



User Guide

GP to BC Migration Assistant

Last updated: October 31, 2024

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1. ABOUT



Simplify the Microsoft Dynamics GP to Microsoft Dynamics 365 Business Central transition process by aligning Microsoft Dynamics 365 Business Central process flows more closely with those of Microsoft Dynamics GP. Use documents' information for filtering and easy visualization, add up to 3 custom fields to different documents, and filter Historical General Journal lines by document number.

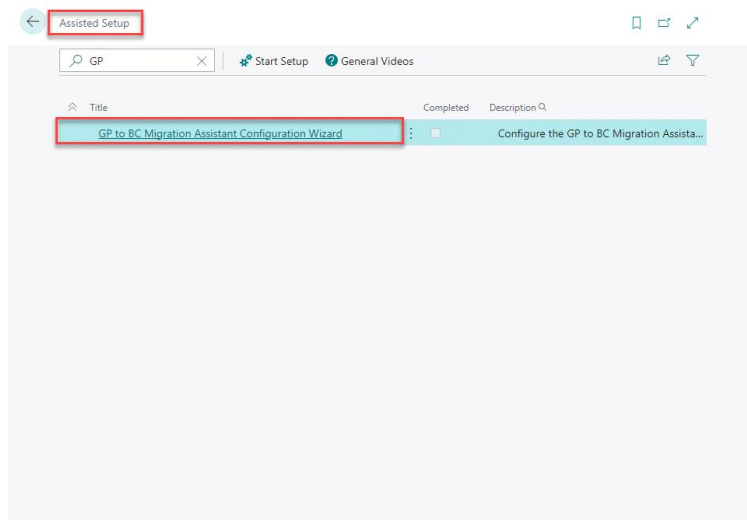
For more information, please go to <https://www.websan.com/gp-to-bc-migration-assistant>

2. BASIC SETUP

This section covers the basic system setup needed to use the GP to BC Migration Assistance app. These steps should be completed prior to using the app.

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the GP to BC Migration Assistance Configuration Wizard.



3. Follow the instructions in the wizard. You will be ready to start using the application.

GP to BC Migration Assistant On-Boarding Wiz... ↗ ✕

GP to BC Migration Assistant Setup

Thank you for using the GP to BC Migration Assistant application by WebSan Solutions Inc. For more information about the application, please visit <https://www.websan.com/gp-to-bc-migration-assistant>

Please follow along to configure the solution. Configuration can be changed at any time by navigating to the appropriate setup windows in Business Central.

Let's go!

Choose Next to start configuring GP to BC Migration Assistant module.

To manually configure the application, refer to the remaining topics of the Basic Setup section in this user guide.

General Settings

Use the magnifying glass tool to go to the My Settings page. Turn on the Display Migration Help toggle to enable Dynamics GP to Dynamics 365 Business Central instructional videos.

My Settings

Role Business Manager

Company CRONUS Canada, Inc.

Work Date 2024-10-21

Region English (Canada)

Language English (Canada)

Time Zone (UTC-05:00) Eastern Time (US & Canada)

Notifications [Change when I receive notifications.](#)

Teaching Tips

Legacy Action Bar

Display Migration Help

Security

Your last sign in was on 24-10-31 10:06 AM.







OK Cancel

Instructional videos can be found in the following pages:

- G/L Account Categories
- Posting Groups
- General Posting Setup
- Dimensions
- General Ledger Setup
- Chart of Accounts
- Cash Receipt Journals
- Register Customer Payments
- Payment Journals
- Vendor Card
- Customer Templates
- Customer Card
- Customers
- General Journals
- General Ledger Entries
- Purchase Invoices
- Purchase Invoice
- Sales Journals
- Sales Invoices
- Sales Invoice

Use the magnifying glass tool to go to the GP to BC Migration Assistance Setup page. In the table that appears, note that there are different entities available: Customer, Vendor, Item, Sales Header, and Purchase Header. For the Entity of your choosing:

1. Update the value in one of the “Label” fields. This is the name that the custom field will display in your desired entity’s card.
2. Select a field type. Options are: Text, Date, & Decimal.
3. Check the “Enabled” box to enable the custom field. This will make the field visible and modifiable in its respective card.
4. Check the “Required” box to make the field required.





✓ Saved



GP to BC Migration Assistant Setup

User Defined Fields

User Defined Fields Setup ▾

Entity	Label	Type	Enabled	Required	Default From
→ Customer	Cust. Custom Text Field	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Customer	Cust. Custom Date Field	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Customer	Cust. Custom Decimal Field	Decimal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Vendor	Vendor Custom Text	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Vendor	Vendor Custom Date	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Vendor	Vendor Custom Dec	Decimal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Item	Champ de texte/Text field	Text	<input type="checkbox"/>	<input type="checkbox"/>	
Item	Champ de date/Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	
Item	Champ de decimal/Decimal Fi...	Decimal	<input type="checkbox"/>	<input type="checkbox"/>	

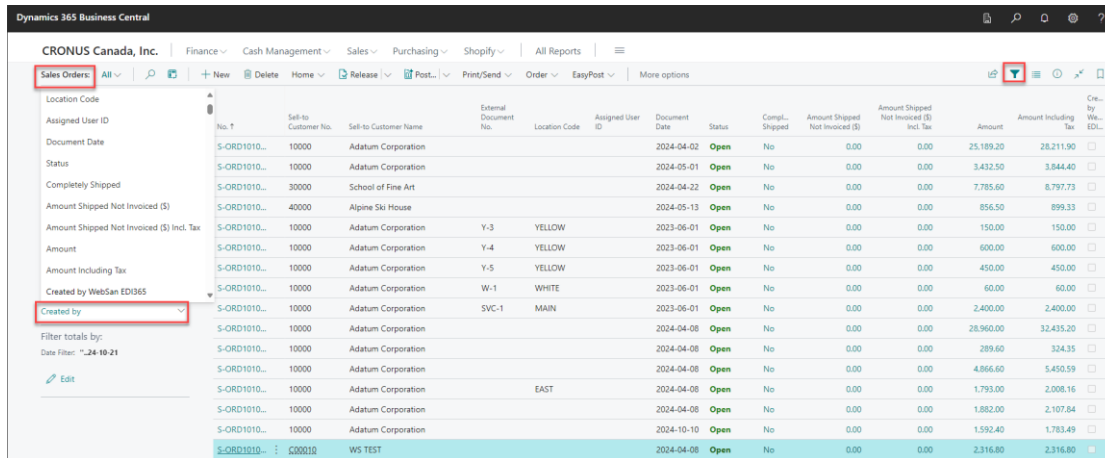
3. FUNCTIONALITY

The GP to BC Migration Assistant app allows users to replicate Dynamics GP process flows in Dynamics 365 Business Central, including: Batch Viewing and User Defined Fields.

Batch Viewing

Batch viewing is available for Sales & Purchase documents. To use this feature:

1. Go to the Sales or Purchase list page.
2. Use the 'Created by' and/or 'Created at' filters to display a list of your desired documents.



The documents in the list will be filtered according to the values set in the filters.

User-Defined Fields

Once the user-defined fields have been configured, these can be utilized like any other standard Business Central field. For example, the text field “Transportation Instructions” field was added to the Item entity; the field is enabled and required.

Entity	Label	Type	Ena...	Req...	Default From
Customer	Champ de texte/Text field	Text	<input type="checkbox"/>	<input type="checkbox"/>	
Customer	Champ de date/Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	
Customer	Champ de decimal/Decimal Field	Decimal	<input type="checkbox"/>	<input type="checkbox"/>	
Vendor	Champ de texte/Text field	Text	<input type="checkbox"/>	<input type="checkbox"/>	
Vendor	Champ de date/Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	
Vendor	Champ de decimal/Decimal Field	Decimal	<input type="checkbox"/>	<input type="checkbox"/>	
→ Item	Transportation Instructions	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Item	Champ de date/Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	

In the Item Card, the custom field “Transportation Instructions” (text) is enabled and must be populated.

The screenshot shows the 'Item Card' interface for '1896-S · ATHENS Desk'. The 'Transportation Instructions' field is highlighted with a red box and contains an asterisk, indicating it is a required field. The field is currently empty. Other fields include 'No.' (1896-S), 'Description' (ATHENS Desk), 'Type' (Inventory), 'Base Unit of Measure' (PCS), 'Item Category Code' (DESK), 'Variant Mandatory if Exists' (Default (No)), 'Service Level' (0.00), 'Created By', and 'Created Date' (2024-09-25 7:02 AM).

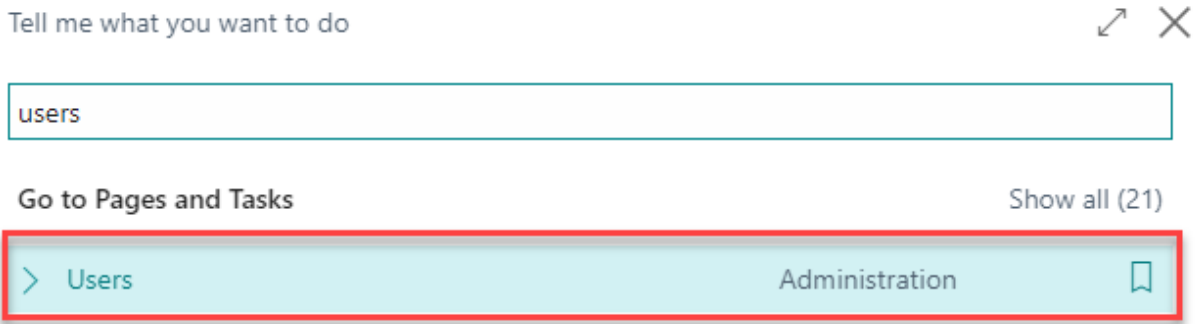
Item		Show more
No.	1896-S	Item Category Code DESK
Description	ATHENS Desk	Variant Mandatory if Exists Default (No)
Blocked	<input type="checkbox"/>	Service Level 0.00
Type	Inventory	Transportation Instructions *
Base Unit of Measure	PCS	Created By
Landed Cost Group ID		Created Date 2024-09-25 7:02 AM

4. SECURITY

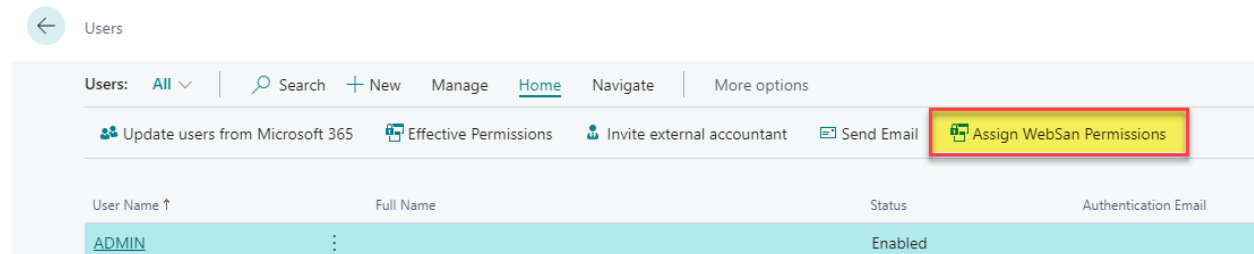
The GP to BC Migration Assistant app, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



5. REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.

Tell me what you want to do ↗ ✕

websan client information

Go to Pages and Tasks

> WebSan Client Information Administration 🔖

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.

📄 🔗 + 🗑️ ✓ Saved 🔖 🔄 ↗

WebSan Client Information

📄 Transmit Data

General

MS Client ID On Hold

Active

Contact Information

Company *	PostalCode / ZipCode *
Name *	Country *
Address *	Phone
Address2	Email
City *	Email CC
Province / State *	Billing is Same as Co... <input checked="" type="checkbox"/>