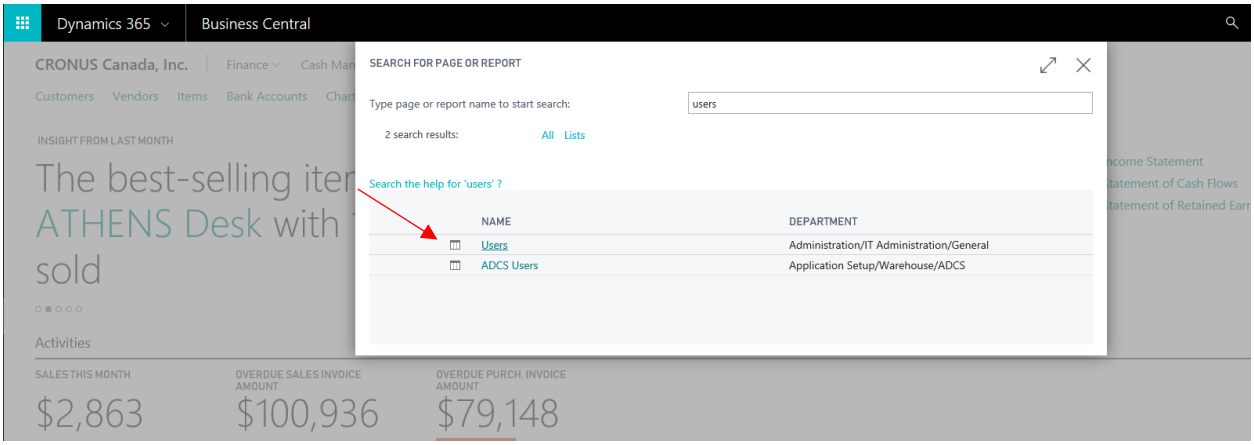
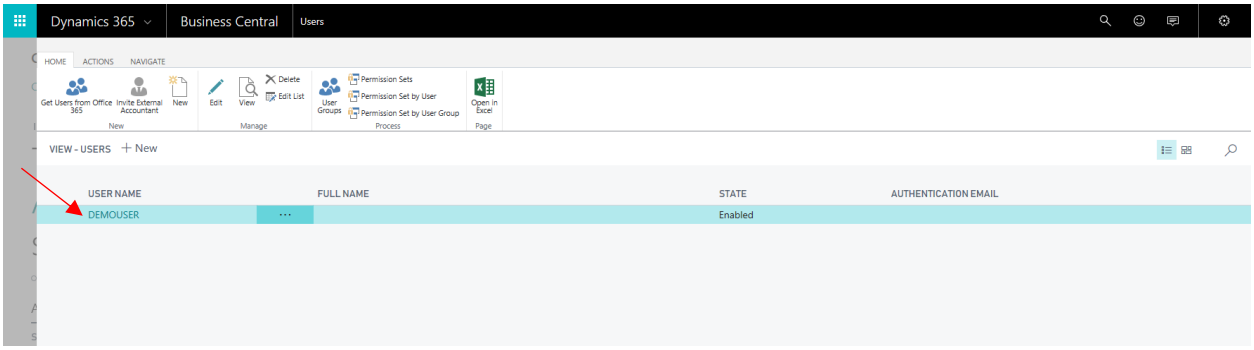
Invoice Connector for Dynamics 365 – Setup & Usage Guide

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

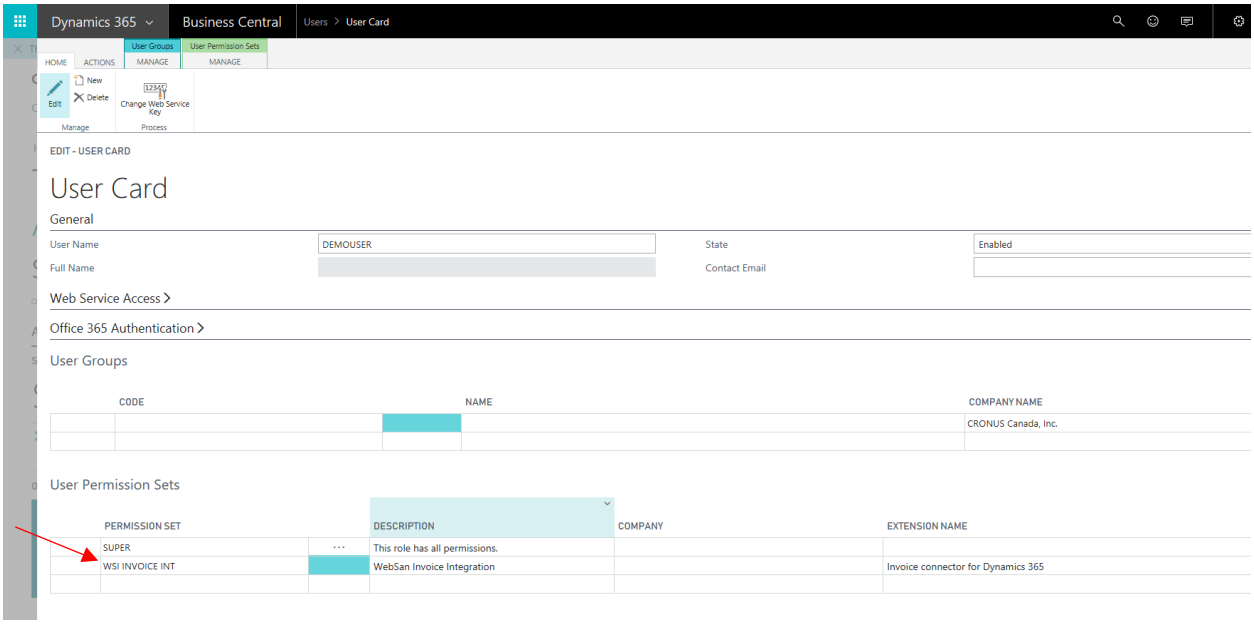
1. Assign User App Permissions by using the search function and typing “users” in the search field.



2. Drill into user.



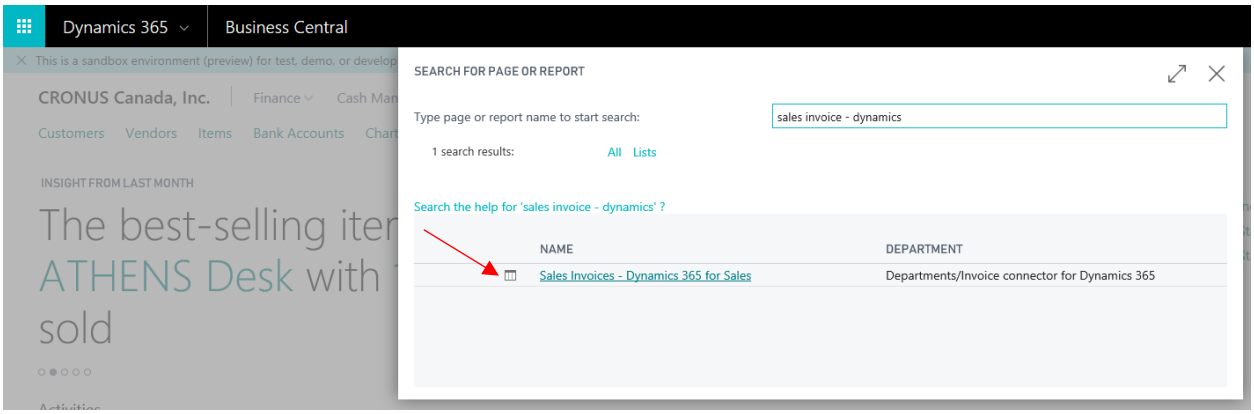
3. Add WSI INVOICE INT permission set.



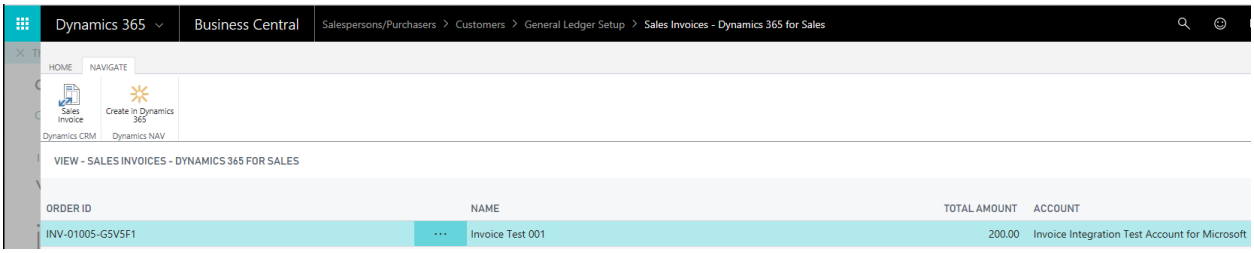
4. Follow the directions to setup and integrate your Microsoft Dynamics 365 Business Central environment with your Dynamics 365 for Sales environment. Integrate Dynamics 365 for Sales. For this application to work successfully, you will need to have successfully coupled your Customers and accounts along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

Usage

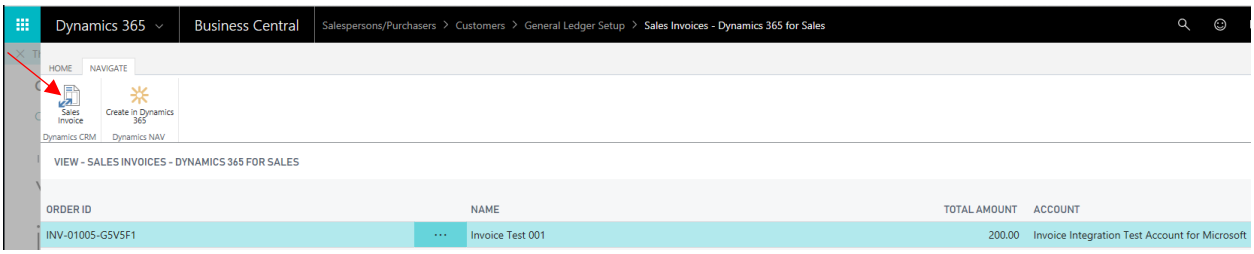
1. After you have completed all tasks to integrate your Dynamics 365 for Sales environment, navigate to the Sales Invoices – Dynamics 365 for Sales page.



2. 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.

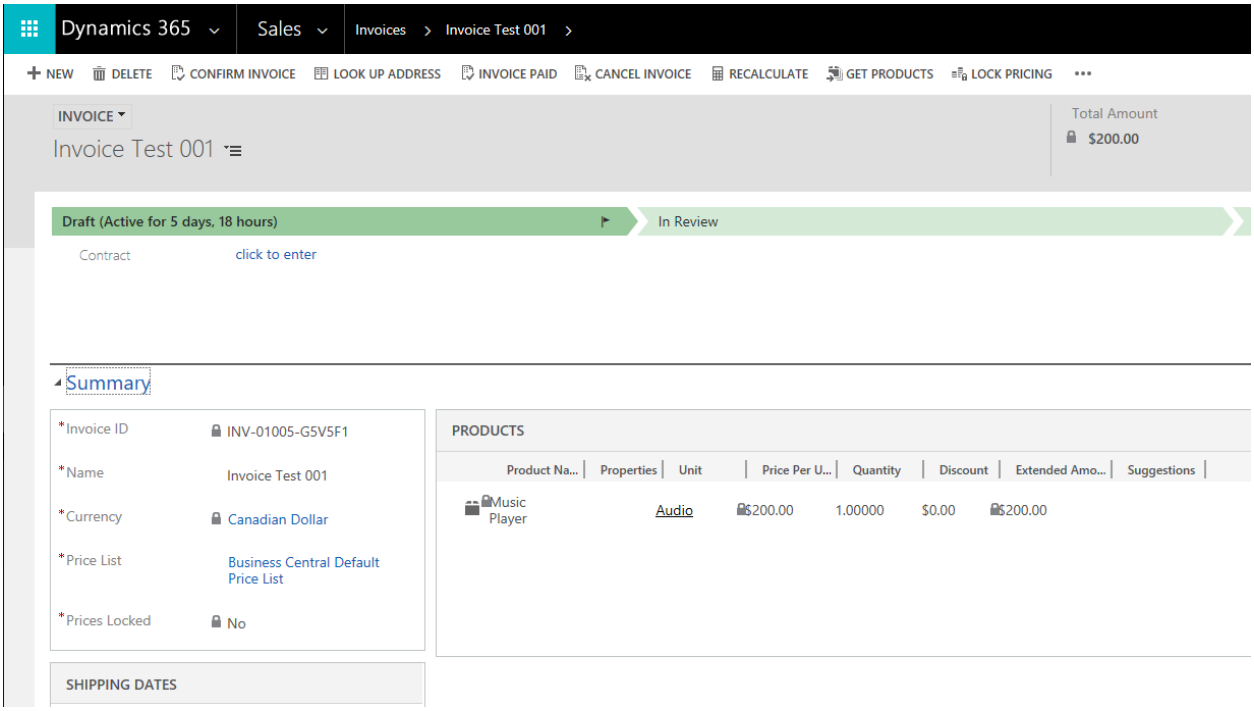


3. On the navigate tab, pressing the Sales Invoice action will open this Invoice record in your Dynamics 365 for Sales application.

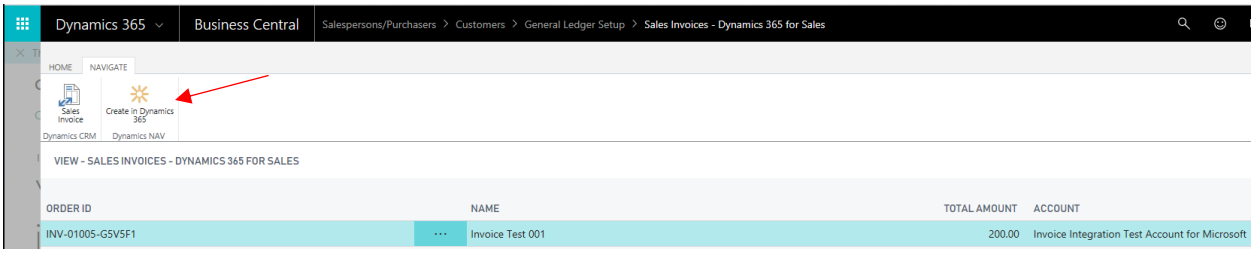


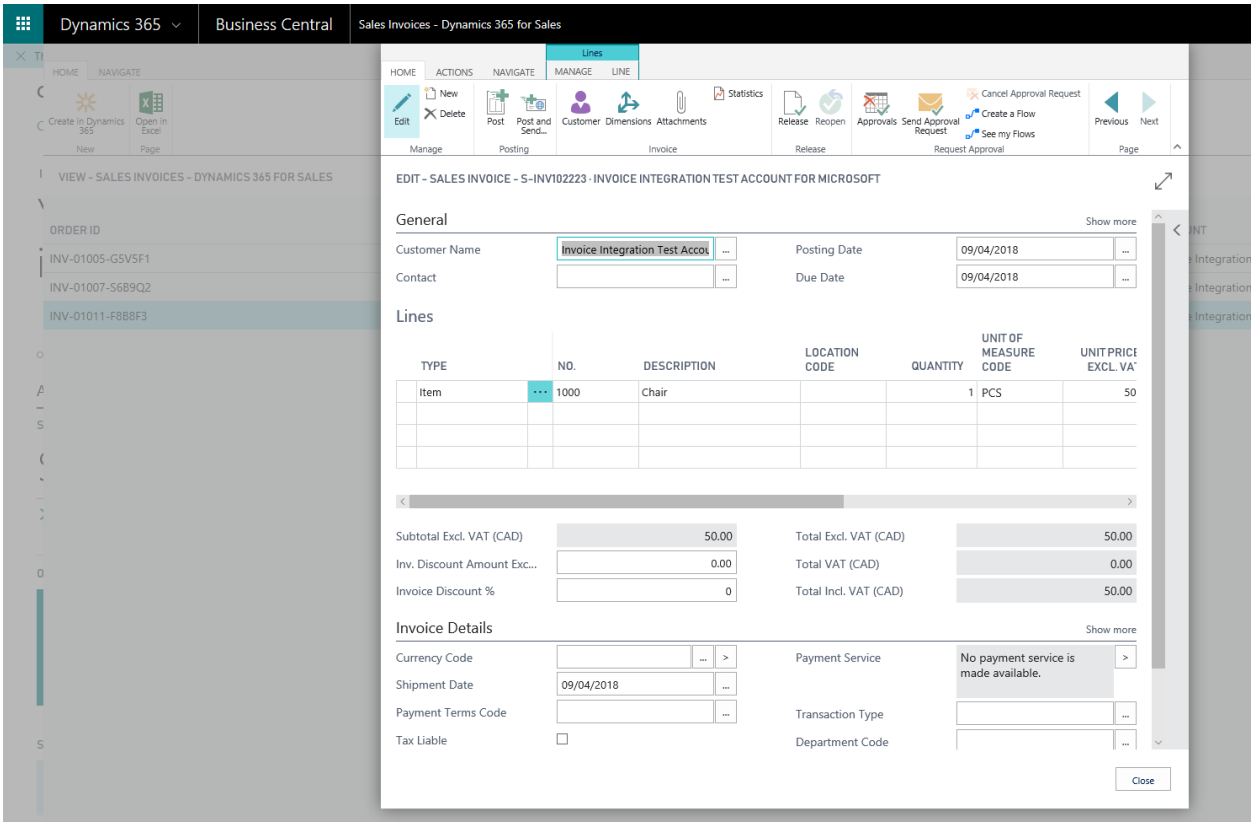
Invoice Connector for Dynamics 365 – Setup & Usage Guide

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

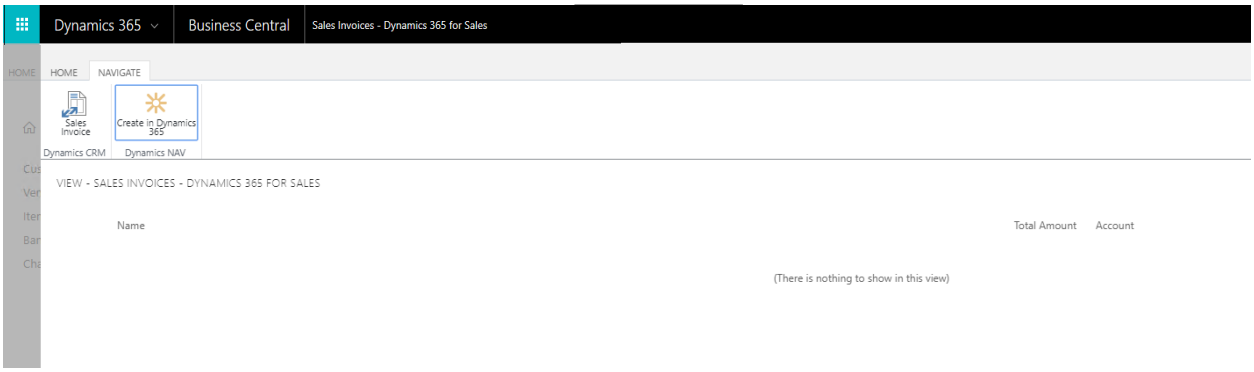


4.Pressing the Create in Dynamics 365 action will create this invoice into your Dynamics 365 Business Central application.





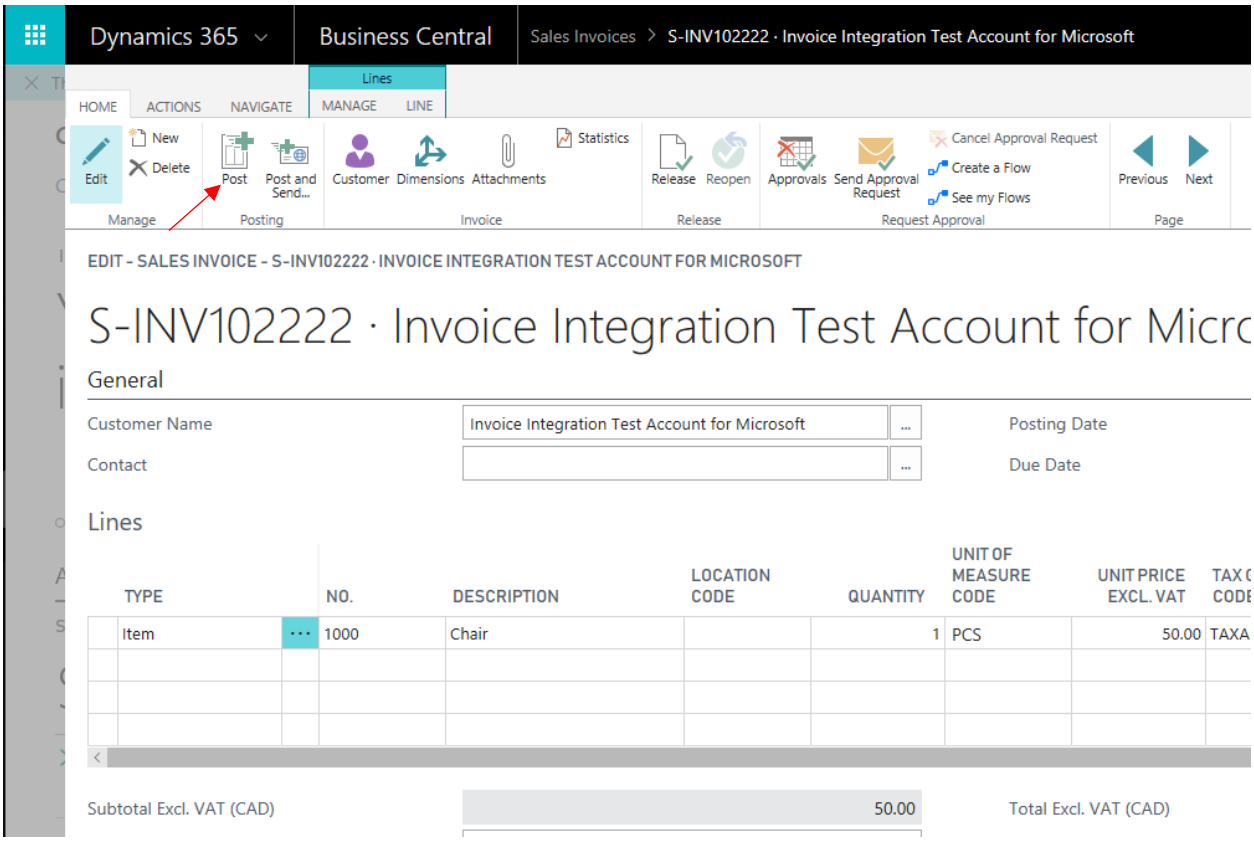
5. This invoice will now disappear from the Sales Invoices – Dynamics 365 for Sales page as it has been processed into your Dynamics 365 Business Central application.

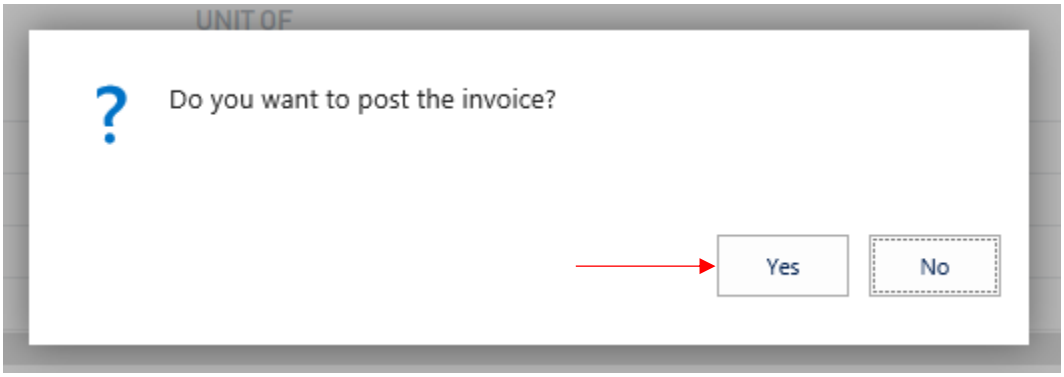


6. Once you have posted and paid this Sales Invoice in your Dynamics 365 Business Central application, the Status of the Dynamics 365 for Sales Invoice will be updated to paid.

Invoice Connector for Dynamics 365 – Setup & Usage Guide

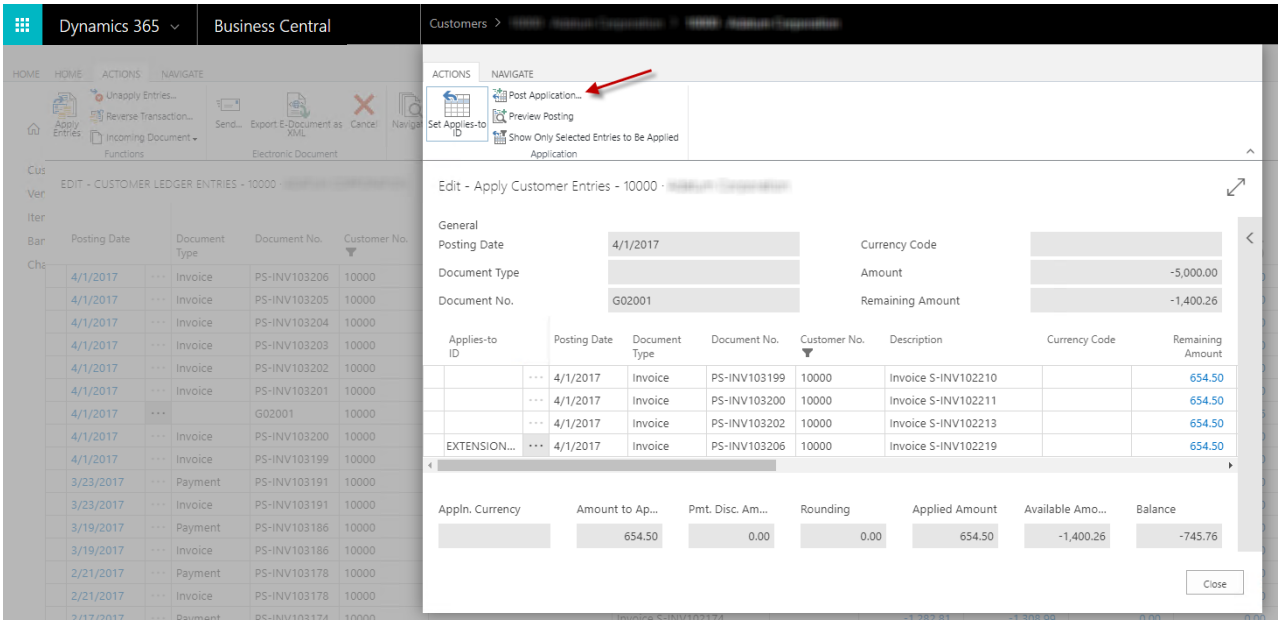
If you would like to purchase our app, scroll to the last page.

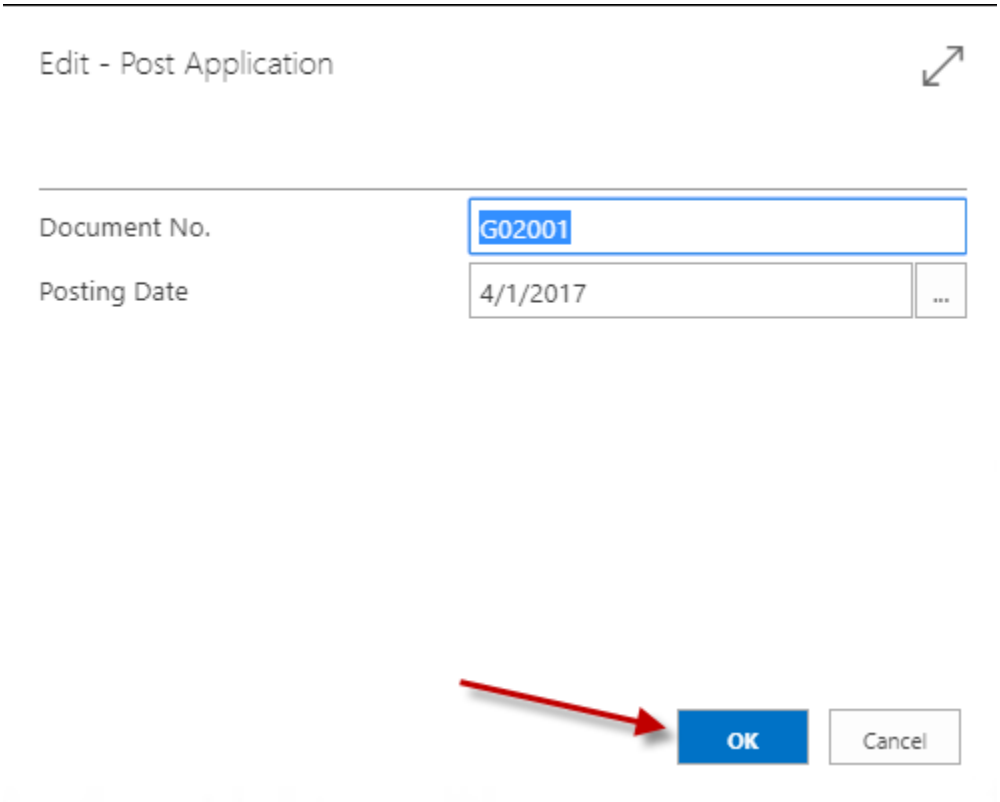




Invoice Connector for Dynamics 365 – Setup & Usage Guide

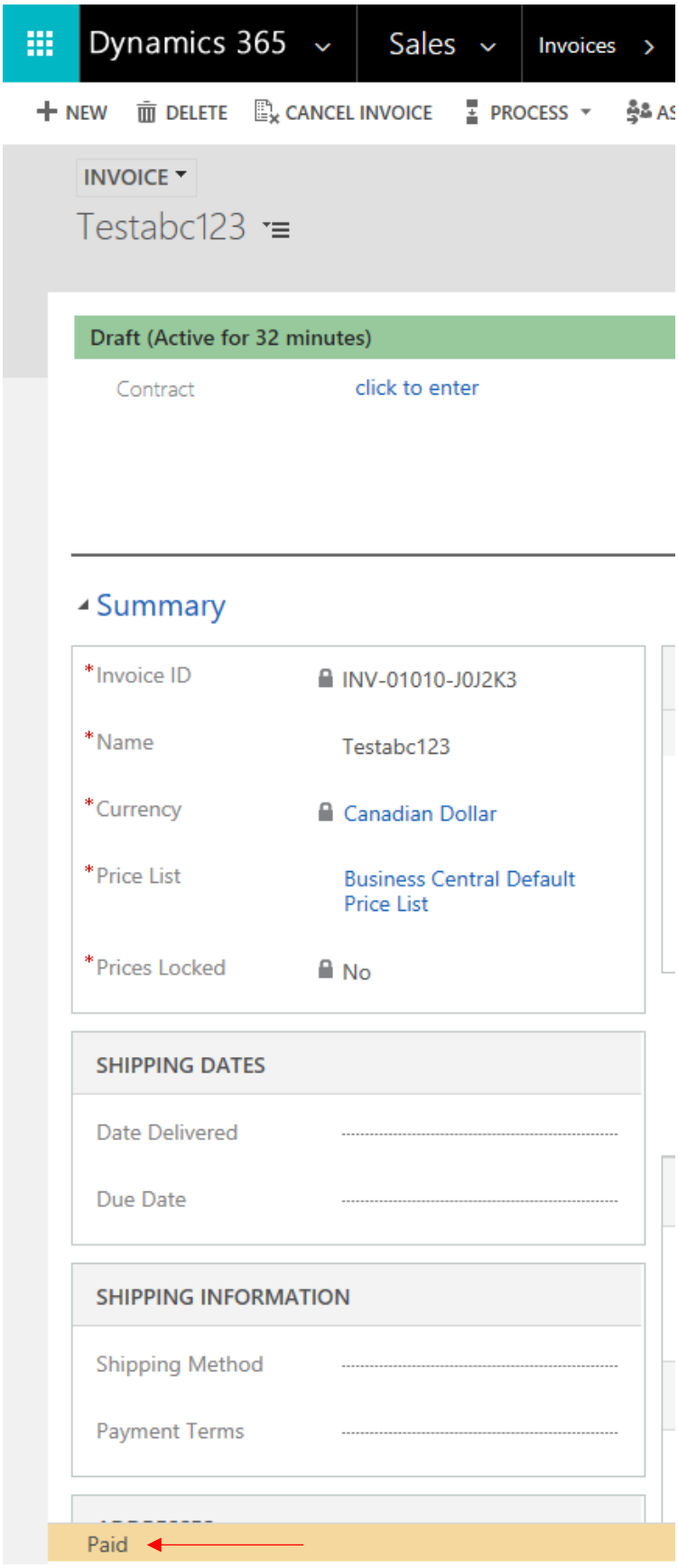
If you would like to purchase our app, scroll to the last page.





Invoice Connector for Dynamics 365 – Setup & Usage Guide

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

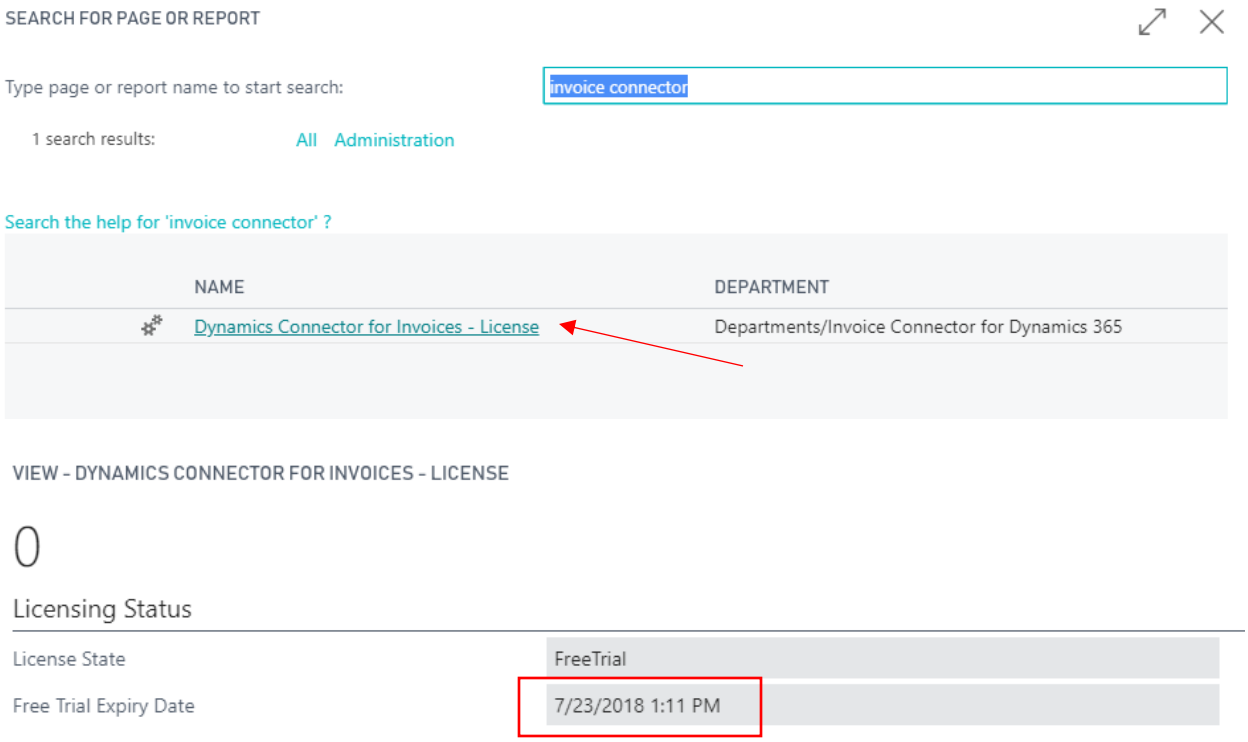


Invoice Connector for Dynamics 365 – Setup & Usage Guide

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

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.



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