Microsoft Dynamics Business Central Setup Guide

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ConnectBooster & Microsoft Dynamics Business Central Setup

Overview

Use this guide for configuring ConnectBooster to synchronize with Dynamics 365 Business Central. This guide includes step-by-step instructions for installing the required Extension. After connection is established, be certain to set your organization's preferred reconciliation behavior.

Preparation

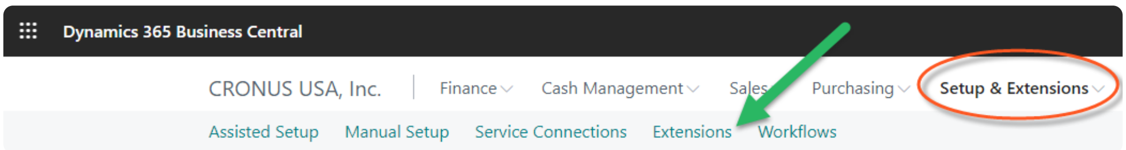
To help ensure smooth integration, the below should be verified before starting.

- Logged in to Business Central with Full Admin access.
- You have means to create or edit a User to create a "Web Service Access Key" in Business Central.
- Admin level access on your ConnectBooster "Internal User" account.

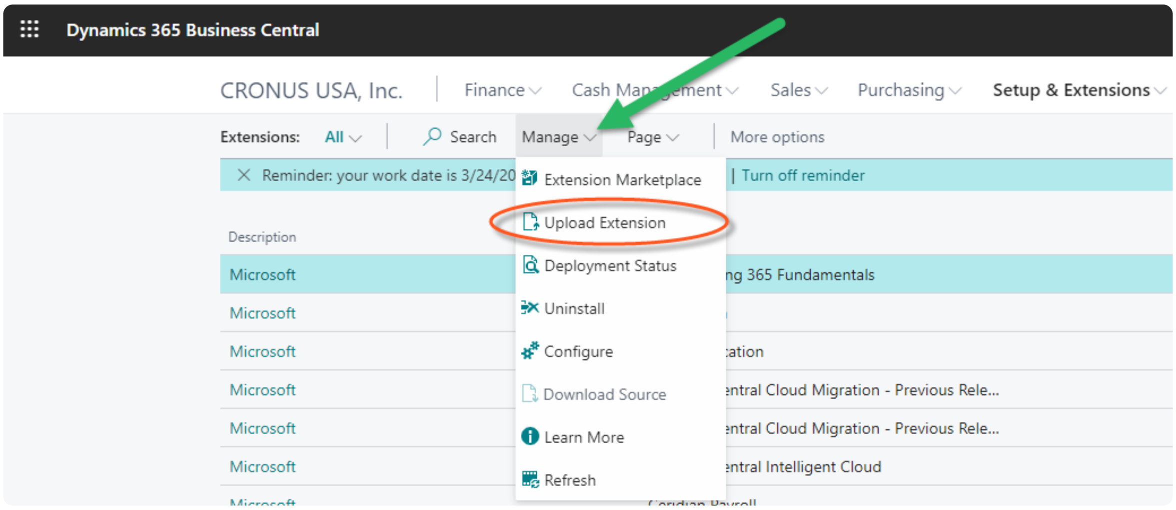
Extension Installation

The ConnectBooster Extension must be manually downloaded, and uploaded following the installation steps below.

Navigate to Setup & Extensions -> Extensions



Navigate to Manage -> "Upload Extension"



DOWNLOAD the ConnectBooster .app file:

> .APP File

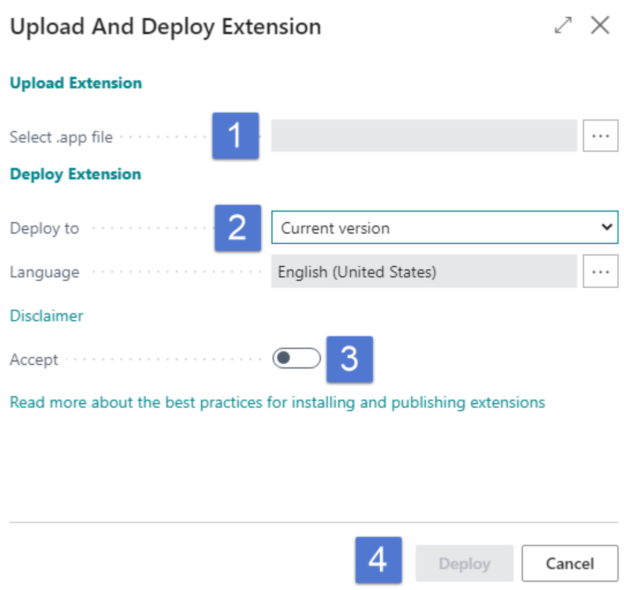
Upload And Deploy the Extension

1. Select the newly downloaded ConnectBooster .APP file.

2. Select current version for deployment.

3. Accept the extension Disclaimer

4. Deploy

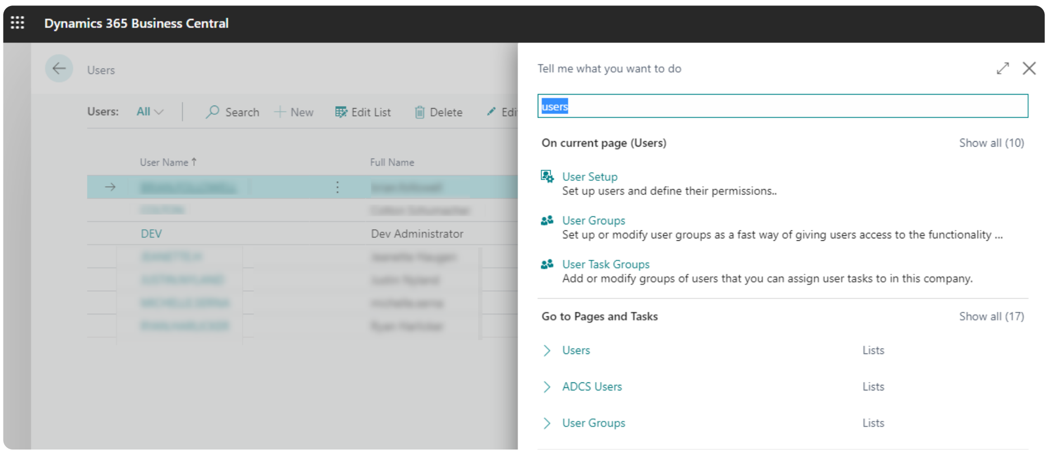


Authorization

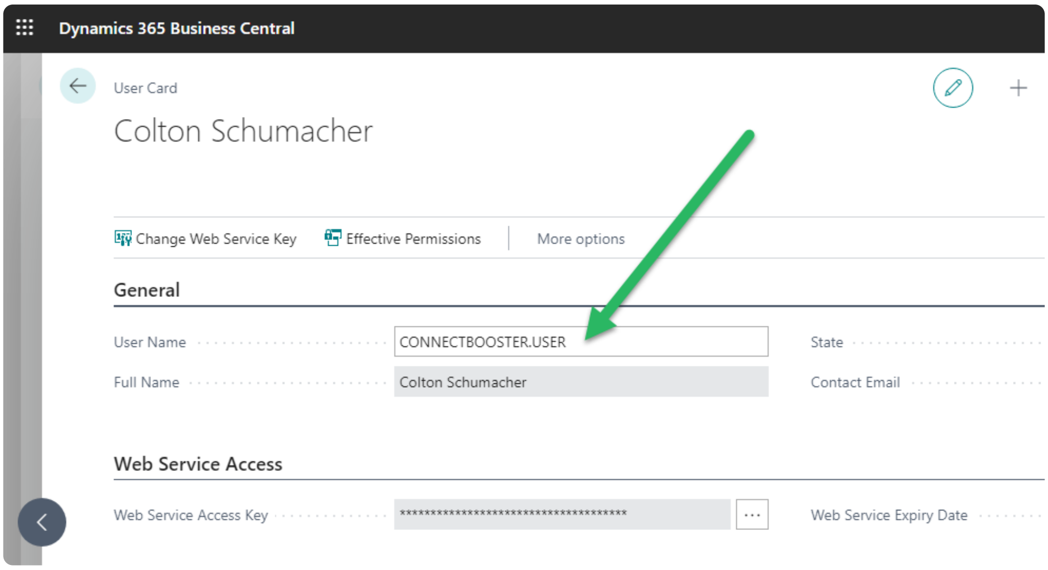
In order for ConnectBooster to establish connection with Business Central, a "User" must be configured, with a "Web Service Access Key".

Once credentials are generated in Business Central, they must subsequently be entered within your ConnectBooster portal, under Settings + Integrations.

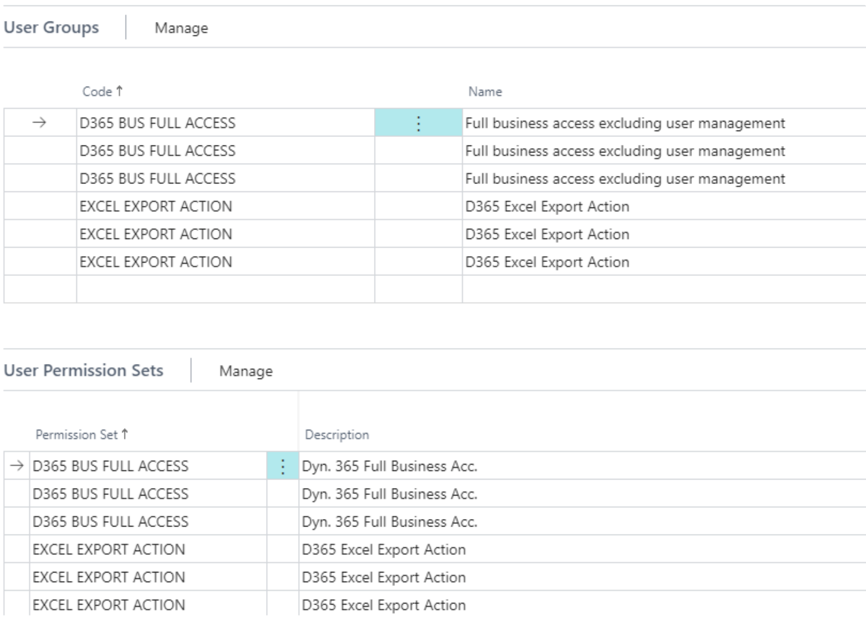
1. To begin, use the main search to navigate to Users.



2. Create a "New" User, or leverage an existing user.

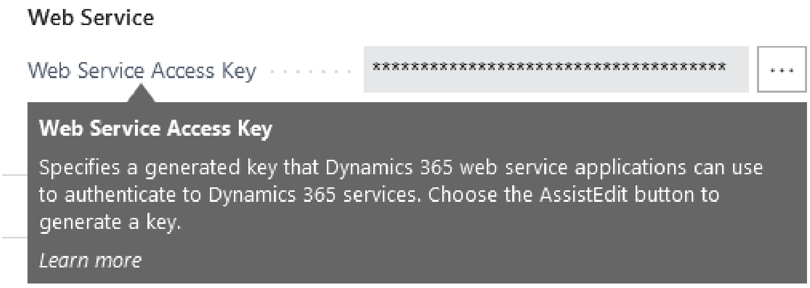


3. Enroll the new User with a User Group permission or Permission Set that has full admin access.



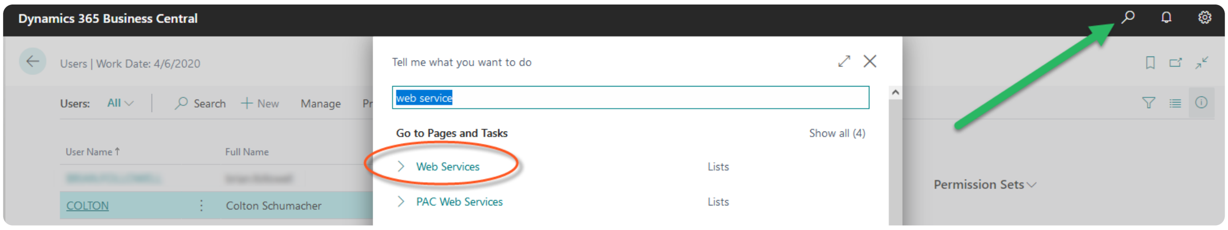
WARNING: Using Permission Sets with *less than admin* type credentials may cause failure points with the integration. ConnectBooster has been tested with Full administrator rights.

4. Generate a Web Service Access Key, document and copy to clipboard.

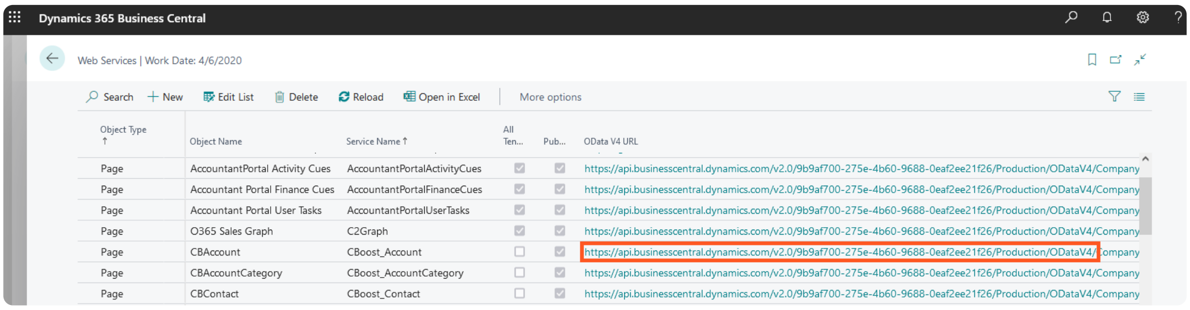


5. Fetch your company's OData V4 URL Endpoint

Search for the Web Services Lists



Select any URL with the format *https://api.businesscentral.dynamics.com/v2.0/*



Copy the URL to clipboard up to */ODataV4/*.

Note: If you right click and "copy link", the URL does NOT copy to clipboard as displayed. You need to click the URL, and copy directly from the browser URL bar.

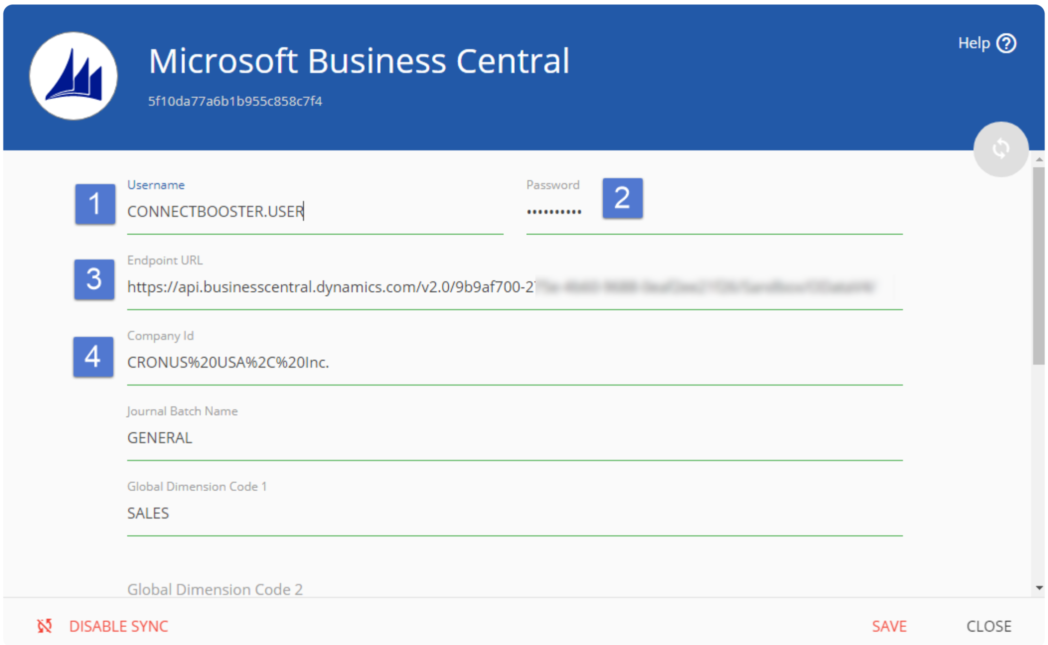
6. Fetch the Company ID

Within the ODataV4 URL, copy the Company ID (between the single quotes) to your clipboard separately.

ConnectBooster Setup

Next, within your ConnectBooster portal navigate to Settings + Configuration + Integrations.

Select the Business Central Integration Card:



> Note: if this integration does not exist for you, please contact support@connectbooster.com to have this added to your portal.

Enter the credentials:

> 1. User Name
> 2. Web Service Access Key
> 3. The ODataV4 Endpoint URL
> 4. Your Company ID

Save the integration card, and validate via "Test Connection".

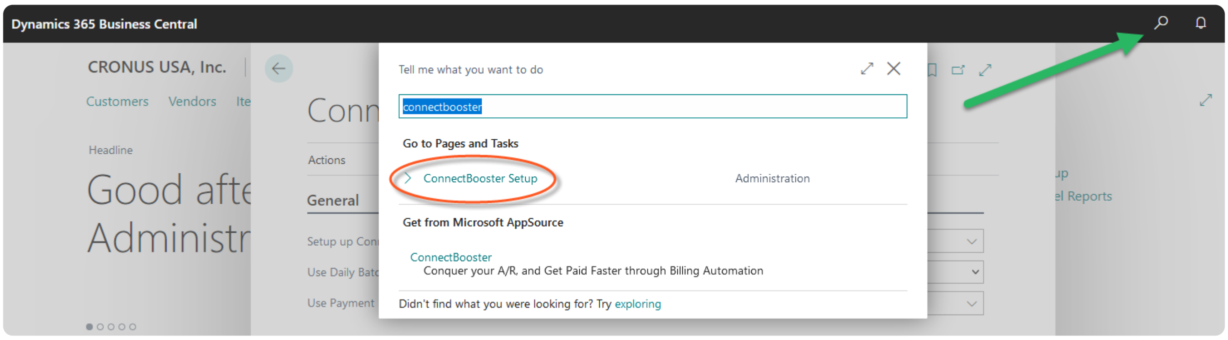
Once you see the successful confirmation toast, the integration should be connected.

> A sync will begin within the hour, otherwise you may immediately initialize via "Sync Now".

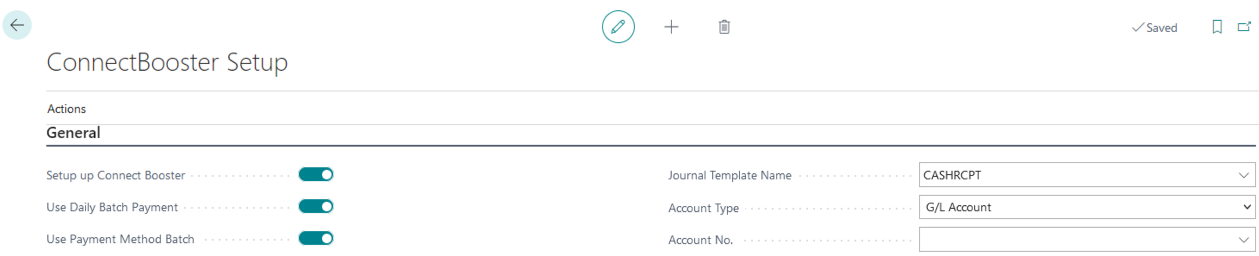
Configure Reconciliation Preferences

Now that your connection is established, your organization needs to make a few setup decisions how you want the integration to operate.

Navigate to the ConnectBooster setup within Business Central.



ConnectBooster Setup:

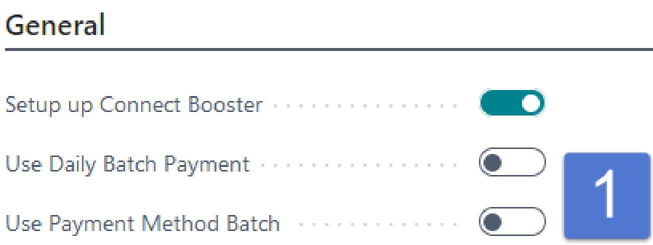


The first decision surrounds ***how payments are recorded and posted back into Business Central***.

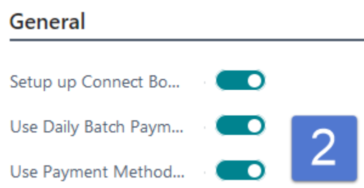
In this context, a payment is defined as transactions done with Payment Method types Credit Card, or E-Check (ACH).

Your Options:

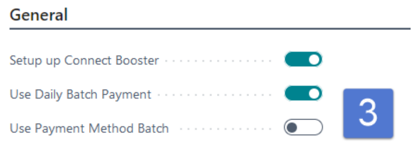
1. Singular Payment Posting (more granular, harder to reconcile)



2. Daily Batch - Split by Payment Method Type (less granular, easier to reconcile)



3. Daily Batch - Both Payment Method Types lumped together -- **NOT RECOMMENED**



> The reconciliation method you choose will immediately change which settings are required.

General

- **Setup ConnectBooster**
  - Leave this to ON
- **Journal Template Name**
  - Name of the Journal Template
- **Account Type**
  - Type of account where the lump sum deposit journal line will post to
- **Account No**
  - Account number where the lump sum deposit journal line will post to

Payment Batch

- **Credit Card Payment Batch Name**
  - Set the name of the journal batch for CC payments
- **Bank Account Payment Batch Name**
  - Set the name of the journal batch for ACH payments

Payment Methods

- **Credit Card**
  - Select existing record or create a new code
- **Bank Account**
  - Select existing record or create a new code

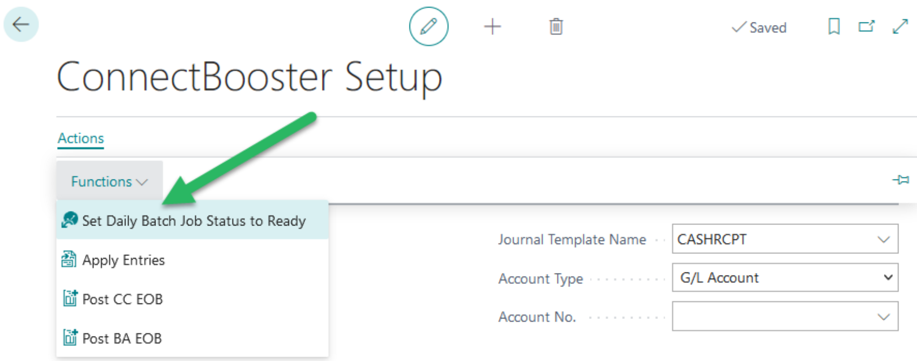
Daily Batch Payment

- **End of Business Day**

- Set the hour to finalize the point in which payments after this point count as the next day's batch. Latest suggested cut-off time is 8:00 pm EST.

Note: after configuring Option #2 or #3, you will need to set the Daily Batch Job Status to "Ready".

Do this under Actions + Functions.



If you encounter issues, please don't hesitate to Contact Support.