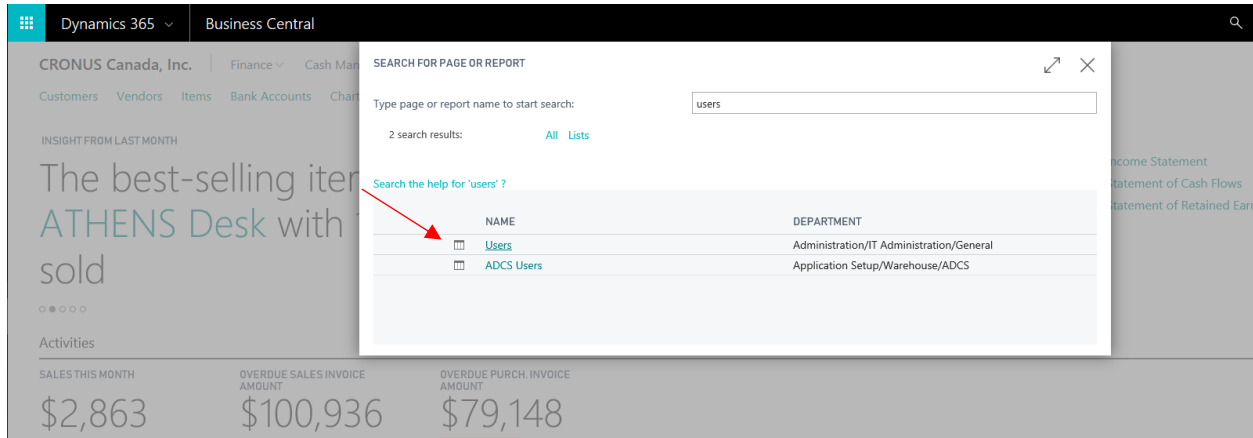
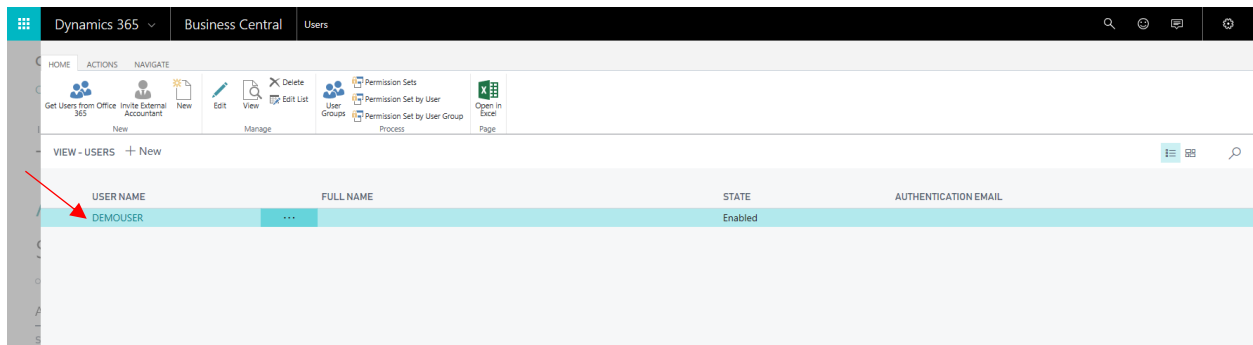


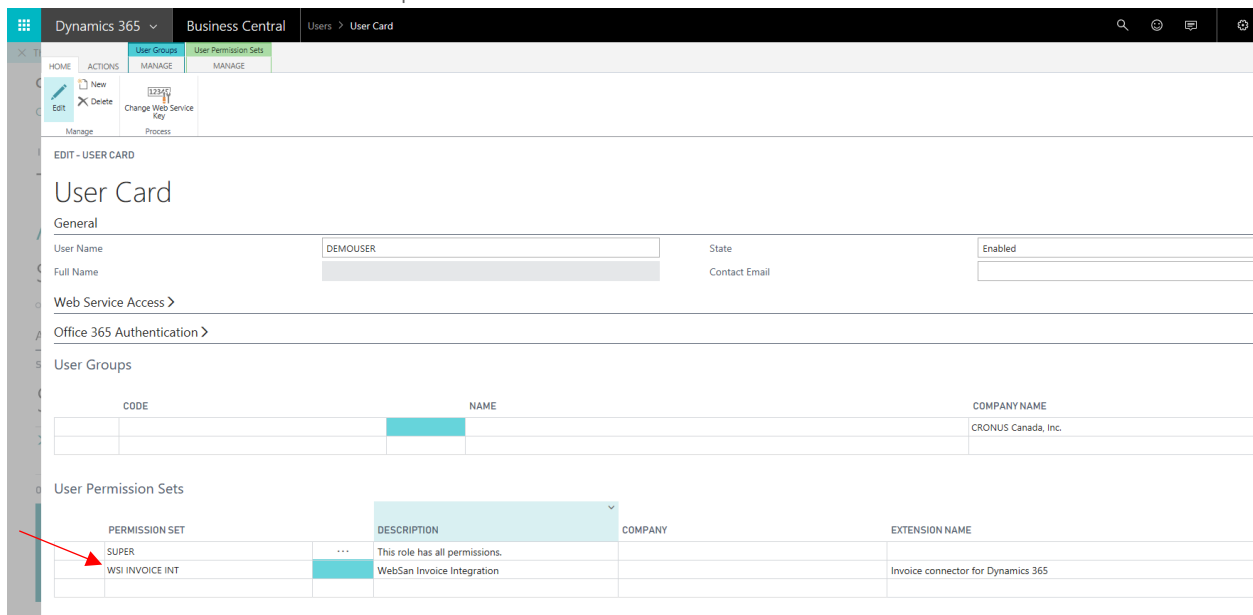
1. Assign User App Permissions by using the search function and typing “users” in the search field.



2. Drill into user.



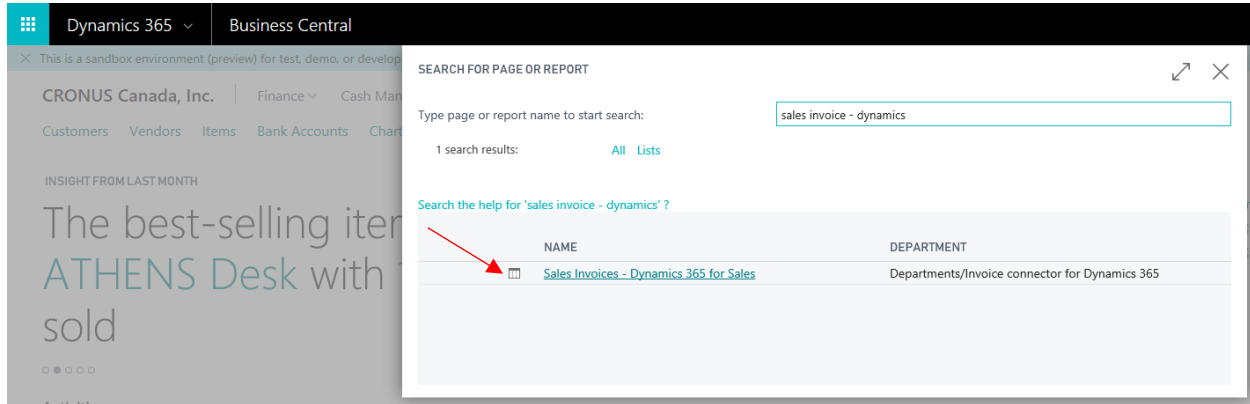
3. Add WSI INVOICE INT permission set.



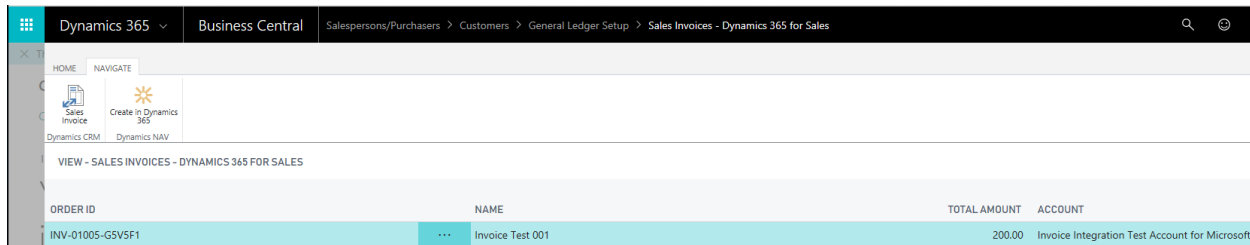
4. Follow the directions to setup and integrate your Microsoft Dynamics 365 Business Central environment with your Dynamics 365 for Sales environment. [Integrate Dynamics 365 for Sales](#). For this application to work successfully, you will need to have successfully coupled your Customers and accounts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

## Usage

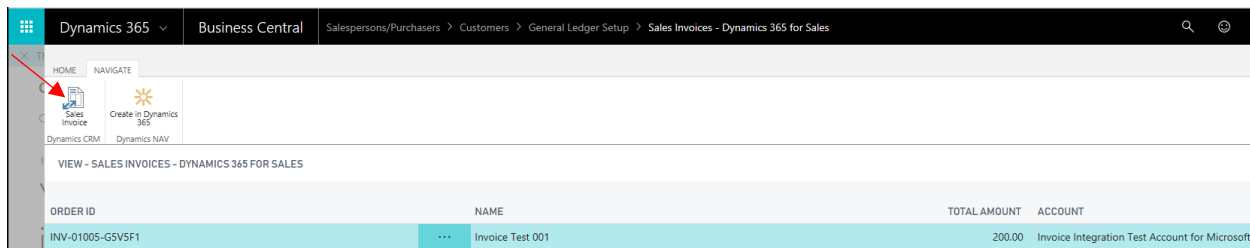
1. After you have completed all tasks to integrate your Dynamics 365 for Sales environment, navigate to the Sales Invoices – Dynamics 365 for Sales page.



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



The screenshot shows the Dynamics 365 interface for an invoice. At the top, the navigation bar includes '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 area displays 'INVOICE' and 'Invoice Test 001', with 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 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 also visible:

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 partially 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 navigation bar includes 'Dynamics 365', 'Business Central', and 'Salespersons/Purchasers > Customers > General Ledger Setup > Sales Invoices - Dynamics 365 for Sales'. Below this is a 'NAVIGATE' section with two buttons: 'Sales Invoice' and 'Create in Dynamics 365'. A red arrow points to the 'Create in Dynamics 365' button. Below the navigation bar is a table titled 'VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES' with the following data:

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

The screenshot displays 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 window title is "EDIT - SALES INVOICE - S-INV102223 - INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT".

**General Information:**

- Customer Name: Invoice Integration Test Account
- Posting Date: 09/04/2018
- Contact: (empty)
- Due Date: 09/04/2018

**Lines Table:**

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

**Summary Totals:**

- 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: (empty)
- Shipment Date: 09/04/2018
- Payment Terms Code: (empty)
- Tax Liabile:
- Payment Service: No payment service is made available.
- Transaction Type: (empty)
- Department Code: (empty)

- 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 window title is "VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES".

The interface shows a list view with columns for Name, Total Amount, and Account. The list is currently empty, with the message "(There is nothing to show in this view)" displayed at the bottom.

- 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.

Dynamics 365 Business Central Sales Invoices > S-INV102222 · Invoice Integration Test Account for Microsoft

HOME ACTIONS NAVIGATE MANAGE LINE

Edit New Delete Post Post and Send... Customer Dimensions Attachments Statistics Release Reopen Approvals Send Approval Request Cancel Approval Request Create a Flow See my Flows Previous Next

Manage Posting Invoice Release Request Approval Page

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

## S-INV102222 · Invoice Integration Test Account for Microsoft

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)

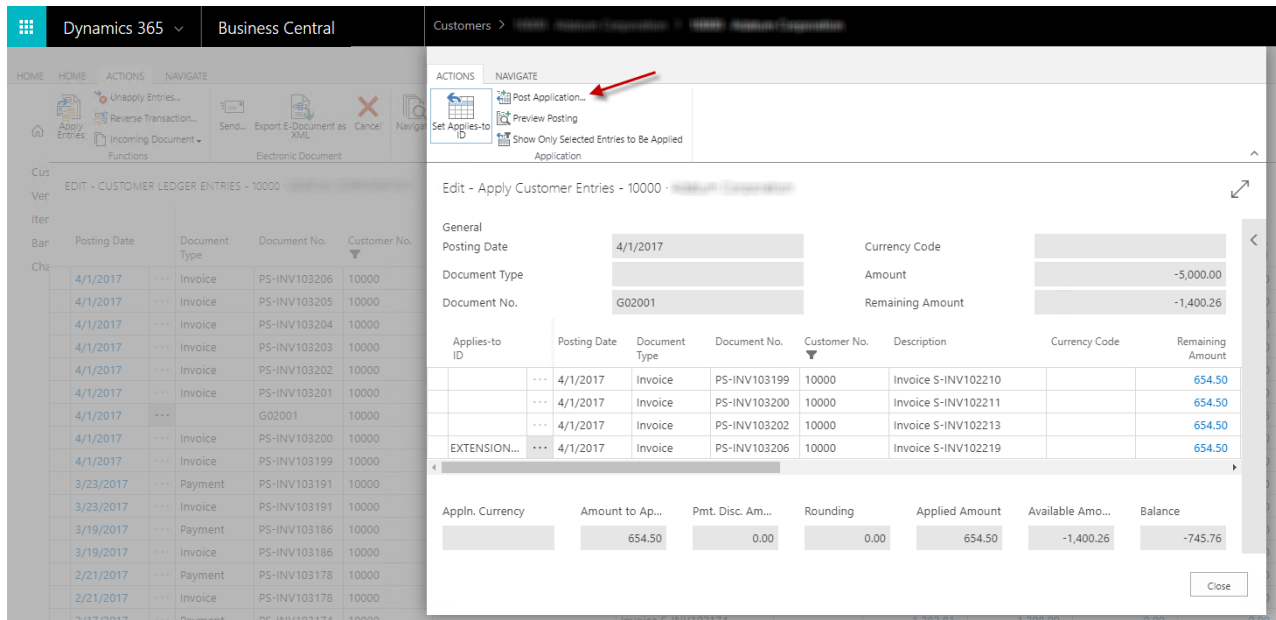
UNIT OF

?

Do you want to post the invoice?

Yes No

# Invoice Connector for Dynamics 365 – Setup & Usage Guide



The screenshot shows the Dynamics 365 Business Central interface. The 'Apply Customer Entries' dialog box is open, displaying a list of entries and summary statistics. A red arrow points to the 'Post Application...' button in the ACTIONS menu.

Posting Date	Document Type	Document No.	Customer No.
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
3/23/2017	Payment	PS-INV103191	10000
3/19/2017	Payment	PS-INV103186	10000
3/19/2017	Invoice	PS-INV103186	10000
2/21/2017	Payment	PS-INV103178	10000
2/21/2017	Invoice	PS-INV103178	10000

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

**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** ←