



User Guide

Invoice Connector

Last updated: February 10, 2025

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1. ABOUT

The Invoice Connector application is designed to facilitate invoice creation from Dynamics 365 for Sales, Project Servier, and Field Service, and have those flow into Dynamics 365 Business Central. This seamless transfer of data allows for real-time information access in your system of choice & eliminates manual data entry.

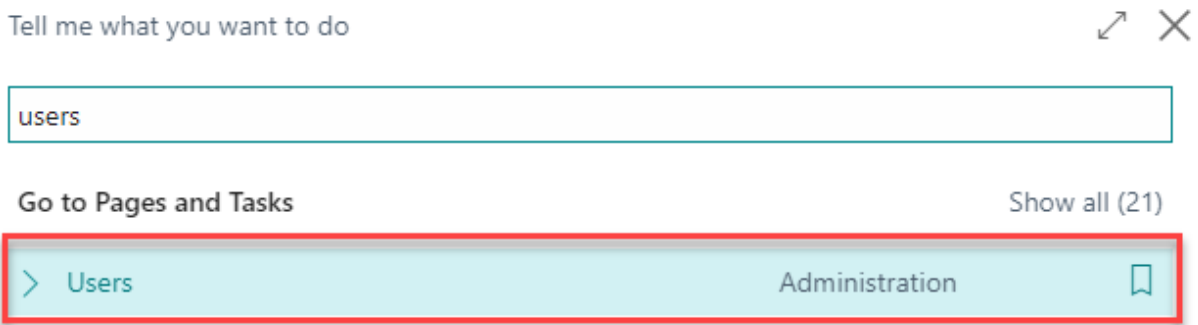
For more information, please go to <https://www.websan.com/invoice-connector-for-dynamics-365>

2. SECURITY

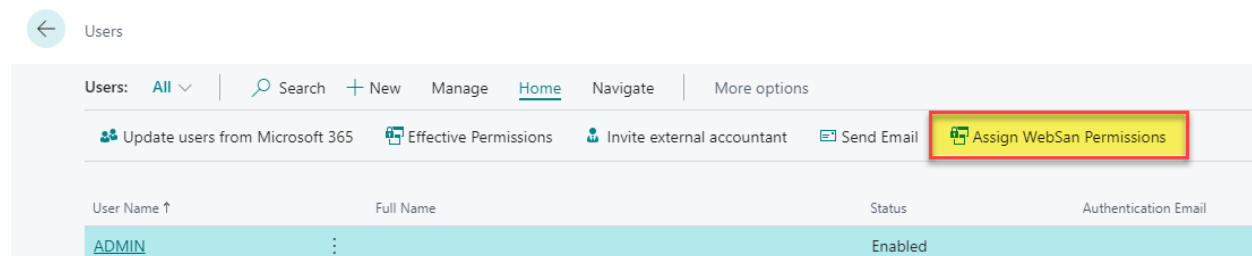
The Invoice Connector App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other 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.



3. 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

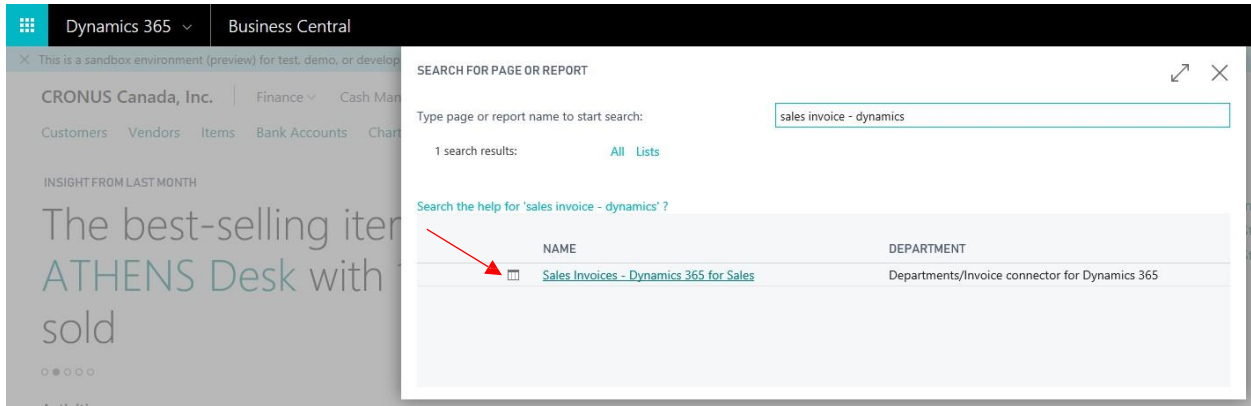
Province / State *

Billing is Same as Co...

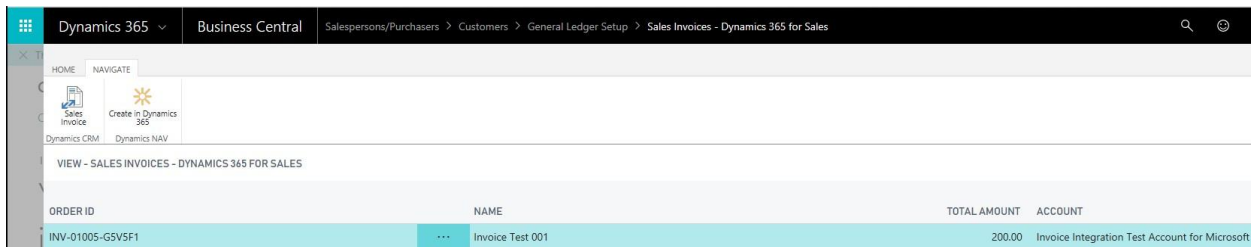
4. FEATURES

Note: For this application to work successfully, you will need to have successfully coupled your Customers & Accounts along with Items & Resources between systems.

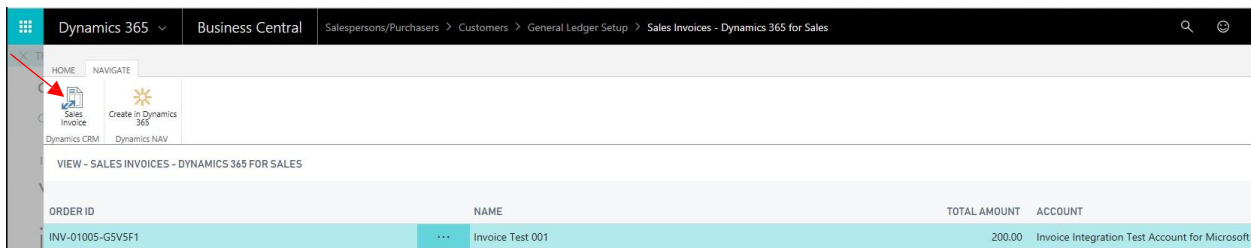
1. After you have completed all tasks to integrate your Dynamics 365 for Sales environment, navigate to the Sales Invoices – Dynamics 365 for Sales page.



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. Only invoices that are active with the status reason billed are integrated into Dynamics 365 Business Central.



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



Dynamics 365 Sales Invoices Invoice Test 001

+ NEW DELETE CONFIRM INVOICE LOOK UP ADDRESS INVOICE PAID CANCEL INVOICE RECALCULATE GET PRODUCTS LOCK PRICING ...

INVOICE Invoice Test 001 Total Amount \$200.00

Draft (Active for 5 days, 18 hours) In Review

Contract [click to enter](#)

Summary

*Invoice ID	INV-01005-GSV5F1
*Name	Invoice Test 001
*Currency	Canadian Dollar
*Price List	Business Central Default Price List
*Prices Locked	No



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

SHIPPING DATES

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

Dynamics 365 Business Central Salespersons/Purchasers Customers General Ledger Setup Sales Invoices - Dynamics 365 for Sales

HOME NAVIGATE

Dynamics CRM Dynamics NAV

VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES

ORDER ID	NAME	TOTAL AMOUNT	ACCOUNT
INV-01005-GSV5F1	Invoice Test 001	200.00	Invoice Integration Test Account for Microsoft

EDIT - SALES INVOICE - S-INVI02223 - 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 Ex...	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 Liab:

- 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.

VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES

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.

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

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) Total Excl. VAT (CAD)

UNIT OF

Do you want to post the invoice?

Yes No

Dynamics 365 Business Central

Customers > 10000 Microsoft Corporation > 10000 Microsoft Corporation

HOME ACTIONS NAVIGATE

Unapply Entries... Reverse Transaction... Send... Export E-Document as XML... Cancel... Navigate

Functions Electronic Document

ACTIONS NAVIGATE

Post Application... Preview Posting Show Only Selected Entries to Be Applied Application

Set Applies-to ID

EDIT - CUSTOMER LEDGER ENTRIES - 10000

General

Posting Date: 4/1/2017 Currency Code: Amount: -5,000.00

Document Type: Document No.: G02001 Remaining Amount: -1,400.26

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

Close

Edit - Post Application



Document No.

G02001

Posting Date

4/1/2017

...



OK

Cancel

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 ←