Quick Guide

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Microbizz Connector

BASIC INTEGRATION FOR CORRECT ACCOUNTING AND INVOICING OF RESOURCE CONSUMPTION

Microsoft Partner

profacto en del af ROOPRO

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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.

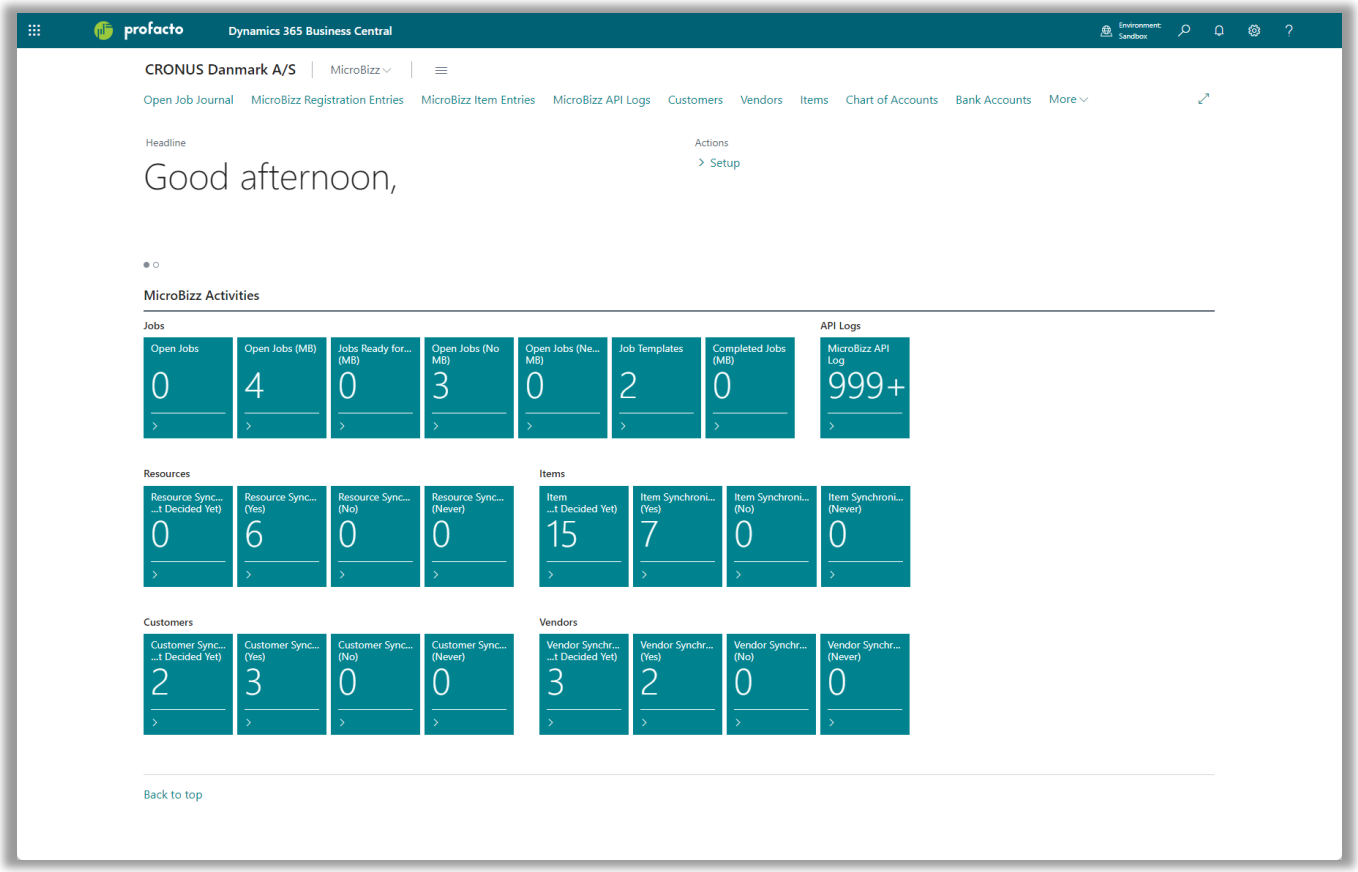
This quick guide takes you through setup for synchronization step by step.

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 and all other Microbizz features

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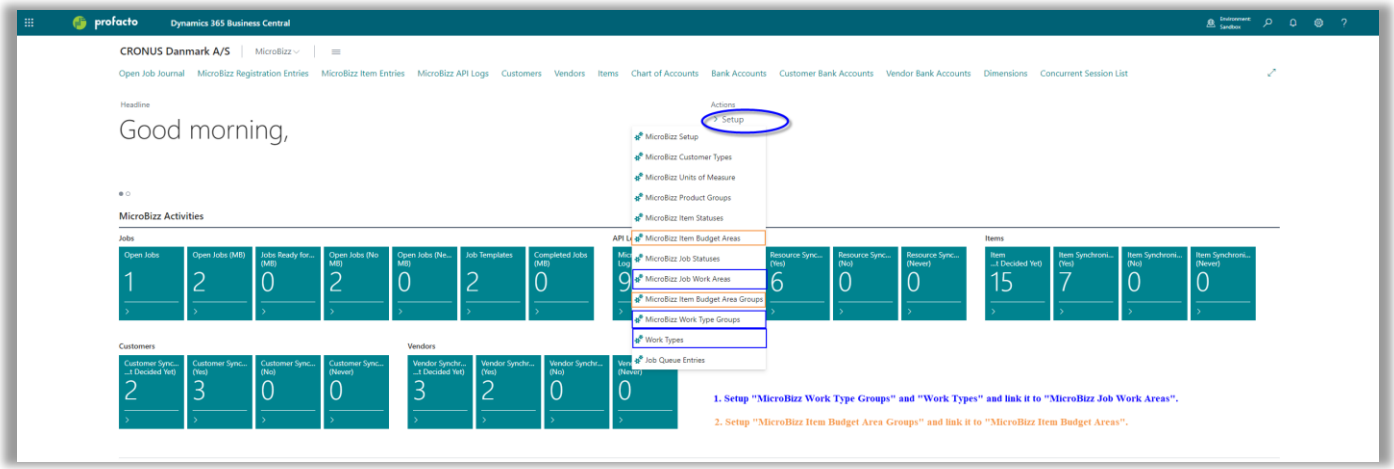
SETTING UP MICROBIZZ



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

Most settings are automatically set up when running the *Synchronize All Setup* function.

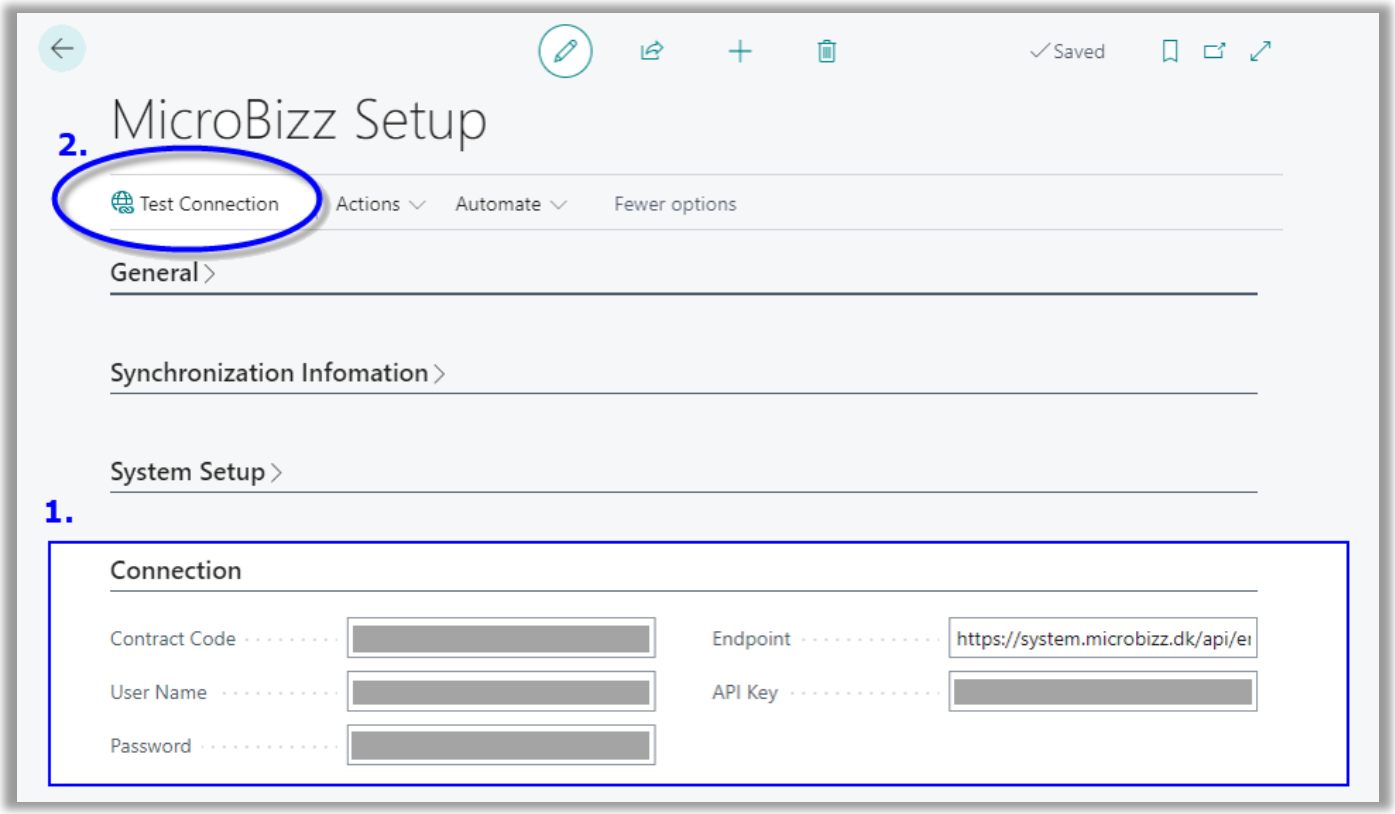
- Set up Connection in the Microbizz Setup page.
- Run the *Synchronize All Setup* function from the Microbizz Setup page. Automatic pre-defined settings.
- Set up System Setup in the Microbizz Setup page.
- Set up Microbizz Work Type Groups
- Set up Work Types
- Set up Microbizz Item Budget Area Groups
- Set up Microbizz Customer Types
- Set up Microbizz Units of Measure
- Set up Microbizz Product Groups
- Set up Microbizz Item Statuses
- Set up Microbizz Item Budget Areas
- Set up Microbizz Job Statuses
- Set up Microbizz Job Work Areas
- Verifying setup after completed setup
- Select data to synchronize

Required settings are described in the next chapters.

For more information see the *Microbizz Connector Manual*. This manual can be downloaded from ProFactos website www.profacto.dk.

MICROBIZZ SETUP

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



Set up Connection

Fill in the fields in the Connection group of the Microbizz Setup page. The connection parameters defining how the connection is identified.
You are getting the required information from Microbizz after having signed an agreement with Microbizz.

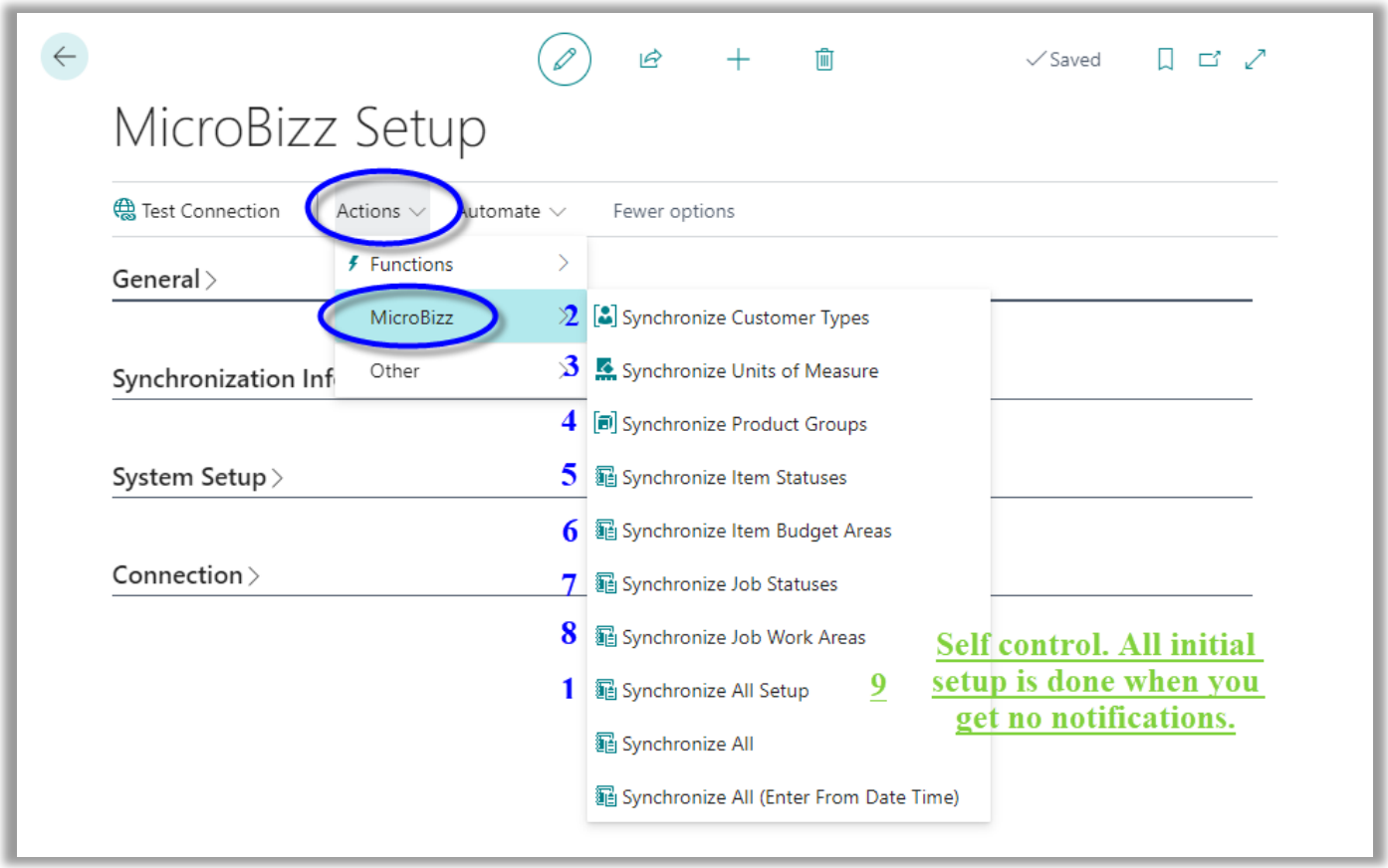
Test Connection

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.

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.

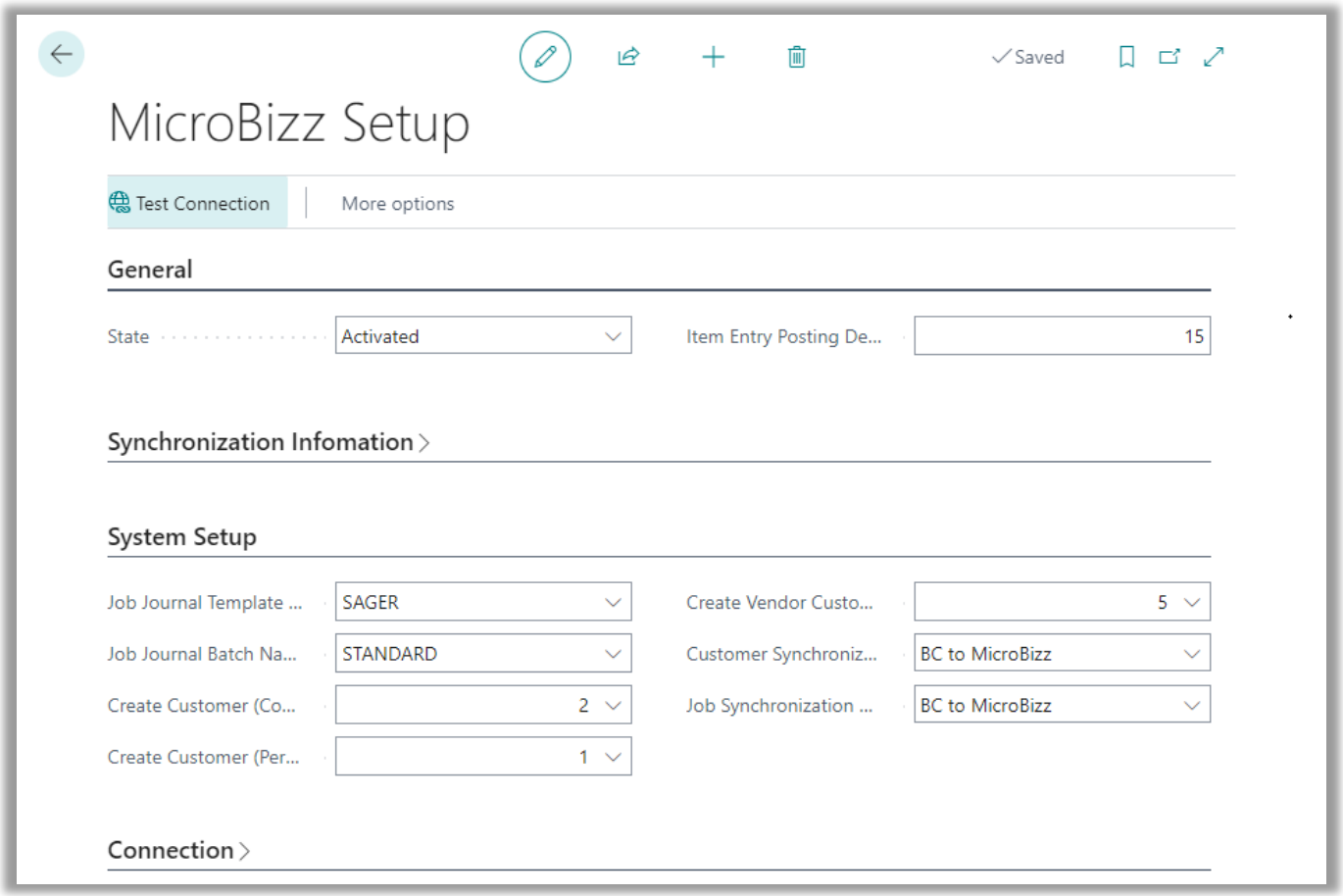
Finally run the *Synchronize All Setup* again to see if any notifications are giving you a hint of missing details in the setup. When no notifications appear, the setup is complete.

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.

Set up System 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.

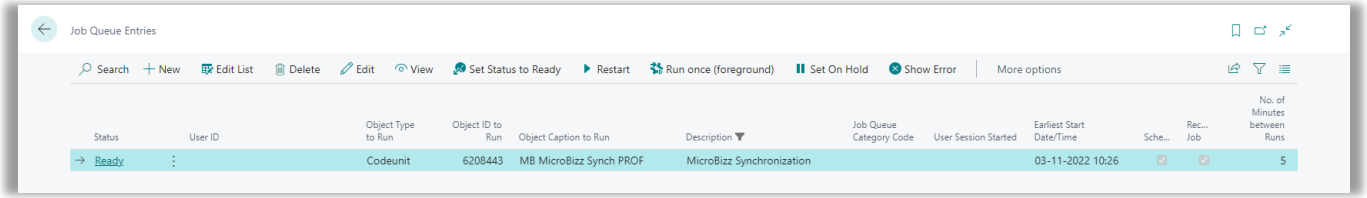


Set up every field in the System Setup group. **Wait setting "State" to Activated until all setup is completed. Please use the "On Hold" state until all setup is ready.**
Continue setting up all other setup pages. You will find these described on the next pages.

For more information see the *Microbizz Connector Manual*. This manual can be downloaded from ProFactos website www.profacto.dk.

Job Queue

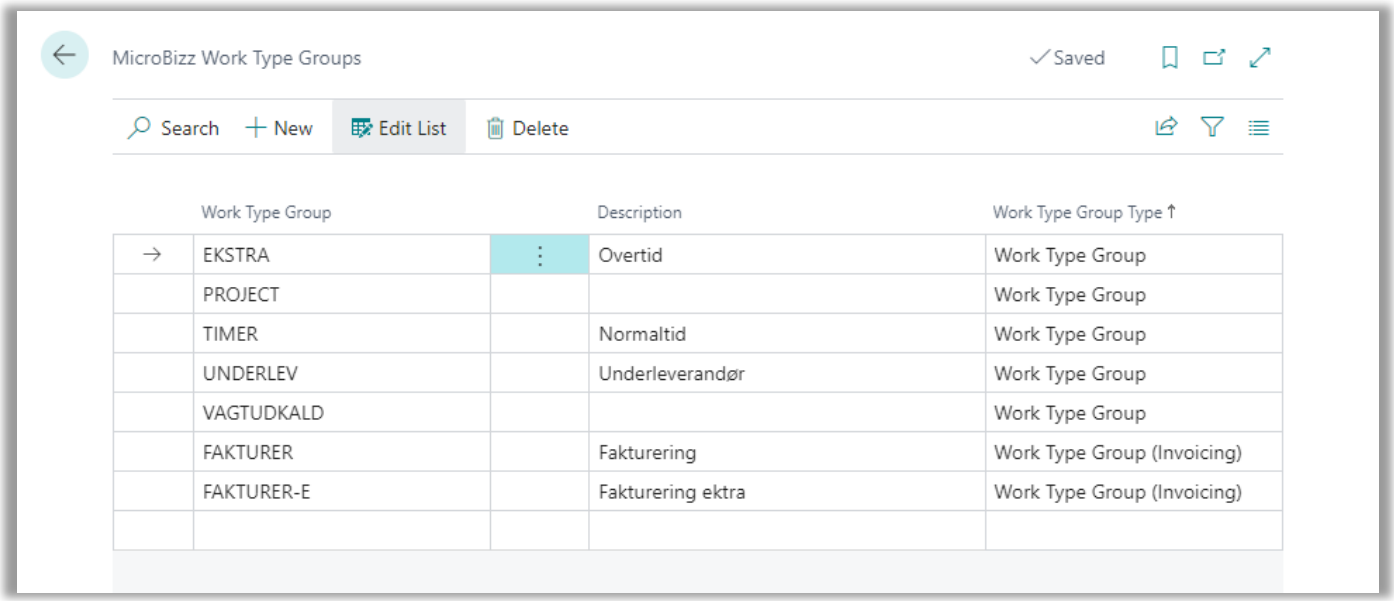
Codeunit 6208443 "MB Microbizz Synch. PROF" will be created and started when activating the State.



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

MICROBIZZ WORK TYPE GROUPS

Set the type of Work Type Groups used by Microbizz and Business Central.



	Work Type Group		Description	Work Type Group Type
→	EKSTRA	⋮	Overtid	Work Type Group
	PROJECT			Work Type Group
	TIMER		Normaltid	Work Type Group
	UNDERLEV		Underleverandør	Work Type Group
	VAGTUDKALD			Work Type Group
	FAKTURER		Fakturering	Work Type Group (Invoicing)
	FAKTURER-E		Fakturering ektra	Work Type Group (Invoicing)

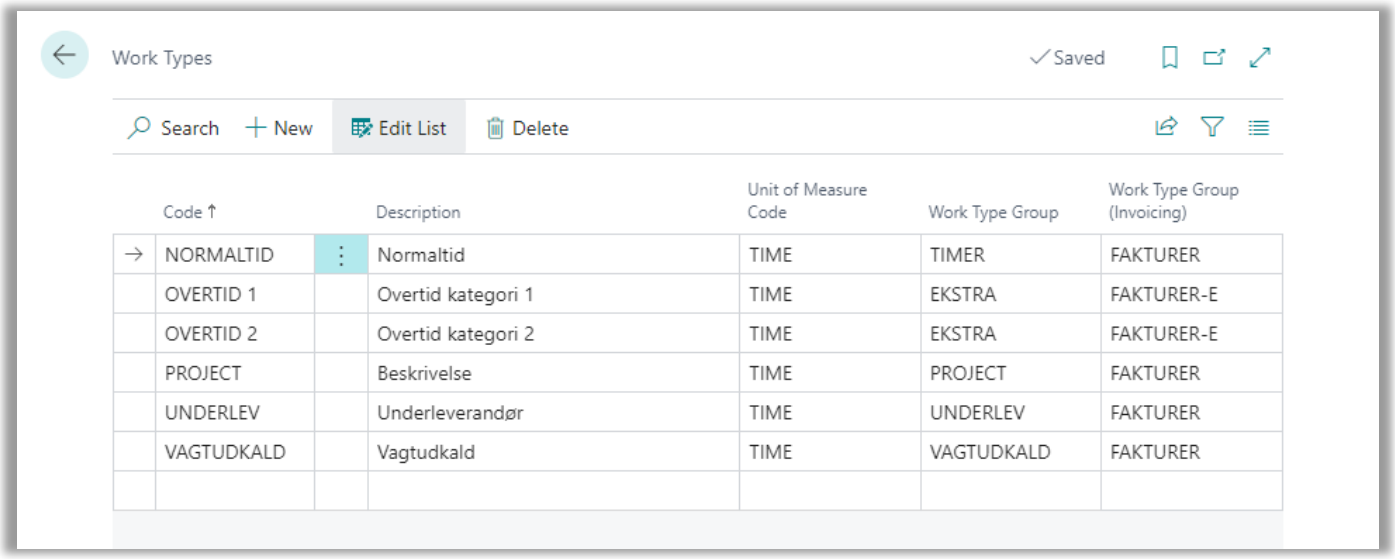
Select “Work Type Group Type” for every single Work Type Group. Setting up ‘Work Type Group (Invoicing)’ is optional.

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.

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.

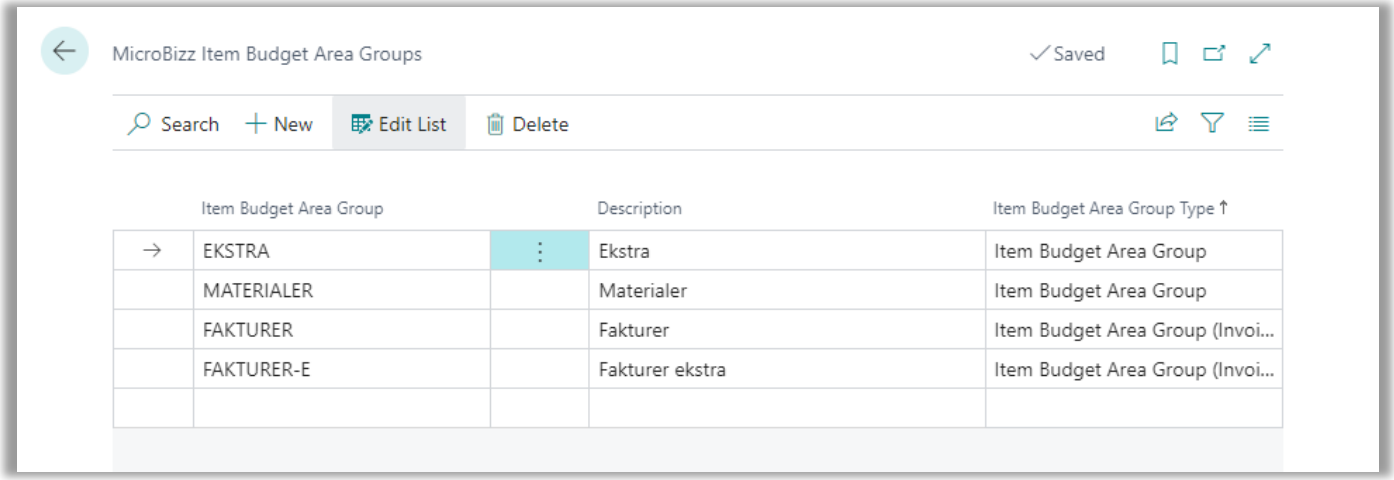


Code	Description	Unit of Measure Code	Work Type Group	Work Type Group (Invoicing)
NORMALTID	Normaltid	TIME	TIMER	FAKTURER
OVERTID 1	Overtid kategori 1	TIME	EKSTRA	FAKTURER-E
OVERTID 2	Overtid kategori 2	TIME	EKSTRA	FAKTURER-E
PROJECT	Beskrivelse	TIME	PROJECT	FAKTURER
UNDERLEV	Underleverandør	TIME	UNDERLEV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

Set up fields “Unit of Measure Code” and “Work Type Group”. Use lookup for the selection.
Field “Work Type Group (Invoicing)” is optional. Set the field if you want separate posting for invoicing

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...

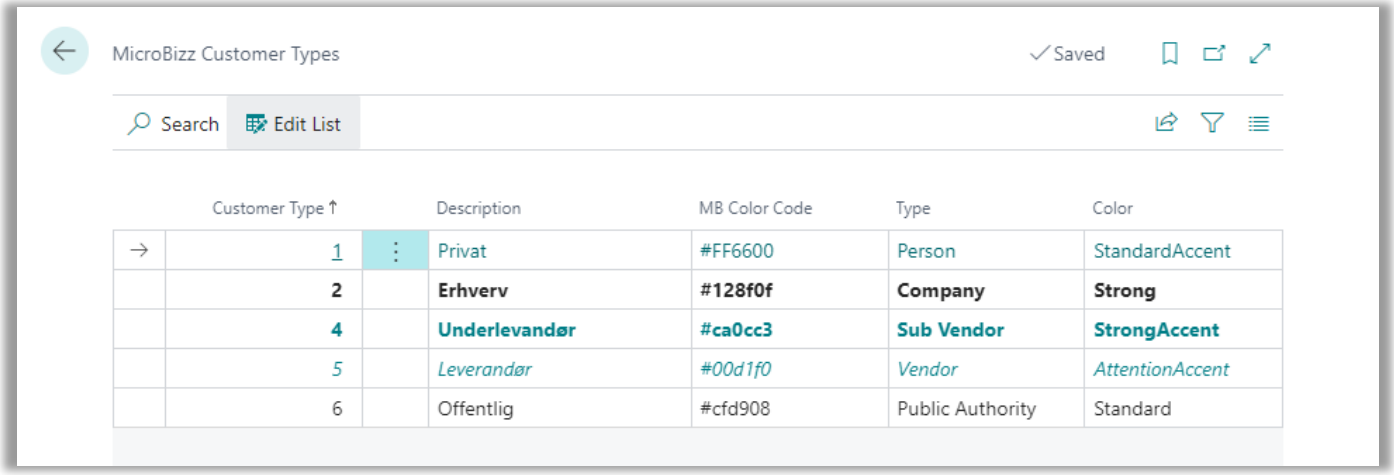
Select "Item Budget Area Group" for every single Item Budget Area Group. Setting up 'Item Budget Area Group (Invoicing)' is optional.

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 CUSTOMER TYPES

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

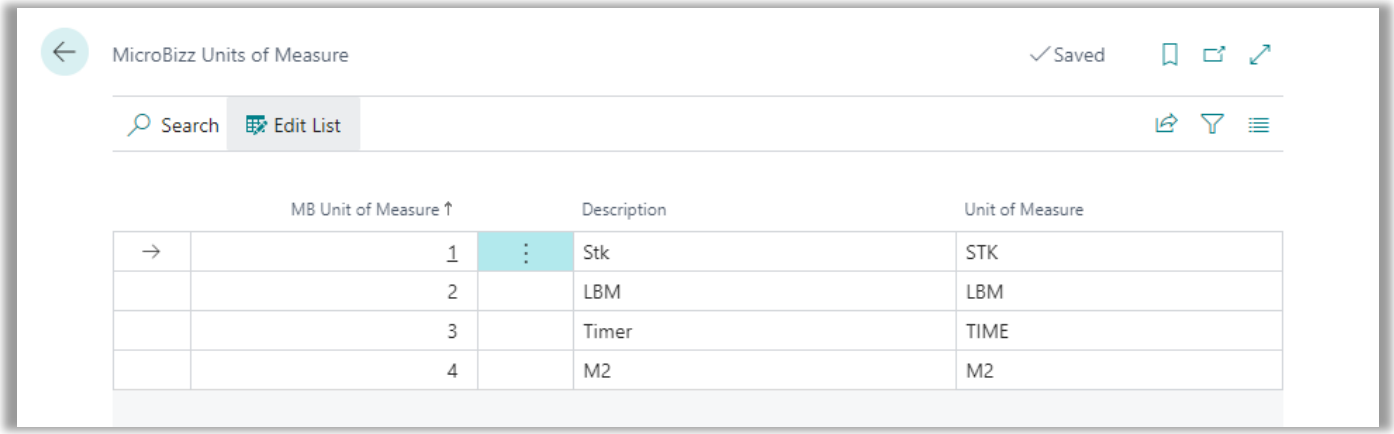


Customer Type	Description	MB Color Code	Type	Color
1	Privat	#FF6600	Person	StandardAccent
2	**Erhverv**	**#128f0f**	**Company**	**Strong**
4	**Underlevandør**	**#ca0cc3**	**Sub Vendor**	**StrongAccent**
5	*Leverandør*	*#00d1f0*	*Vendor*	*AttentionAccent*
6	Offentlig	#cfd908	Public Authority	Standard

Set up field "Type" and choose Business Central style in field "Color" if you want other style than *Standard*.

MICROBIZZ UNITS OF MEASURE

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

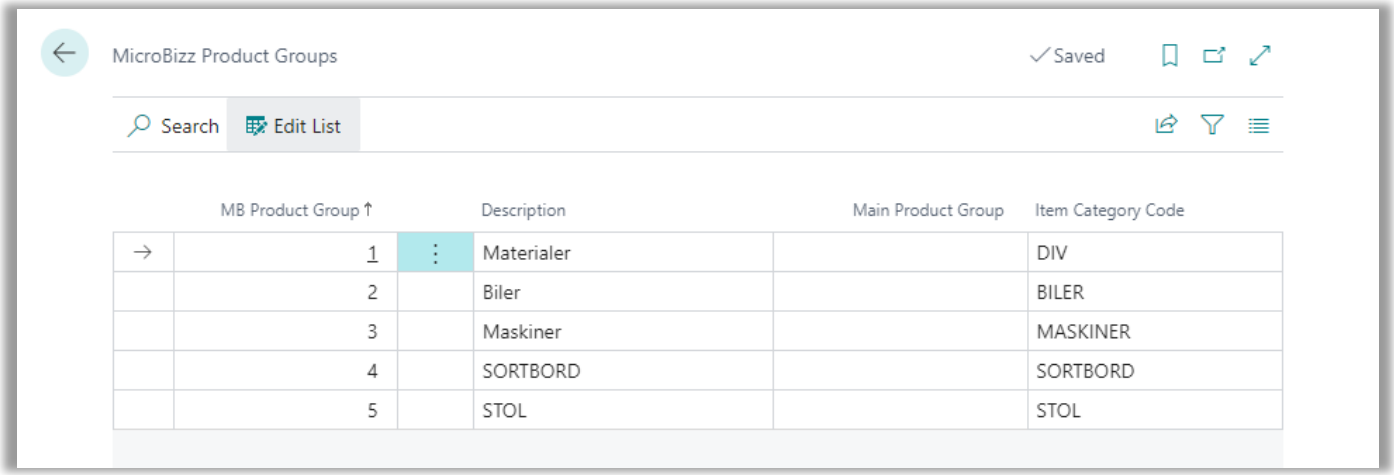


MB Unit of Measure	Description	Unit of Measure
1	Stk	STK
2	LBM	LBM
3	Timer	TIME
4	M2	M2

Set up field “Unit of Measure” with values used in Business Central.

MICROBIZZ PRODUCT GROUPS

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

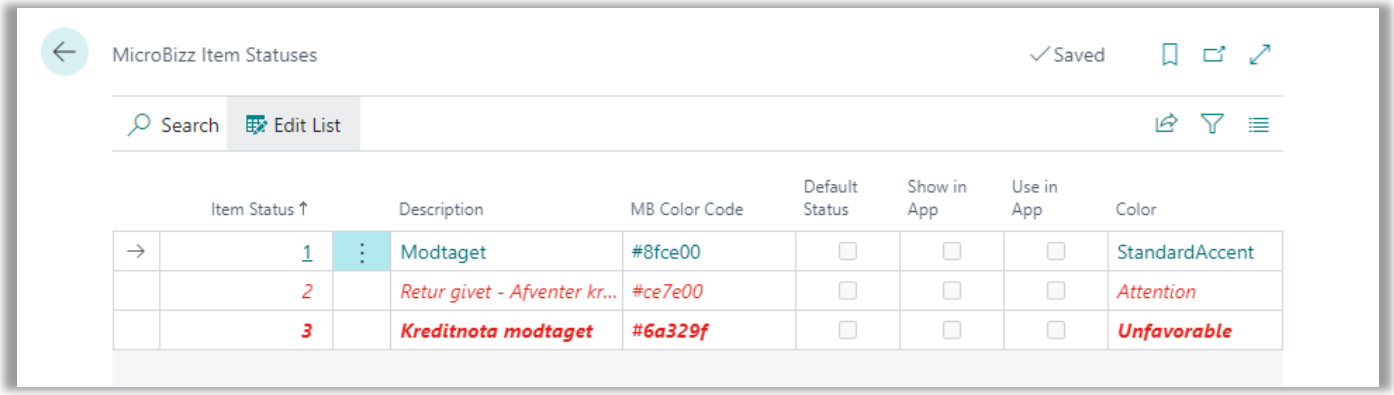


MB Product Group	Description	Main Product Group	Item Category Code
1	Materialer		DIV
2	Biler		BILER
3	Maskiner		MASKINER
4	SORTBORD		SORTBORD
5	STOL		STOL

Define “Item Category Code” for each “MB Product Group”.

MICROBIZZ ITEM STATUSES

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

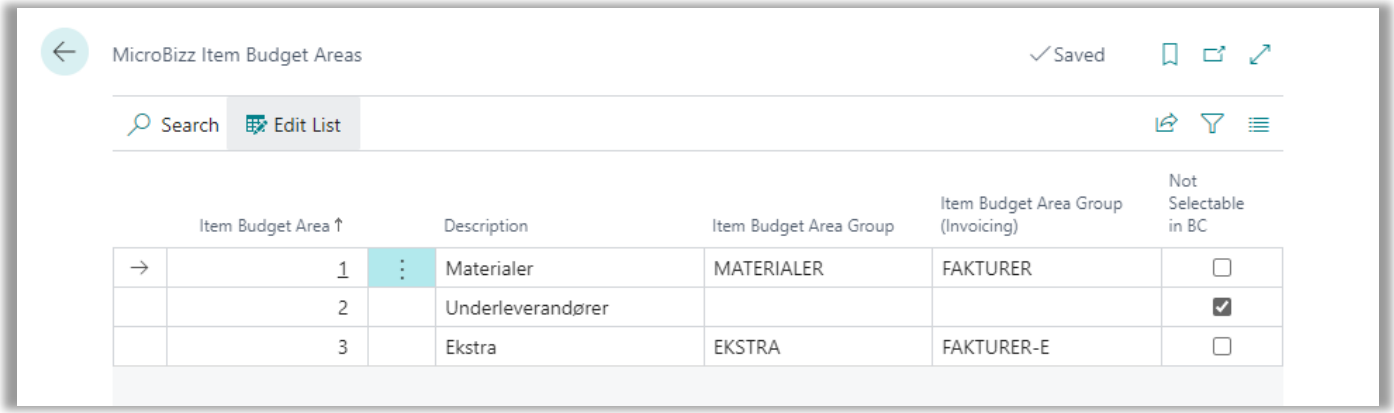


Item Status	Description	MB Color Code	Default Status	Show in App	Use in App	Color
1	Modtaget	#8fce00	☐	☐	☐	StandardAccent
2	Retur givet - Afventer kr...	#ce7e00	☐	☐	☐	Attention
3	Kreditnota modtaget	#6a329f	☐	☐	☐	Unfavorable

Set “Color” for distinguishing between the types you can set one of the styles used within Business Central.

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.

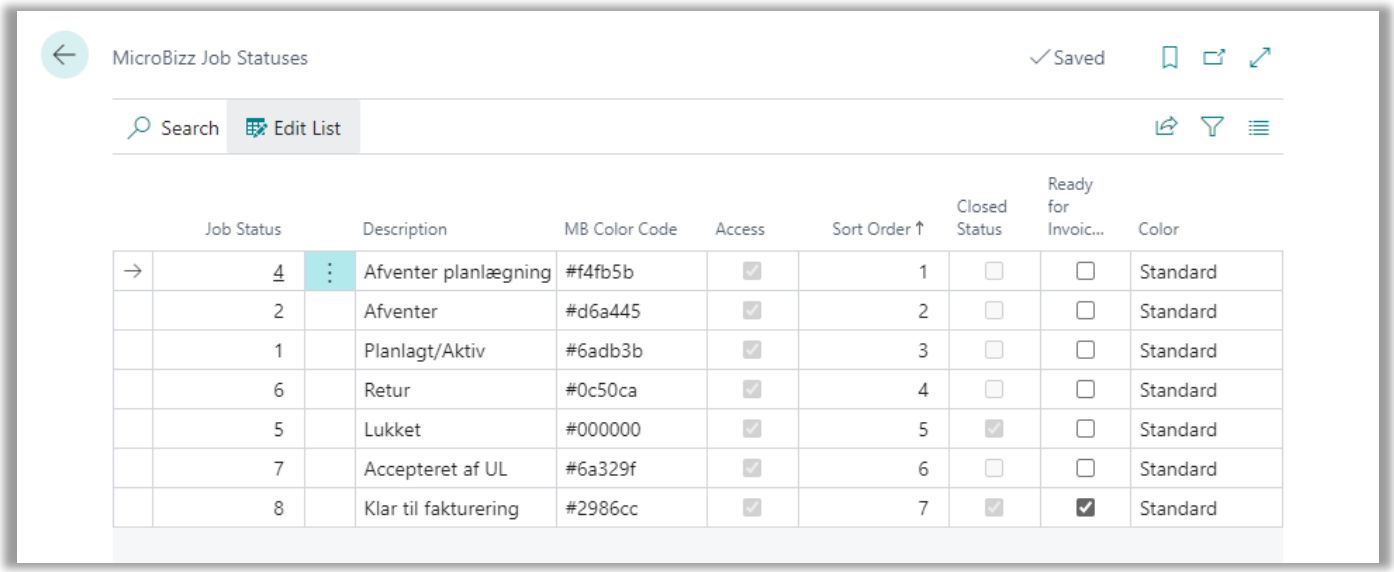


Item Budget Area	Description	Item Budget Area Group	Item Budget Area Group (Invoicing)	Not Selectable in BC
1	Materialer	MATERIALER	FAKTURER	☐
2	Underleverandører			☑
3	Ekstra	EKSTRA	FAKTURER-E	☐

Please note that we can split the posting of Item Budget Areas in two parts.
Set mapping in fields “Item Budget Area Group” and “Item Budget Area Group (Invoicing)” from the list provided when looking up from the field. “Item Budget Area Group (Invoicing)” is optional.
Mark “Not Selectable in BC” if not used in Business Central.

MICROBIZZ JOB STATUSES

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

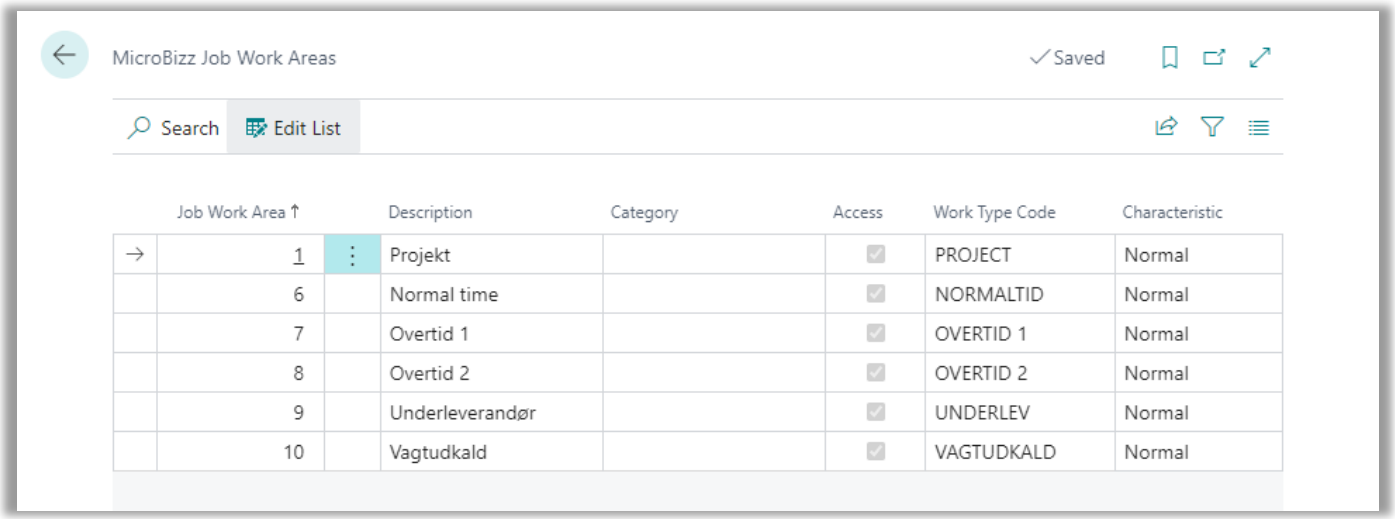


Job Status	Description	MB Color Code	Access	Sort Order ↑	Closed Status	Ready for Invoic...	Color
4	Afventer planlægning	#f4fb5b	☑	1	☐	☐	Standard
2	Afventer	#d6a445	☑	2	☐	☐	Standard
1	Planlagt/Aktiv	#6adb3b	☑	3	☐	☐	Standard
6	Retur	#0c50ca	☑	4	☐	☐	Standard
5	Lukket	#000000	☑	5	☑	☐	Standard
7	Accepteret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

Set the field “Ready for Invoicing” for the “Job Status” which is corresponding to *Ready for Invoicing*.
For distinguishing between the types you can one of the styles used within Business Central in the field “Color”.

MICROBIZZ JOB WORK AREAS

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



Job Work Area	Description	Category	Access	Work Type Code	Characteristic
1	Projekt		☑	PROJECT	Normal
6	Normal time		☑	NORMALTID	Normal
7	Overtid 1		☑	OVERTID 1	Normal
8	Overtid 2		☑	OVERTID 2	Normal
9	Underleverandør		☑	UNDERLEV	Normal
10	Vagtudkald		☑	VAGTUDKALD	Normal

Mapping “Microbizz Work Areas” with corresponding Business Central Work Types by setting field “Work Type Code”.
Characteristic must be defined as well. 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.

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.

Synchronize with Microbizz

In each card page you can set the field “Synchronize with Microbizz”.

Options are:

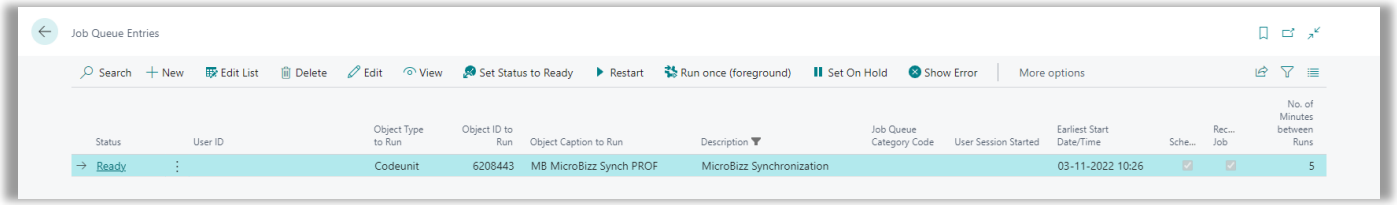
- *Yes* - Synchronizing current record with Microbizz is activated.
- *No* - Record is not being synchronized with Microbizz.
- *Never* - Used when a decision of never synchronizing the record with Microbizz.

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.

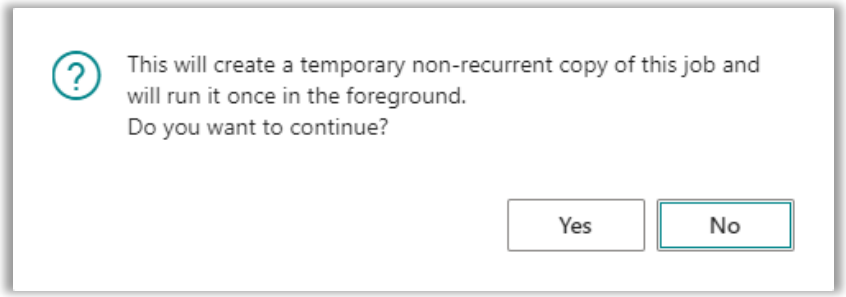


Keep an eye on the status in the Job Queue Entries list. If the "Status" field has the Error indicator, please check the *Log Entries* for further information.

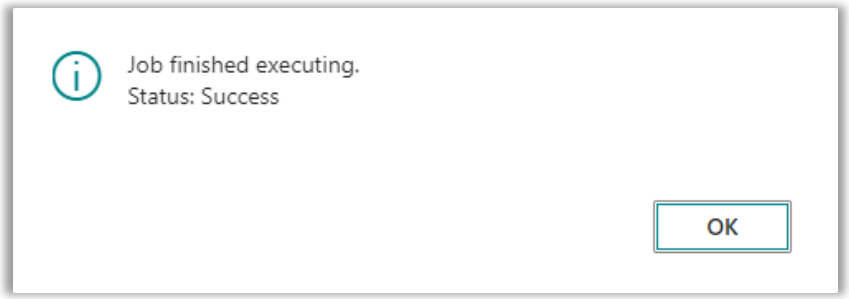
Identifying problems

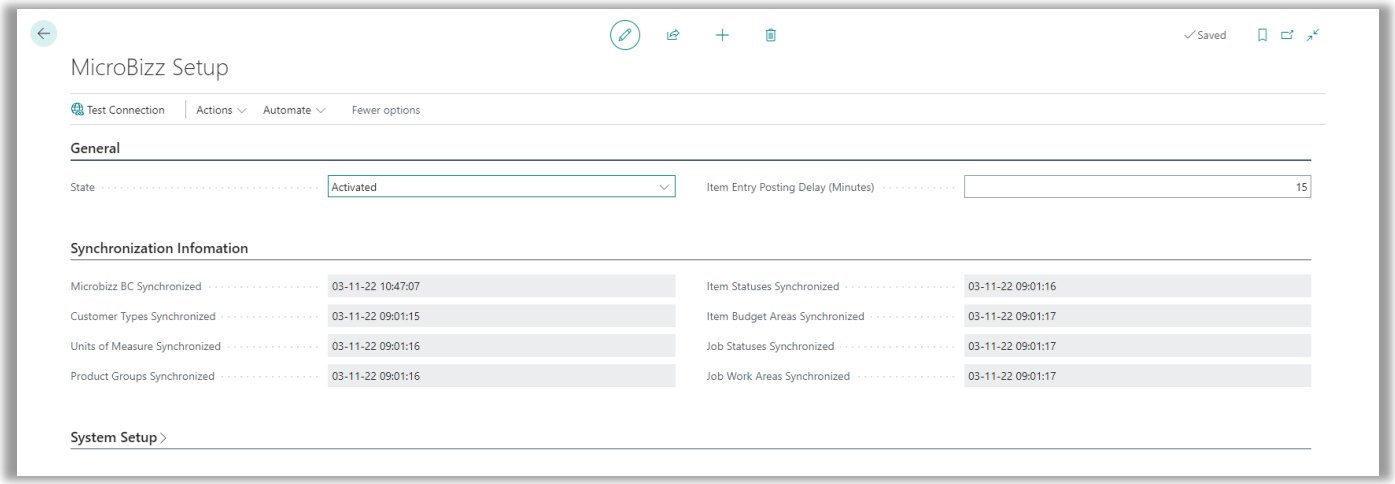
You can also run the job in the foreground for getting on screen messages to tell more about how the job is performing.

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.