Microbizz Connector

BASIC INTEGRATION FOR CORRECT ACCOUNTING AND INVOICING OF RESOURCE CONSUMPTION

Microsoft Partner

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en del af ADDPRO

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INTRODUCTION

Microbizz Connector is an add-on solution that connects Microsoft Dynamics 365 Business
Central and the project and task management system Microbizz.
The integration manages the exchange of data between the systems, which means you can always be sure that
accounting and invoicing is executed in accordance with time consumption, goods, and resources.

This manual takes you through setup for synchronization step by step.

REQUIREMENTS

Microbizz Connector is to be installed on a Microsoft Dynamics 365 Business Central.
For using the Microbizz Connector it is mandatory to have an API Key provided by Microbizz.

MICROBIZZ ADMINISTRATOR ROLE CENTER

When setting up the Microbizz Connector it is recommended to use the Microbizz Administrator role center for
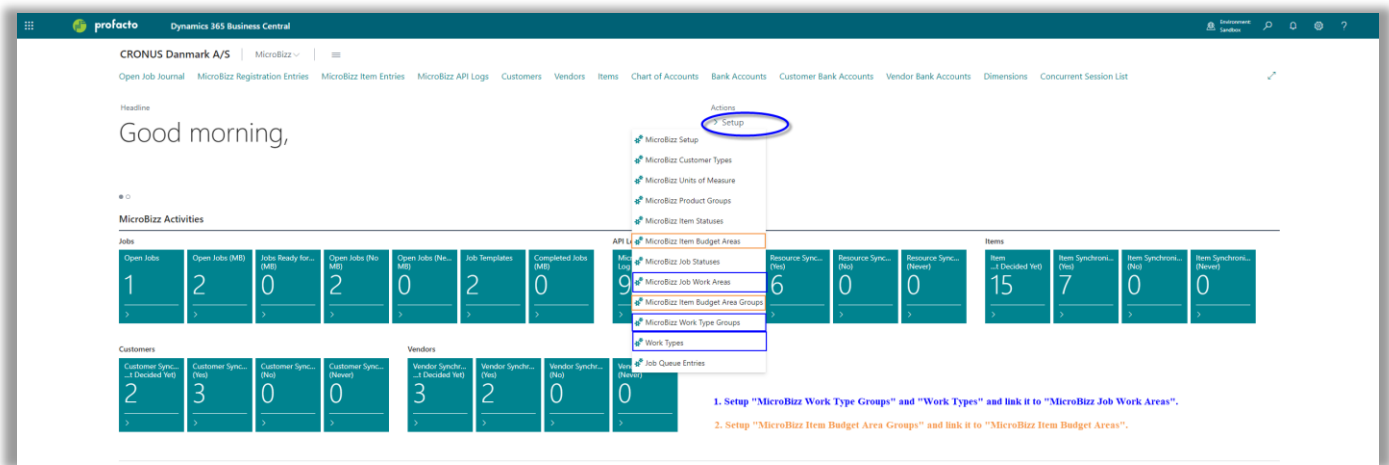best overview and access to tables to set up.
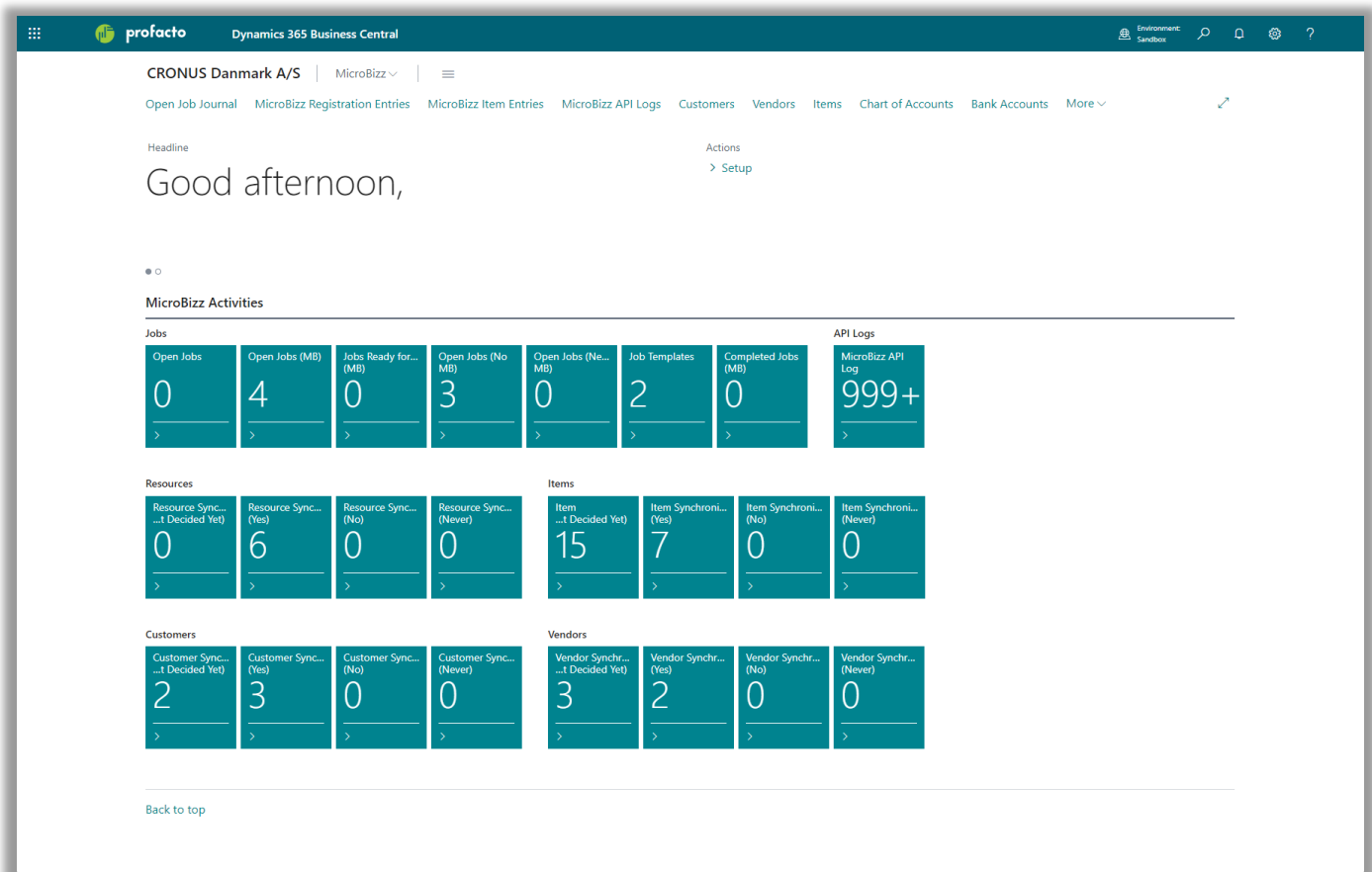
Alternative role center: The *Project Manager* role center is expanded with the Microbizz Activities group.

MICROBIZZ SETUP

Setting up Microbizz Connector requires a few definitions in various areas all accessible from the *Setup* action in the Microbizz Administrator role center.

Setting up the *Microbizz Setup* page must be done in two steps. The first part is setting up connection parameters making the connection between Business Central and Microbizz ready.
Then a part of the setup can be fetched from Microbizz using the *Synchronize All Setup* function. This feature is setting pre-defined settings from Microbizz up automatically.
Second part of setting up the *Microbizz Setup* page is about defining System Setup.

Required settings are described in the next paragraphs. *Microbizz Setup – Part I, Synchronizing All Setup* and *Microbizz Setup – Part II*.

Microbizz Setup – Part I – Connection

The general Microbizz Connector setup requires definitions for communication through the Microbizz API.
First, you need to set up *Connection* parameters. Second, run the Test Connection to verify
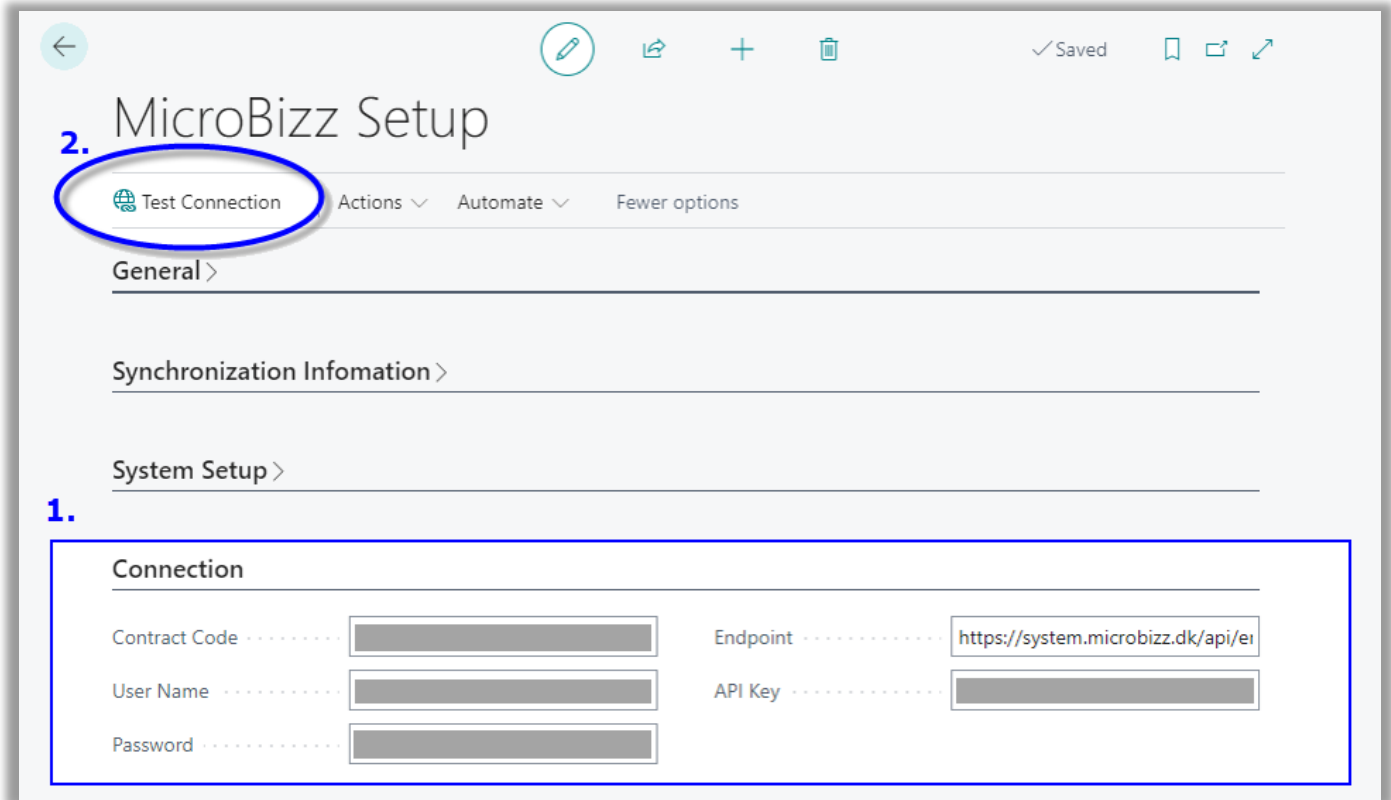
Connection parameters defining how the connection is identified.

Connection

Contact Code	Contract Code defining your agreement with Microbizz.
User Name	E-mail address used for the connection to Microbizz.
Password	Password for the connection to Microbizz.
Endpoint	URL defining where to connect.
API Key	Key from Microbizz obtained when having a signed agreement with Microbizz.

Test Connection

When the connection fields all are entered, you can test the connection using the *Test Connection* command button.

When the connection is successful, please proceed with the remaining setup, as described next.
You need the connection running for getting pre-defined setup installed automatically.

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Synchronize All Setup

First after setting up connection please select the Synchronize All Setup. This option will fetch pre-defined values for the setup. The function is found on the Microbizz Setup page.
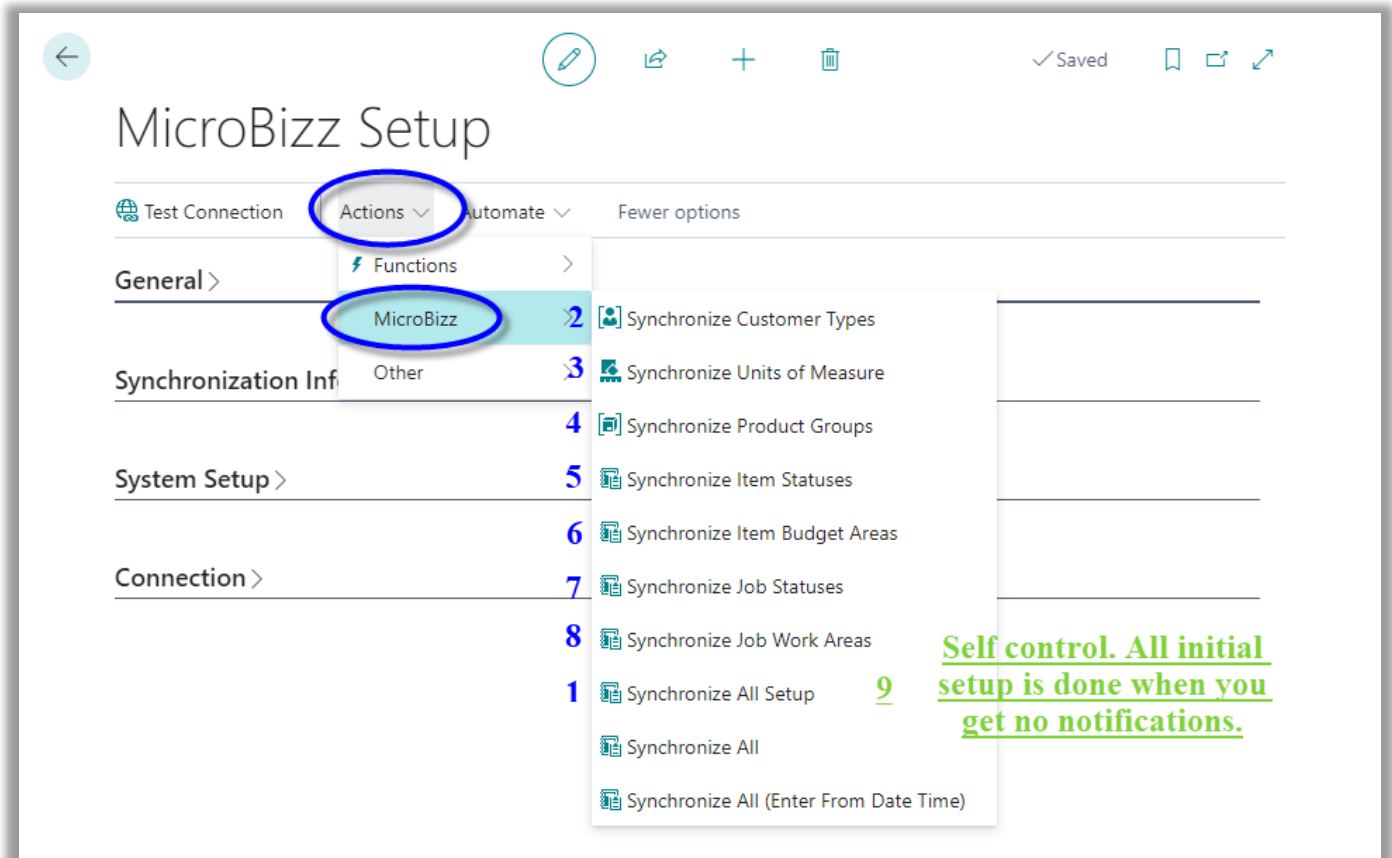
The figure gives an overview of the rank of the other areas to set up. The ranking by numbers indicates that you must start with the *Synchronize All Setup* function, then setting up one area after each other.
The *Synchronize All Setup* is setting some pre-defined settings in most setup areas.

> *Please note:*
> Expect several notifications to be listed in the role center after running the *Synchronize All Setup* function.
>
> First time the standard settings are transferred to a few setup pages.
> These are to be set up one by one.

Finally run the *Synchronize All Setup* again to see if any notifications are giving you a hint of missing details in the setup. When no notifications appear, the setup is complete.

Dependencies of basic Microbizz setup
After getting the pre-defined by running *Synchronize All Setup*, start setting up the areas *Microbizz Work Type Groups* and *Work Types*. Other settings are dependent of these settings.

Microbizz Setup – Part II – System Setup and Activation

The System Setup is defining how to process data during synchronization transactions. Please be aware, when setting the state to *Activated*, the Microbizz Connector is beginning the synchronizing process.

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General

State	Here the system is activated. Options are: *Not Activated* The connector is inactive. *Activated* The connector is running. *On Hold* The connector is paused. When "State" is changed to *Activated*, a Job Queue Entry is set and started automatically. The Job Queue is handling communications between Business Central and Microbizz.
Item Entry Posting Delay (Minutes)	Delay in minutes from when an Item Entry is registered until it is processed and sent to Business Central. Default value is 15 minutes.

System Setup

Job Journal Template Name	Enter a Template Name from the Job Journal Template List.
Job Journal Batch Name	Enter a Batch Name from Job Journal Batches.
Create Customer (Company) Customer Type	Definition of Microbizz Customer Type to use as Customer Company.
Create Customer (Person) Customer Type	Definition of Microbizz Customer Type to use as Customer Contact Person.
Create Vendor Customer Type	Definition of Microbizz Customer Type to use as Vendor.
Customer Synchronization Method	Method for synchronization. Options are: *BC to Microbizz* *BC to/from Microbizz*
Job Synchronization Method	Method for synchronization. Options are: *BC to Microbizz* – One way communication. *BC to/from Microbizz* – Transactions are being send both ways.

Connection

Please see paragraph *Microbizz Setup – Part I – Connection* for further information.

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Job Queue

Codeunit 6208443 "MB Microbizz Synch. PROF" will be created and started when activating the State.
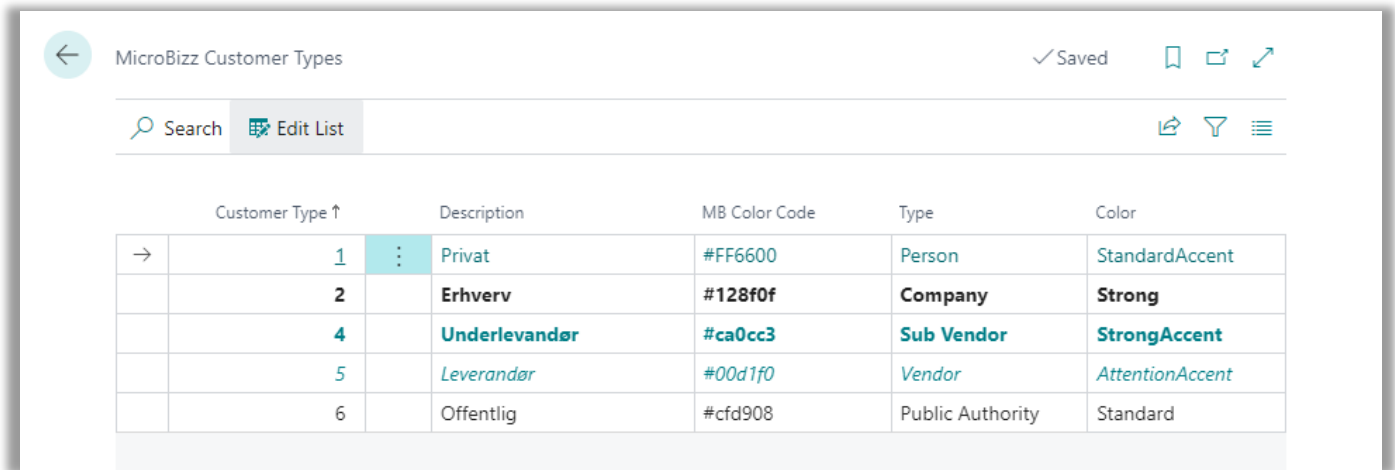

Default value for "No. of Minutes between Runs" is 5 minutes. This can be altered if so required or desired.

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Microbizz Customer Types

Customer Types are defining the type of company to be used when communicating with Microbizz.

Customer Type ↑		Description	MB Color Code	Type	Color
→ 1	⋮	Privat	#FF6600	Person	StandardAccent
2		Erhverv	#128f0f	Company	Strong
4		Underlevandør	#ca0cc3	Sub Vendor	StrongAccent
5		Leverandør	#00d1f0	Vendor	AttentionAccent
6		Offentlig	#cfd908	Public Authority	Standard

Type

Select the "Type" to be used with the pre-defined customer types numbered 1 to 6.

Available types are:

Company
Person
Public Authority
Vendor
Sub Vendor
Bank
Insurance Company
Auditor
Lawyer
Inspector
Appraiser
Delivery Location

Color

For distinguishing between the types you can one of the styles used within Business Central.
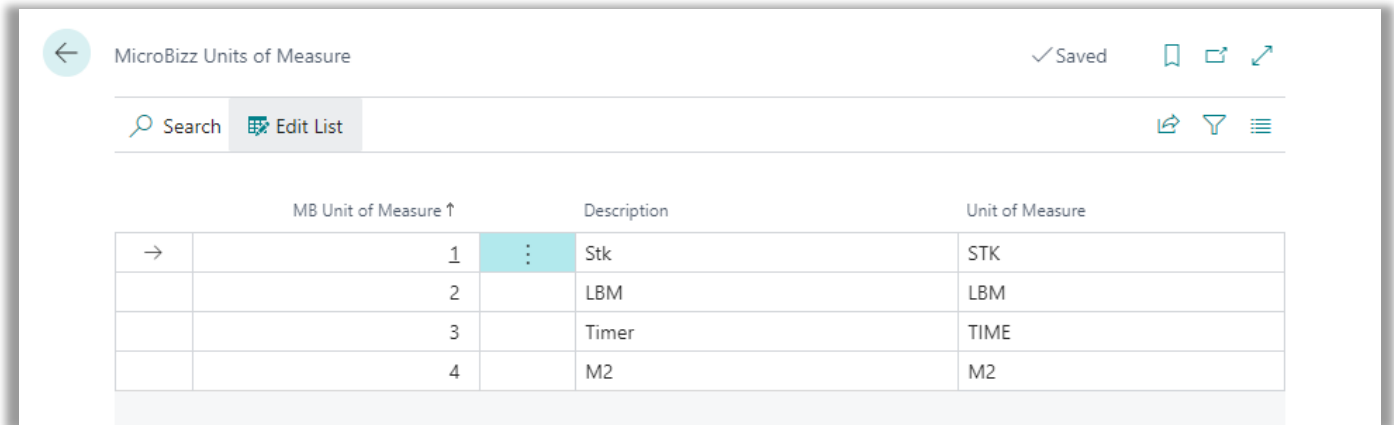
If you do not want to use this option feel free to have them all using *Standard* style.

Microbizz Units of Measure

Mapping of Units of Measure used by Microbizz and Business Central is to be defined.

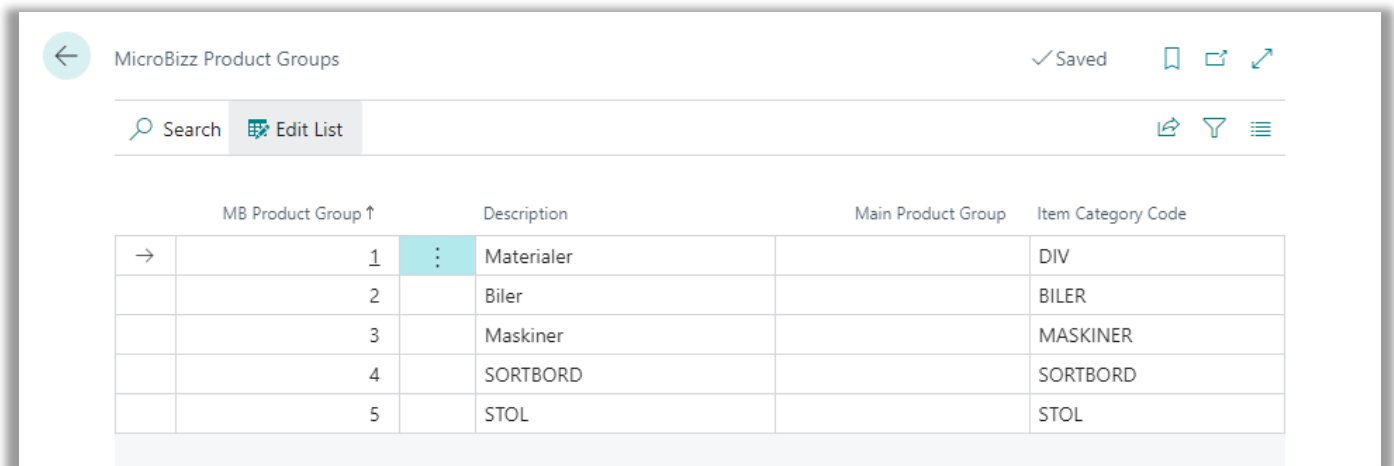| | Unit of Measure | | Mapping Microbizz Unit of Measure codes with corresponding Business Central Unit of Measure code. |

Unit of Measure

Mapping Microbizz Unit of Measure codes with corresponding Business Central Unit of Measure code.

Select for each of the lines a Unit of Measure from the Unit of Measure list in Business Central.

Microbizz Product Groups

Mapping of Product Groups used by Microbizz and Business Central is to be defined.

Item Category Code

Mapping Microbizz Product Groups with corresponding Business Central Item Category Code.
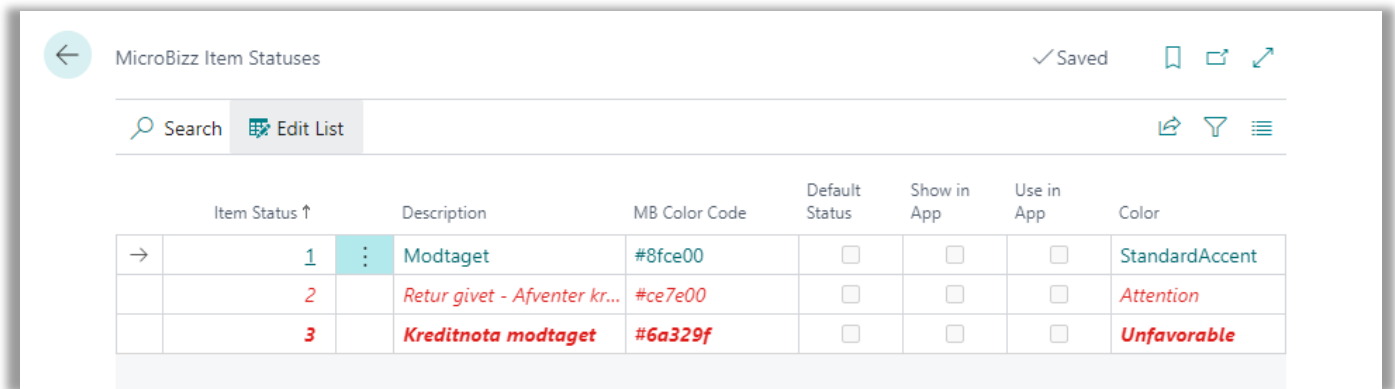
Select for each of the lines an Item Category Code from the Category Code list in Business Central.

Microbizz Item Statuses

Mapping of Product Groups used by Microbizz and Business Central is defined.

Item Status ↑		Description	MB Color Code	Default Status	Show in App	Use in App	Color
1	⋮	Modtaget	#8fce00	☐	☐	☐	StandardAccent
2		Retur givet - Afventer kr...	#ce7e00	☐	☐	☐	Attention
3		Kreditnota modtaget	#6a329f	☐	☐	☐	Unfavorable

Color	For distinguishing between the types you can set one of the styles used within Business Central.
	If you do not want to use this option feel free to have them all using *Standard* style.

Microbizz Item Budget Areas

Mapping of Item Budget Groups used by Microbizz and Business Central is to be defined. Setting up Item Budget Area Groups must be defined before the Item Budget Areas can be grouped.

Please note that we can split the posting of Item Budget Areas in two parts.

Item Budget Area Group	Select from the list of Microbizz Item Budget Area Groups to group the Item Budget Areas for general use.
	Filter on type *Item Budget Area Group* or *Both*.
	Field is mandatory.
Item Budget Area Group (Invoicing)	Select from the list of Microbizz Item Budget Area Groups to group the Item Budget Areas for invoicing.
	Filter on type *Item Budget Area Group (Invoicing)* or *Both*.
	Field is mandatory.
Not Selectable in BC	If not used in Business Central, please mark the field.
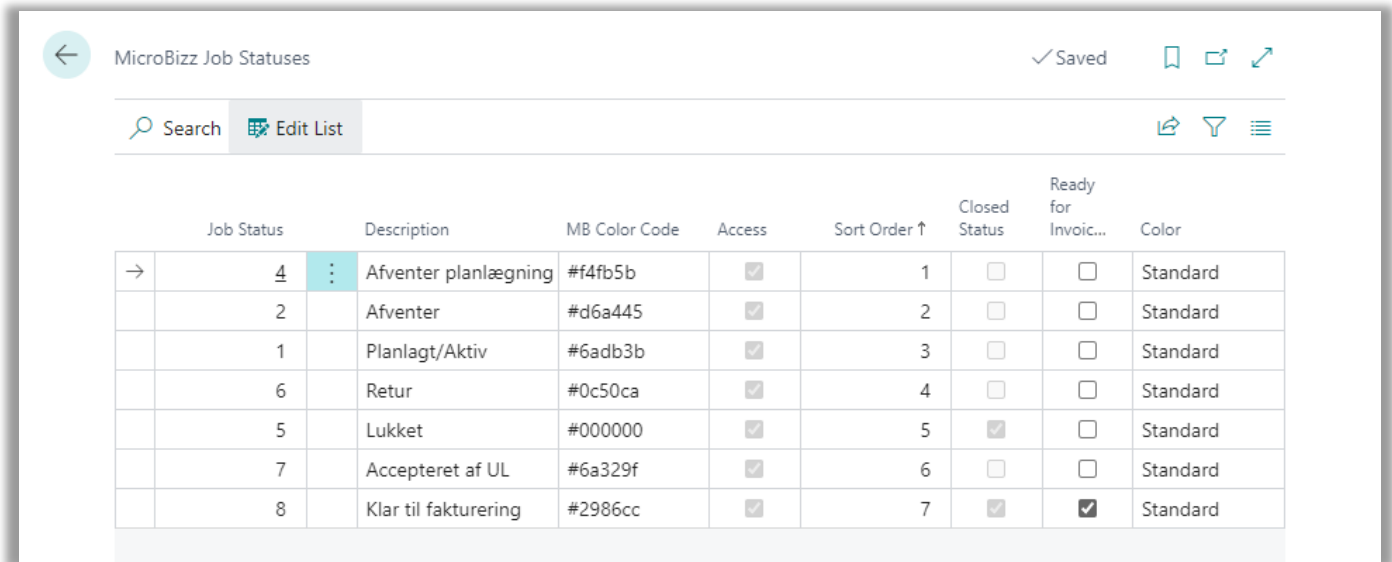
Microbizz Job Statuses

Mapping of Job Statuses used by Microbizz and Business Central is defined.

Job Status		Description	MB Color Code	Access	Sort Order ↑	Closed Status	Ready for Invoic...	Color
→ 4	⋮	Afventer planlægning	#f4fb5b	☑	1	☐	☐	Standard
2		Afventer	#d6a445	☑	2	☐	☐	Standard
1		Planlagt/Aktiv	#6adb3b	☑	3	☐	☐	Standard
6		Retur	#0c50ca	☑	4	☐	☐	Standard
5		Lukket	#000000	☑	5	☑	☐	Standard
7		Accepteret af UL	#6a329f	☑	6	☐	☐	Standard
8		Klar til fakturering	#2986cc	☑	7	☑	☑	Standard

Ready for Invoicing   Set the field for the "Job Status" which is corresponding to "Ready for Invoicing".
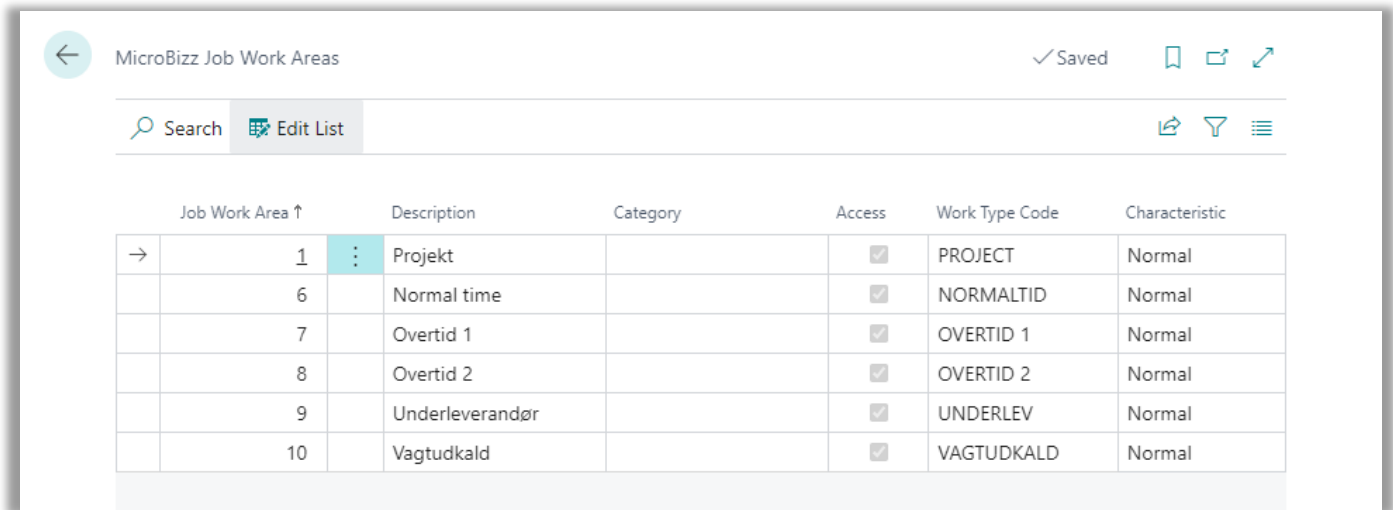
Color   For distinguishing between the types you can one of the styles used within Business Central.
If you do not want to use this option feel free to have them all using *Standard* style.

Microbizz Job Work Areas

Mapping of Job Work Areas used by Microbizz and Business Central is to be defined.

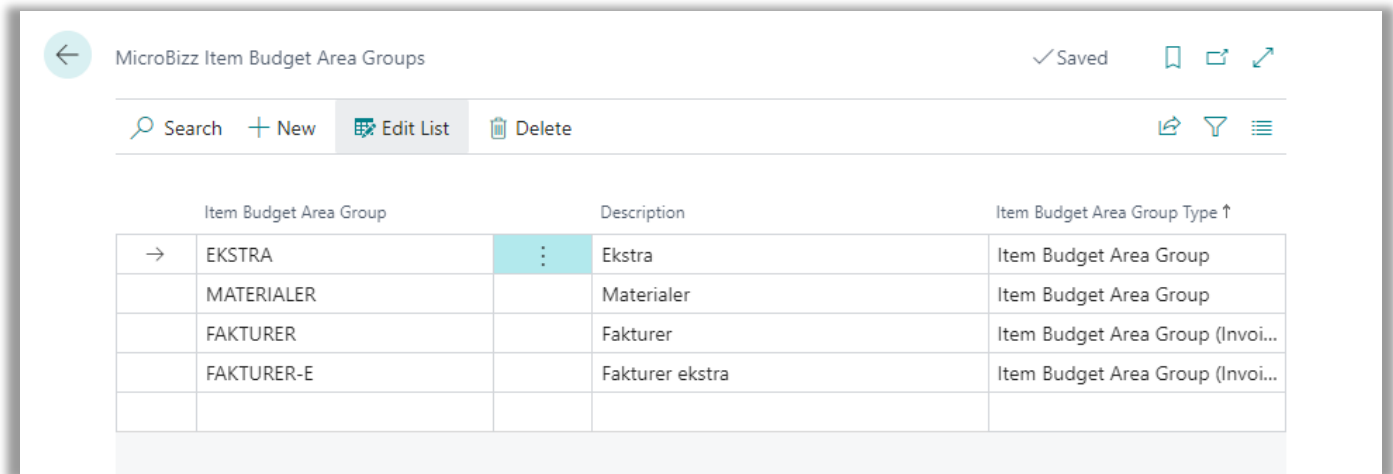| Work Type Code	Mapping Microbizz Work Areas with corresponding Business Central Work Types.
	Select from the Work Types list in Business Central.
Characteristic	Options are:
	Normal When Normal the job is ready to be synchronized with Business Central.
	Quote The job exists only in Microbizz.
	On Hold Option used for temporary setting the job on hold.

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Microbizz Item Budget Area Groups

Mapping of Item Budget Area Groups used by Microbizz and Business Central is to be defined.

	Item Budget Area Group	Description	Item Budget Area Group Type ↑
→	EKSTRA	Ekstra	Item Budget Area Group
	MATERIALER	Materialer	Item Budget Area Group
	FAKTURER	Fakturer	Item Budget Area Group (Invoi...
	FAKTURER-E	Fakturer ekstra	Item Budget Area Group (Invoi...

Item Budget Area Group

Set the type for every single Item Budget Area Group.

Options are:

Item Budget Area Group
Normal usage, Job Ledger Entry with Line Type Billable.

Item Budget Area Group (Invoicing)
The Job Ledger Entries will be split in two. An Expense entry relevant for invoicing, Job Ledger Entry with "Line Type" *Billable*, and an entry with all information for production analysis, Job Ledger Entry with "Line Type" *blank*.
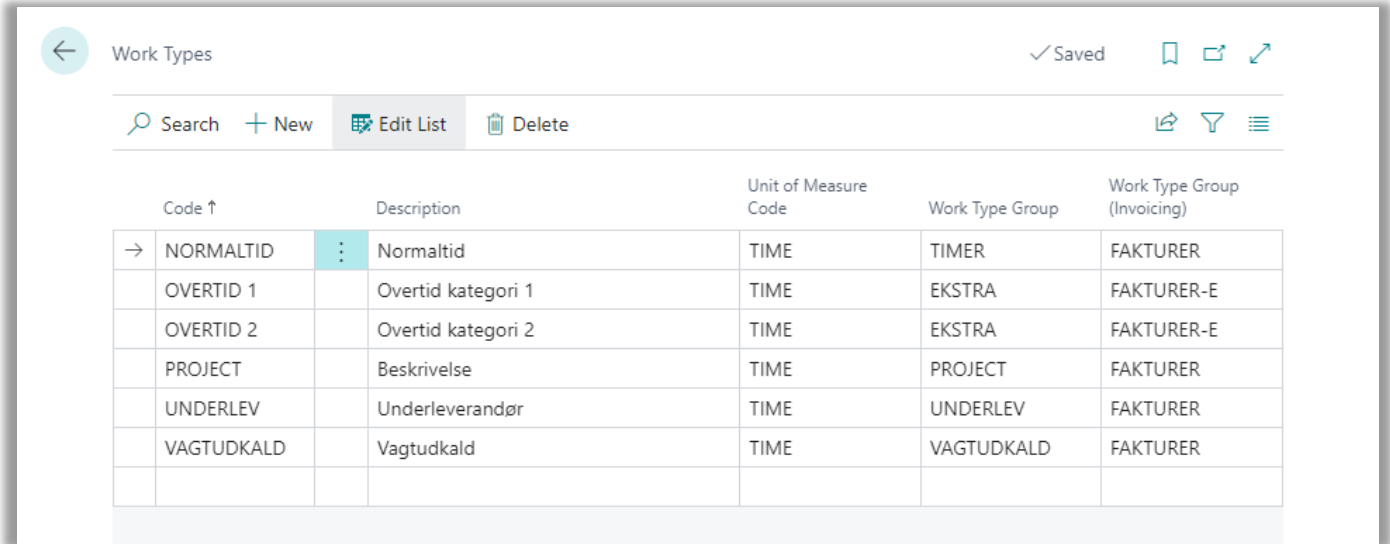
Both
Usage of the Item Budget Area Group can be used for both categories.

Microbizz Work Type Groups

Set the type of Work Type Groups used by Microbizz and Business Central.
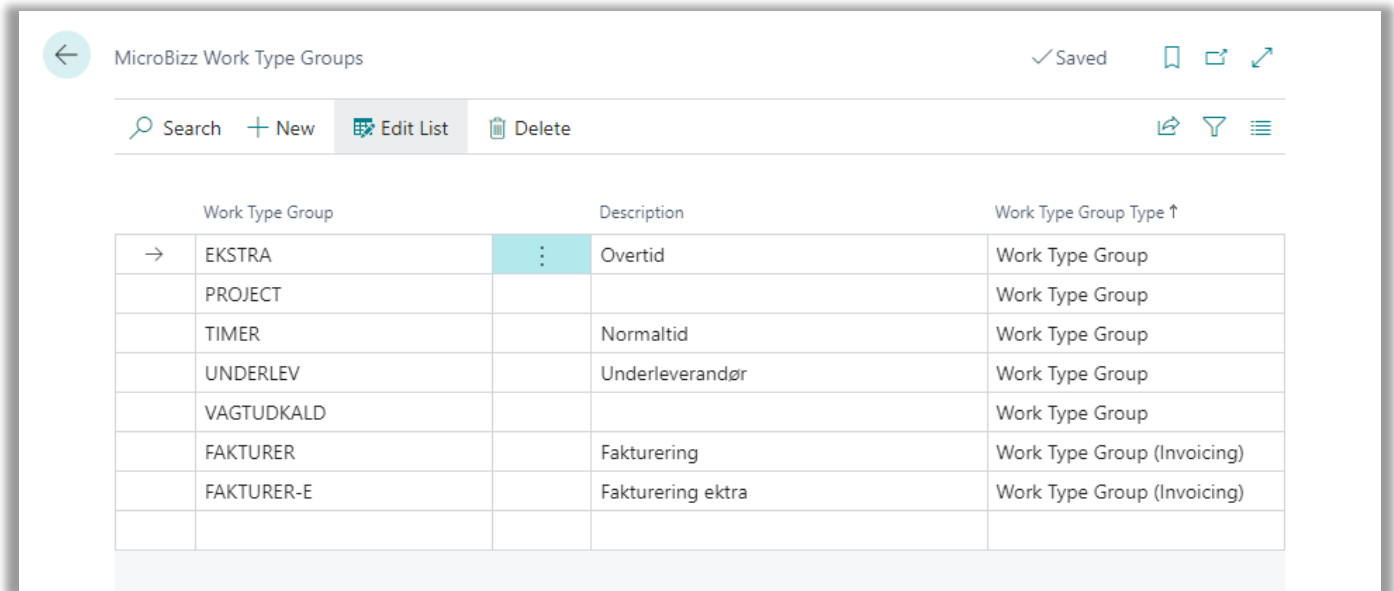
Work Type Group Type	Set the type for every single Work Type Group.
	Options are:
	Work Type Group
	Normal usage, Job Ledger Entry with Line Type Billable.
	Work Type Group (Invoicing)
	The Job Ledger Entries will be split in two. An Expense entry relevant for invoicing, Job Ledger Entry with "Line Type" *Billable*, and an entry with all information for production analysis, Job Ledger Entry with "Line Type" *blank*.
	Both
	Usage of the Item Budget Area Group can be used for both categories.

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Work Types

Set up Work Types used by Microbizz and Business Central. Definitions of Work Type Groups must be completed for setting "Work Group Type" and "Work Group Type (Invoicing)" on this page.

Code ↑	Description	Unit of Measure Code	Work Type Group	Work Type Group (Invoicing)
NORMALTID	Normaltid	TIME	TIMER	FAKTURER
OVERTID 1	Overtid kategori 1	TIME	EKSTRA	FAKTURER-E
OVERTID 2	Overtid kategori 2	TIME	EKSTRA	FAKTURER-E
PROJECT	Beskrivelse	TIME	PROJECT	FAKTURER
UNDERLEV	Underleverandør	TIME	UNDERLEV	FAKTURER
VAGTUDKALD	Vagtudkald	TIME	VAGTUDKALD	FAKTURER

Unit of Measure Code	Select Unit of Measure from the Unit of Measure list.
Work Type Group	Select the Work Type from the Microbizz Work Type Groups list. Filter on type *Work Type Group* or *Both*. Field is mandatory.
Work Type Group (Invoicing)	Select the Work Type from the Microbizz Work Type Groups list. Filter on type *Work Type Group (Invoicing)* or *Both*. Field is optional.

Verifying setup after completed setup

Now after the several pages of setup are completed, it would be a good idea running *Synchronize All Setup* from the Microbizz Setup page. Find the action button under *Actions, Microbizz*.

If no notices are revealed the setup should be completed.

SELECT DATA TO SYNCHRONIZE

What data to synchronize must be defined before any data are synchronized between Business Central and Microbizz.

Within the supported types, every single entity which are to be synchronized to Microbizz must be set up for synchronization. On the card pages you will find a field "Synchronize with Microbizz" which must be set to Yes if the record is to be synchronized.

Supported types are

- Jobs
- Customers
- Vendors
- Items
- Resources

The state of last performed synchronization will be visible on the card page after the synchronization is set.

Customer card

For every customer it is possible to set up if the customer is to be synchronized with Microbizz.

Synchronize with Microbizz

Indicates if the customer is to be synchronized with Microbizz.

Yes
Synchronizing current customer with Microbizz is activated.

No
Customer is not being synchronized with Microbizz.

Never
Used when a decision of never synchronizing the customer with Microbizz.

Microbizz Job ID

Job ID identifying the job in Microbizz.

The field is not editable. Controlled by Microbizz.

Microbizz Synchronized

Date and Time for when the job was synchronized with the Microbizz system.

The field is not editable. Controlled by Microbizz.

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Vendor card

For every customer it is possible to set up if the customer is to be synchronized with Microbizz.

Synchronize with Microbizz	Indicates if the customer is to be synchronized with Microbizz.
	Yes Synchronizing current customer with Microbizz is activated.
	No Customer is not being synchronized with Microbizz.
	Never Used when a decision of never synchronizing the customer with Microbizz.
Microbizz Job ID	Job ID identifying the job in Microbizz. The field is not editable. Controlled by Microbizz.
Microbizz Synchronized	Date and Time for when the job was synchronized with the Microbizz system. The field is not editable. Controlled by Microbizz.

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Item card

For every customer it is possible to set up if the customer is to be synchronized with Microbizz.

Synchronize with Microbizz	Indicates if the customer is to be synchronized with Microbizz.
	Yes Synchronizing current customer with Microbizz is activated.
	No Customer is not being synchronized with Microbizz.
	Never Used when a decision of never synchronizing the customer with Microbizz.
Microbizz Job ID	Job ID identifying the job in Microbizz. The field is not editable. Controlled by Microbizz.
Microbizz Synchronized	Date and Time for when the job was synchronized with the Microbizz system. The field is not editable. Controlled by Microbizz.

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Resource card

For every customer it is possible to set up if the customer is to be synchronized with Microbizz.

Synchronize with Microbizz	Indicates if the customer is to be synchronized with Microbizz.
	Yes Synchronizing current customer with Microbizz is activated.
	No Customer is not being synchronized with Microbizz.
	Never Used when a decision of never synchronizing the customer with Microbizz.
Microbizz Job ID	Job ID identifying the job in Microbizz. The field is not editable. Controlled by Microbizz.
Microbizz Synchronized	Date and Time for when the job was synchronized with the Microbizz system. The field is not editable. Controlled by Microbizz.

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Job card

Creating a new job, you need to do some extra when connecting to Microbizz.

Person Responsible	Set up a person from the Resources list.
	Field is mandatory.
Synchronize with Microbizz	Indicates if the job is to be synchronized with Microbizz.

Yes
Synchronizing current job with Microbizz is activated.

No
Job is not being synchronized with Microbizz.

Never
Used when a decision of never synchronizing the job with Microbizz.

Job Template
The job is to be used as a template for creating new jobs.

|	
Microbizz Job ID	Job ID identifying the job in Microbizz. The field is not editable. Controlled by Microbizz.
	The field is visible after synchronizing with Microbizz only.
Microbizz Synchronized	Date and Time for when the job was synchronized with the Microbizz system. The field is not editable. Controlled by Microbizz.
	The field is visible after synchronizing with Microbizz only.
Invoice Policy (Microbizz)	Invoice Policy set in Microbizz. The field is not editable. Controlled by Microbizz.
	The field is visible after synchronizing with Microbizz only.
Ready for Invoicing (Microbizz)	Indicating if the job is ready for being invoiced through Microbizz. The field is not editable. Controlled by Microbizz.
	The field is visible after synchronizing with Microbizz only.

Use *Copy Job Tasks from…* to fetch information directly from a job template or from another job.
Please note that the copy function will also copy the "Invoice Policy (Microbizz)" from the source.

Related entries

From the Job Card you can access Microbizz entries from the *Navigate* menu.
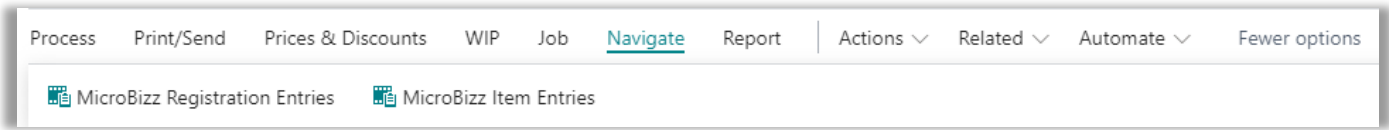
Microbizz Registration Entries are displaying registrations performed in Microbizz. Here in Business Central the entries are a mirror of what was processed in Microbizz.

Microbizz Item Entries are displaying registrations performed in Microbizz. Here in Business Central the entries are a mirror of what was processed in Microbizz.

JOB QUEUE

For handling the daily communication between Business Central and Microbizz, an entry in the job queue must be running.

As described in *Microbizz Setup* description, the job queue is initialized automatically then setting the "State" field to *Activated*.

Codeunit 6208443 "MB Microbizz Synch. PROF" is handling the communication between Business Central and Microbizz.

Keep an eye on the status in the Job Queue Entries list. If the "Status" field has the Error indicator, please check the *Log Entries* for further information.

Identifying problems

You can also run the job in the foreground for getting on screen messages to tell more about how the job is performing.

Click on the action button *Run once (foreground)* to run the job with visible error messages.
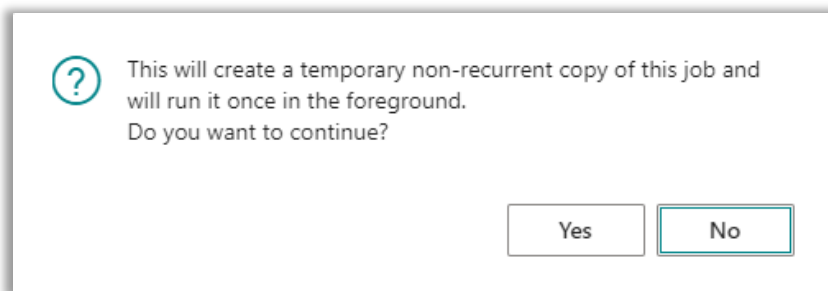
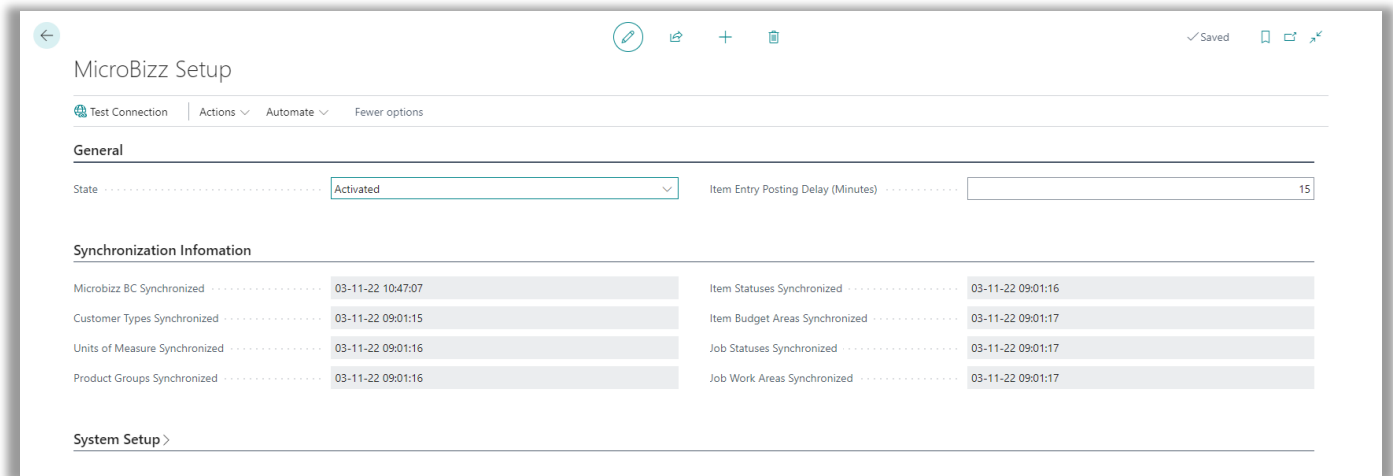If the job is running successfully Status *Success* is reported.
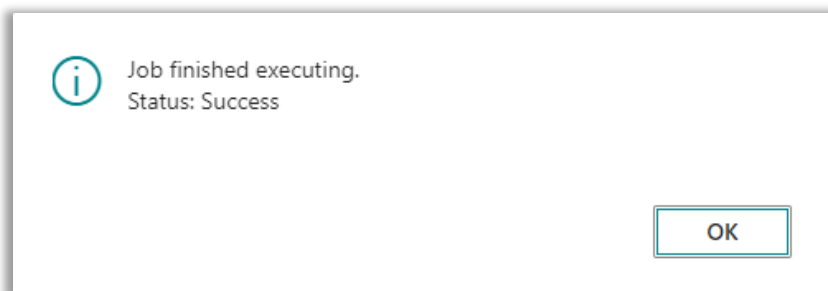
SURVEILLANCE OF SYNCHRONIZATION

From the *Microbizz Setup* page you will find the Synchronization Information. Here you can see when the different areas have been synchronized last time.

Microbizz BC Synchronized	The last time Business Central was synchronized with Microbizz.
Customer Types Synchronized	The last time Customer Types was synchronized with Microbizz.
Units of Measure Synchronized	The last time Units of Measure was synchronized with Microbizz.
Product Groups Synchronized	The last time Product Groups was synchronized with Microbizz.
Item Statuses Synchronized	The last time Item Statuses was synchronized with Microbizz.
Item Budget Areas Synchronized	The last time Item Budget Areas was synchronized with Microbizz.
Job Statuses Synchronized	The last time Job Statuses was synchronized with Microbizz.
Job Work Areas Synchronized	The last time Job Work Areas was synchronized with Microbizz.

APPENDIXES

Project Manager Role Center

The Project Manager role center is extended with the Microbizz Activities group. As a project manager you have easy access to the Microbizz features in Business Central.

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Special feature: Synchronize All (From Date Time)

In case of Business Central and Microbizz are getting out of sync, due to lost connection or other technical problems, the Microbizz Connector is providing a special feature for synchronizing lost communications.

From the Microbizz Administrator role center you can access the feature *Synchronize All (From Date Time)*. Click on the Microbizz menu button located between the company name and the three horizontal lines (Role Explorer).
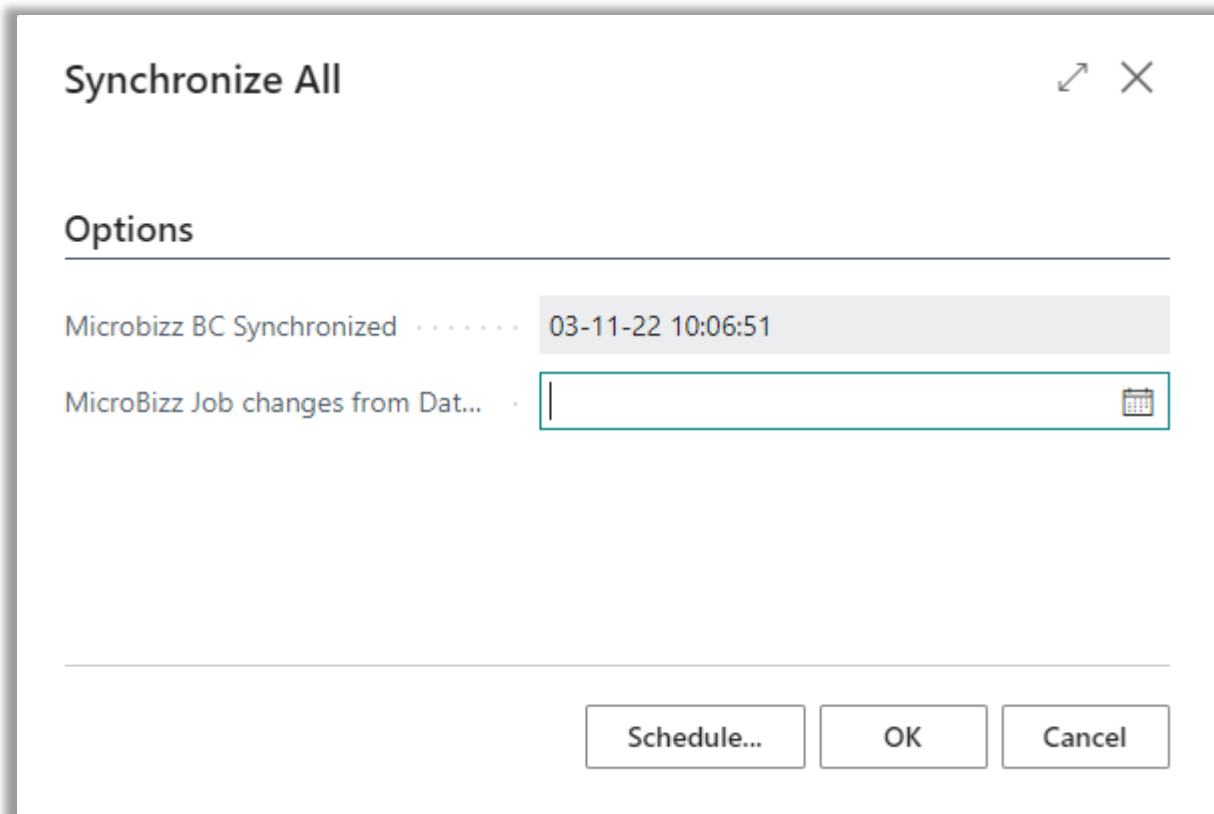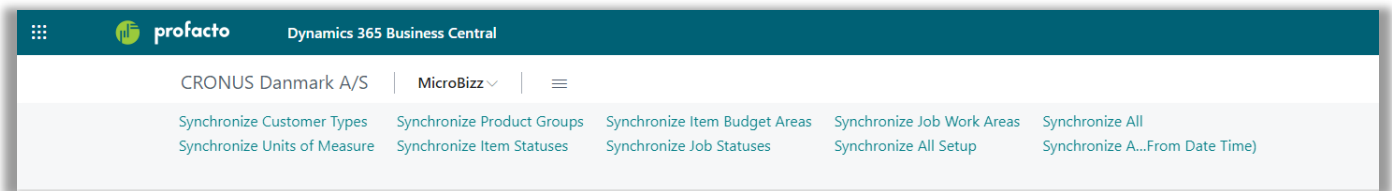
Microbizz Job changes from Date Time   Enter a date (and time) from where the synchronizing job should search for not processed transactions.

This feature is to be used if the normal synchronization did not process all transactions as expected only.