

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.

Tell me what you want to do		2 X
users		
Go to Pages and Tasks	Show all (21)	
> Users	Administration	Д

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

\leftarrow	Users									
	Users: All \lor	,	- New Manage	Home	Navigate	More option:	5			
	🚨 Update users fr	🗄 Effective Perm	Effective Permissions		al accountant	🖃 Send Email	🖶 Assign WebSan Permissions			
	User Name 1		Full Name				Status	Authentication Em	ail	
	ADMIN	÷					Enabled			

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	\sim >
websan client information	
Go to Pages and Tasks	
> WebSan Client Information	Administration
n the WebSan Client Information	window, enter your company's contact and billing
nformation. After your informatio	n is complete, select Transmit Data.
WebSan Client Inf	ormation
🔂 Transmit Data	
General	
MS Client ID · · · · · · ·	On Hold
Active	
Contact Information	
Company · · · · · · · *	PostalCode / ZipCode \star
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.



 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.

	Dynamics 365 🗸	Business Central	Salespersons/Purchasers > Cu	sers > Customers > General Ledger Setup > Sales Invoices - Dynamics 365 for Sales							
×n	HOME NAVIGATE										
((Sales Invoice Dynamics CRM Dynamics NAV	YNAMICS 365 FOR SALES									
N	ORDER ID			NAME TOTAL AMOUNT	ACCOUNT						
i	INV-01005-G5V5F1			Invoice Test 001 200.00	Invoice Integration Test Account for Microsoft						

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

	Dynamics 365 ${\scriptstyle \lor}$	Business Central	Salespersons/Purchasers > C	alespersons/Purchasers > Customers > General Ledger Setup > Sales Invoices - Dynamics 365 for Sales						
\checkmark	HOME NAVIGATE									
	Sales Invoice Dynamics CRM Dynamics NAV									
	VIEW - SALES INVOICES - D	YNAMICS 365 FOR SALES								
	ORDERID			NAME		TOTAL AMOUNT	ACCOUNT			
	INV-01005-G5V5F1			Invoice Test 001		200.00	Invoice Integration Test Account for Microsoft			

ew 前 delete 🛛	CONFIRM INVOICE 🗉 LOOK UP ADD	RESS	CANCEL INVOICE	RECALCULATE	SET PRODUC	TS ■FB LOCK PRICING	•••
<mark>INVOICE ▼</mark> Invoice Test	001 ' ≡						Total Amount
Draft (Active for 5	days, 18 hours)		► In Revie	w			
Contract	click to enter						
▲ Summary							
Summary	■ INV-01005-G5V5F1	PRODUCTS					
Summary Invoice ID Name	INV-01005-G5V5F1	PRODUCTS Product Na	Properties Unit	Price Per	J Quantity	Discount Extended	ed Amo Suggestions
Summary Invoice ID Name Currency	 INV-01005-G5V5F1 Invoice Test 001 Canadian Dollar 	PRODUCTS Product Na Music Player	Properties Unit Audio	Price Perl	J Quantity 1.00000	Discount Extend \$0.00 \$\$200.00	ed Amo Suggestions
Summary Invoice ID Name Currency Price List	 INV-01005-G5V5F1 Invoice Test 001 Canadian Dollar Business Central Default Price List 	PRODUCTS Product Na Music Player	Properties Unit <u>Audio</u>	Price Per 1	J Quantity 1.00000	Discount Extend \$0.00 ₽\$200.00	ed Amo Suggestions

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 Q						
× т (HOME NAVIGATE								
1	VIEW - SALES INVOICES - D	YNAMICS 365 FOR SALES							
1									
	ORDER ID			NAME		TOTAL AMOUNT	ACCOUNT		
i	INV-01005-G5V5F1			Invoice Test 001		200.00	Invoice Integration Test Account for Microsoft		

Dynamics 365 Business Central 5a	ales Invoices - Dynamics 365 for Sa	es				
HOME NAVIGATE C Create in Dynamics C Create in Dynamics New Page	HOME ACTIONS NAVIGATE	Lines MANAGE LINE Customer Dimens	sions Attachments	Release Reopen Release Repert	Cancel Approval Reque	st Previous Next
VIEW - SALES INVOICES - DYNAMICS 365 FOR SALES	EDIT - SALES INVOICE - S-INV General	/102223 · INVOICI	E INTEGRATION TEST ACCO	UNT FOR MICROSOFT		Show more
INV-01005-G5V5F1	Customer Name	Invoice Integra	tion Test Accou	Posting Date	09/04/2018	······································
INV-01007-5689Q2	Lines			Due Date	09/04/2018	Integration
	ТҮРЕ	N0.	DESCRIPTION	LOCATION CODE QUAN	UNIT OF MEASURE TITY CODE	UNIT PRICE EXCL. VA
A - S	Item •••	1000	Chair		1 PCS	50
(- 188
	¢					>
	Subtotal Excl. VAT (CAD)		50.00	Total Excl. VAT (CAD)		50.00
0	Inv. Discount Amount Exc		0.00	Total VAT (CAD) Total Incl. VAT (CAD)		0.00
	Invoice Details					Show more
	Currency Code Shipment Date	09/04/2018		Payment Service	No payment service is made available.	s >
1	Payment Terms Code			Transaction Type		
S	Tax Liable			Department Code		
						Close

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.

	Dynamics 365 v Business Central	Sales Invoices - Dynamics 365 for Sales	
HOME	HOME NAVIGATE		
ŵ	Sales Invoice Create in Dynamics		
Cus	Dynamics CRM Dynamics NAV		
Ver	VIEW - SALES INVOICES - DYNAMICS 365 FOR S	LES .	
Iter	Name	Total A	mount Account
Cha		There is nothing to show in this yield	
		(There is houring to show in one view)	

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.

	Dynamics 365 \vee	Business C	entral Sales Invoices	> S-INV102222	Invoice Integration Tele	est Account for Micro	osoft					
× Ti	HOME ACTIONS NAVIGATE	Lines MANAGE LINE										
0	Edit Delete Post ar Send.	d Customer Dimen	➤ ↓ ∑ Statistics sions Attachments	Release Reopen	Approvals Send Approval Request	Cancel Approval Request Create a Flow See my Flows	Previous Next					
1	Maringre Posting Invoice Release Request approval Page EDIT - SALES INVOICE - S-INV102222 · INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT S-INV1022222 · INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT S-INV1022222 · INVOICE INTEGRATION TEST ACCOUNT FOR MICROSOFT											
i	General											
	Customer Name Contact		Invoice Integration Tes	t Account for Micro	osoft	Posting Date	2					
0 A 	Lines	N0.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE U CODE	JNIT PRICE EXCL. VAT	TAX (CODE				
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0.	<											
	Subtotal Excl. VAT (CAD)			50.00 Total Excl. VAT (CAD)								
	UNIT OF P Do you wan	t to post th	ne invoice?	,	Yes	D						
					<u> </u>	<u>-</u>						

	Dynamics 3	65	~ Busi	iness Central		Customers >				199981 (Nonum 15m					
HOME	HOME ACTIONS	N	AVIGATE			ACTIONS NAVIO	ACTIONS NAVIGATE								
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Cus Ver				Edit - Apply Customer Entries - 10000 ·									2		
iter Bar	Posting Date		Document Type		Customer No.	General Posting Date			4/1/2017		Cur	rency Code			<
Cha	4/1/2017		Invoice			Document Type	3				Am	ount		-5,000.00	
	4/1/2017		Invoice			Document No.			G02001		Ren	aining Amount		-1,400.26	
	4/1/2017		Invoice	PS-INV103204											
	4/1/2017		Invoice			Applies-to ID		Posting Date	Document Type	Document No.	Customer No. T	Description	Currency Code	Remaining Amount	
	4/1/2017		Invoice					4/1/2017	Invoice	PS-INV103199	10000	Invoice S-INV102210		654.50	
	4/1/2017		Invoice			24		4/1/2017	Invoice	PS-INV103200	10000	Invoice S-INV102211		654.50	
	4/1/2017							4/1/2017	Invoice	PS-INV103202	10000	Invoice S-INV102213		654.50	
	4/1/2017		Invoice			EXTENSION		4/1/2017	Invoice	PS-INV103206	10000	Invoice S-INV102219		654.50	
	4/1/2017		Invoice			<		4 4							
			Payment												
			Invoice			Appln. Currenc	ý	Amoun	it to Ap	Pmt. Disc. Am	Rounding	Applied Amount	Available Amo	Balance	
			Payment						654 50	0.00	0.00	654 50	-1.400.26	-745 76	
			Invoice						034.50	0.00	0.00	054.50	1,400.20	145.70	
			Payment											C1	
			Invoice											Close	
	2/17/2017		Doument	DS-INIV103174	10000				Inunina S-IN	/105178		-1 282 81	1 202 00	0.00	0.00

Edit - Post Application

Document No.

Posting Date

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4/1/2017	

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Dynamics 365 \sim	Sales 🗸	Invoices	>
NEW 🛅 DELETE 🖺 CANC	CEL INVOICE PRO	CESS 🔻	Å₽ ¥2
INVOICE ▼ Testabc123 =			
Draft (Active for 32 minu	ites)		
Contract	click to enter		
✓ Summary			
*Invoice ID	INV-01010-J0J2K3		
*Name	Testabc123		
*Currency	Canadian Dollar		
*Price List	Business Central De Price List	efault	
*Prices Locked	No		
SHIPPING DATES			
Date Delivered			
Due Date			
SHIPPING INFORMATIO	N		
Shipping Method			
Payment Terms			
Paid 4			