d.velop

d.velop connect for Microsoft Dynamics 365: Administrator

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1. d.velop connect for Microsoft Dynamics 365: Administrator

1.1. Basic information on the application

This chapter contains general product information and conventions regarding documentation.

1.1.1. About d.velop connect for Microsoft Dynamics 365

d.velop connect for Microsoft Dynamics 365 creates a seamless connection between your ERP system and the digital archive systems of d.velop AG that features an exchange of information in both directions. As a result of the integration of the ECM system, all outbound documents printed in Microsoft Dynamics 365 are automatically stored in the central information management function. That means the documents are also available outside of the ERP system. This component forms only the adapter for d.velop cloud and works together with interfaces from Microsoft Dynamics 365.

1.2. Installing and uninstalling

This chapter contains information about the deployment of d.velop connect for Microsoft Dynamics 365.

1.2.1. System requirements

Web browser

The following web browsers are supported:

- Mozilla Firefox
- Google Chrome
- Microsoft Edge (based on Chromium)
- Safari

d.velop tests its products with current web browser versions and strives to maintain compatibility for at least twelve months. d.velop usually resolves incompatibilities in new web browser versions promptly.

The web browser used must be able to process the **text/javascript** content type.

Systems

- Microsoft Dynamics 365 F&O
  The versions of the Microsoft One Version strategy are supported.
- Microsoft Dynamics 365 Sales
  The versions of the Microsoft One Version strategy are supported as of version 9.1.
- Microsoft Dynamics 365 Business Central (AL)
  As of version 15 with the AL architecture, the versions of the Microsoft One Version strategy are supported.
- Microsoft Dynamics 365 Business Central (C/Side)
  The versions of Microsoft Navision 2013 - Microsoft Business Central Version 14 are supported.

1.2.2. Installing d.velop connect for Microsoft Dynamics 365 (d.velop cloud)

You want to install an app in your d.velop cloud tenant.

This is how it works

1. Click the **Subscribe App** feature on the start page of your d.velop cloud instance.

2. Select the app to be installed from the list.
3. Click **Subscribe now**.
4. Follow the configuration assistant.
5. Confirm the provision by **Subscribe for a fee**.

1.2.3. Uninstalling d.velop connect for Microsoft Dynamics 365 (d.velop cloud)

You want to remove an app in your d.velop cloud tenant.

This is how it works

1. Click the **d.velop cloud management** feature on the start page of your d.velop cloud instance.
2. Select the organization with the tenant from which you want to remove the app.
3. Select the correct tenant and click on **Edit tenant**.
4. Find the app you want to remove and click on **Cancel app**.
5. Confirm that you want to unsubscribe from the app.

1.2.4. Installing d.velop connect for Microsoft Dynamics 365 (on-premises)

You install the software exclusively using d.velop software manager. If an application is required for different products, the corresponding software packages are also installed automatically.

For further information on installing the software, see the d.velop software manager manual.

1.2.5. Updating an installation of d.velop connect for Microsoft Dynamics 365 (on-premises)

You can only update the software using d.velop software manager.

For further information on updates, see the d.velop software manager manual.

1.2.6. Uninstalling d.velop connect for Microsoft Dynamics 365 (on-premises)

The software you installed using d.velop software manager can only be uninstalled with d.velop software manager. If the software to be uninstalled has dependencies with other software packages, you must resolve these conflicts accordingly.

For further information on uninstallation, see the d.velop software manager manual.

1.2.7. Installing d.velop connect in your Finance environment

You want to install d.velop connect for Microsoft Dynamics 365 in your Finance environment. This chapter provides you with the information you need to do so.

d.velop connect for D365 is provided as a deployable package. This package is installed or deployed via a standard Microsoft process in the relevant Finance environments.

Follow the steps in the Microsoft Dynamics 365 documentation for deploying a package via Microsoft Dynamics Lifecycle Services (LCS).

You will find the current installation package, which you can download, in the app d.velop connect for Microsoft Dynamics 365 in your d.velop cloud tenant.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Navigate to **Microsoft Dynamics 365 connections > Download integration.**
3. Download the package for Microsoft Dynamics 365.

1.2.8. Installing d.velop connect in your Sales environment

You can connect your Microsoft Dynamics 365 Sales environment with the d.velop connect for Dynamics 365 adapter.

This is how it works

1. In preparation, download the managed solution from the adapter configuration area.
2. Use an authorized user to open **Advanced settings** in your Sales environment.
3. Go to **Setup > Customizations > Solutions**
4. Click **Import** and follow the instructions.

You have now successfully installed d.velop connect for Dynamics 365 Sales.

You will find the current installation package, which you can download, in the app d.velop connect for Microsoft Dynamics 365 in your d.velop cloud tenant.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Navigate to **Microsoft Dynamics 365 connections > Download integration.**
3. Download the package for Microsoft Dynamics 365.

To use and install the managed solution, you must first install Plug-In Profiler.

This is how it works

1. Download the program **PluginRegistrationTool** from Microsoft if you do not already use it.
2. Start the program.
3. Click **Create New Connection** to create a connection to your Sales environment.
4. Select the type **Office 365.**
5. If you have several instances of Microsoft Dynamics 365 Sales, select **Display list of available organizations**.
6. Now log on with a Microsoft Dynamics administrator user account.
7. If you use several instances of Microsoft Dynamics 365 Sales, select the target instance and click **Login**.
8. Click **Install Profiler**.

You have now successfully installed Plug-In Profiler.

1.3. Configuring d.velop connect for Microsoft Dynamics 365

This chapter contains information about configuring d.velop connect for Microsoft Dynamics 365.

1.3.1. Creating a target system

You have the option of defining target systems in the adapter. The adapter d.velop connect for Microsoft Dynamics 365 accepts documents for storage purposes, but it needs to know in which DMS the documents are to be stored. If you have already created a repository (for instance, using the DMS app or d.velop connect for Microsoft SharePoint), you can use this repository for the next steps.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Settings for Microsoft Dynamics 365> Connection data**.
3. Click the plus sign to create a new export system.
4. Give the system a meaningful designation.
5. Choose a target system. You will find entries there such as **SharePoint adapter** or **d.velop documents**, depending on the app you have configured.
6. Select the desired target system under **Repository**.

You have successfully created a target system in the adapter. The system appears in the list of configured target systems.

1.3.2. Configuring document types

You can configure document types in order to inform the d.velop cloud platform about which documents and metadata are supplied from a Microsoft Dynamics 365 system. This source information is used, for example, in later field assignments for storing documents in a d.3 DMS or in Microsoft SharePoint Online.

The document types are provided automatically if you have created the connection from integration components from d.velop AG for Microsoft Dynamics 365 Finance and Microsoft Dynamics 365 Sales and have also configured the appropriate backward communication. In this case, you do not need to configure the document types manually. Document types activated for exports in Microsoft Dynamics 365 are automatically provisioned in your d.velop cloud tenant for later field assignments. The manual contains additional information about this.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Settings for Microsoft Dynamics 365 > Document types**.
3. Click the download icon to download an example configuration.
4. Modify the example configuration to configure the desired document types.
5. Click the upload icon and select your configuration.

You have now created a document type that is available as a possible source in additional adapters of the d.velop cloud platform.

Example configuration

JSON

```
[{
    "id": "SalesOrder",
    "displayName": "SalesOrder",
    "attributes": [{
        "id": "Id",
        "displayName": "ID"
    }, {
        "id": "CompanyName",
        "displayName": "Company Name"
    }, {
        "id": "CompanyNumber",
        "displayName": "Company Number"
    }, {
        "id": "CustomerName",
        "displayName": "Customer Name"
    }, {
        "id": "CustomerNumber",
        "displayName": "Customer Number"
    }, {
        "id": "SalesOrderNumber",
        "displayName": "Sales Order Number"
    }]
}, {
    "id": "SalesOrderConfirmation",
    "displayName": "Sales Order Confirmation",
    "attributes": [{
        "id": "Id",
        "displayName": "ID"
    }, {
```

```
        "id": "CompanyName",
        "displayName": "Company Name"
    }, {
        "id": "CompanyNumber",
        "displayName": "Company Number"
    }, {
        "id": "CustomerName",
        "displayName": "Customer Name"
    }, {
        "id": "CustomerNumber",
        "displayName": "Customer Number"
    }, {
        "id": "SalesOrderConfirmationNumber",
        "displayName": "Sales Order Confirmation Number"
    }]
}]
```

Structure of a JSON object

Key	Value
ID	Internal ID of the document type
displayName	Designation with which the document type appears in additional configuration dialogs.
attributes	Attributes that further describe this document type and its possible metadata.
attributes:id	Internal ID of the field. The supplying system uses this very key during the transfer.
attributes:displayName	Designation with which this field appears in additional configuration dialogs.

1.3.3. Customizing a target system

You can customize an existing target system.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Settings for Microsoft Dynamics 365 > Connection data**.
3. Click the pencil symbol beside the entry.
4. Change your desired export system under **Storage system**.

You have successfully changed your target system for the storage of documents.

1.3.4. Customizing document types

You can customize existing document types.

Please check whether additional configurations are dependent on this document type, such as the assignments for document storage in a d.3 repository or the assignments in the app d.velop connect for Microsoft SharePoint.

This is how it works

1. Click **Configuration** in the start area of your d.velop cloud tenant.
2. Go to **Settings for Microsoft Dynamics 365 > Document types**.
3. Click the download symbol to download the current configuration as a JSON file.
4. Modify the configuration to create new desired document types or modify existing document types.
5. Click the upload symbol and select the configuration you just created.

You have now modified an existing document type. Your changes are visible right away.

1.3.5. Deleting a target system

You can delete an existing target system.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Settings for Microsoft Dynamics 365> Connection data**.
3. Click the trash can symbol to remove an entry.

You have successfully deleted the existing target system.

1.3.6. Deleting document types

You have the option of deleting document types that have already been created.

Please check whether additional configurations are dependent on this document type, such as the assignments for document storage in a d.3 repository or the assignments in the app d.velop connect for Microsoft SharePoint.

This is how it works

1. Click **Configuration** in the start area of your d.velop cloud tenant.
2. Go to **Settings for Microsoft Dynamics 365 > Document types**.
3. Click the download icon to download the current configuration as a JSON file.
4. Modify the configuration to remove the desired document type.
5. Click the upload icon and select your configuration.

You have now removed an existing document type. Your changes are visible immediately.

1.3.7. Configuring permissions

You can configure permission groups for service-to-service communication (Service2Service, S2S). The configuration is individually available for querying master data and for creating and posting invoices.

This is how it works

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Go to **Microsoft Dynamics 365 > Permissions**.
3. Select the required authorization groups. If you want to select all users, you can use the **Everyone** option.

   > **Note**
   > The **d.velop invoices (smart invoice)** group always retains the permission.

4. Choose **Save** to confirm the permissions.

You have now successfully configured the permissions for your Microsoft Dynamics 365 systems.

1.4. Tips and Tricks

This topic informs you about additional options that the application offers to help you reach your goal faster.

1.4.1. Integration of d.velop documents or d.3one as an IFrame

You can integrate d.velop documents or d.3one as an iframe in all the systems listed here. To do this, configure the trust relationship in d.velop documents or d.3one.

This is how it works – d.velop documents in the cloud

1. Click **Configuration** on the start page in your d.velop cloud tenant.
2. Navigate to **Routing > Integration settings**.
3. Add the domain of the requesting sales system with **Add domain** e.g. https://<YourSalesEnvironment>.crm4.dynamics.com
4. Finish the configuration with **Apply changes**.

You have now successfully allowed d.velop documents to be integrated into the requesting domain as an IFrame.

This is how it works – d.3one on-premises

1. Start d.ecs http gateway.
2. Go to **Configuration**.
3. Modify the entry **Content-Security-Policy for Business Central, for example** as follows: **frame-ancestors 'self' businesscentral.dynamics.com**
4. Choose **Save** to close the configuration.

You have now successfully allowed d.3one to be integrated into the requesting domain as an Iframe.

1.4.2. Automated vendor invoicing processes

In this article, you can find more information about d.velop connect with the Microsoft feature for automated vendor invoicing processes.

Introduction

Microsoft has introduced a feature for the automated processing of your vendor invoices. These functions apply only to vendor invoices, not to invoices that are processed through the invoice journal or invoice accounting.

You can use this feature to automate some of the vendor invoicing processes for vendor accounts. This invoice automation solution enables a standard interface that can accept invoice meta data for invoices at header and line item level and assigned attachments.

The feature includes the following functions and more:

- Automatic mapping of product receipts
- Automatic posting
- Automatic invoice comparison

For this feature, a background process has been implemented that checks whether outstanding vendor invoices are marked for processing by the feature. The invoice is then processed.

Invoice automation with d.velop connect

To avoid any conflicts between the d.velop connect invoice creation process and the background process of the feature, the invoice creation process in d.velop connect has been modified. When an invoice is transferred from d.velop invoices to your Finance environment, the feature marker for the invoice is initially deactivated. Once the invoice is fully created by d.velop connect, the feature marker on the invoice is reactivated so that the invoice can be processed by the background process of the feature.

1.4.3. Checking the status of an imported invoice

Once an invoice is transferred from d.velop invoices, you can determine the status of the import process in Dynamics 365 Finance by checking the **d.velop invoice status** field.

This information is important because the import process for an invoice takes some time, and the information lets you identify according to the invoice status whether the import process is complete, including all the property changes and invoice line items. You can find this field in the invoice journal and in the outstanding vendor invoices, which you can add and make visible by customizing the Dynamics forms. The column can be used for custom filtering, for example, to display only successfully created invoices. Invoices that were not created successfully (for example, because the validation of the account structures failed) are automatically removed again and do not attain the **Done** status. Subsequently, invoices that could not be created generate a task in d.velop invoices with appropriate feedback for the end user or accountant.

An invoice can receive the following statuses:

- **None**: The invoice object does not have a status. It may be an earlier invoice object.
- **Processing**: Additional properties and line items are currently being added to the invoice object. Its validity is also being checked.
- **Done**: The invoice object was created successfully. The import process is complete.

1.4.4. Description of the options under Advanced settings

When configuring connection data, you can activate or deactivate several options under **Advanced settings**.

Enable Business Central AL support

When this option is activated, the invoice data is transferred appropriately for the d.velop smart invoice cockpit for Business Central versions 15 or higher. This is the case if you are using Business Central in the AL architecture.

These options are not available to you for the cloud.

Ignore errors while synchronizing master data

When this option is activated, errors during master data synchronization are not returned as errors, but with the status OK. This option should be activated only if the customer cannot make all the necessary master data available as web services.

Do not synchronize locked data

When this option is activated, locked data records (G/L accounts, for example) are no longer transferred to d.velop smart invoice. By default, all data records, including locked ones, are transferred to d.velop smart invoice.

Synchronize blocked creditors

When this option is activated, blocked creditors are also transferred to d.velop smart invoice. By default, blocked creditors are not transferred to d.velop smart invoice.

Synchronize fixed asset

When this option is activated, fixed asset accounts are transferred to d.velop smart invoice. In d.velop smart invoice, these fixed asset accounts are provided as additional dimensions in the bucket and must be assigned to the field **Custom 20** in the line item data.

Synchronize charge (Item)

When this option is activated, the charge (item) posting type is also transferred to d.velop smart invoice. In d.velop smart invoice, this posting type is provided as additional dimensions in the bucket and must be assigned to the field **Custom 19** in the line item data.

In addition, the charges are synchronized with the appropriate bucket for the charge types in d.velop smart invoice.

With the invoice monitor under C/SIDE architecture, the function for allocating the charges at item level in d.velop smart invoice is unavailable because this data is not transferred to the invoice monitor with C/SIDE architecture.

Synchronize projects

When this option is activated, the project number and project task number are transferred to d.velop smart invoice. In d.velop smart invoice, these numbers are provided as additional dimensions in the bucket. Assign the dimensions to the field **Custom 17** (for the project number) and **Custom 18** (for the project task number) in the line item data.

Use page 1 instead of page 5473 for tenant synchronization

When you activate this parameter, page 1 is used to transfer tenant information to d.velop smart invoice instead of page 5473.

Synchronization of data in English language

When this option is activated, the keywords for synchronizing the master data and transferring the invoice are implemented in English instead of German.

Validate invoice data only after final handover (NAV C/SIDE)

The invoice monitor version 2.4 for NAV with C/SIDE is required to activate this parameter. In addition, the **Check entries** field must be prepopulated with the value **dbsCheckEntry** in the configuration.

When you activate this parameter, the invoice data is fully validated following the final transfer to NAV.

If an error occurs while validating the data, this error is transferred back to d.velop smart invoice.

If the validation was successful, the workflow finishes.

The parameter does not have any effects for Business Central with AL architecture.

Disable validation of the invoice data for cost invoices (Business Central AL)

If you activate this parameter, during the transfer of cost invoices to Business Central, the system does not check whether this invoice data is valid.

This parameter should be activated, for example, if the G/L account is only defined later in the course of the workflow but an invoice item is already created beforehand. In the standard version of Business Central, the type and number are mandatory fields.

If the workflow is finished, all the invoice data in Business Central is validated, which means the values entered must be valid at this time.

If the values entered are invalid, the error is transferred back to the workflow.

To activate this parameter, the invoice monitor for Business Central AL is required.

The parameter does not have any effects for Business Central with C/SIDE architecture.

Submit all order numbers in head

When activated, all the order numbers in the header are transferred to the ERP system separated (in NAV/BC with C/SIDE by the pipe character ('|') and in BC AL by a comma (', ')).

If the option is activated, you must ensure that the necessary adjustments have been made in the ERP system to enable several order numbers to be transferred in the same field.

Synchronize goods receipts

If this parameter is activated, the goods receipts (posted delivery notes) from NAV/Business Central are also transferred to d.velop smart invoice.

To ensure that the master data can be synchronized successfully, the following fields in Business Central must be added to page 137 (Posted Purchase Rcpt. Subform):

- Order Line No.
- Order No.
- Buy-from Vendor No.

If these fields have not been added on page 137, the master data cannot be synchronized successfully.

Synchronize purchase orders with no. only

If this option is activated, only purchase order lines that have a reference to a number are synchronized. A reference may be a G/L account or an item, for example.

Rows with a comment are then no longer transferred to d.velop smart invoice.

Transfer items for cost invoices only after the last step (Business Central AL)

When this option is activated, no item data is transferred to Business Central AL for cost accounting as long as the workflow is active.

Use this option if, for example, you specified the G/L account or tax account information later in the course of the workflow.

If the workflow is finished, all the item data is transferred to Business Central and validated, which means the values entered must be valid at this time.

If the values entered are invalid, the error is transferred back to the workflow.

To activate this option, you require the invoice monitor of Konica Minolta for Business Central AL.

The option does not have any effects for Business Central with C/SIDE architecture.

When calculating profit and income tax for tax synchronization, consider the VAT calculation type field

Activating this option will set the VAT to 0 when synchronizing the VAT if the VAT calculation type is set to **Income taxation** and the profit and income tax account is filled.

If this option is not active, the VAT is set to 0 if the profit and income tax account is filled.

Write the document ID as Custom 20 head property to the invoice monitor (Business Central AL)

When this option is activated, the document ID is transferred to the invoice monitor in Business Central AL as Custom 20 field, allowing you to custom map this field to a Table 38 field.

This option is frequently used to assign the document ID to the field 5461128.

> **Note**
> This field is only 20 characters long.

Document type for incoming invoice

You can use this selection field to select the document type for the invoices or credit memos received.

The document type is required if, for example, the posted document number is to be transferred back to d.velop documents after posting.

For this function, you need at least the components ECM smart connect in version 24.0.11169.0 and invoice monitor in version 24.0.11214.0.

Connection data for document storage

You can use this selection field to select the export system for updating invoices or credit memos received.

The export system is required if, for example, the posted document number is to be transferred back to d.velop documents after posting.

For this function, you need at least the components ECM smart connect in version 24.0.11169.0 and invoice monitor in version 24.0.11214.0.

Select custom fields for synchronizing head data

To provide additional custom values from NAV/Business Central to users in d.velop smart invoice, you can add additional custom values.

In Microsoft Dynamics 365 NAV/Business Central, publish these master data pages as web services with the following service name: **SI_Custom_H_<custom field no.>**, e.g. example: SI_Custom_H_2 for custom field 2

In addition, the web service must contain the following values:

- **No**
- **Description**

Select custom fields for synchronizing line item data

To provide additional custom values from NAV/Business Central to users in d.velop smart invoice, you can add additional custom values.

In Microsoft Dynamics 365 NAV/Business Central, publish these master data pages as web services with the following service name: **SI_Custom_P_<custom field no.>**, e.g. SI_Custom_P_10 for custom field 10

In addition, the web service must contain the following values:

- **No**
- **Description**

Write custom header fields to NAV/Business Central

You can add additional required custom values and transfer them and other properties from d.velop smart invoice to NAV/Business Central.

To do so, you must include the added fields in the invoice monitor web service page in Microsoft Dynamics 365 NAV/Business Central.

You can currently transfer the following values:

Property in smart invoice	Property value in Microsoft Dynamics 365 NAV/Business Central	Note
Custom_<custom field no.>	Custom_<custom field no.> Example: Custom_2 for custom field 2	

Property in smart invoice	Property value in Microsoft Dynamics 365 NAV/Business Central	Note
Posting date	Posting_Date	With the Konica Minolta invoice monitor with Business Central AL, this property is already transferred by default and therefore does not have to be activated.
Payment amount	Payment_Amount	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
Date of supply	Date_Of_Supply	This property can be mapped to the field custom100 in the Konica Minolta invoice monitor with Business Central AL.
Payment date	Payment_Date	This property can be mapped to the field custom102 in the Konica Minolta invoice monitor with Business Central AL.
QR type (Switzerland)	QR_Typ	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
QR reference (Switzerland)	QR_Reference_No custom104	In the Konica Minolta invoice monitor AL, the **QR reference** field is mapped to the field custom104. The MS QR Bill Management add-on must be installed for this.
QR amount (Switzerland)	QR_Amount custom105	In the Konica Minolta invoice monitor AL, the **QR amount** field is mapped to the field custom105. The MS QR Bill Management add-on must be installed for this.
QR currency (Switzerland)	QR_Currency_Code custom106	In the Konica Minolta invoice monitor AL, the **QR currency** field is mapped to the field custom106. The MS QR Bill Management add-on must be installed for this.
QR description (Switzerland)	QR_Description custom107	In the Konica Minolta invoice monitor AL, the **QR description** field is mapped to the field custom107. The MS QR Bill Management add-on must be installed for this.
QR IBAN (Switzerland)	QR_IBAN custom108	In the Konica Minolta invoice monitor AL, the **QR IBAN** field is mapped to the field custom108. The MS QR Bill Management add-on must be installed for this.
ESR line (Switzerland)	ESR_Coding_Line	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
Bank code	Bank_Code	This property can be mapped to the field custom101 in the Konica Minolta invoice monitor with Business Central AL.

Write custom line item fields to NAV/Business Central

You can add additional required custom values and transfer them and other properties from d.velop smart invoice to NAV/Business Central.

To do so, you must include the added fields in the invoice monitor web service page in Microsoft Dynamics 365 NAV/Business Central.

You can currently transfer the following values:

Property in smart invoice	Property value in Microsoft Dynamics 365 NAV/Business Central	Note
Custom_9	Custom_9	
Custom_10	Custom_10	
Custom_11	Custom_11	
Custom_12	Custom_12	
Custom_13	Custom_13	
Custom_14	Custom_14	
Custom_16 (item)	Item	The field Custom 16 is mapped to the Item posting type to enable the selection and transfer of items.
Custom_17 (project)	Job_No	With the Konica Minolta invoice monitor with Business Central AL, this property is already transferred by default and therefore does not have to be activated.
Custom_18 (project task number)	Job_Task_No	With the Konica Minolta invoice monitor with Business Central AL, this property is already transferred by default and therefore does not have to be activated.

Property in smart invoice	Property value in Microsoft Dynamics 365 NAV/ Business Central	Note
Disc. %	Line_Discount_Percent	
Unit	Unit_of_Measure_Code	With the Konica Minolta invoice monitor with Business Central AL, this property is already transferred by default and therefore does not have to be activated.
Unit of price	Price_Unit	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
Disc. 2 %	Discount_2_Percent	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
Discount per unit	Discount_Per_Unit	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
Disc. total	Discount_Absolute	
Tax amount	Vat_Amount	This property currently cannot be transferred with the Konica Minolta invoice monitor with Business Central AL.
Unit price	Direct_Unit_Cost	With the Konica Minolta invoice monitor with Business Central AL, this property is already transferred by default and therefore does not have to be activated.
Gross amount	Amount_Including_VAT	

Order synchronization period

All the purchase orders are synchronized between NAV/Business Central and d.velop invoices by default.

Under some circumstances, these purchase orders may go far back into the past and may therefore overburden the system.

To ensure that only the required, current purchase orders are taken into account, this parameter allows you to include only purchase orders with a specific interval starting from the current date. The following intervals are available for selection:

- 6 months
- 12 months
- 18 months
- 24 months

You still have the option of including all the purchase orders. The property **All** is preset by default; in this case, all the purchase orders are synchronized, regardless of the purchase order date.

Use posting date instead of document date as reference date

By default, the document date is used as the date for synchronization with smart invoice.

This switch enables the posting date to be used for synchronization with smart invoice instead of the document date.

Receipts synchronization period

All the goods receipts are synchronized between NAV/Business Central and d.velop invoices by default.

Under some circumstances, these goods receipts may go far back into the past and may therefore cause a high load.

To ensure that only the required, current goods receipts are taken into account, this parameter allows you to include only goods receipts with a specific interval starting from the current date. The following intervals are available for selection:

- 6 months

- 12 months
- 18 months
- 24 months

You still have the option of including all the goods receipts. The property **All** is preset by default; in this case, all the goods receipts are synchronized, regardless of the receipt date.

Number of elements per synchronization run

By default, 300 data records are queried for each run for NAV/Business Central onPremise 300 and when using Business Central.

This can now be adapted to the customer's specific requirements so that between 100 and 20,000 data records can be transferred during each synchronization run.

By default, 500 data records are queried per synchronization run.

When using ODataV3 and when querying purchase orders and goods receipts, this switch is ignored and 50 data records per synchronization run continue to be queried.

1.4.5. Performing tax regulation based on the invoice header

When using d.velop connect for Microsoft Dynamics 365 in combination with d.velop invoices, you can set the configuration so that tax regulation is carried out based on the invoice header. One requirement for doing so is that only one tax rate is available at item level. Tax regulation may be helpful for you if most of the incoming invoices you process have a standard tax rate. If you have to process incoming invoices with multiple tax rates despite activating the advance function (feature flag), the normal tax regulation based on the item entries is used again for these incoming invoices.

This is how it works

1. Open your d.velop cloud tenant and go to **Configuration > Integrations and interfaces > Microsoft Dynamics 365 > Connection data**.
2. Open the connection of the tenant for which you want to activate the setting.
3. Go to **Advanced settings**.
4. Enable or disable the option **Perform tax regulation based on the invoice header if only one tax information is present**.
5. Save your changes.

The feature has now been successfully deactivated or activated in the module of d.velop connect for Microsoft Dynamics 365.

1.4.6. Processing prepayment invoices in the background

If you are using d.velop invoices, you can automatically apply prepayments to invoices using d.velop connect for Microsoft Dynamics 365. If there are existing prepayments for a purchase order, you can automatically apply these prepayments in the background.

This is how it works

1. Open your d.velop cloud tenant and go to **Configuration > Integrations and interfaces > Microsoft Dynamics 365 > Connection data**.
2. Open the configured connection data that was automatically created earlier and go to the **Advanced settings** tab.
3. Enable **Apply existing prepayments when creating invoice**.
4. Then click **Save**.

You have successfully enabled background processing of prepayments.

1.4.7. Defining the number of threads for asynchronously sending invoice data to Microsoft Dynamics 365 (On-Premises)

You can use the parameter **voucherThreadCnt** to define the number of threads with which the invoice data is to be sent to Microsoft Dynamics 365. The default value is one thread. You can enter the parameter when starting the program.

> **Warning**
> Ensure that invoices can be processed in parallel and that customizing this parameter does not overload the ERP system.

This is how it works

1. Open d.3 process manager.
2. Go to **d.velop connect > d.velop connect for Microsoft Dynamics 365**.
3. Select **STOP** under **Execute** and click **Save**.
4. Click **Copy** to duplicate the process **d.velop connect for Microsoft Dynamics 365**. The duplicated process opens.

> **Note**
> You have to duplicate the process because you cannot edit the field **Target** in the original process.

5. Enter a name for the process in the field **Caption**.
6. Enter the parameter **voucherThreadCnt** in the field **Target**.
7. Add a space after **voucherThreadCnt** .
8. Enter the number of threads after the space. (Example for two threads: **voucherThreadCnt 2**)
9. Select **RUN** under **Execute** and click **Save**.

> **Note**
> Ensure that the original process has actually been stopped. Otherwise, the application will start multiple times due to the duplication.

1.5. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.