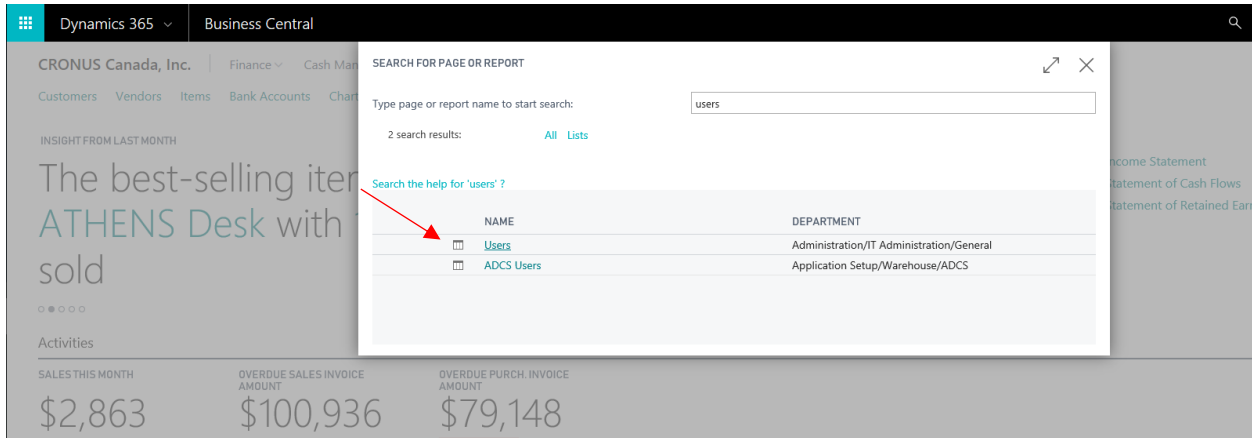


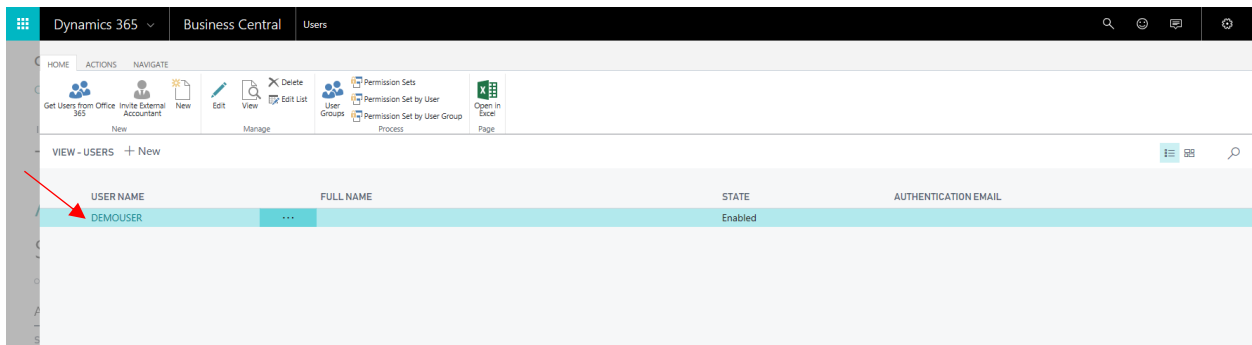
# Invoice Connector for Dynamics 365 – Setup & Usage Guide

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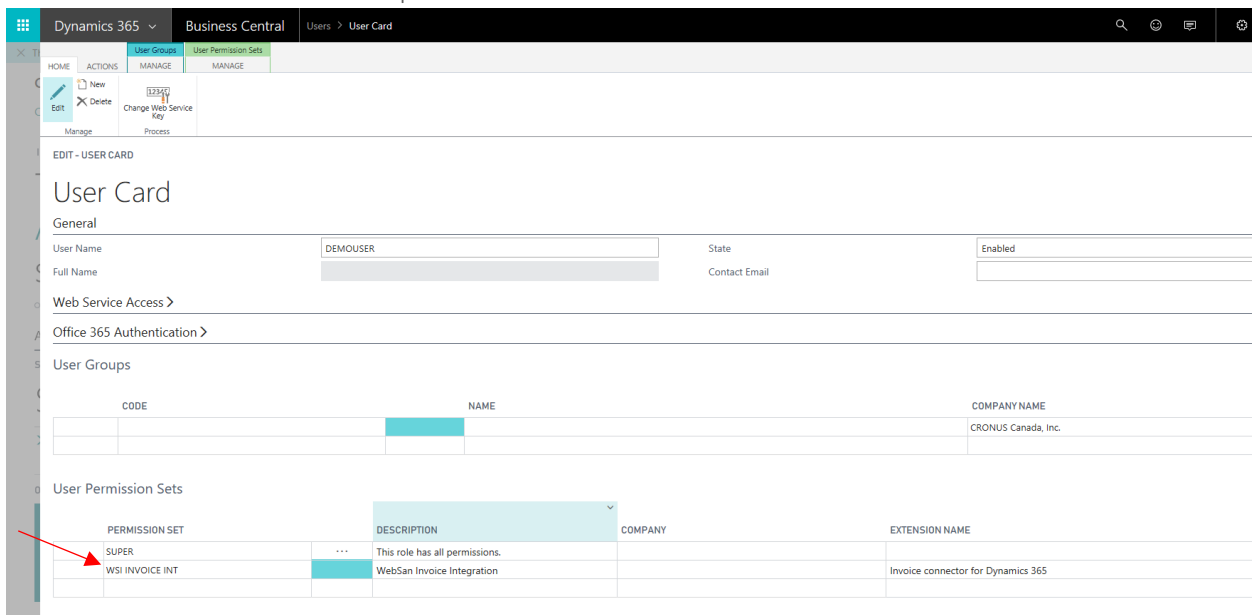
1. Assign User App Permissions by using the search function and typing “users” in the search field.



2. Drill into user.



3. Add WSI INVOICE INT permission set.



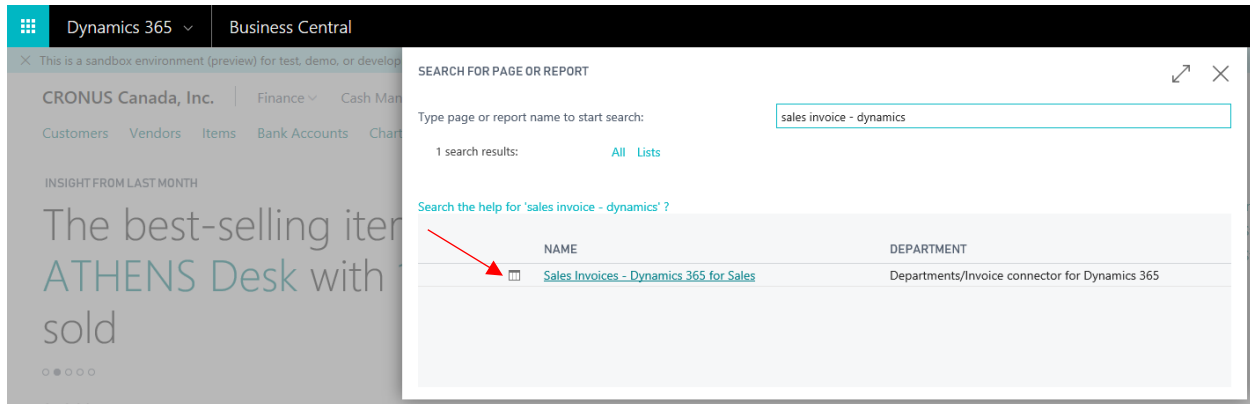
# Invoice Connector for Dynamics 365 – Setup & Usage Guide

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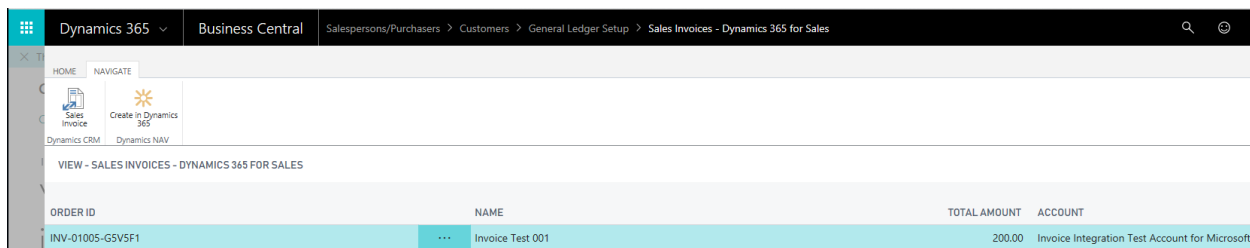
- Follow the directions to setup and integrate your Microsoft Dynamics 365 Business Central environment with your Dynamics 365 for Sales environment. [Integrate Dynamics 365 for Sales](#). For this application to work successfully, you will need to have successfully coupled your Customers and accounts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

## Usage

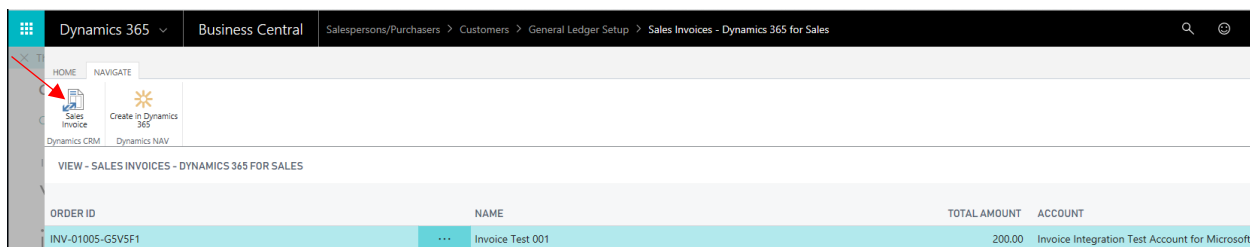
- After you have completed all tasks to integrate your Dynamics 365 for Sales environment, navigate to the Sales Invoices – Dynamics 365 for Sales page.



- 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.

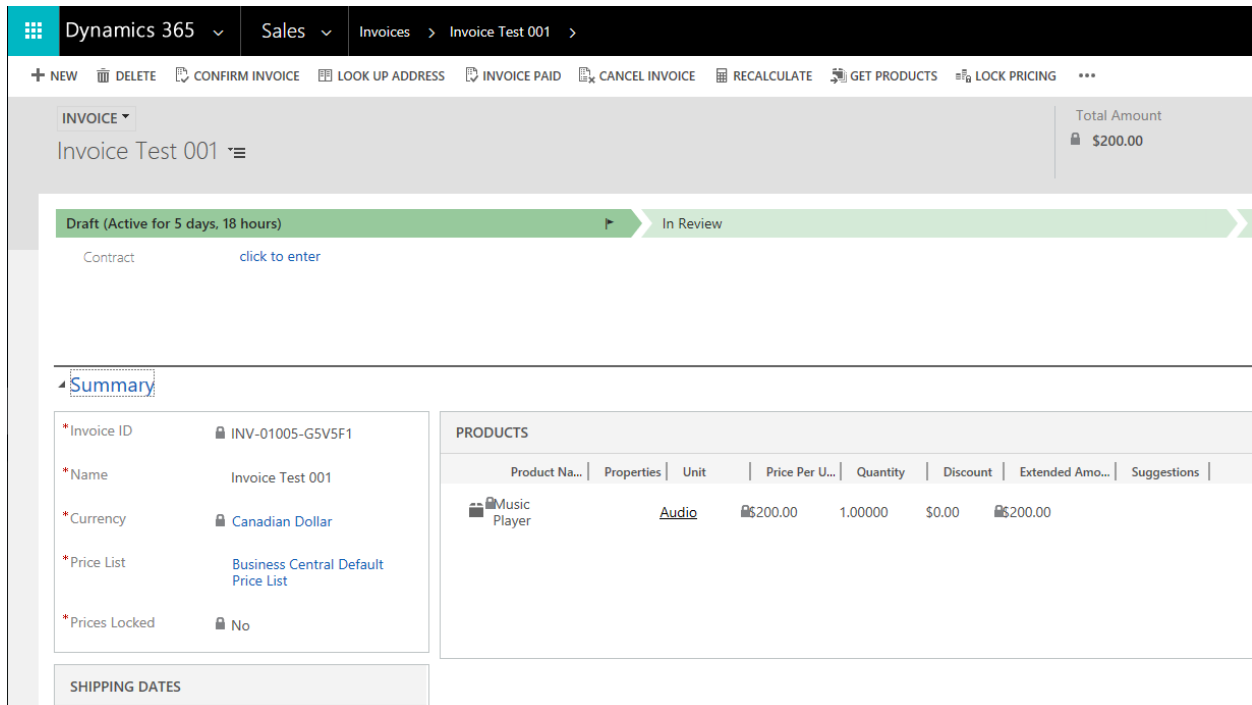


- On the navigate tab, pressing the Sales Invoice action will open this Invoice record in your Dynamics 365 for Sales application.



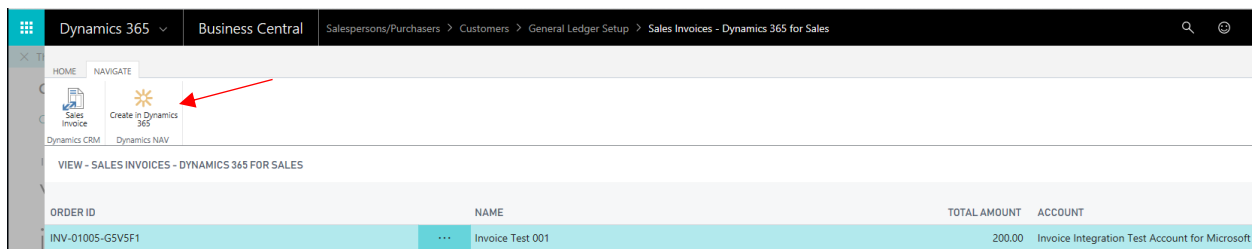
# Invoice Connector for Dynamics 365 – Setup & Usage Guide

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The screenshot shows the Dynamics 365 interface for an invoice. At the top, there's a navigation bar with 'Dynamics 365', 'Sales', and 'Invoices > Invoice Test 001'. Below this is a toolbar with actions like 'NEW', 'DELETE', 'CONFIRM INVOICE', 'LOOK UP ADDRESS', 'INVOICE PAID', 'CANCEL INVOICE', 'RECALCULATE', 'GET PRODUCTS', and 'LOCK PRICING'. The main header shows 'INVOICE Invoice Test 001' and a 'Total Amount' of '\$200.00'. A progress bar indicates the invoice is in the 'Draft (Active for 5 days, 18 hours)' stage, with a 'click to enter' link. Below this is a 'Summary' section with fields for Invoice ID (INV-01005-G5V5F1), Name (Invoice Test 001), Currency (Canadian Dollar), Price List (Business Central Default Price List), and Prices Locked (No). To the right is a 'PRODUCTS' table with one row for 'Music Player' (Audio) with a price of \$200.00 and a quantity of 1.00000. At the bottom, there's a 'SHIPPING DATES' section.

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

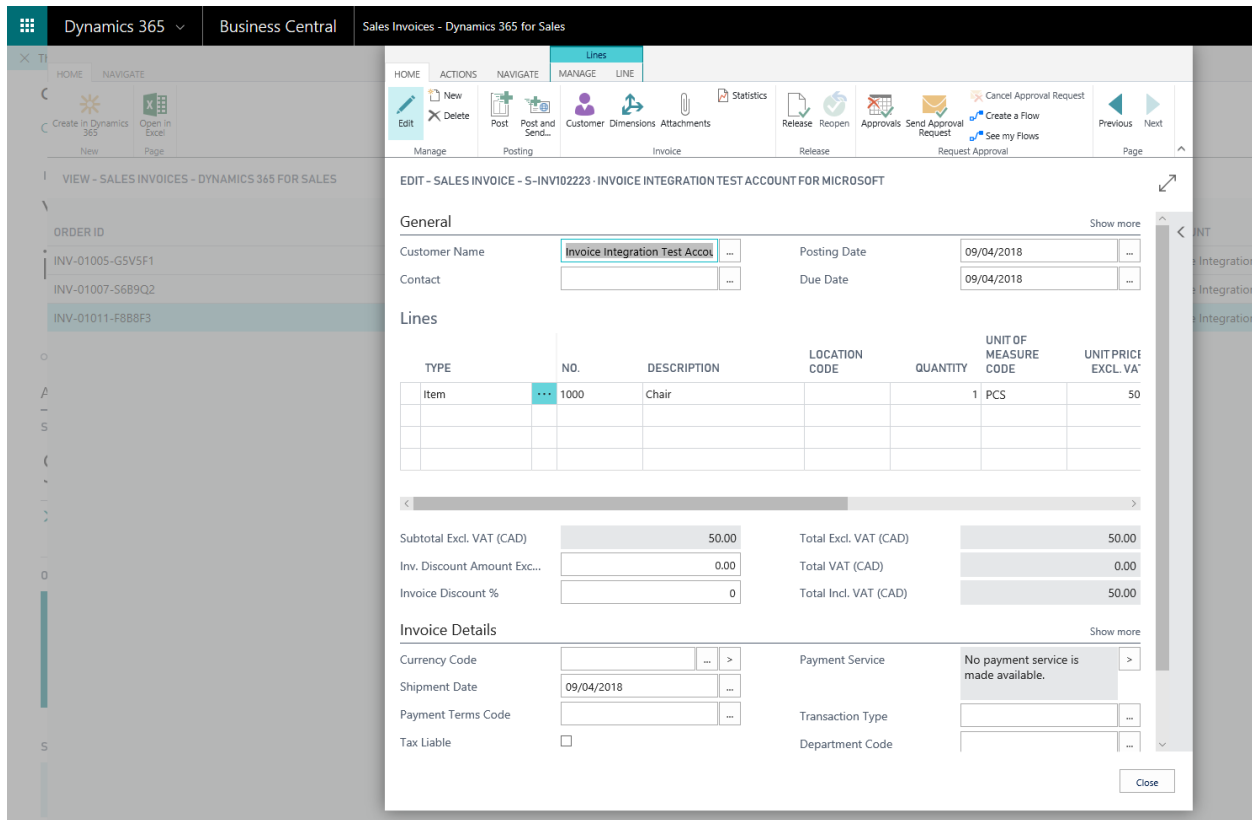


The screenshot shows the Dynamics 365 Business Central interface. The navigation bar includes 'Dynamics 365', 'Business Central', and a breadcrumb trail: 'Salespersons/Purchasers > Customers > General Ledger Setup > Sales Invoices - Dynamics 365 for Sales'. Below the navigation bar is a 'HOME NAVIGATE' section with two icons: 'Sales Invoice' and 'Create in Dynamics 365'. A red arrow points to the 'Create in Dynamics 365' icon. Below this is a 'VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES' section with a table showing the invoice details:

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

# Invoice Connector for Dynamics 365 – Setup & Usage Guide

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The screenshot shows the Dynamics 365 Business Central interface for a sales invoice. The breadcrumb trail is "Sales Invoices - Dynamics 365 for Sales". The main view is titled "EDIT - SALES INVOICE - S-INV102223 - INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT".

**General**

Customer Name	Invoice Integration Test Accou...	Posting Date	09/04/2018
Contact		Due Date	09/04/2018

**Lines**

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

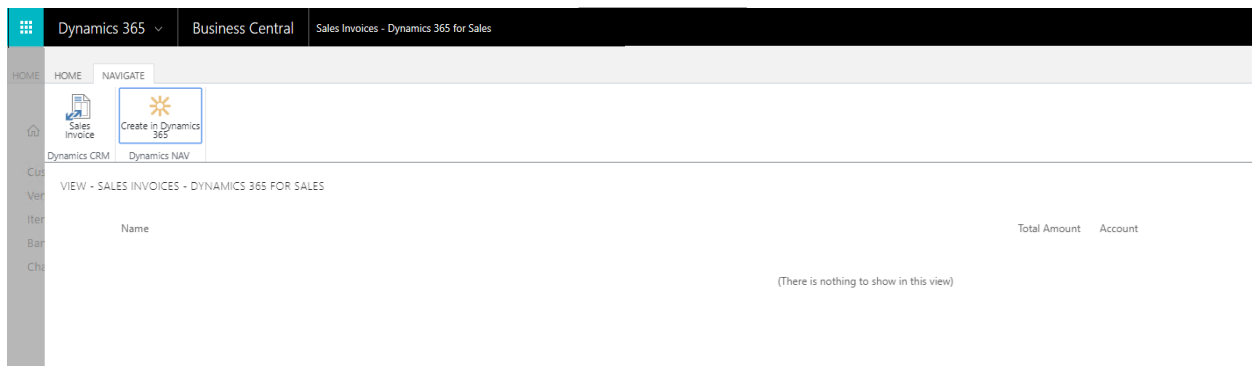
**Summary**

Subtotal Excl. VAT (CAD)	50.00	Total Excl. VAT (CAD)	50.00
Inv. Discount Amount Exc...	0.00	Total VAT (CAD)	0.00
Invoice Discount %	0	Total Incl. VAT (CAD)	50.00

**Invoice Details**

Currency Code		Payment Service	No payment service is made available.
Shipment Date	09/04/2018	Transaction Type	
Payment Terms Code		Department Code	
Tax Liabile	<input type="checkbox"/>		

- 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 for the "Sales Invoices - Dynamics 365 for Sales" page. The breadcrumb trail is "Sales Invoices - Dynamics 365 for Sales". The main view is titled "VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES".

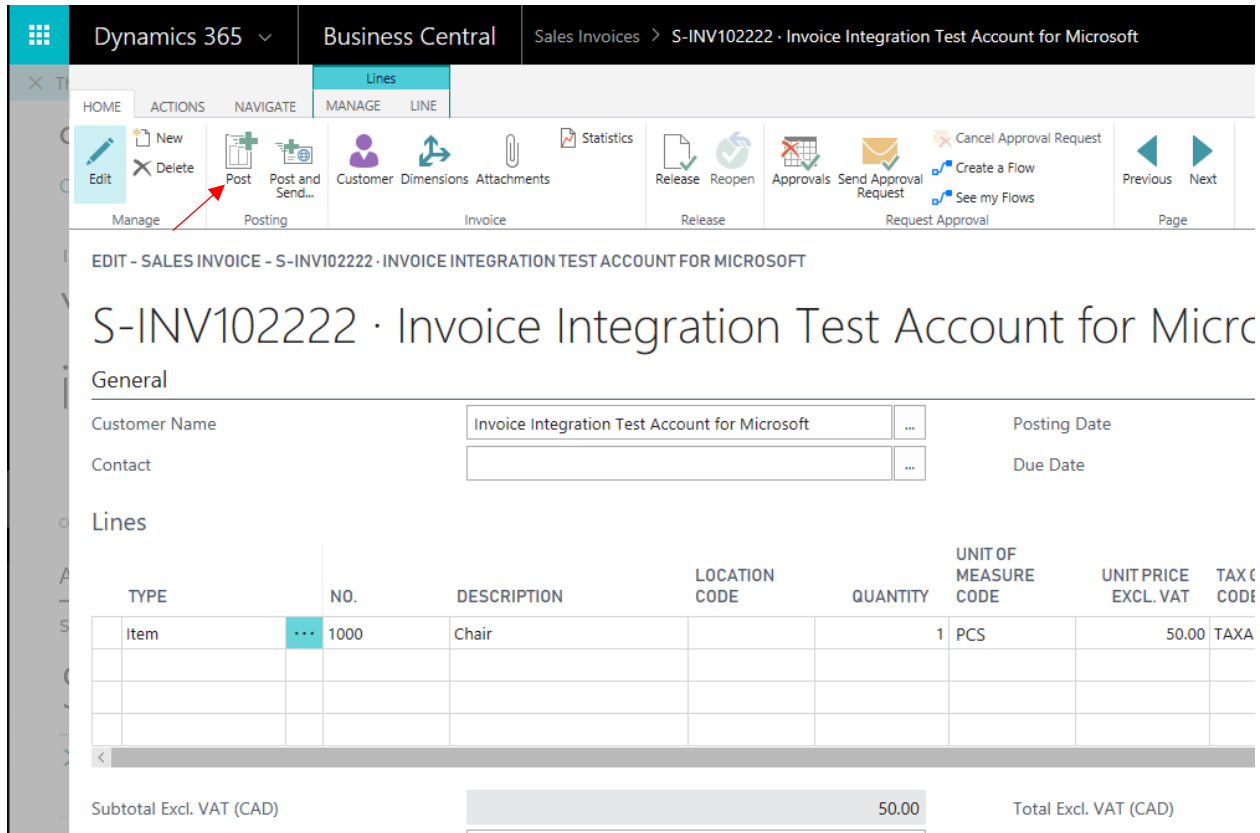
The table below shows the columns for the sales invoice list:

Name	Total Amount	Account
(There is nothing to show in this view)		

- 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.

# Invoice Connector for Dynamics 365 – Setup & Usage Guide

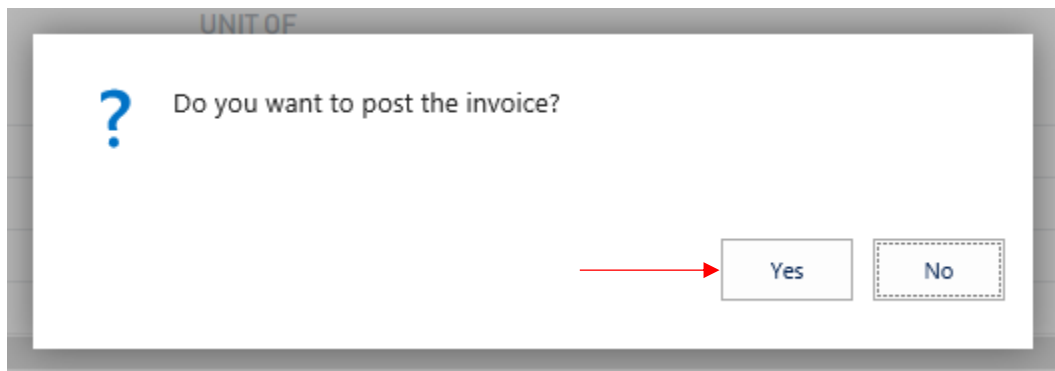
If you would like to purchase our app, scroll to the last page.



The screenshot shows the Dynamics 365 Business Central interface for editing a sales invoice. The breadcrumb trail is 'Sales Invoices > S-INV102222 · Invoice Integration Test Account for Microsoft'. The ribbon includes tabs for HOME, ACTIONS, NAVIGATE, MANAGE, and LINE. The ACTIONS tab is active, showing buttons for Edit, Delete, Post, Post and Send..., Customer, Dimensions, Attachments, Release, Reopen, Approvals, Send Approval Request, Cancel Approval Request, Create a Flow, and See my Flows. A red arrow points to the 'Post' button. Below the ribbon, the page title is 'EDIT - SALES INVOICE - S-INV102222 · INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT'. The main content area shows the invoice details for 'S-INV102222 · Invoice Integration Test Account for Microsoft'. The 'General' section includes fields for Customer Name (Invoice Integration Test Account for Microsoft), Posting Date, Contact, and Due Date. The 'Lines' section contains a table with one line item: 'Chair' with a quantity of 1 and a unit price of 50.00. The subtotal is 50.00 CAD.

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

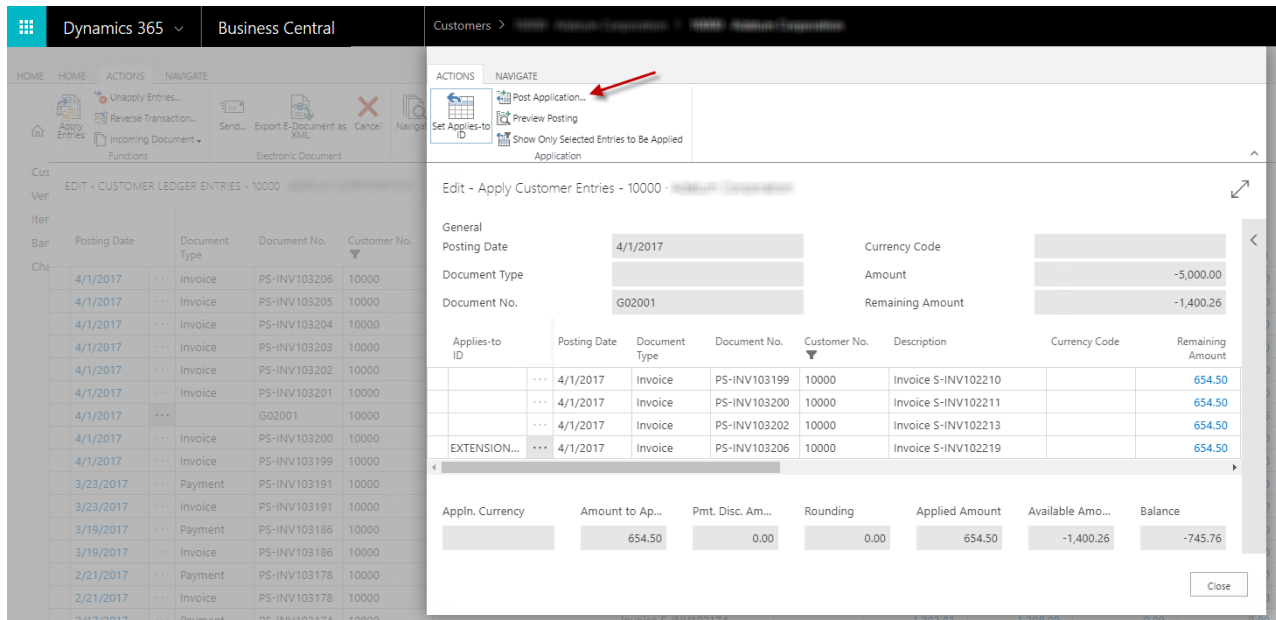
Subtotal Excl. VAT (CAD) 50.00 Total Excl. VAT (CAD)



The screenshot shows a confirmation dialog box with the text 'Do you want to post the invoice?' and a question mark icon. There are two buttons: 'Yes' and 'No'. A red arrow points to the 'Yes' button.

# Invoice Connector for Dynamics 365 – Setup & Usage Guide

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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 'Apply Customer Entries' window with the following data:

Posting Date	Document Type	Document No.	Customer No.	Description	Remaining Amount
4/1/2017	Invoice	PS-INV103206	10000		
4/1/2017	Invoice	PS-INV103205	10000		
4/1/2017	Invoice	PS-INV103204	10000		
4/1/2017	Invoice	PS-INV103203	10000		
4/1/2017	Invoice	PS-INV103202	10000		
4/1/2017	Invoice	PS-INV103201	10000		
4/1/2017	Invoice	G02001	10000		
4/1/2017	Invoice	PS-INV103200	10000		
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
4/1/2017	Invoice	PS-INV103206	10000	Invoice S-INV102219	654.50

Summary values at the bottom of the window:

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	<a href="#">Business Central Default Price List</a>
* 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
 <a href="#">Dynamics Connector for Invoices - License</a>	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](mailto:accounting@websan.com) or 416-499-1235, when you're ready to purchase our app.