Quick Guide



Microbizz Connector

BASIC INTEGRATION FOR CORRECT ACCOUNTING AND INVOICING OF RESOURCE CONSUMPTION





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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

CONTACT INFORMATION

SETTING UP MICROBIZZ

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CRONUS Danmar	A/S MicroBizz ~	=											
Open Job Journal M	croBizz Registration Entries	MicroBizz Item Entries	MicroBizz API Logs Custor	mers Vendors Item	s Chart of Accounts	Bank Accounts Custom	ner Bank Accounts	/endor Bank Accounts	Dimensions Co	incurrent Session Lis	t		2
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2 3	0	0	3 2	0	0								
	Ŭ				<u> </u>	1. Setup "Містовіда	work Type Group	and "work Type	es" and link it to "	MICTOBIZZ JOD W	ork Areas".		

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 <u>www.profacto.dk</u>.

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

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2. MicroBizz Set	tup		
Test Connection Actions	- Automate - Fewer	r options	
General>			
Synchronization Infomation	n>		
	,		
System Setup >			
Connection			
Contract Code		Endpoint	https://system.microbizz.dk/api/ei
Contract Code · · · · · · · · · · · · · · · · · · ·		Endpoint · · · · · · · · · · · · · · · · · · ·	https://system.microbizz.dk/api/ei

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.

•	
MicroBizz Setup)
test Connection	utomate \checkmark Fewer options
General > Functions	>
MicroBizz	2 Synchronize Customer Types
Synchronization Inf	3 Synchronize Units of Measure
	4 Synchronize Product Groups
System Setup >	5 🛐 Synchronize Item Statuses
	6 🗃 Synchronize Item Budget Areas
Connection >	7 🖥 Synchronize Job Statuses
	8 Synchronize Job Work Areas Self control. All initial
	1 Synchronize All Setup 9 <u>setup is done when you</u>
	Synchronize All
	寝 Synchronize All (Enter From Date Time)

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.

			> + 🖻	✓ Saved	
MicroBizz	z Setup				
🕀 Test Connection	More options				
General					
					45
Synchronization In	fomation >	~	Item Entry Posting De		
Synchronization In System Setup	fomation >	~	Item Entry Posting De		
State Synchronization In System Setup Job Journal Template	fomation >	× 	Item Entry Posting De	·	5 ~
State Synchronization In System Setup Job Journal Template Job Journal Batch Na	fomation > SAGER STANDARD	× 	Item Entry Posting De Create Vendor Custo Customer Synchroniz	BC to MicroBizz	5 ×
State Synchronization In System Setup Job Journal Template Job Journal Batch Na Create Customer (Co	fomation > SAGER STANDARD	× × × × 2 ×	Item Entry Posting De Create Vendor Custo Customer Synchroniz Job Synchronization	BC to MicroBizz BC to MicroBizz	5 v v

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 <u>www.profacto.dk</u>.

Job Queue

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

Jol	b Queue Er	ntries														Q 🖬 ,
	O Search	+ New	🐺 Edit List	📋 Delete	🖉 Edit 💿 View	🔊 Set Statu	is to Ready	Restart	🐝 Run once (foreground)	II Set On Hold	😣 Sho	w Error More	options			¢7
	Status		User ID		Object Type to Run	Object ID to Run	Object Captio	on to Run	Description T	Job Cate	Queue gory Code	User Session Started	Earliest Start Date/Time	Sche	Rec Job	No. of Minutes between Runs
	Ready	:			Codeunit	6208443	MB MicroB	lizz Synch PROF	MicroBizz Synchroniz	ation			03-11-2022 10:26			5

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

CONTACT INFORMATION

MICROBIZZ WORK TYPE GROUPS

,∕⊃ Se	arch + New 💀 Edit	List 📋 Delete		<i>Ŀ</i> ₹
	Work Type Group		Description	Work Type Group Type ↑
\rightarrow	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)

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

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.

Q	Search $+$ New	E,	Edit List 📋 Delete			┢ 7 ≣
	Code 1		Description	Unit of Measure Code	Work Type Group	Work Type Group (Invoicing)
\rightarrow	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.

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	Item Budget Area	Group		Description	ltem Budget Area Group Type ↑
\rightarrow	EKSTRA		:	Ekstra	Item Budget Area Group
	MATERIALER			Materialer	Item Budget Area Group
	FAKTURER			Fakturer	Item Budget Area Group (Invoi
	FAKTURER-F			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.

MicroBizz (Customer Types				√S	aved 📙 🗹 🖌
∕ ^O Searc	h 🐺 Edit List					☞ 7 ≡
	Customer Type 🕇		Description	MB Color Code	Туре	Color
\rightarrow	<u>1</u>	:	Privat	#FF6600	Person	StandardAccent
	2		Erhverv	#128f0f	Company	Strong
	4		Underlevandør	#ca0cc3	Sub Vendor	StrongAccent
	5		Leverandør	#00d1f0	Vendor	AttentionAccent
	~		Offontlig	#cfd908	Public Authority	Standard

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

CONTACT INFORMATION

MICROBIZZ UNITS OF MEASURE

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

MicroBizz Ur	nits of Measure				🗸 Saved 🔲 🗖 🧷
,	🐯 Edit List				☞ 7 ≡
	MB Unit o	of Measure 1		Description	Unit of Measure
		4		Stk	CTV
\rightarrow		1		Stk	SIK
\rightarrow		2	:	LBM	LBM
→ 		2	:	LBM Timer	LBM TIME

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.

MicroBizz P	roduct Groups				✓ Saved	Ц	Ľ	2
	h 💀 Edit List					È	\mathbb{V}	=
	MB Product Group ↑		Description	Main Product Group	Item Category	Code		
\rightarrow	<u>1</u>	:	Materialer		DIV			
	2		Biler		BILER			
	3		Maskiner		MASKINER			
	4		SORTBORD		SORTBORD			
			CTO!		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.

WIICIO	JIZZ ILEII	i Statuses						✓ 3ave	
. م	Search	🐯 Edit Lis	t						┢ ७ ≣
	lter	n Status ↑		Description	MB Color Code	Default Status	Show in App	Use in App	Color
\rightarrow		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.

MicroBizz I	tem Budget Areas				√ Saved	
,	:h 🐺 Edit List					┢ 7 ≣
ŀ	tem Budget Area ↑		Description	ltem Budget Area Group	ltem Budget Area Group (Invoicing)	Not Selectable in BC
\rightarrow	1	:	Materialer	MATERIALER	FAKTURER	
	2		Underleverandører			
					FAUXTURED F	

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

viicro	BIZZ JOD	Statuses	5						✓ Saved	Ц С 2
Q	Search	🐯 Edit	List							\$\vec{b}{2} \vec{b}{2}
	Job	Status		Description	MB Color Code	Access	Sort Order 1	Closed Status	Ready for Invoic	Color
\rightarrow		<u>4</u>	÷	Afventer planlægning	#f4fb5b	v	1			Standard
		2		Afventer	#d6a445	v	2			Standard
		1		Planlagt/Aktiv	#6adb3b	V	3			Standard
		6		Retur	#0c50ca	V	4			Standard
		5		Lukket	#000000		5	~		Standard
		7		Accepteret af UL	#6a329f		6			Standard
		8		Klar til fakturering	#2986cc	~	7	~	~	Standard

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

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

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\$	Search	🐯 Edit L	ist					┢ 7 ≣
	Job Wo	ork Area 1		Description	Category	Access	Work Type Code	Characteristic
->	,	1	÷	Projekt		V	PROJECT	Normal
		6		Normal time			NORMALTID	Normal
		7		Overtid 1		V	OVERTID 1	Normal
		8		Overtid 2		1	OVERTID 2	Normal
		9		Underleverandør		V	UNDERLEV	Normal
		10		Vaqtudkald			VAGTUDKALD	Normal

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

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.

Job Queu	e Entries										1] 🖬 📌
,	ch + Ne	w 💀 Edit List	🗓 Delete 🧳	edit ⓒ View	🔊 Set Statu	s to Ready 🕨 🕨 Restart	🐝 Run once (foreground) 🛛 📕 Set	On Hold 🛛 Show Error More	options		Ľ	? \ ≣
Status		User ID		Object Type to Run	Object ID to Run	Object Caption to Run	Description T	Job Queue Category Code User Session Started	Earliest Start Date/Time	Sche	Rec Job	No. of Minutes between Runs
→ <u>Read</u>	y.			Codeunit	6208443	MB MicroBizz Synch PROF	MicroBizz Synchronization		03-11-2022 10:26			5

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.

?	This will create a temporary non-recurrent copy of this job and will run it once in the foreground. Do you want to continue?
	Yes No

If the job is running successfully Status *Success* is reported.

Job finished executing. Status: Success	
	ОК

CONTACT INFORMATION

ProFacto A/S | Lyfaparken | Måløv Byvej 229 G, 1 | DK-2760 Måløv +45 31 31 07 00 | info@profacto.dk | www.profacto.dk

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 Setup					
$$ Test Connection $ $ Actions \lor Automate \lor	Fewer options				
General					
State	Activated	\sim	Item Entry Posting Delay (Minutes)		15
Synchronization Infomation					
Synchronization Infomation	03-11-22 10:47:07		Item Statuses Synchronized	03-11-22 09:01:16	
Synchronization Infomation Microbizz BC Synchronized Customer Types Synchronized	03-11-22 10:47:07 03-11-22 09:01:15		Item Statuses Synchronized	03-11-22 09:01:16 03-11-22 09:01:17	
Synchronization Infomation Microbizz BC Synchronized Customer Types Synchronized Units of Measure Synchronized	03-11-22 10:47:07 03-11-22 09:01:15 03-11-22 09:01:16		Item Statuses Synchronized · · · · · · · · · · · · · · · · · · ·	03-11-22 09:01:16 03-11-22 09:01:17 03-11-22 09:01:17	
Synchronization Infomation Microbizz BC Synchronized Customer Types Synchronized Units of Measure Synchronized Product Groups Synchronized	03-11-22 10:47:07 03-11-22 09:01:15 03-11-22 09:01:16 03-11-22 09:01:16		Item Statuses Synchronized Item Budget Areas Synchronized Job Statuses Synchronized Job Work Areas Synchronized	03-11-22 09:01:16 03-11-22 09:01:17 03-11-22 09:01:17 03-11-22 09:01:17	