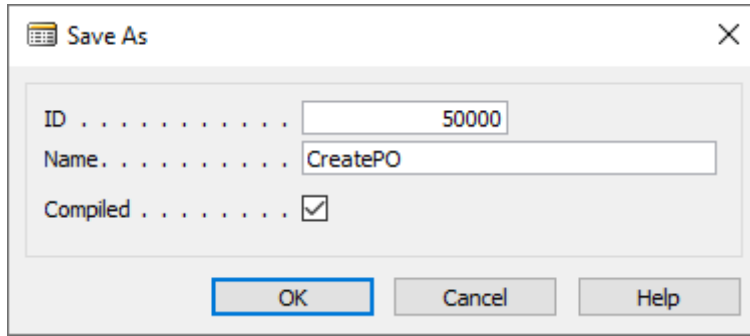
You must use the same names for the [exposed functions](#) as indicated in this guide in order to everything work properly. All functions' declarations (input parameters, return values, local variables) must be the same (case-sensitive) as it described here if you intend to use the functions' bodies indicated in this guide as they are.

Close the **C/AL Editor** window. Click **Yes** when it asks to save the changes.

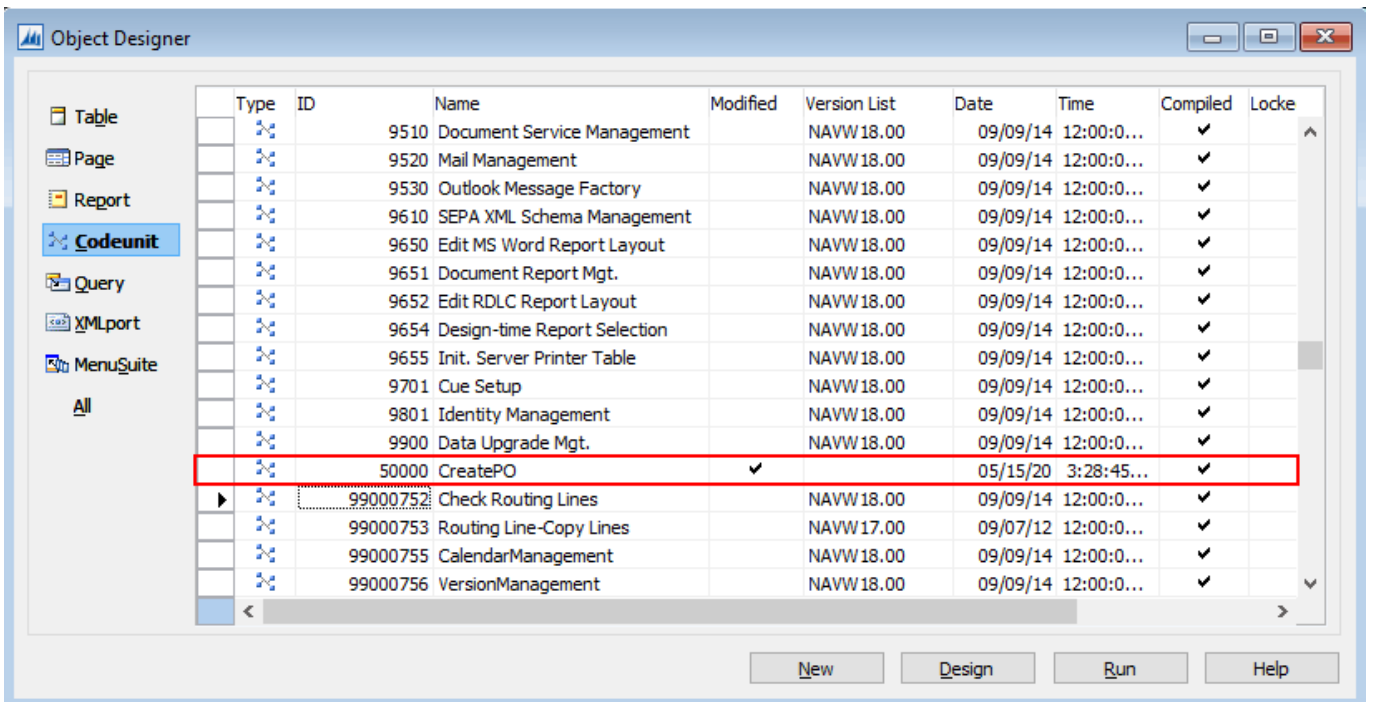
7. Save your codeunit using the **Save As** dialog appeared.

7.1 Choose the **ID** for the codeunit from the range 50,000-99,999. This ID range is reserved for customer-specific objects according to the [NAV Developer and IT Help](#).

7.2. Give the codeunit a name. For example, 'CreatePO'. Ensure that **Compiled** option is checked (see figure below).



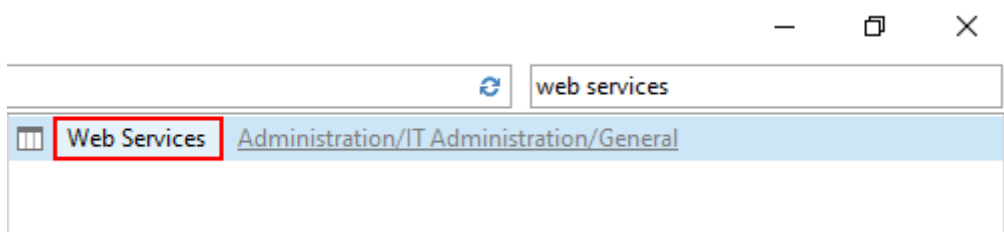
After that, your newly created codeunit will appear in the list (see figure below).



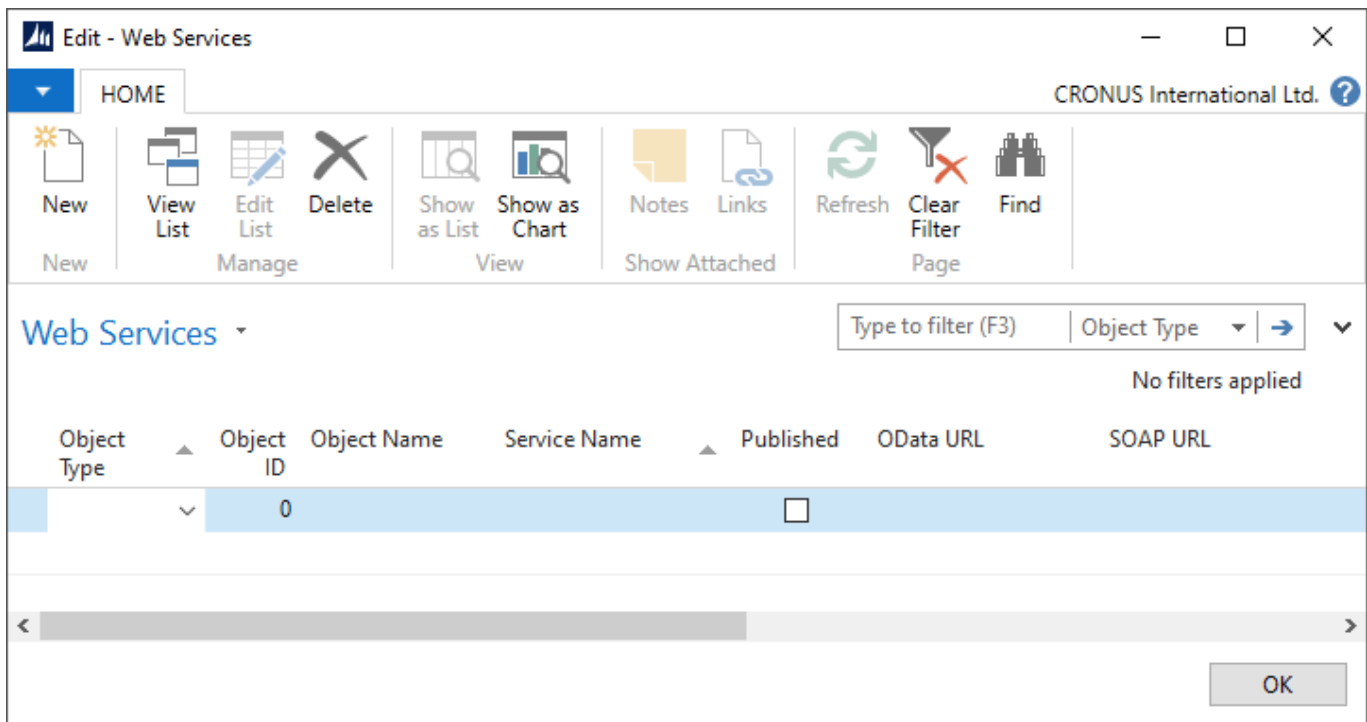
Publish the Web-service

The last step is to publish a web-service based on the created codeunit. To do this:

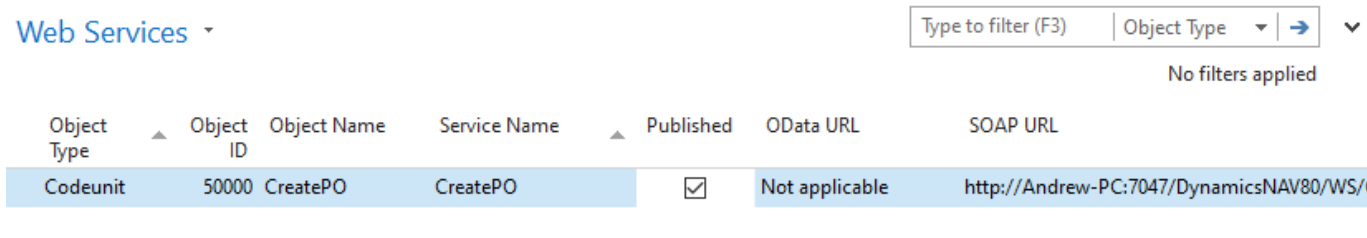
1. Open NAV Client and type into the search bar 'web services'. Click on the **Web services** link (see figure below)



2. Click the **New** button of the **Home** toolbar. **Edit- Web Services** window appears (see figure below).



3. Select the **Codeunit** option for the **Object Type** column.
4. Enter the **ID** of the created codeunit or choose it from the list for the **Object ID** column.
5. Give the web-service a name. It is a good practice to set this name as the codeunit **Object Name**.
6. Set the checkbox checked in the **Published** column (see figure below).



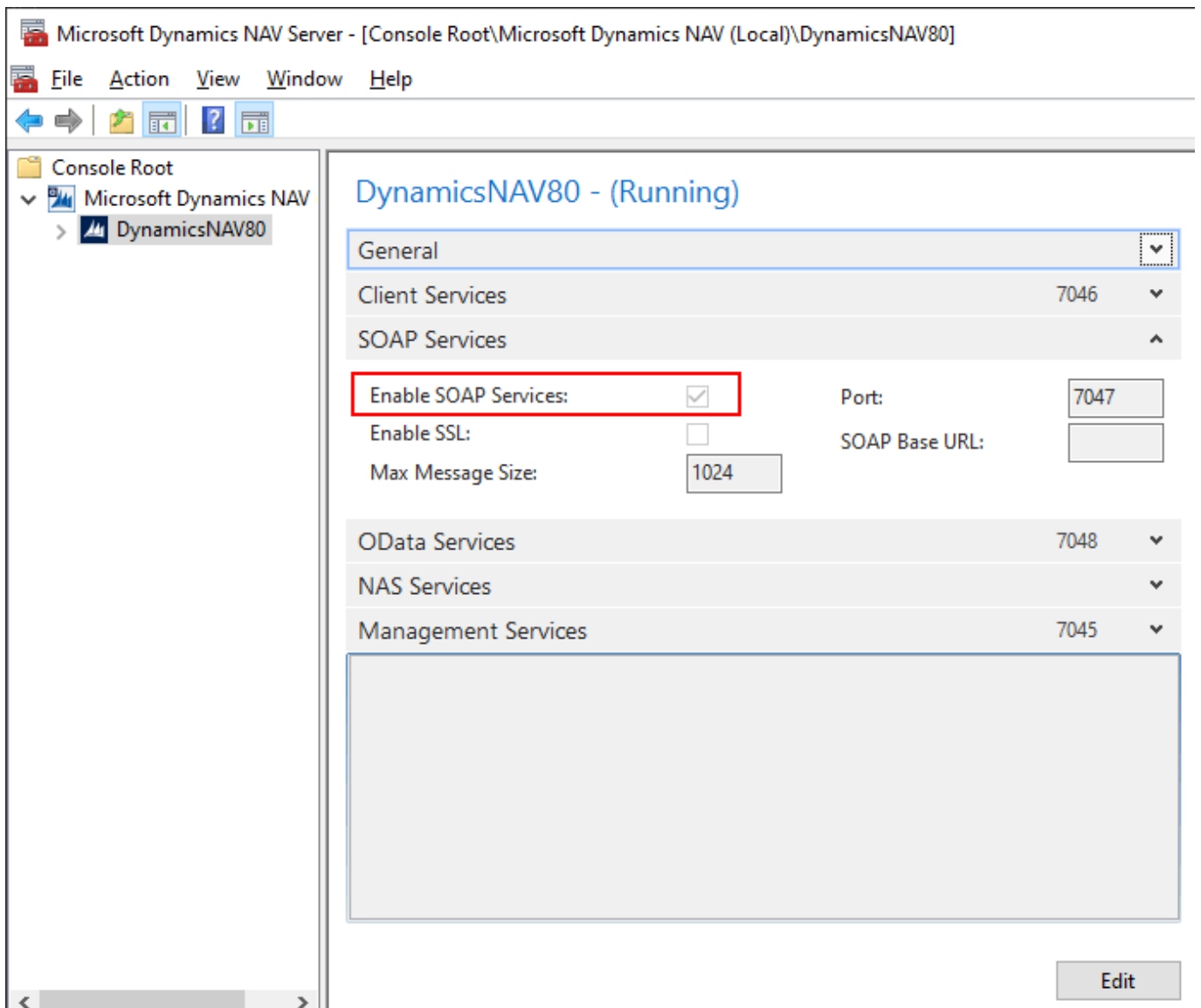
After that, NAV will automatically generate an URL for the web-service in the **SOAP URL** column. This URL is used to call the service by other applications like Streamline.

SOAP services must be enabled for your Dynamics NAV Server instance.

Enabling SOAP Services

1. Open Dynamics NAV Administration.
2. Click on your Dynamics NAV Server instance in the tree on the left.
3. Expand the **Soap Services** section.
4. Ensure that **Enable SOAP Services** option is checked (see figure below). If it's not:
 - 4.1. Click the **Edit** button at the bottom.
 - 4.2. Check the option.
 - 4.3. Click the **Save** button.

4.4. Restart the server.



Testing the Web-service

No, let's test our web-service. To do this, click on the cell with the URL and then click on the little icon with a globe (see figure below).

SOAP URL

<http://Andrew-PC:7047/DynamicsNAV80/WS/CRONUS%20International%20Ltd./Codeunit/CreatePO>



NAV opens the URL in your default browser. A top part of the server response is shown in the figure below.

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```

▼<definitions xmlns="http://schemas.xmlsoap.org/wsdl/" xmlns:tns="urn:microsoft-dynamics-schemas/codeunit/CreateP
schemas/codeunit/CreatePO">
  ▼<types>
    ▼<schema xmlns="http://www.w3.org/2001/XMLSchema" elementFormDefault="qualified" targetNamespace="urn:microsoft-dynamics-schemas/codeunit/CreatePO">
      ▼<element name="CreatePurchaseOrder">
        ▼<complexType>
          ▼<sequence>
            <element minOccurs="1" maxOccurs="1" name="vendorNo" type="string"/>
            <element minOccurs="1" maxOccurs="1" name="location" type="string"/>
            <element minOccurs="1" maxOccurs="1" name="deliveryDate" type="date"/>
          </sequence>
        </complexType>
      </element>
      ▼<element name="CreatePurchaseOrder_Result">
        ▼<complexType>
          ▼<sequence>
            <element minOccurs="1" maxOccurs="1" name="return_value" type="string"/>
          </sequence>
        </complexType>
      </element>
      ▼<element name="CreatePurchaseLine">
        ▼<complexType>
          ▼<sequence>
            <element minOccurs="1" maxOccurs="1" name="orderNo" type="string"/>
            <element minOccurs="1" maxOccurs="1" name="itemNo" type="string"/>
            <element minOccurs="1" maxOccurs="1" name="itemVariant" type="string"/>
            <element minOccurs="1" maxOccurs="1" name="location" type="string"/>
            <element minOccurs="1" maxOccurs="1" name="quantity" type="int"/>
          </sequence>
        </complexType>
      </element>
    </schema>
  </types>
</definitions>

```

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