Cambridge Air Solutions: Integrating Epicor ERP with Dynamics 365 Using Power Automate

ORGANIZATION

Cambridge Air Solutions, based in Chesterfield, Missouri, has designed and manufactured commercial and industrial HVAC equipment for more than 60 years, guided by its mission to "Create Healthy Working Environments for Hard-Working People." Its product lines span HTHV space heating (S-Series and SA-Series), make-up air (M-Series), evaporative cooling (ESC-Series and E-Series), and freeze protection (Spec Air Series) for warehouses, distribution centers, manufacturing, industrial, and transportation facilities. Epicor ERP is Cambridge's system of record for customers, quotes, orders, invoices, and equipment, with Rep Firms configuring quotes in ConfigureOne (SMART), which feeds Epicor.

CHALLENGE

Cambridge's sales and service teams depend on ERP data, but they work in CRM. Under Salesforce, a separate third-party ETL platform ran 16 scheduled integration jobs that pulled changed records from Epicor's REST API several times a day and wrote them into Salesforce Accounts and custom objects. Moving CRM to Dynamics 365 meant rebuilding every one of those jobs, and the third-party tool added another platform to license and maintain.

The existing jobs also left gaps. There was no product feed, no shipment data such as ship dates and tracking, and no way to tie a parts quote, order, or RMA in Epicor back to the service case that triggered it. Territory zip-code mappings were loaded into Epicor, Salesforce, and the website separately from a CSV export. Cambridge needed an integration that matched its new equipment-centric CRM design, closed these gaps, and ran on the Microsoft platform it was standardizing on.

TECHNICAL SOLUTION

Why XTIVIA: XTIVIA brought experience with Epicor's business object services and BAQs, the existing Salesforce data model, and Microsoft Power Automate and Dataverse, so the team could translate each job end to end rather than one system at a time.

XTIVIA started by documenting every XPlenty package: its schedule, the Epicor API endpoint or BAQ it queried, its filter logic, and each source field. A single field mapping workbook then recorded, for every Epicor field, its current Salesforce field and its new Dynamics 365 destination, standard or custom. In total, we defined about 440 field mappings across 16 jobs, covering the record types below.

Data from Epicor	What lands in Dynamics 365
Customers	Accounts, keyed on Epicor customer number and ID
Quotes and quote lines	Quotes with Config One quote number, close probability, job type, building use, and Rep Firm
Sales orders and order lines	Orders with commissions, discounts, ship dates, Rep Firm and up to four sales rep codes
Invoices and invoice lines	Invoices with amounts, commissionable flags and ship-to details
Unit configuration	Model number, gas type, control type, base unit and insulation options on quotes and orders
Sales reps	Contacts linked to their Rep Firm, matched first on Epicor sales rep code, then email
Business development quotes	Business Development records with Config One quote number, part number, product code, and customer details

The jobs were re-platformed onto Microsoft Power Automate, retiring XPlenty. XTIVIA also used the move to simplify the model: Epicor sales reps became Contacts instead of a separate custom object, and the matching logic updates an existing contact before creating a new one. New integrations added products, Customer Shipment Entry data (need-by, ship-by and ship dates, tracking and ship-to address), zip-code territory mappings, equipment serial numbers for the Asset record, RMAs, and a new Case Number field in Epicor so parts quotes, orders and RMAs link automatically to the Dynamics case.

Because the integration writes into Dataverse, downstream Power Automate flows build on it directly. Large or qualifying Epicor quotes create opportunities, quotes link to projects by name, Factory Startups are created from order lines, Sales Line Credits are recalculated for Rep Firm performance, and a daily report flags possible duplicate accounts created from Epicor. Phase 2 extends the same pattern to Epicor contacts and a direct ConfigureOne (SMART) feed.

BUSINESS RESULT

Sales and Service teams see current ERP data on the records they already work in: an RSM sees a Rep Firm's open quotes and orders during a Progress Report, and a service rep sees the parts order or RMA tied to a case. Equipment from Epicor is the shared record that connects customers, orders, and service history. Epicor became the single source of truth for zip-code territories, ending the manual CSV loads into Salesforce. Moving the integration onto Power Automate removed a separate third-party ETL platform, so Cambridge's CRM, automation, and integration now run on one Microsoft stack.

BY THE NUMBERS

- 60+ years designing and manufacturing commercial and industrial HVAC
- 16 existing integration jobs rebuilt on Power Automate
- About 440 Epicor fields mapped to Dynamics 365
- 6 new data feeds added: products, shipments, zip-code mappings, equipment serial numbers, RMAs, and case numbers
- 1 third-party ETL platform retired

KEYWORDS

Epicor Dynamics 365 integration, ERP CRM integration, Power Automate integration, Epicor REST API, Dataverse, XPlenty migration, ETL replacement, data mapping, HVAC manufacturing

SOFTWARE

Microsoft Dynamics 365 Sales Enterprise, Dynamics 365 Customer Service Enterprise, Microsoft Power Automate, Epicor ERP (REST API and BAQ services), ConfigureOne (SMART)

HARDWARE/PLATFORM

Microsoft Dataverse, Microsoft Power Platform, Epicor ERP

ABOUT XTIVIA

For over 30 years, XTIVIA has been a leading B2B technology solutions provider, empowering clients to leverage their chosen technology competitively. We bridge legacy systems with modern innovation through a comprehensive suite of services, including Data & AI, Apps & Integration, Cloud & DevOps, Business Solutions, QA Testing, and Managed Services. Partnering with industry leaders like Microsoft, Liferay, AWS, Databricks, and Boomi, our certified experts deliver customized solutions that drive measurable business results. If you can imagine the business outcome, XTIVIA can create it with intelligent technology and AI-powered solutions. www.xtivia.com