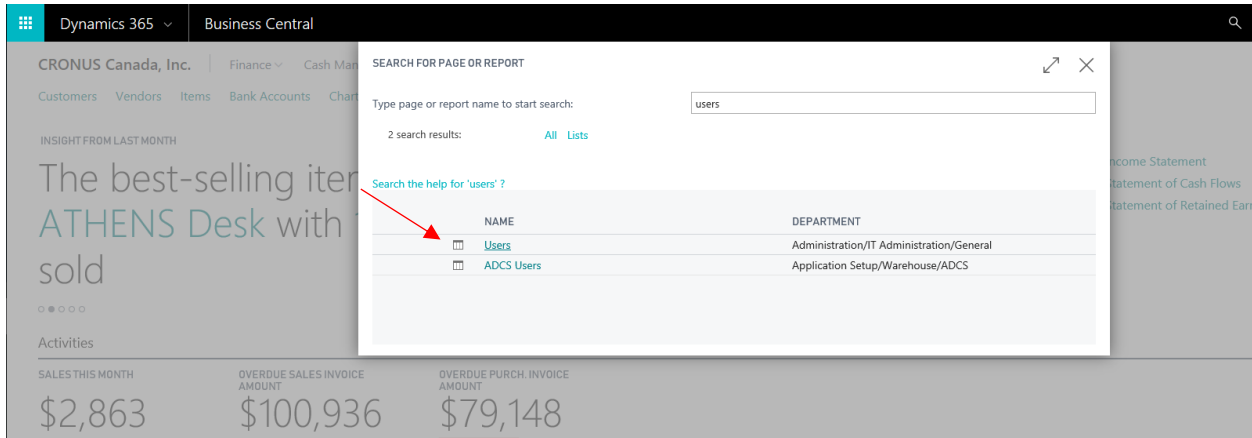


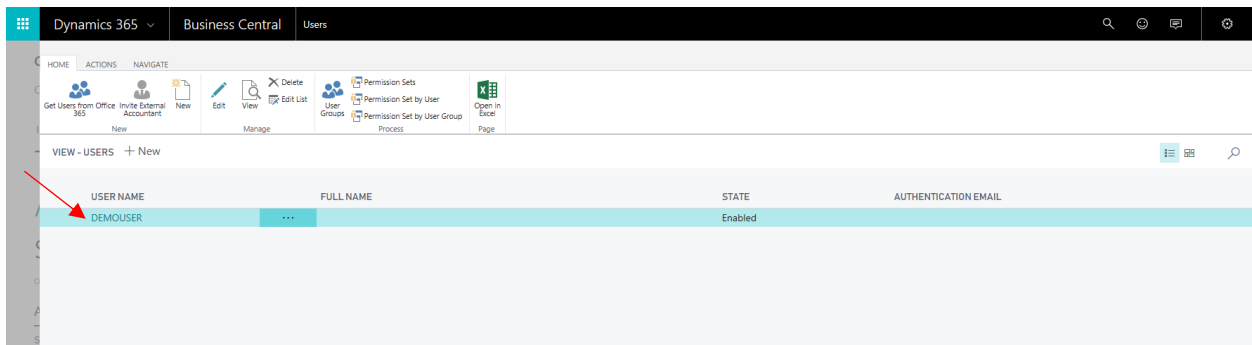
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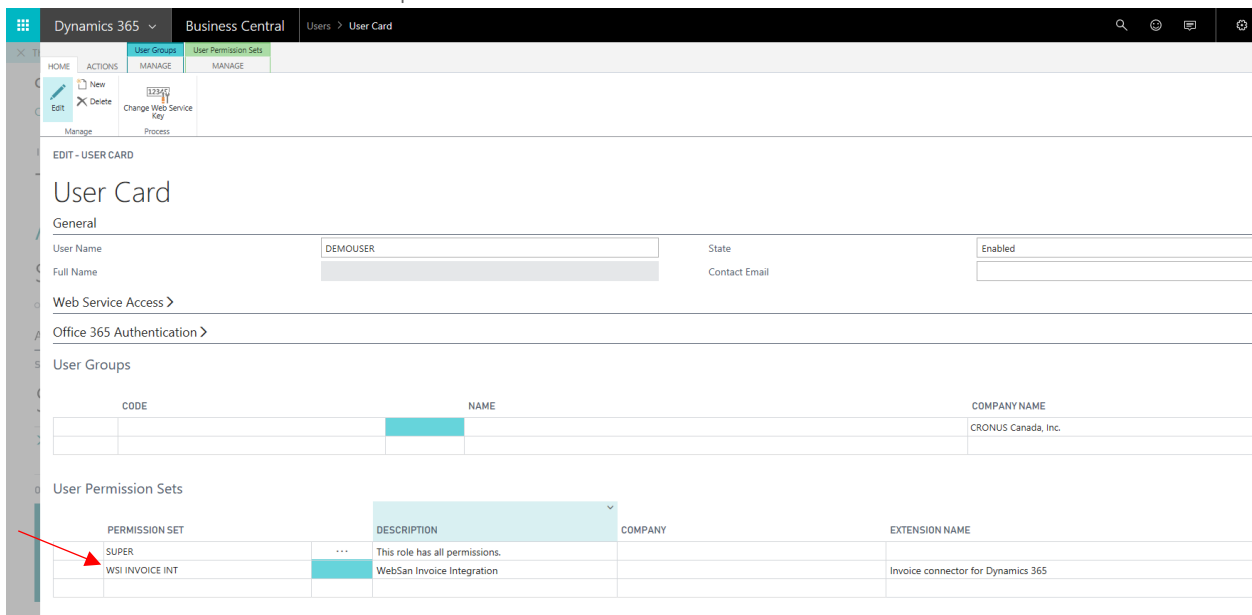
1. Assign User App Permissions by using the search function and typing “users” in the search field.



2. Drill into user.



3. Add WSI INVOICE INT permission set.



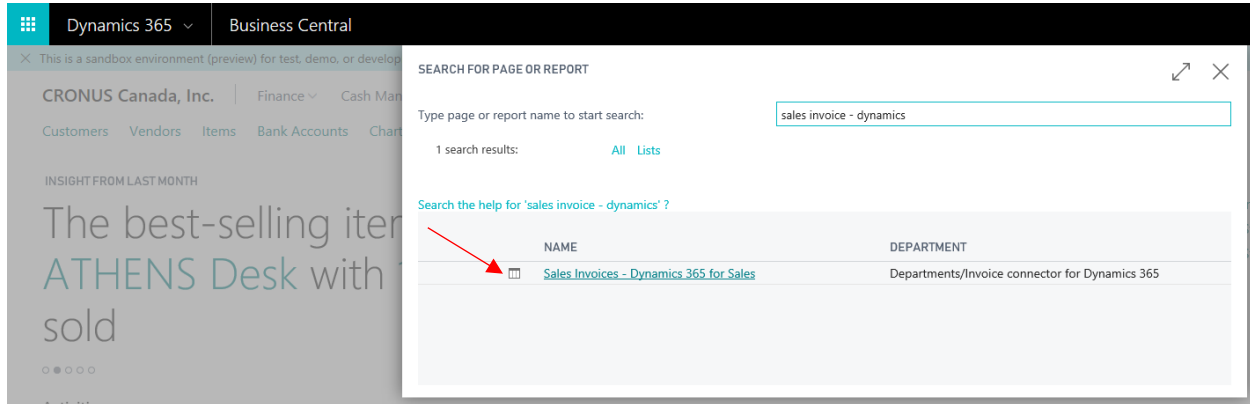
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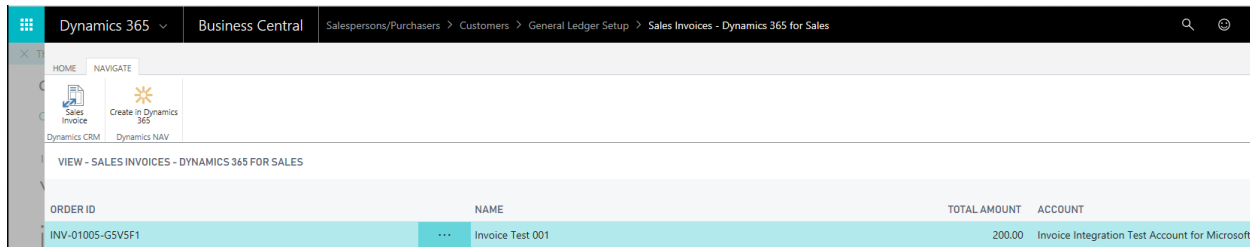
- Follow the directions to setup and integrate your Microsoft Dynamics 365 Business Central environment with your Dynamics 365 for Sales environment. [Integrate Dynamics 365 for Sales](#). For this application to work successfully, you will need to have successfully coupled your Customers and accounts along with Items & resources.

Usage

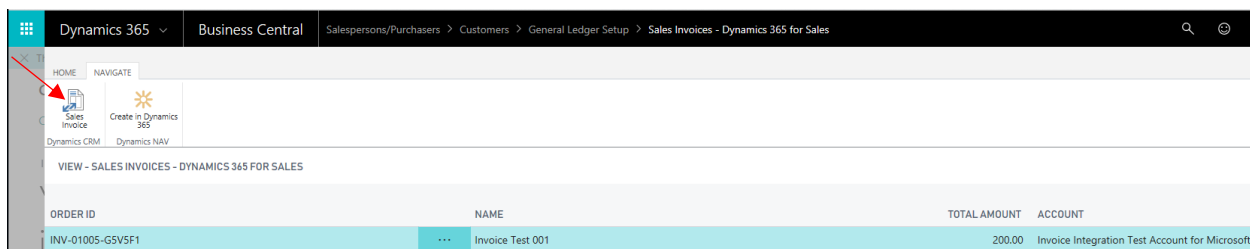
- After you have completed all tasks to integrate your Dynamics 365 for Sales environment, navigate to the Sales Invoices – Dynamics 365 for Sales page.



- This page will display a list of Invoices from Dynamics 365 for Sales that you can create into your Dynamics 365 Business Central application. **Note:** Once you have created an invoice into the Dynamics 365 Business Central application, the invoice will no longer be displayed on this page. Only invoices that are active with the status reason **billed** are integrated into Dynamics 365 Business Central.



- On the navigate tab, pressing the Sales Invoice action will open this Invoice record in your Dynamics 365 for Sales application.



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The screenshot shows the Dynamics 365 interface for an invoice. The breadcrumb trail is: Dynamics 365 > Sales > Invoices > Invoice Test 001. The top navigation bar includes actions: NEW, DELETE, CONFIRM INVOICE, LOOK UP ADDRESS, INVOICE PAID, CANCEL INVOICE, RECALCULATE, GET PRODUCTS, LOCK PRICING, and a menu icon. The invoice title is "Invoice Test 001" with a "Total Amount" of \$200.00. A progress bar shows the invoice is in the "Draft (Active for 5 days, 18 hours)" stage, with a "Contract" link and an "In Review" stage. The "Summary" section displays the following details:

- *Invoice ID: INV-01005-G5V5F1
- *Name: Invoice Test 001
- *Currency: Canadian Dollar
- *Price List: Business Central Default Price List
- *Prices Locked: No

The "PRODUCTS" table is as follows:

Product Na...	Properties	Unit	Price Per U...	Quantity	Discount	Extended Amo...	Suggestions
Music Player	Audio		\$200.00	1.00000	\$0.00	\$200.00	

A "SHIPPING DATES" section is also visible at the bottom.

4. Pressing the Create in Dynamics 365 action will create this invoice into your Dynamics 365 Business Central application.

The screenshot shows the Dynamics 365 Business Central interface. The breadcrumb trail is: Salespersons/Purchasers > Customers > General Ledger Setup > Sales Invoices - Dynamics 365 for Sales. The "HOME" and "NAVIGATE" tabs are visible. A red arrow points to the "Create in Dynamics 365" button. Below the navigation bar, the view title is "VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES". A table displays the invoice details:

ORDER ID	NAME	TOTAL AMOUNT	ACCOUNT
INV-01005-G5V5F1	Invoice Test 001	200.00	Invoice Integration Test Account for Microsoft

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The screenshot shows the Dynamics 365 Business Central interface for a sales invoice. The breadcrumb trail is 'Dynamics 365 > Business Central > Sales Invoices - Dynamics 365 for Sales'. The main view is 'EDIT - SALES INVOICE - S-INV102223 - INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT'. The 'General' section shows 'Customer Name' as 'Invoice Integration Test Account', 'Posting Date' as '09/04/2018', and 'Due Date' as '09/04/2018'. The 'Lines' table contains one item:

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT
Item	1000	Chair		1	PCS	50

The summary section shows: Subtotal Excl. VAT (CAD) 50.00, Total Excl. VAT (CAD) 50.00, Total VAT (CAD) 0.00, and Total Incl. VAT (CAD) 50.00. The 'Invoice Details' section shows 'Currency Code' as CAD, 'Shipment Date' as 09/04/2018, and 'Payment Service' as 'No payment service is made available'.

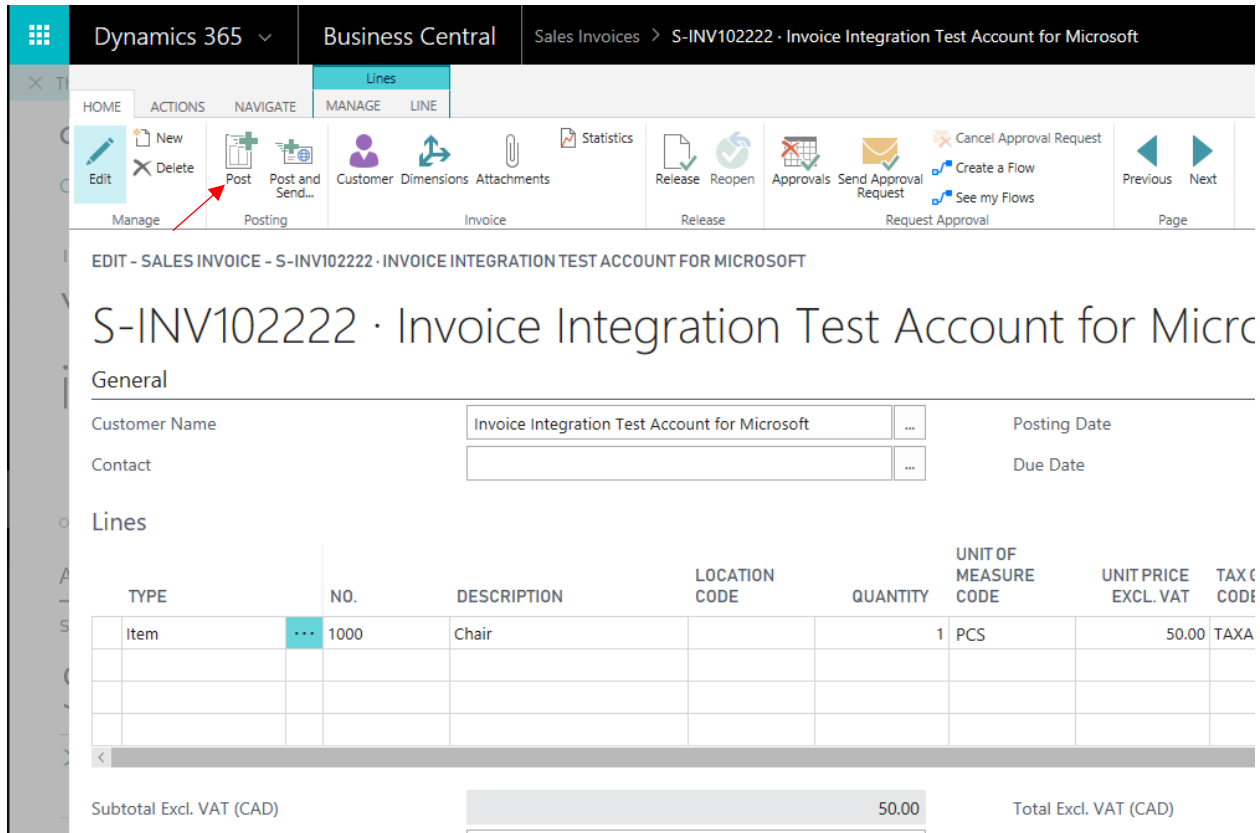
5. This invoice will now disappear from the Sales Invoices – Dynamics 365 for Sales page as it has been processed into your Dynamics 365 Business Central application.

The screenshot shows the Dynamics 365 Business Central interface with the breadcrumb trail 'Dynamics 365 > Business Central > Sales Invoices - Dynamics 365 for Sales'. The main view is 'VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES'. The table header shows columns for 'Name', 'Total Amount', and 'Account'. The table content is empty, with the message '(There is nothing to show in this view)' displayed at the bottom.

6. Once you have posted and paid this Sales Invoice in your Dynamics 365 Business Central application, the Status of the Dynamics 365 for Sales Invoice will be updated to paid.

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EDIT - SALES INVOICE - S-INV102222 - INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT

S-INV102222 · Invoice Integration Test Account for Micro

General

Customer Name: Invoice Integration Test Account for Microsoft
Posting Date:

Contact:
Due Date:

Lines

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	TAX CODE
Item	1000	Chair		1	PCS	50.00	TAXA

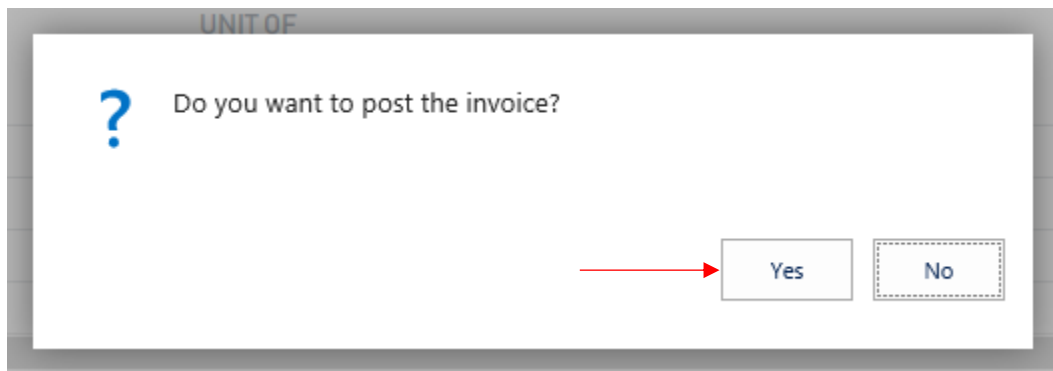
Subtotal Excl. VAT (CAD) 50.00 Total Excl. VAT (CAD)

UNIT OF

?

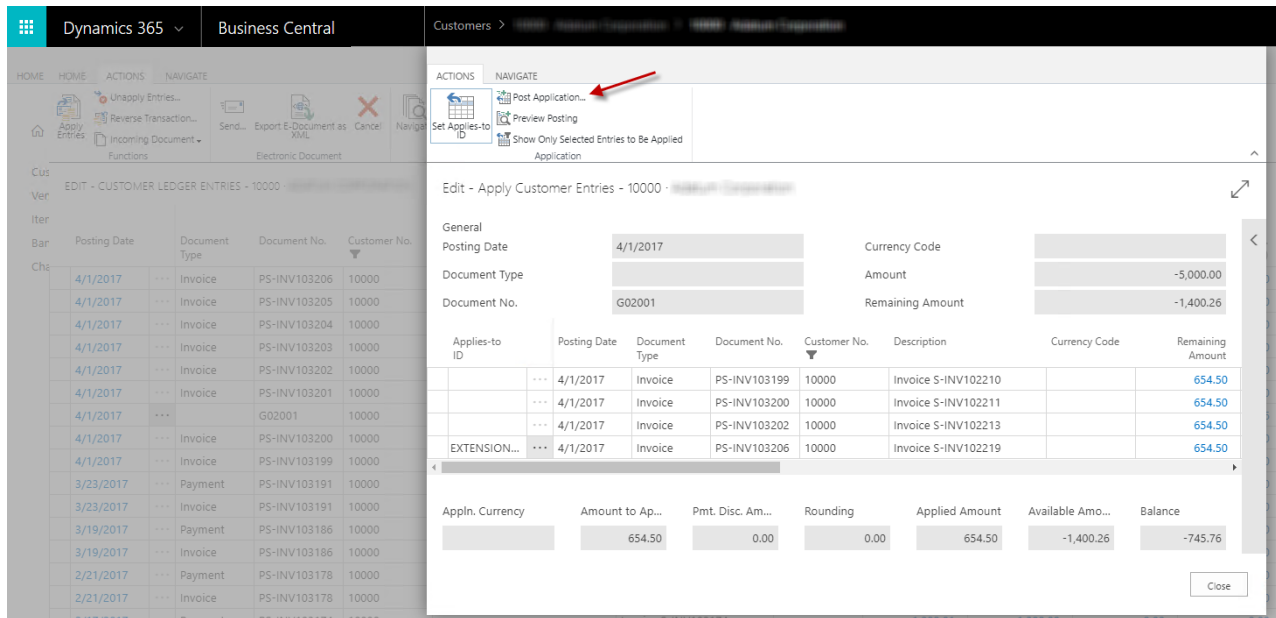
Do you want to post the invoice?

Yes No



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The screenshot shows the Dynamics 365 Business Central interface. The left pane contains a list of customer ledger entries. The right pane shows the 'Edit - Apply Customer Entries - 10000' window. In the ACTIONS pane, the 'Post Application...' button is highlighted with a red arrow. Below the ACTIONS pane, there are several tables showing application details.

Applies-to ID	Posting Date	Document Type	Document No.	Customer No.	Description	Currency Code	Remaining Amount
...	4/1/2017	Invoice	PS-INV103199	10000	Invoice S-INV102210		654.50
...	4/1/2017	Invoice	PS-INV103200	10000	Invoice S-INV102211		654.50
...	4/1/2017	Invoice	PS-INV103202	10000	Invoice S-INV102213		654.50
EXTENSION...	4/1/2017	Invoice	PS-INV103206	10000	Invoice S-INV102219		654.50

Appln. Currency	Amount to Ap...	Pmt. Disc. Am...	Rounding	Applied Amount	Available Amo...	Balance
	654.50	0.00	0.00	654.50	-1,400.26	-745.76

Edit - Post Application



Document No.

G02001

Posting Date

4/1/2017

...



OK

Cancel

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Dynamics 365 ▾ **Sales** ▾ **Invoices** >

+ NEW 🗑️ DELETE 📄 CANCEL INVOICE ⚙️ PROCESS ▾ 👤 AS

INVOICE ▾
Testabc123 ☰

Draft (Active for 32 minutes)

Contract [click to enter](#)

◀ **Summary**

* Invoice ID	🔒 INV-01010-J0J2K3
* Name	Testabc123
* Currency	🔒 Canadian Dollar
* Price List	Business Central Default Price List
* Prices Locked	🔒 No

SHIPPING DATES

Date Delivered
Due Date

SHIPPING INFORMATION

Shipping Method
Payment Terms

Paid ←

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How to purchase our Invoice Connector for Dynamics 365 app

You will get access to our Invoice Connector app for Dynamics 365 free for 30 days. If you would like to view the free trial expire date, search for invoice connector in the search bar.

SEARCH FOR PAGE OR REPORT




Type page or report name to start search:

invoice connector

1 search results:

All Administration

Search the help for 'invoice connector' ?

NAME	DEPARTMENT
 Dynamics Connector for Invoices - License	Departments/Invoice Connector for Dynamics 365

VIEW - DYNAMICS CONNECTOR FOR INVOICES - LICENSE

0

Licensing Status

License State

FreeTrial

Free Trial Expiry Date

7/23/2018 1:11 PM

Contact accounting@websan.com or 416-499-1235, when you're ready to purchase our app.