



## 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.

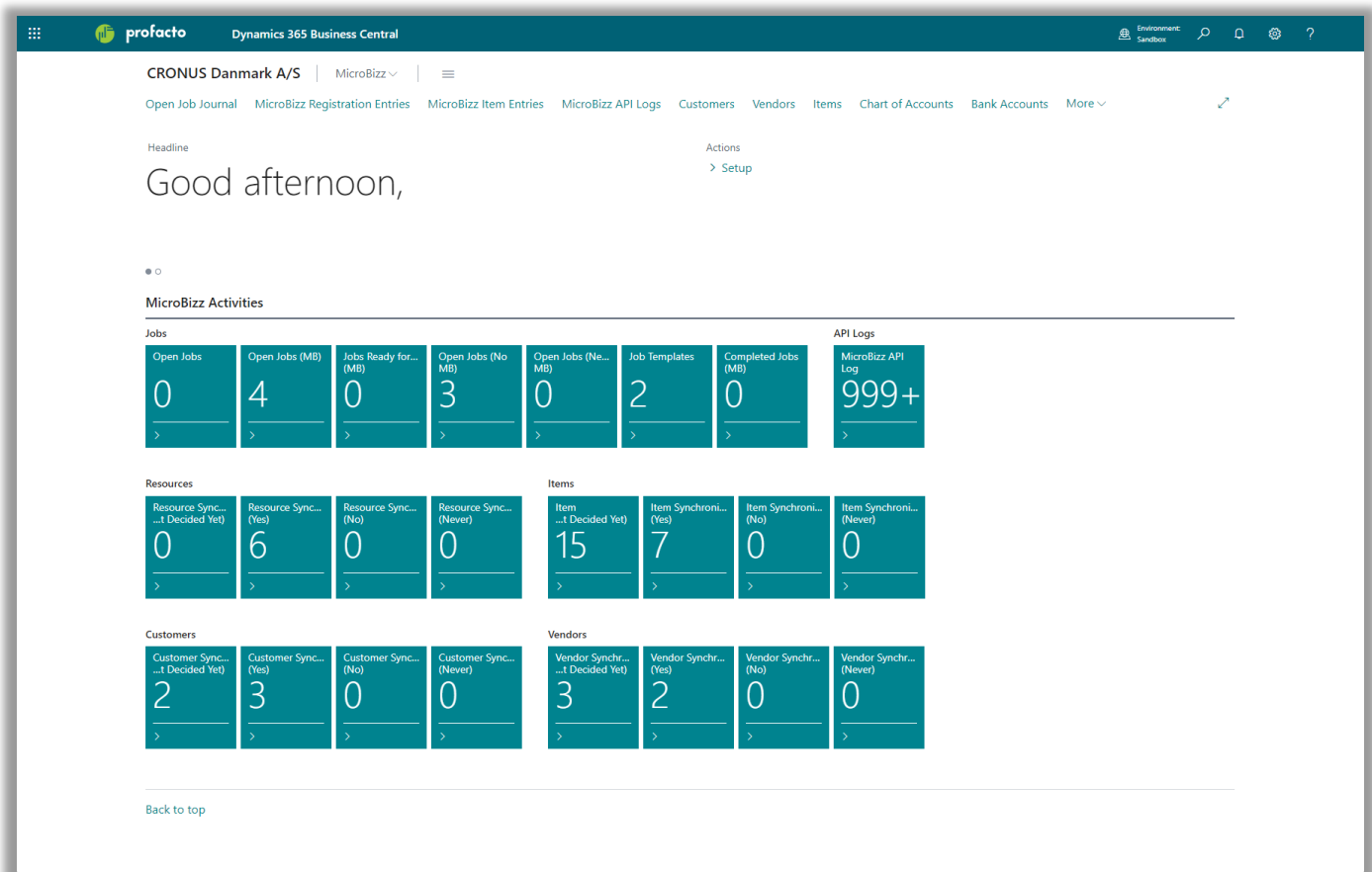
This manual takes you through setup for synchronization step by step.

# 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.

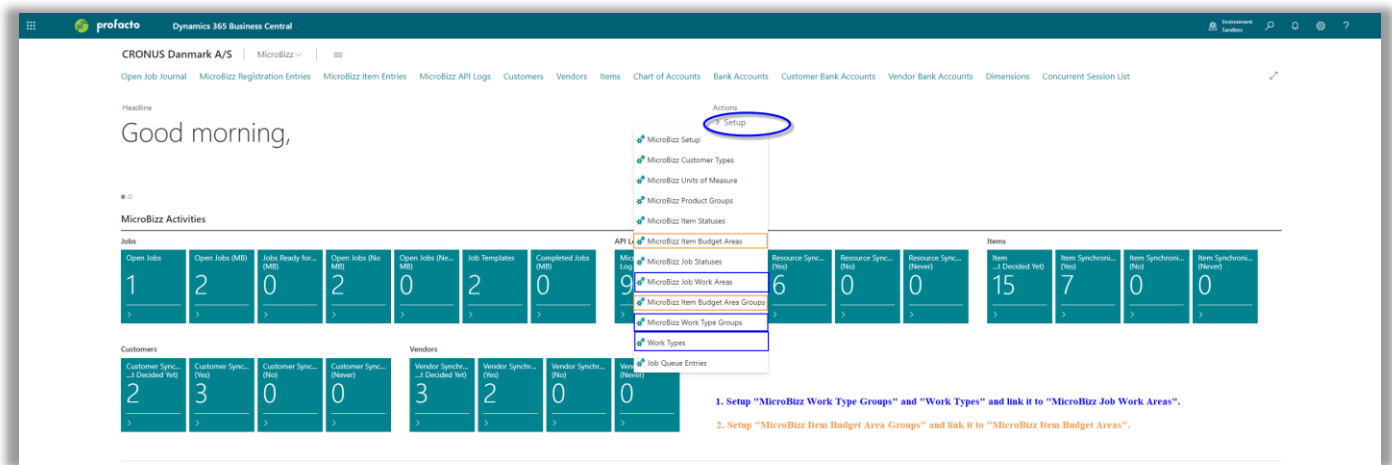


Alternative role center: The *Project Manager* role center is expanded with the Microbizz Activities group.

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# 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.

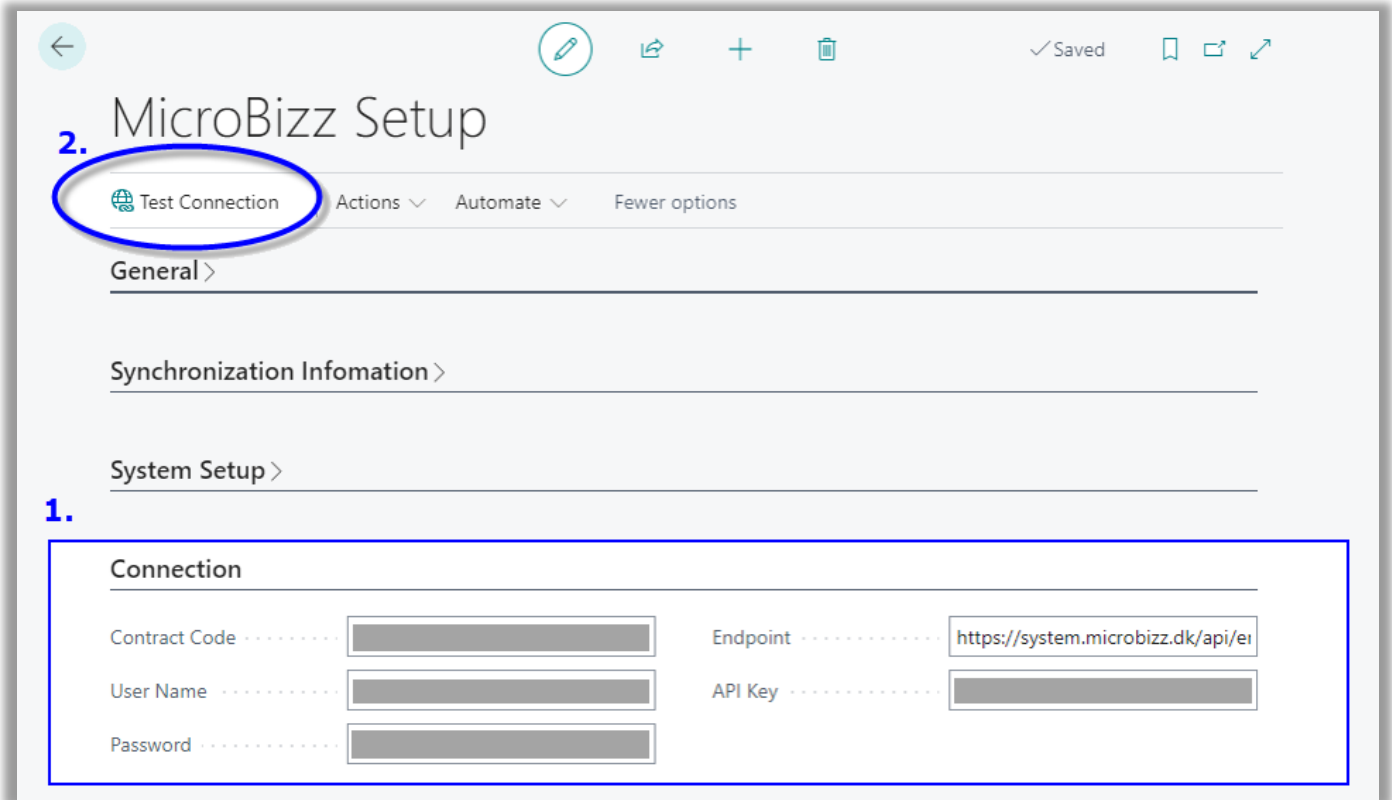
Required settings are described in the next paragraphs. *Microbizz Setup – Part I, Synchronizing All Setup* and *Microbizz Setup – Part II*.

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## 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.

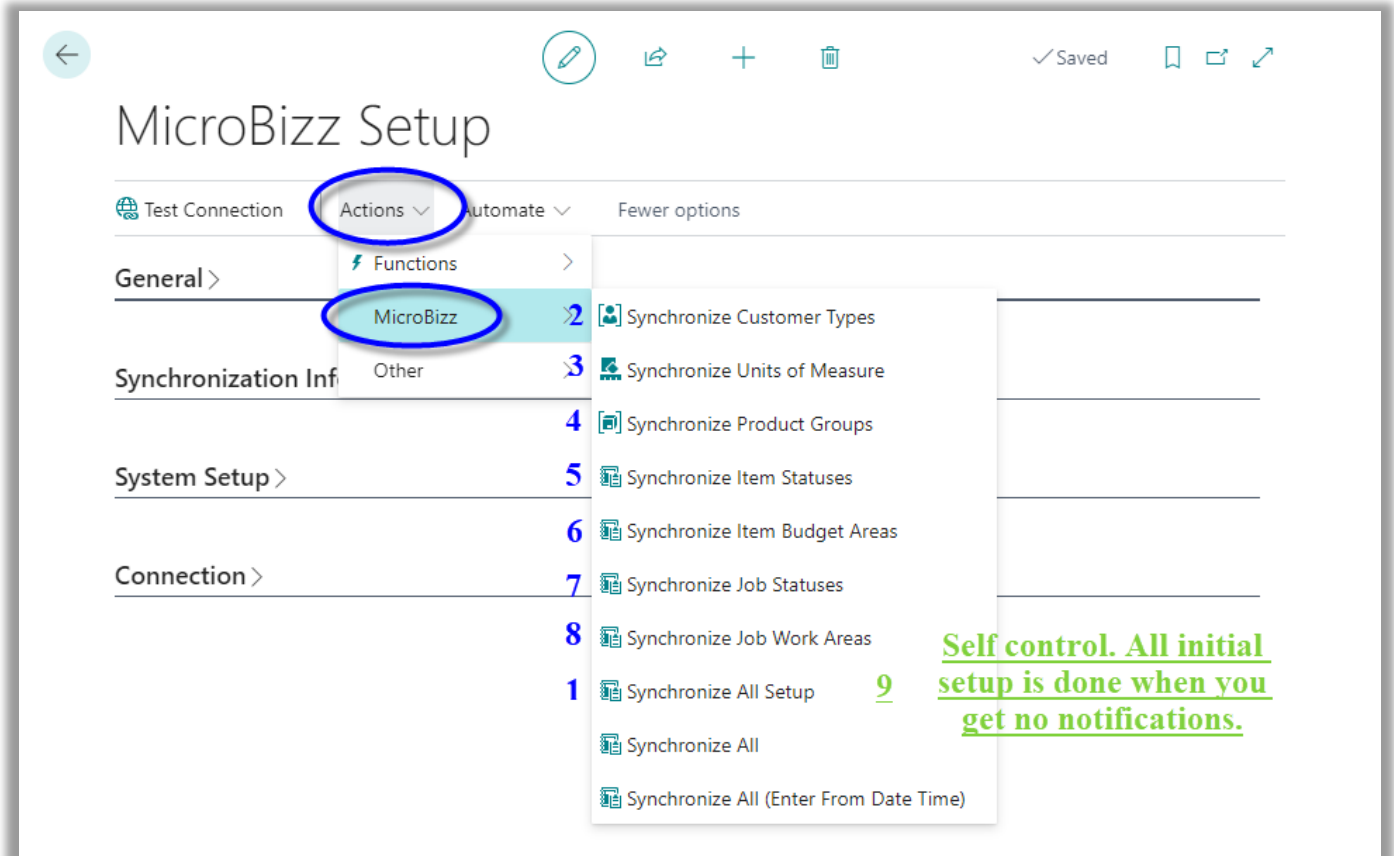
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## Synchronize All Setup

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.

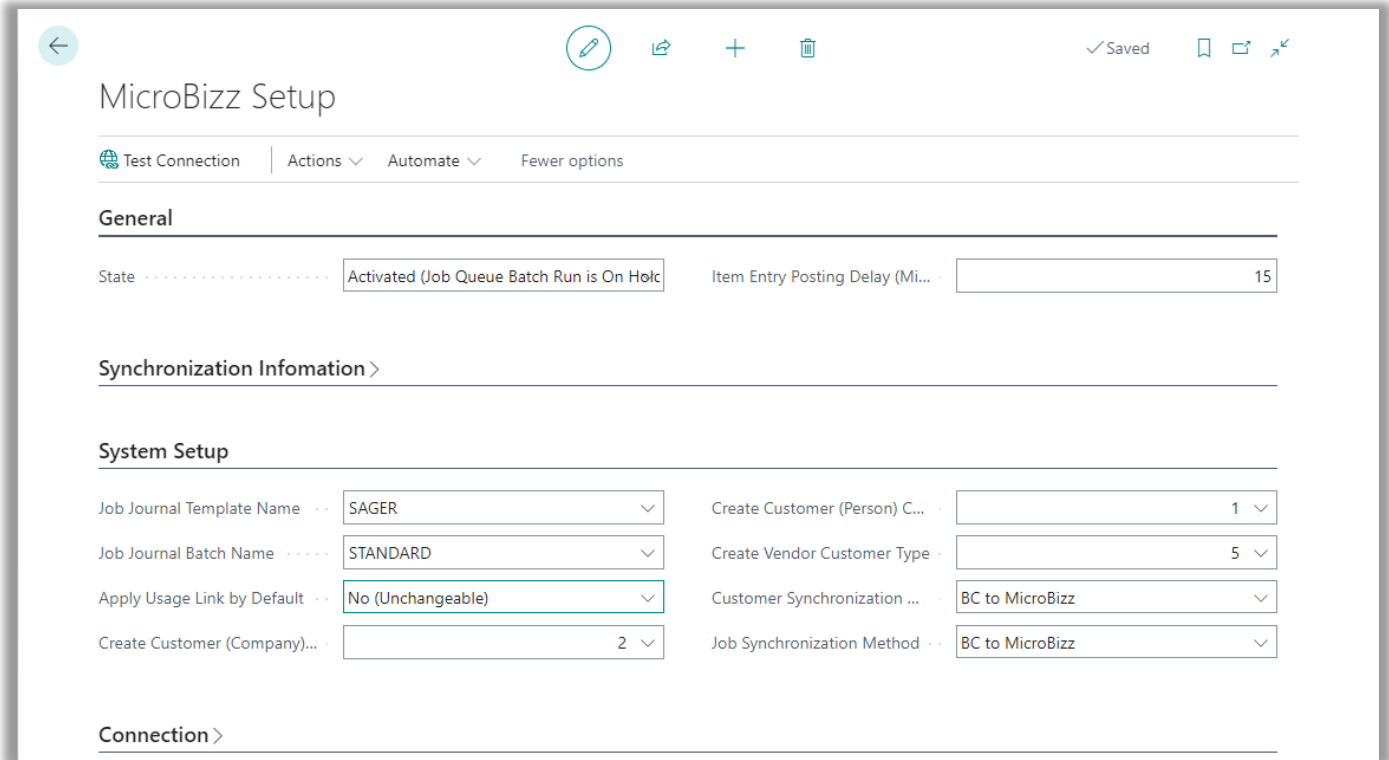
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## Microbizz Setup – Part II – System Setup and Activation

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.



### 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.

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## 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.
Apply Usage Link by Default	<p>Specifies the method that will be used for filling the Line Type when creating billable Job Planning Lines in BC.</p> <p>If the Job is set for using "Apply Usage Link" then new billable Job Planning Lines will be created with "Line Type" "Budget and Billable".</p> <p>If the Job is set for not using "Apply Usage Link" then new billable Job Planning Lines will be created with "Line Type" "Billable".</p> <p>This setting applies to jobs handled by the Microbizz Connector only.</p> <p><i>Use BC Default</i> Uses the standard setup. See Job Setup in appendix <a href="#">Special feature: Apply Usage Link by Default</a></p> <p><i>No</i> Do not use Usage Link. Overrules what is set up in standard applications Jobs Setup. You will be able to change individual settings on the Job Card.</p> <p><i>Yes</i> Use Usage Link. Overrules what is set up in standard applications Jobs Setup. You will be able to change individual settings on the Job Card.</p> <p><i>No (Unchangeable)</i> Do not use Usage Link. Overrules what is set up in standard applications Jobs Setup. You are not allowed to change individual settings on the Job Card afterwards.</p> <p><i>Yes (Unchangeable)</i> Use Usage Link. Overrules what is set up in standard applications Jobs Setup. You are not allowed to change individual settings on the Job Card afterwards.</p> <p>Note: See appendix <a href="#">Special feature: Apply Usage Link by Default</a></p>

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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:  <i>BC to Microbizz</i> <i>BC to/from Microbizz</i>
Job Synchronization Method	Method for synchronization. Options are:  <i>BC to Microbizz – One way communication.</i> <i>BC to/from Microbizz – Transactions are being send both ways.</i>

#### Connection

Please see paragraph [Microbizz Setup – Part I – Connection](#) for further information.

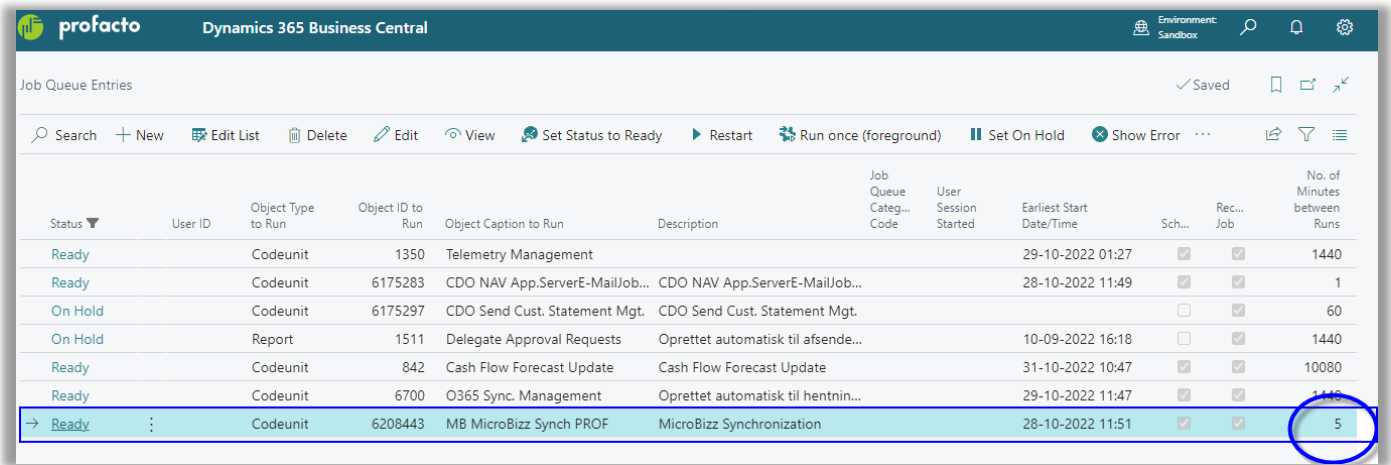
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## Job Queue

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



Status	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description	Job Queue Categ... Code	User Session Started	Earliest Start Date/Time	Sch...	Rec... Job	No. of Minutes between Runs
Ready		Codeunit	1350	Telemetry Management				29-10-2022 01:27	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1440
Ready		Codeunit	6175283	CDO NAV App.ServerE-MailJob...	CDO NAV App.ServerE-MailJob...			28-10-2022 11:49	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1
On Hold		Codeunit	6175297	CDO Send Cust. Statement Mgt.	CDO Send Cust. Statement Mgt.				<input type="checkbox"/>	<input checked="" type="checkbox"/>	60
On Hold		Report	1511	Delegate Approval Requests	Oprettet automatisk til afsende...			10-09-2022 16:18	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1440
Ready		Codeunit	842	Cash Flow Forecast Update	Cash Flow Forecast Update			31-10-2022 10:47	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10080
Ready		Codeunit	6700	O365 Sync. Management	Oprettet automatisk til hentnin...			29-10-2022 11:47	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1440
Ready		Codeunit	6208443	MB MicroBizz Synch PROF	MicroBizz Synchronization			28-10-2022 11:51	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5

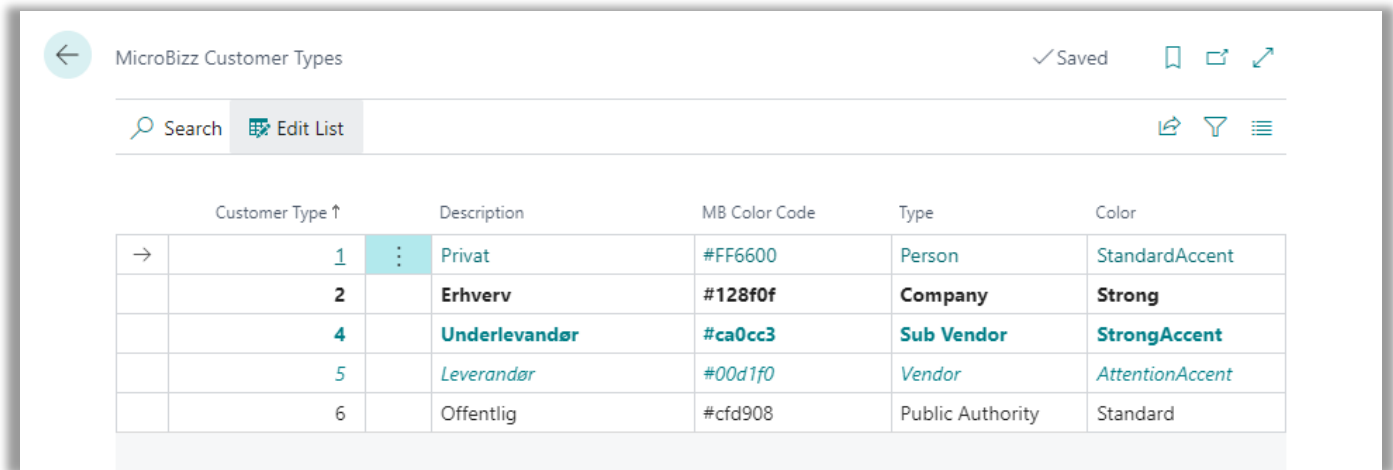
Default value for “No. of Minutes between Runs” is 5 minutes. This can be altered if so required or desired.

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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 use 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.

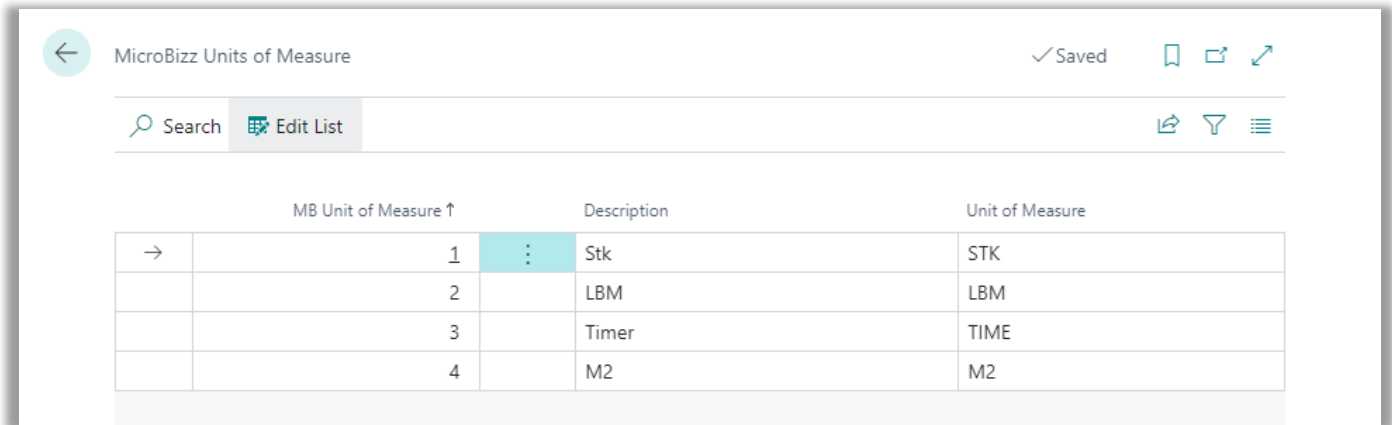
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## Microbizz Units of Measure

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

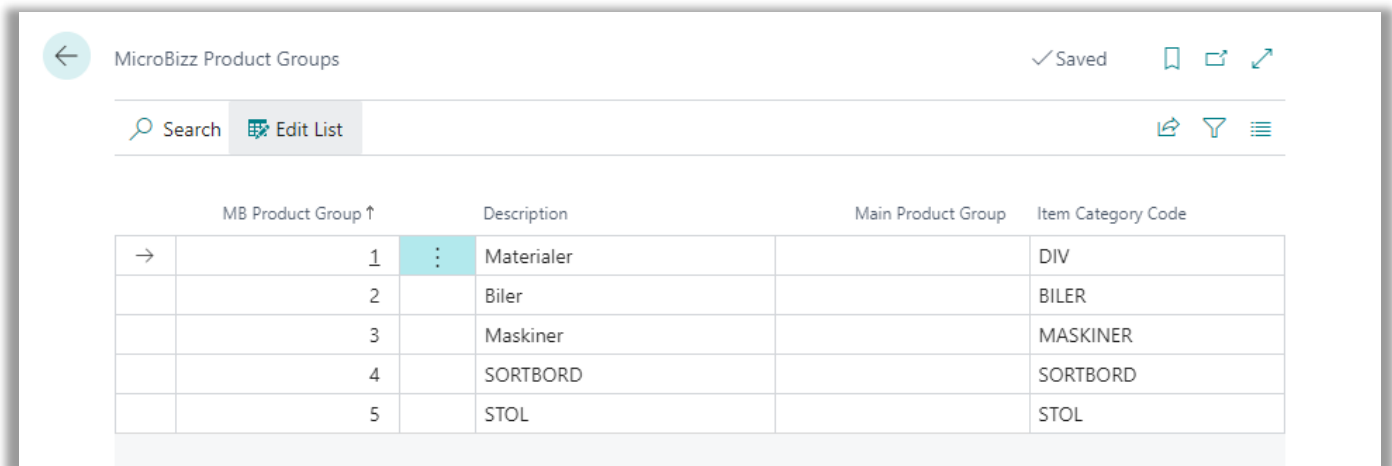
Unit of Measure

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.



	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

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.

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## 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	StandardAccent
2	Retur givet - Afventer kr...	#ce7e00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Attention
3	Kreditnota modtaget	#6a329f	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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.

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## 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	<input type="checkbox"/>
2	Underleverandører			<input checked="" type="checkbox"/>
3	Ekstra	EKSTRA	FAKTURER-E	<input type="checkbox"/>

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 optional.

Not Selectable in BC

If not used in Business Central, please mark the field.

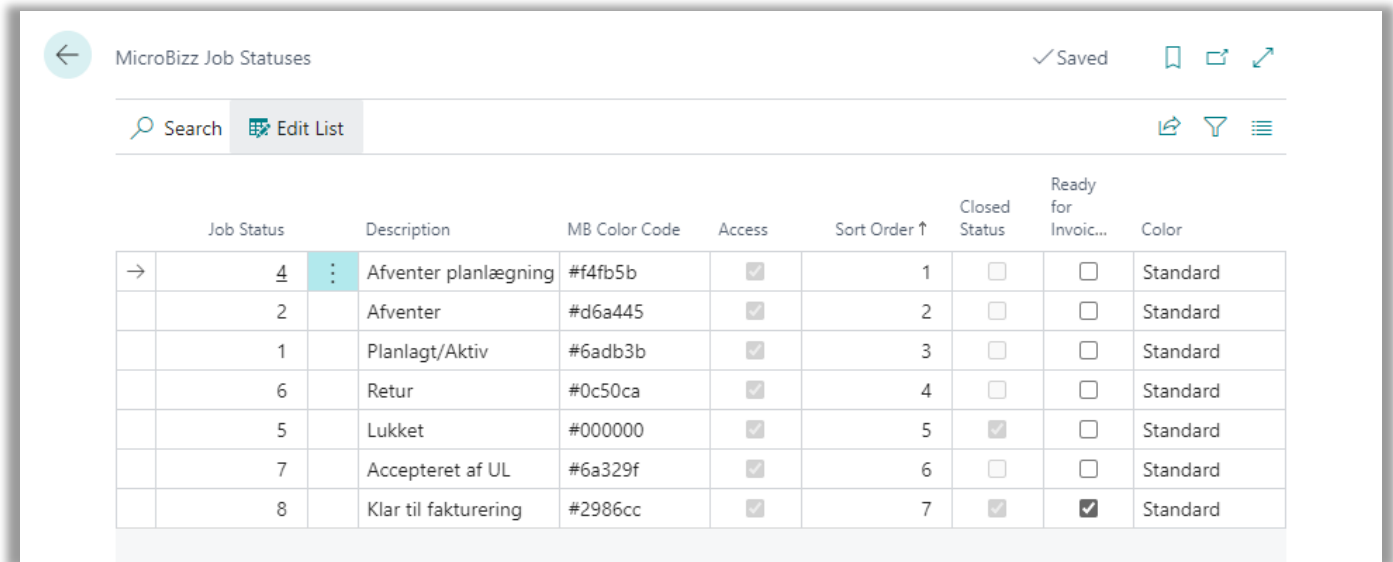
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## Microbizz Job Statuses

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 Invoicing	Color
4	Afventer planlægning	#f4fb5b	<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>	Standard
2	Afventer	#d6a445	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	Standard
1	Planlagt/Aktiv	#6adb3b	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	<input type="checkbox"/>	Standard
6	Retur	#0c50ca	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	Standard
5	Lukket	#000000	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Standard
7	Accepteret af UL	#6a329f	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	<input type="checkbox"/>	Standard
8	Klar til fakturering	#2986cc	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	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 use 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.

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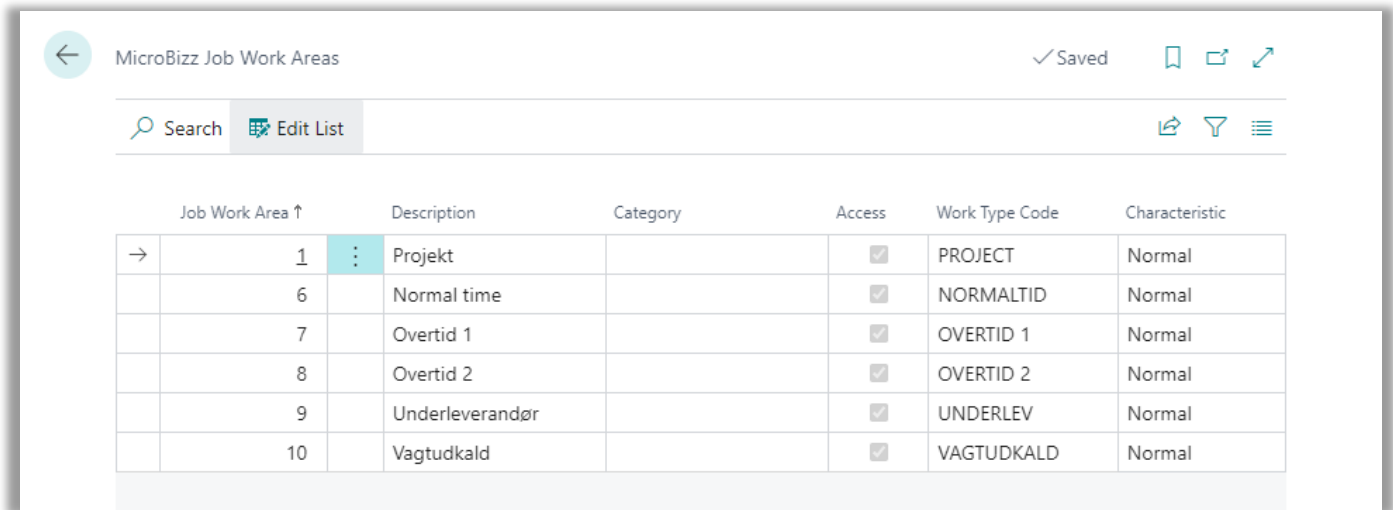
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## Microbizz Job Work Areas

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		<input checked="" type="checkbox"/>	PROJECT	Normal
6	Normal time		<input checked="" type="checkbox"/>	NORMALTID	Normal
7	Overtid 1		<input checked="" type="checkbox"/>	OVERTID 1	Normal
8	Overtid 2		<input checked="" type="checkbox"/>	OVERTID 2	Normal
9	Underleverandør		<input checked="" type="checkbox"/>	UNDERLEV	Normal
10	Vagtudkald		<input checked="" type="checkbox"/>	VAGTUDKALD	Normal

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.

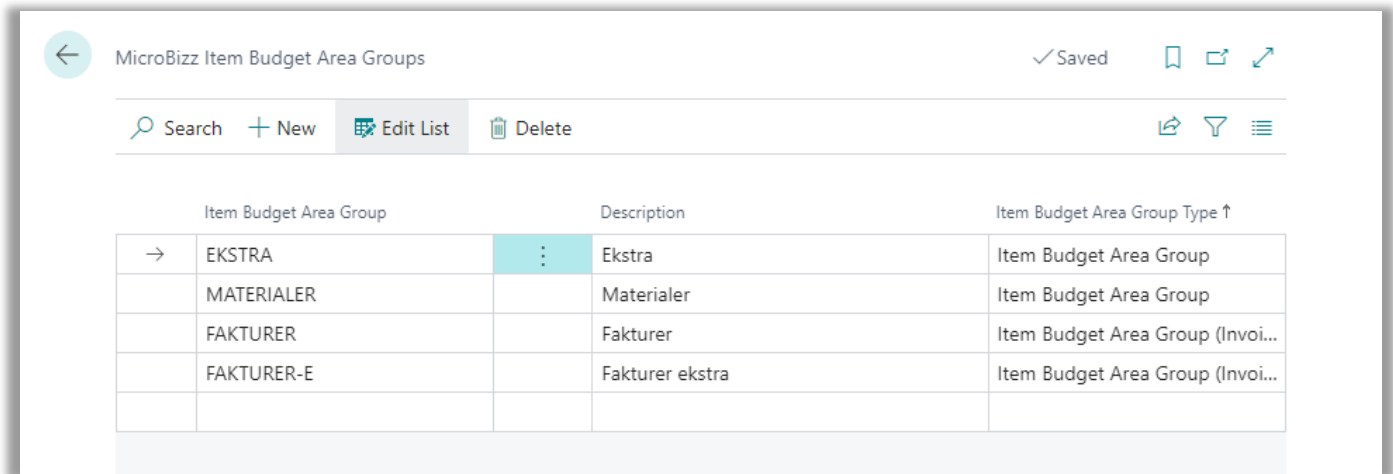
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## Microbizz Item Budget Area Groups

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.

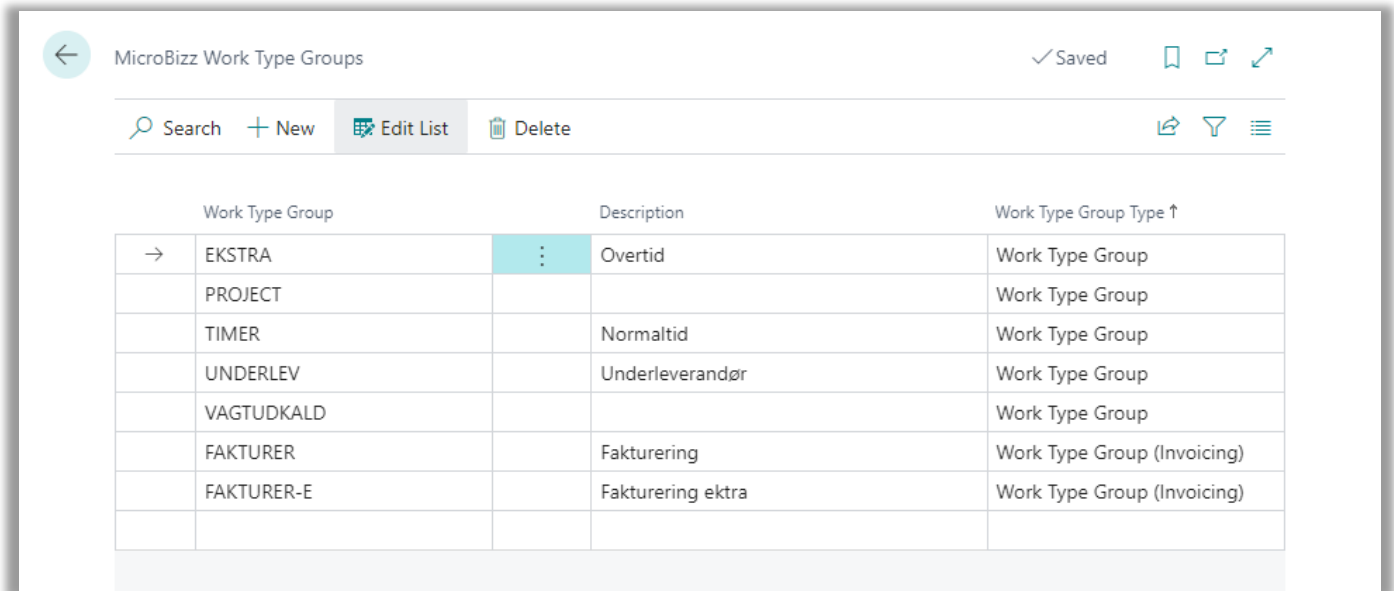
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## Microbizz Work Type Groups

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



The screenshot shows the 'MicroBizz Work Type Groups' interface. At the top, there is a back arrow, the title 'MicroBizz Work Type Groups', and a 'Saved' status. Below the title are navigation buttons: 'Search', '+ New', 'Edit List', and 'Delete'. On the right side, there are icons for a bookmark, a share icon, and a refresh icon. The main content is a table with the following columns: 'Work Type Group', 'Description', and 'Work Type Group Type ↑'. The table contains the following data:

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 ekstra	Work Type Group (Invoicing)

### 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.

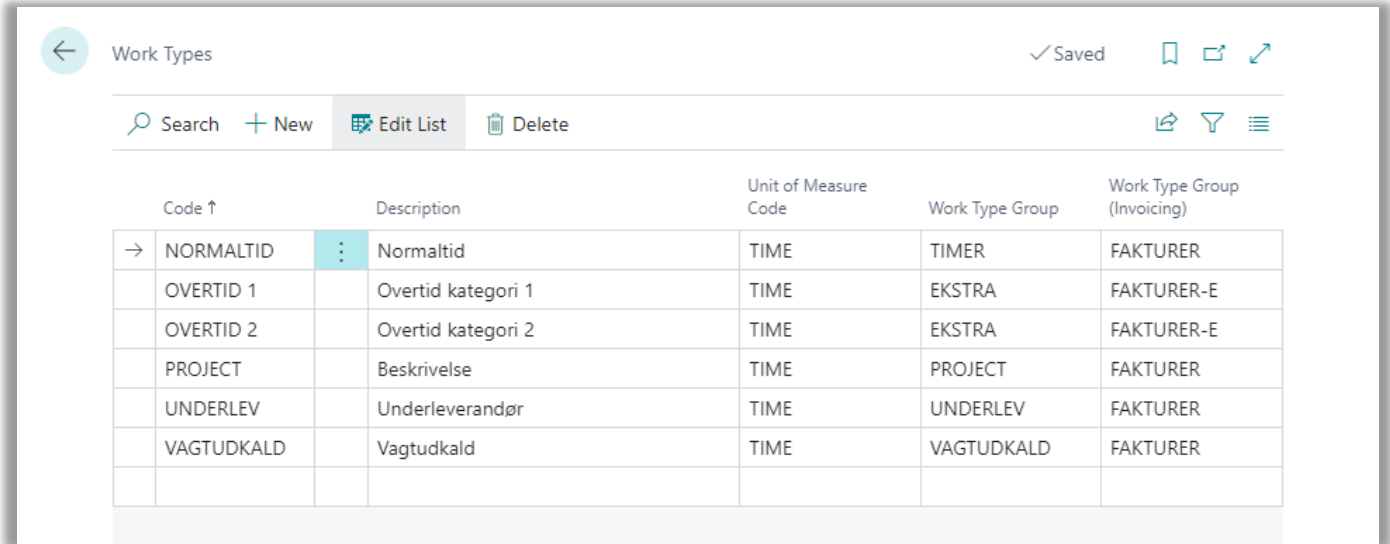
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## Work Types

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.

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## SELECT DATA TO SYNCHRONIZE

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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.

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### CONTACT INFORMATION

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## Customer card

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

The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The card is for customer '40000 · Litware, Inc.'. The 'General' section includes fields for No. (40000), Name (Litware, Inc.), IC Partner Code, Balance (LCY) (50,991.00), Balance (LCY) As Vendor (0.00), Balance Due (LCY) (50,991.00), Credit Limit (LCY) (0.00), Blocked, Bank Account Blocked, Privacy Blocked, Salesperson Code (LB), and Responsibility Center. The 'Address & Contact' section includes Address (10 High Tower Green), Address 2, Phone No., Mobile Phone No., and Email (litware.inc@contoso.com). Financial summary fields show Total Sales (371,366.00), Costs (LCY) (39,964.00), Profit (LCY) (39,866.00), and Profit % (49.9). The 'Synchronize with MicroBizz' field is set to 'Yes', and 'MicroBizz Synchronized' is dated 03-11-22 13:18:14.

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.

The screenshot shows the 'Vendor Card' for 'Wide World Importers' in Dynamics 365 Business Central. The card is divided into two main sections: 'General' and 'Address & Contact'. In the 'General' section, the 'No.' field is set to '40000'. The 'Name' field is 'Wide World Importers'. The 'Synchronize with MicroBizz' field is set to 'Yes'. The 'MicroBizz Vendor ID' field is '30'. The 'MicroBizz Synchronized' field shows a date and time: '03-11-22 13:23:17'. The 'Address & Contact' section shows the address as 'Aviator Way, 3000', 'Manchester', 'GB'. The email field is 'toby.rhode@contoso.com'. The 'Phone No.' and 'Mobile Phone No.' fields are empty. The 'Our Account No.' field is also empty.

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.

The screenshot shows the Dynamics 365 Business Central interface for an Item Card. The item is '1996-S · ATLANTA Whiteboard, basis'. The 'Synchronize with MicroBizz' field is set to 'Default (No)'. The 'Inventory' section shows 'Qty. on Sales Order' as 12, 'Stockout Warning' as 'Default (Yes)', 'Unit Volume' as 0.31, and 'Over-Receipt Code' as empty. The 'Costs & Posting' section is partially visible.

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.

The screenshot shows the Dynamics 365 Business Central interface for a Resource Card. The card is titled "ANE · ANE PEDERSEN". The "General" section includes fields for No. (ANE), Name (ANE PEDERSEN), Type (Person), Base Unit of Measure (TIME), Search Name (ANE PEDERSEN), Resource Group No., Blocked (toggle), and Privacy Blocked (toggle). The "Invoicing" section includes fields for Direct Unit Cost (430.00), Indirect Cost % (10.00), Unit Cost (473.00), Price/Profit Calculation (Profit=Price-Cost), Profit % (45), and Unit Price (860.00). The "Synchronize with Microbizz" field is set to "Yes". Other fields include Last Date Modified (29-06-2022), Use Time Sheet (toggle), Time Sheet Owner User ID, Time Sheet Approver User ID, Microbizz Resource ID (18), and Microbizz Synchronized (29-06-22 17:13:45).

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.  <i>Yes</i> Synchronizing current job with Microbizz is activated.  <i>No</i> Job is not being synchronized with Microbizz.  <i>Never</i> Used when a decision of never synchronizing the job with Microbizz.  <i>Job Template</i> 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.

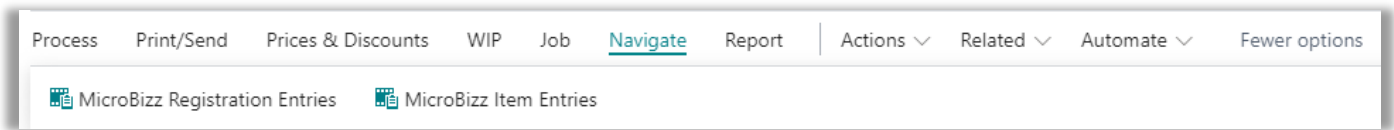
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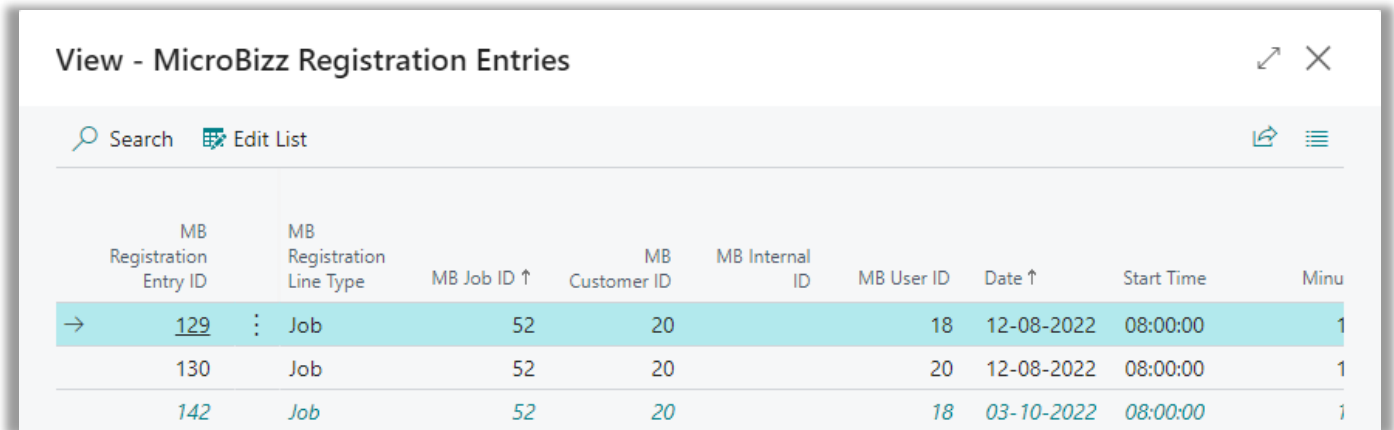
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## Related entries

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.

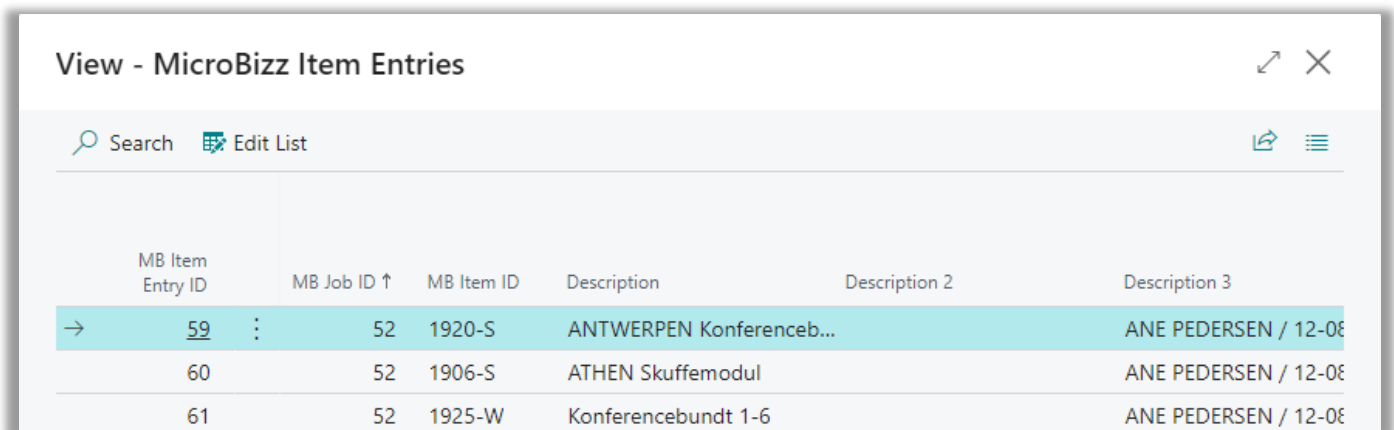


### View - MicroBizz Registration Entries

Search Edit List

MB Registration Entry ID	MB Registration Line Type	MB Job ID ↑	Customer ID	MB Internal ID	MB User ID	Date ↑	Start Time	Minu
→ 129	Job	52	20		18	12-08-2022	08:00:00	1
130	Job	52	20		20	12-08-2022	08:00:00	1
142	Job	52	20		18	03-10-2022	08:00:00	1

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



### View - MicroBizz Item Entries

Search Edit List

MB Item Entry ID	MB Job ID ↑	MB Item ID	Description	Description 2	Description 3
→ 59	52	1920-S	ANTWERPEN Konferenceb...		ANE PEDERSEN / 12-08
60	52	1906-S	ATHEN Skuffemodul		ANE PEDERSEN / 12-08
61	52	1925-W	Konferencebundt 1-6		ANE PEDERSEN / 12-08

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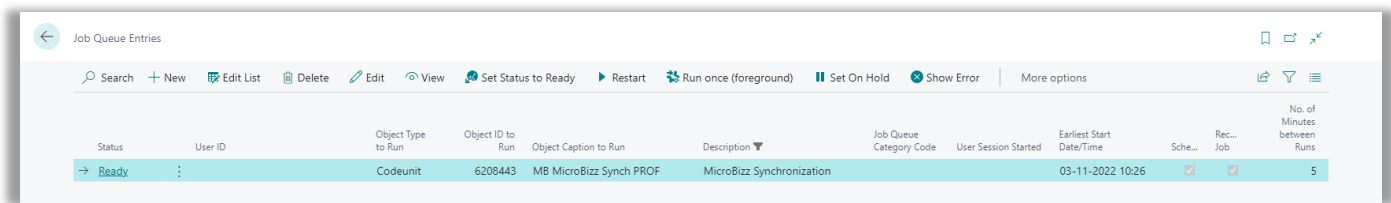
## JOB QUEUE

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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.



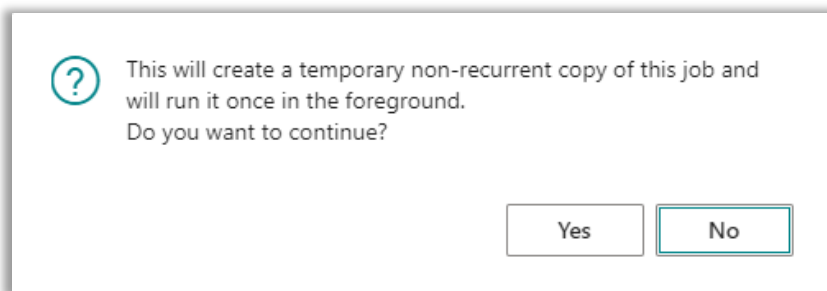
Status	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description	Job Queue Category Code	User Session Started	Earliest Start Date/Time	Sche...	Rec... Job	No. of Minutes between Runs
→ Ready	:	Codeunit	6208443	MB MicroBizz Synch PROF	MicroBizz Synchronization			03-11-2022 10:26	☑	☑	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.

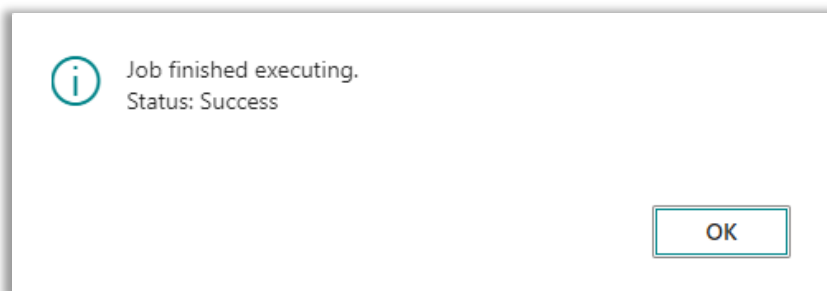
### Identifying problems

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.



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



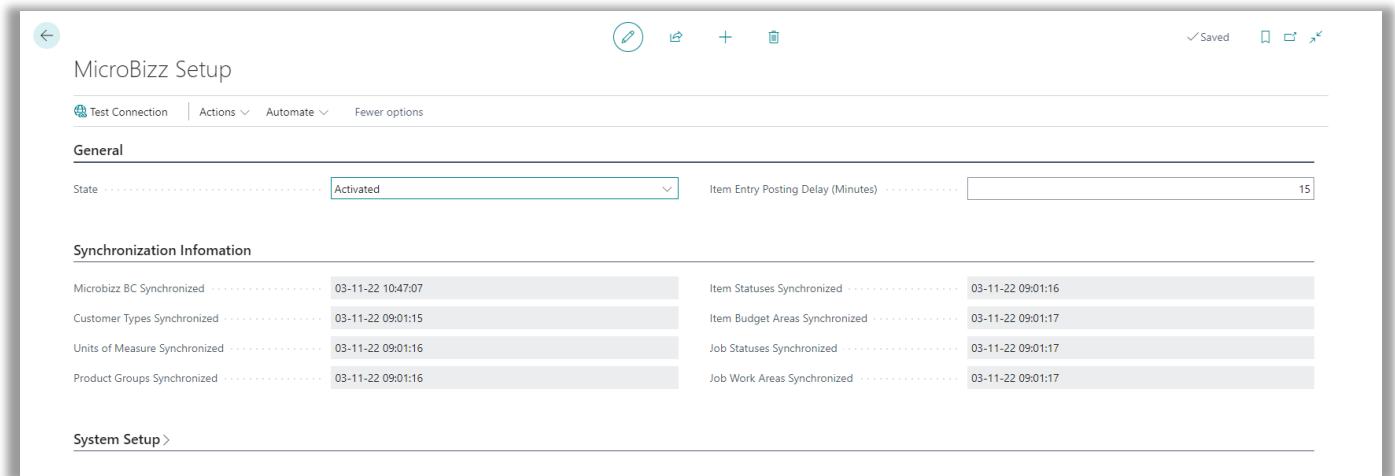
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## SURVEILLANCE OF SYNCHRONIZATION

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.

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# 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.

The screenshot displays the Dynamics 365 Business Central interface for a Project Manager. The top navigation bar includes the Profacto logo, the text 'Dynamics 365 Business Central', and environment information. The main navigation menu lists various areas like Sales & Purchases, Jobs, Resources, Journals, Posted Documents, MicroBizz, and ForNAV. Below the navigation, there are breadcrumb links: 'Jobs > Job Tasks > Customers > Items > Resources > Open Job Journal > MicroBizz Registration Entries > MicroBizz Item Entries > MicroBizz API Logs'. The main content area features a headline 'Want to learn more about Business Central?' and a list of activities categorized into Invoicing, User Tasks, Approvals, Self-Service, and MicroBizz Activities. Each activity is represented by a card showing a count and a link to view details.

Category	Activity	Count
Invoicing	Upcoming Invoices	0
	Invoices Due - ... Created	3
	WIP Not Posted	0
	Completed - ... Calculated	0
	Over Budget	1
User Tasks	Pending User Tasks	0
	Requests Sent ... Approval	0
	Requests to Approve	0
Approvals	Open Current Tl... Sheet	0
	Open Time Sheets	0
	Submitted Time Sheets	0
Self-Service	Rejected Time Sheets	0
	Approved Time Sheets	0
	MicroBizz API Log	999+
MicroBizz Activities	Open Jobs	1
	Open Jobs (MB)	4
	Jobs Ready for... (MB)	0
	Open Jobs (No MB)	3
	Open Jobs (Ne... MB)	0
	Job Templates	2
	Completed Jobs (MB)	0
	Resource Sync... ..I Decided Yet	0
	Resource Sync... (Yes)	6
	Resource Sync... (No)	0
Resource Sync... (Never)	0	

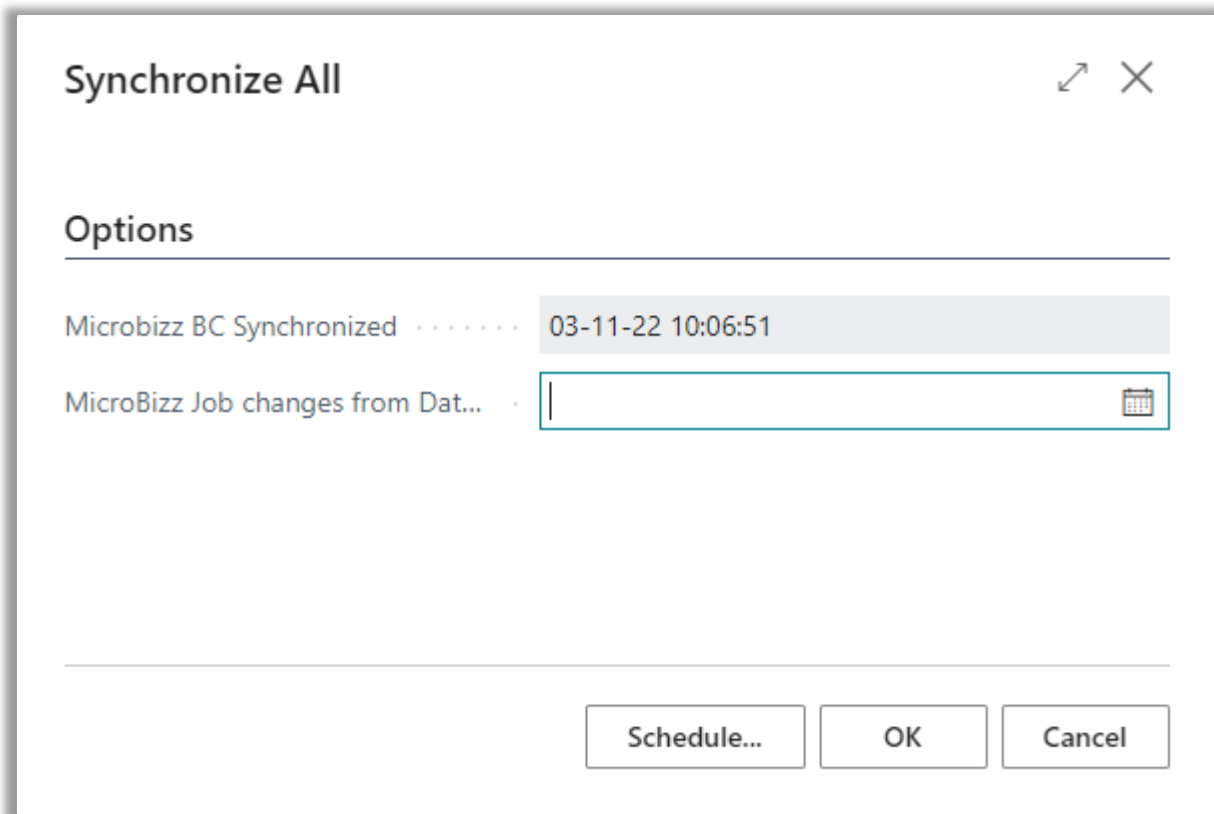
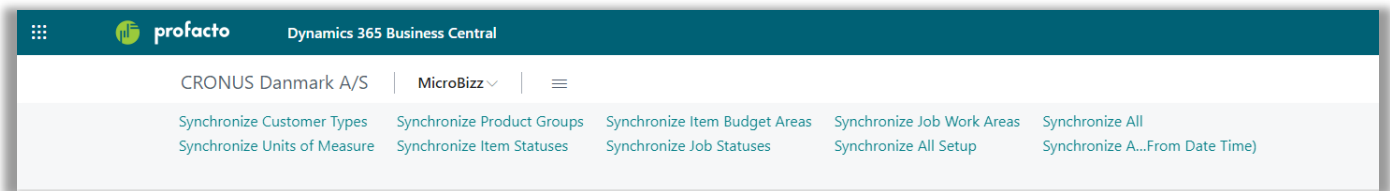
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## Special feature: Synchronize All (From Date Time)

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.

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## Special feature: Apply Usage Link by Default

When setting up the Microbizz connector, you can overrule the setting in the standard Job Setup, defining if Usage Link has to be activated or not.

When using the two options which are named unchangeable, you will not be able to change the setting individual on the Job Card.

### Apply Usage Link by Default

Specifies the method that will be used for filling the Line Type when creating billable Job Planning Lines in BC. If the Job is set for using "Apply Usage Link" then new billable Job Planning Lines will be created with "Line Type" "Budget and Billable". If the Job is set for not using "Apply Usage Link" then new billable Job Planning Lines will be created with "Line Type" "Billable".

See paragraph [Microbizz Setup – Part II – System setup](#) for description of every single option.

Next there is a short description of where the settings in standard Business Central are found.

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## Jobs Setup

You will find the setting “Apply Usage Link by Default” which can be overruled in the *Jobs Setup*.

The screenshot shows the 'Jobs Setup' configuration page. At the top, there is a navigation bar with a back arrow, edit, share, add, and delete icons, and a 'Saved' status. The main title is 'Jobs Setup'. Below the title, there is a 'General' section with a 'Show more' link. The settings in the 'General' section are:

- Automatic Update Jo...:
- Apply Usage Link by ...:
- Allow Budget/Billable ...:
- Default WIP Method: [Dropdown menu]
- Default WIP Posting ...: [Dropdown menu with 'Per Job' selected]
- Default Job Posting G...: [Dropdown menu]
- Document No. Is Job ...:

At the bottom of the 'General' section, there is a 'Numbering >' link.

The individual “Apply Usage Link” setting for the job itself is found in the *Posting* group on the Job Card.

The screenshot shows the 'Job Card' configuration page for job 'JOB00100'. The page is titled 'Job Card' and has a 'Saved' status. The main title is 'JOB00100'. Below the title, there is a navigation bar with a back arrow, edit, share, add, and delete icons, and a 'Saved' status. The main content area is divided into several sections:

- Posting** (Show less):
  - Status: [Dropdown menu with 'Open' selected]
  - Job Posting Group: [Dropdown menu]
  - WIP Method: [Dropdown menu]
  - WIP Posting Method: [Dropdown menu with 'Per Job' selected]
  - Allow Budget/Billable Lines:
  - Apply Usage Link:
  - % Completed: [Progress bar] 0.00
  - % Invoiced: [Progress bar] 0.00
  - % of Overdue Planning Lines: [Progress bar] 0.00
- Invoice and Shipping >**
- Duration >**
- Foreign Trade >**
- WIP and Recognition >**

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