Microsoft Dynamics 365 Business Central

Documentation

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M-Connect Overview

M-Connect is simple the preeminent connector seamlessly integrating Business Central with Magento, Shopify and Big Commerce. M-Connect offers:

1. Simplicity
2. High Performance
3. Reliability
4. Flexibility

Core integration processes are:

1. Orders
2. Customers
3. Inventory
4. Prices
5. Products
6. Invoices
7. Shipments
8. Credit Memos *
9. RMA*

M-Connect uses Business Central validation to guarantee that data imported or exported from Business Central follows all Microsoft Best Practices

For Magento you can download M-Connect from Releases · MalibuCommerceDev/mconnect-magento2 · GitHub. For Shopify and Big Commerce Malibu Commerce will create an AWS hosted middleware extension that schedules process frequency and manages a multitude of options.

For supported version see www.malibucommerce.com

*****Magento only

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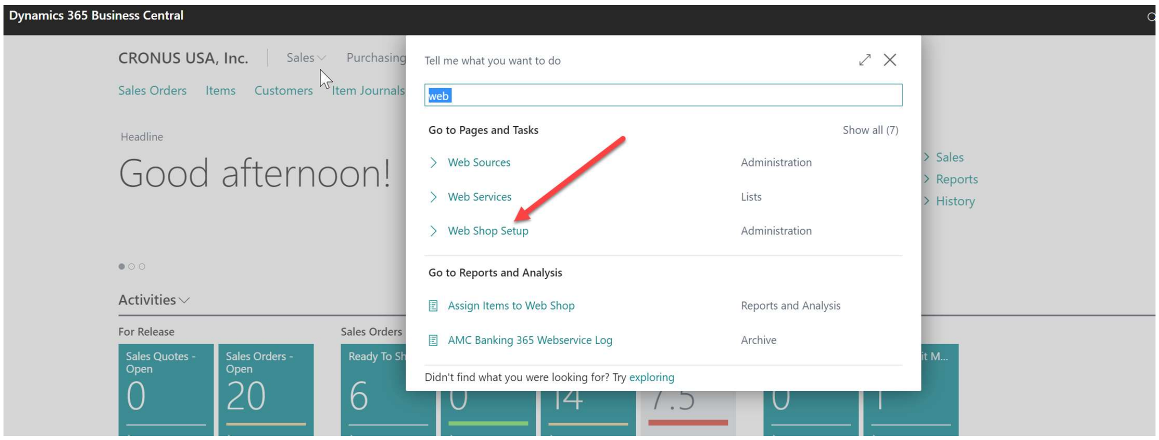
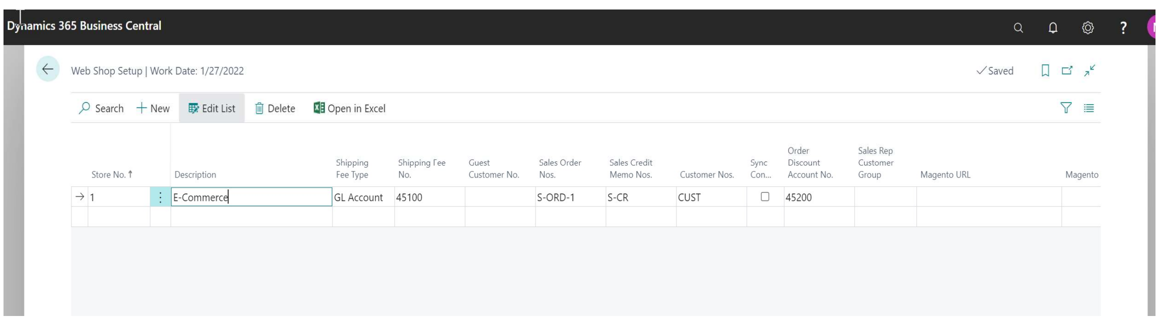
Microsoft Dynamics 365 Business Central Setup

A. M-Connect Web Shop Setup table

The Web Shop Setup table is used to set the defaults upon customer and order creation per E-Commerce store. Search for Web Shop and look for Web Shop Setup



And then the Web Shop Setup Table appears with the following options:



1. Enter in the Store No.

a. The store No. needs to correspond with the Store ID in E-Commerce, please ask your e-commerce provider to supply you with the website id(s) you are using.

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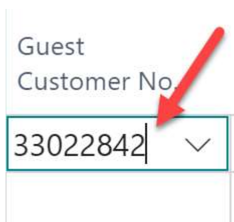
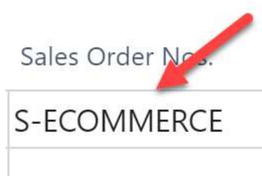
2. **Enter in a Description so users know which store this is**
    a. User defined description of the E-Commerce store

3. **Select the Guest Customer No. here**
    a. When a customer does not create an account on the website, all orders come into Microsoft Dynamics 365 Business Central under one customer card.
    b. Select the Dynamics 365 Business Central customer card which will be used for all guest customer sales orders



4. **Select a Sales Order Nos. Series**
    a. If E-Commerce sales orders need to be created with a unique numbering series, select the Sales order number series. If left blank M-Connect will create sales orders in sequence



5. **Select Sales Credit Memo Number – Not a required field**

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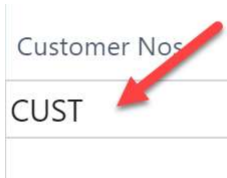
6. **Select a Customer Nos.**

   a. Select the Customer number series for new customers created from E-Commerce



7. **Set your Customer Posting Group**

   a. Used to set the default Customer posting group upon new customer creation

   b.

8. **Set your Customer Gen. Bus. Posting Group**

   a. Used to set the default Customer Gen. Bus. Posting Group upon new customer creation

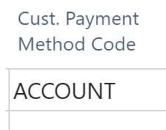
9. **Select your Customer Payment Terms**

   a. Used to set the default Customer Payment Terms upon new customer creation

   b.

10. **Select your Customer Payment Method**

   a. Used to set the default Customer Payment Method upon new customer creation



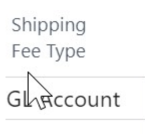
11. Select your Default Customer Location code

a. Used to set the default Customer Location Code upon new customer creation

Select a Shipping Fee Type

b. This is used to create a line on the sales order for the shipping charge fee from the e-commerce platform

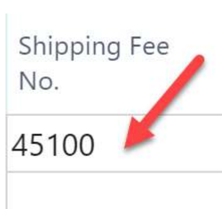
c. Select either G/L Account or Resource for freight charged on the web



12. Select a Shipping Fee No.

a. This is used to post the shipping amount to the correct g/l accounts

b. Select the account to apply the freight charge to



13. Select your Order Discount Account No.

a. This is used to create a line on the sales order to account for coupon codes or additional web discounts

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b. Select the G/L account that will be used to apply E-Commerce discounts

14. Sales representative Customer Group

Add sales representative customer group for automatic posting in Business Central

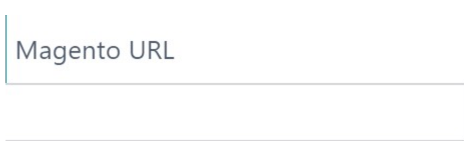
15. Tax G/L Account No.

a. Select the G/L account that will be used to apply order tax

16. Magento URL – Not a required Field

a. The URL for the Magento admin environment; not used for Shopify, Big Commerce or other E-Commerce platforms

b. Used for instantly creating items from Business Central to E-Commerce



17. Magento Key – Not a required field

a. This is the trigger password set in Magento (See E-Commerce Setup section below) Not used for Shopify, Big Commerce or other E-Commerce platforms

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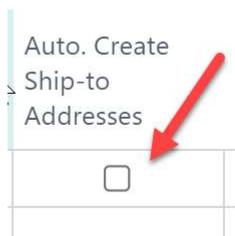
18. Sync Contacts – Not a required field

a. If you are using contacts in Business Central and need to sync them to become customers in e-commerce, check this box.

b. Check this box to sync contacts from Business Central to E-Commerce

19. Auto Create Ship-to – Not a required field

a. If checked, new ship-to address cards will be created upon order creation when a new shipping address is created in E-Commerce



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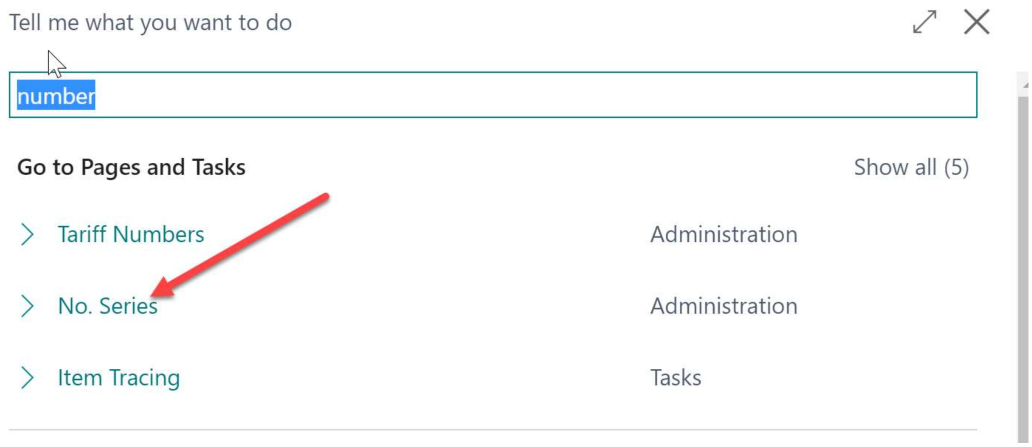
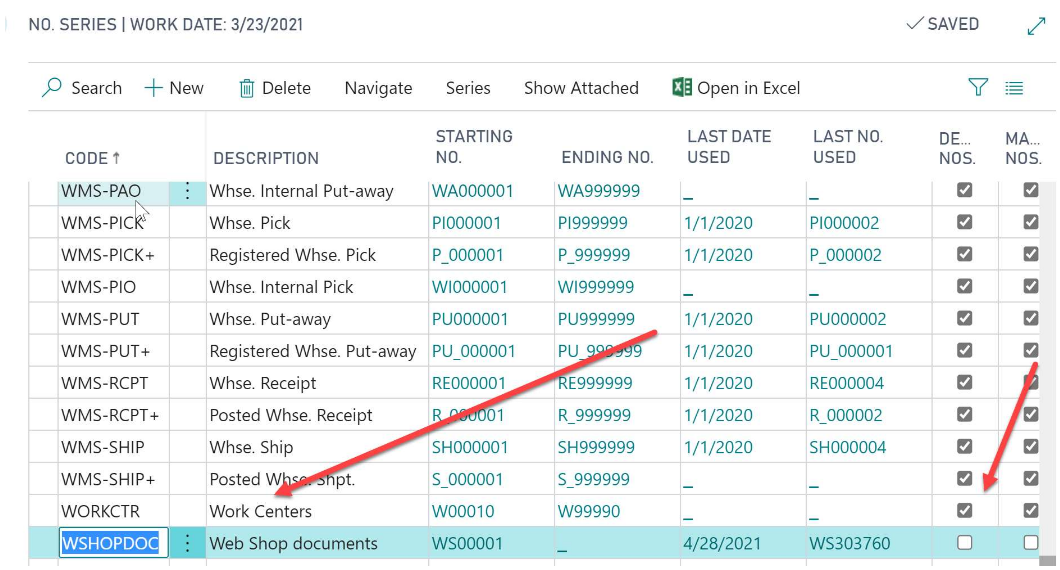
B. Setup WSHOPDOC Number Series in No. Series Table

1. Search on the Number or NO Series and click on No. Series



2. Click on +New and create a new series called WSHOPDOC



CODE ↑	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DE... NOS.	MA... NOS.
WMS-PAO	Whse. Internal Put-away	WA000001	WA999999	_	_	☑	☑
WMS-PICK	Whse. Pick	PI000001	PI999999	1/1/2020	PI000002	☑	☑
WMS-PICK+	Registered Whse. Pick	P_000001	P_999999	1/1/2020	P_000002	☑	☑
WMS-PIO	Whse. Internal Pick	WI000001	WI999999	_	_	☑	☑
WMS-PUT	Whse. Put-away	PU000001	PU999999	1/1/2020	PU000002	☑	☑
WMS-PUT+	Registered Whse. Put-away	PU_000001	PU_999999	1/1/2020	PU_000001	☑	☑
WMS-RCPT	Whse. Receipt	RE000001	RE999999	1/1/2020	RE000004	☑	☑
WMS-RCPT+	Posted Whse. Receipt	R_000001	R_999999	1/1/2020	R_000002	☑	☑
WMS-SHIP	Whse. Ship	SH000001	SH999999	1/1/2020	SH000004	☑	☑
WMS-SHIP+	Posted Whse. Shpt.	S_000001	S_999999	_	_	☑	☑
WORKCTR	Work Centers	W00010	W99990	_	_	☑	☑
WSHOPDOC	Web Shop documents	WS00001	_	4/28/2021	WS303760	☐	☐

3. Select Manuel and Automatic

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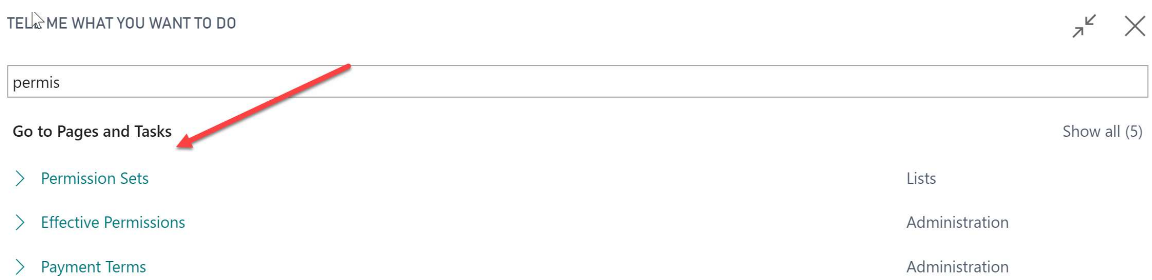
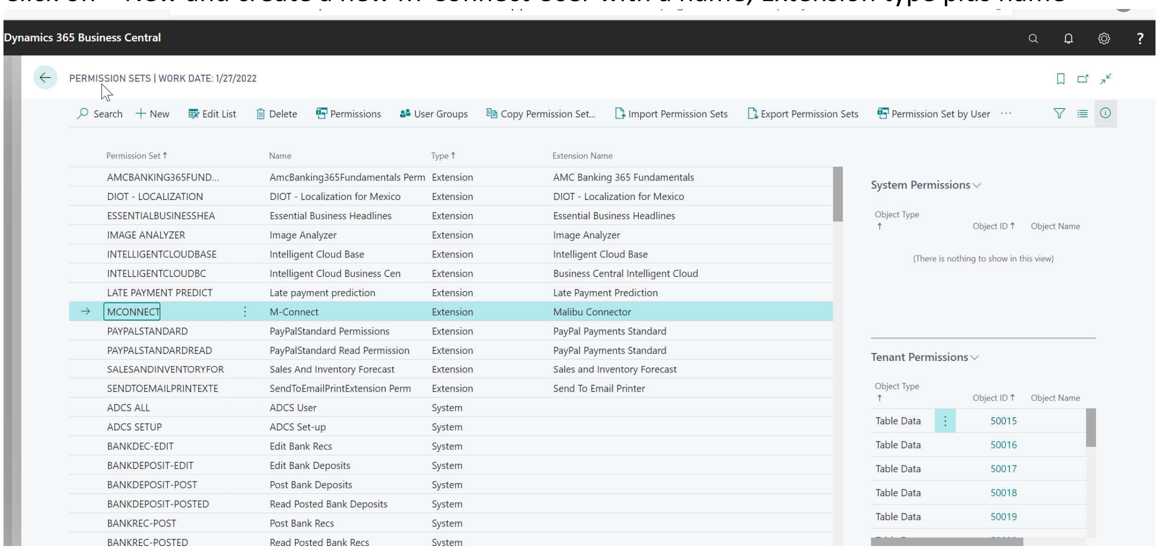
Setup Security Roles

A. Create new MCONNECT user and Add Table Data to BASIC Role:

Search for Permission and click on Permission Sets:



Click on + New and create a new M-Connect User with a name, Extension type plus name



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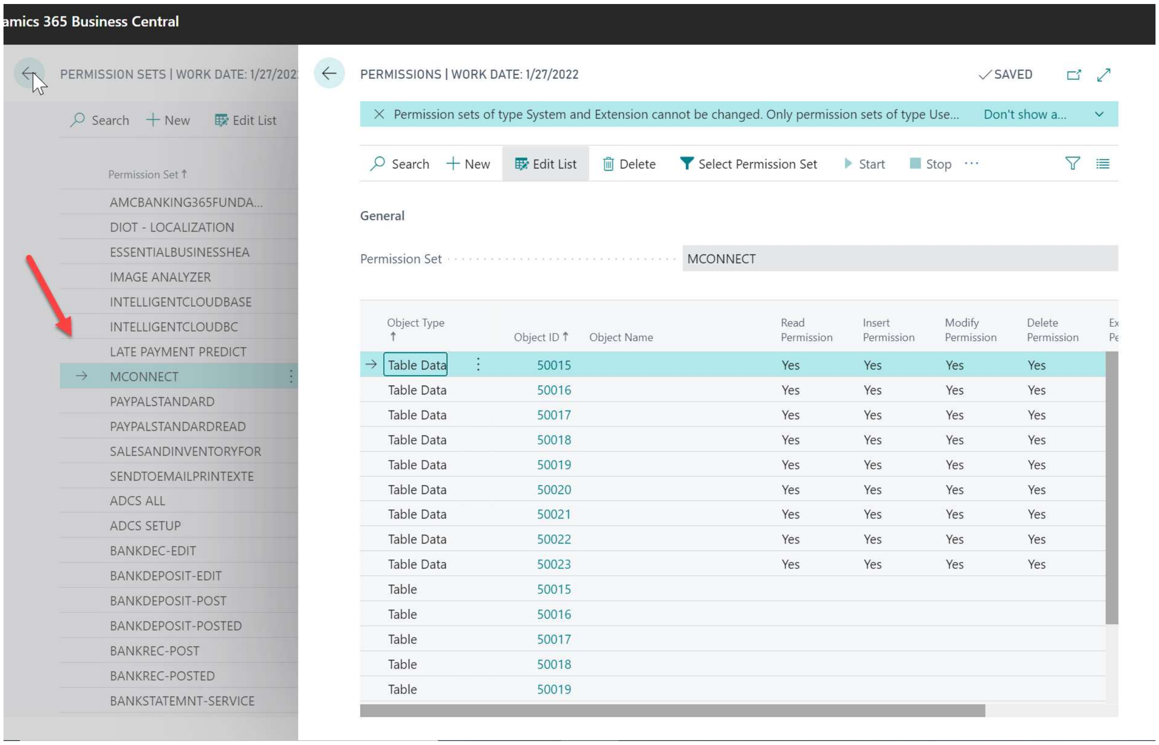
B. Add Table Data to new MCONNECT Role:



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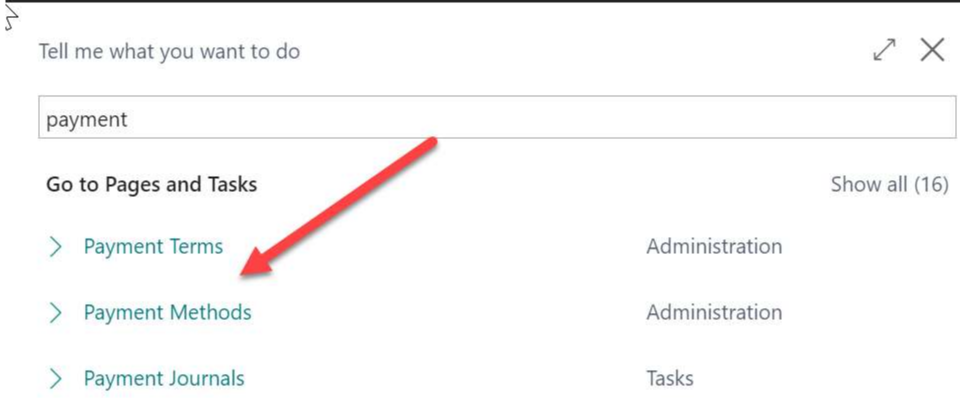
Mapping Business Central Entities:

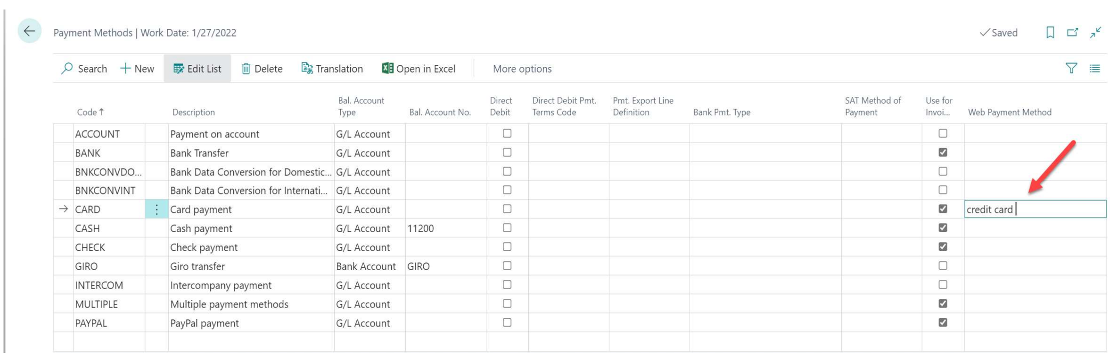
A. Payment Method Mapping

Map E-Commerce payment methods to the correct corresponding Business Central payment method

Search for Payments and select Payment Methods:



On the 'Web Payment Method' field add the corresponding Payment Method



Payment Methods | Work Date: 1/27/2022

Code ↑	Description	Bal. Account Type	Bal. Account No.	Direct Debit	Direct Debit Pmt. Terms Code	Pmt. Export Line Definition	Bank Pmt. Type	SAT Method of Payment	Use for Invoi...	Web Payment Method
ACCOUNT	Payment on account	G/L Account		☐					☐	
BANK	Bank Transfer	G/L Account		☐					☑	
BNKCONVDO...	Bank Data Conversion for Domestic...	G/L Account		☐					☐	
BNKCONVINT	Bank Data Conversion for Internati...	G/L Account		☐					☐	
CARD	Card payment	G/L Account		☐					☑	credit card
CASH	Cash payment	G/L Account	11200	☐					☑	
CHECK	Check payment	G/L Account		☐					☑	
GIRO	Giro transfer	Bank Account	GIRO	☐					☐	
INTERCOM	Intercompany payment	G/L Account		☐					☐	
MULTIPLE	Multiple payment methods	G/L Account		☐					☑	
PAYPAL	PayPal payment	G/L Account		☐					☑	

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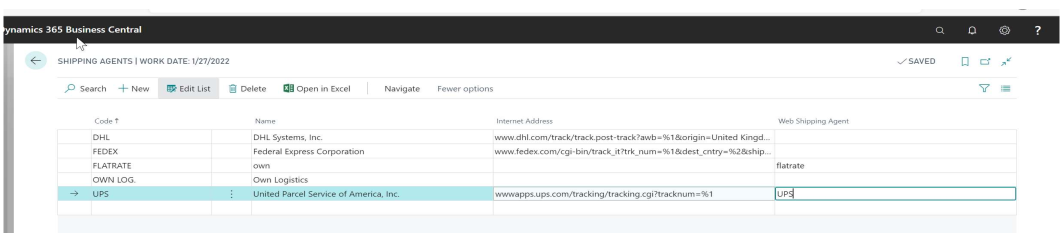
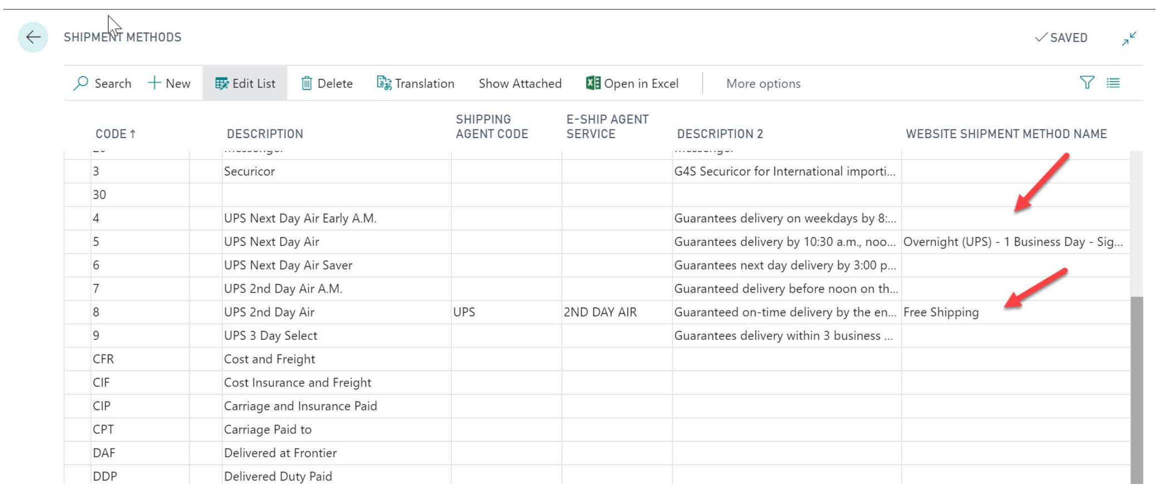
B. Shipping Agent/Service Mapping

A. Map your E-Commerce shipping agent/service methods to the correct corresponding Business Central agent/service method

Search for Shipping Agent and add the corresponding E-Commerce names in the Web Shipping Agent column



Within the Shipping Agent click on “related” then “line” then Shipping Agent service. Add the corresponding E-Commerce Shipping Agent Service to the Web Shipping Agent column



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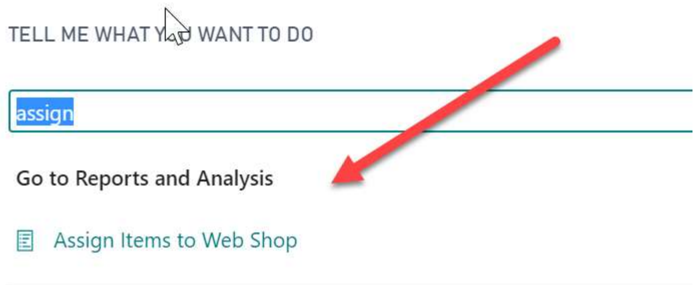
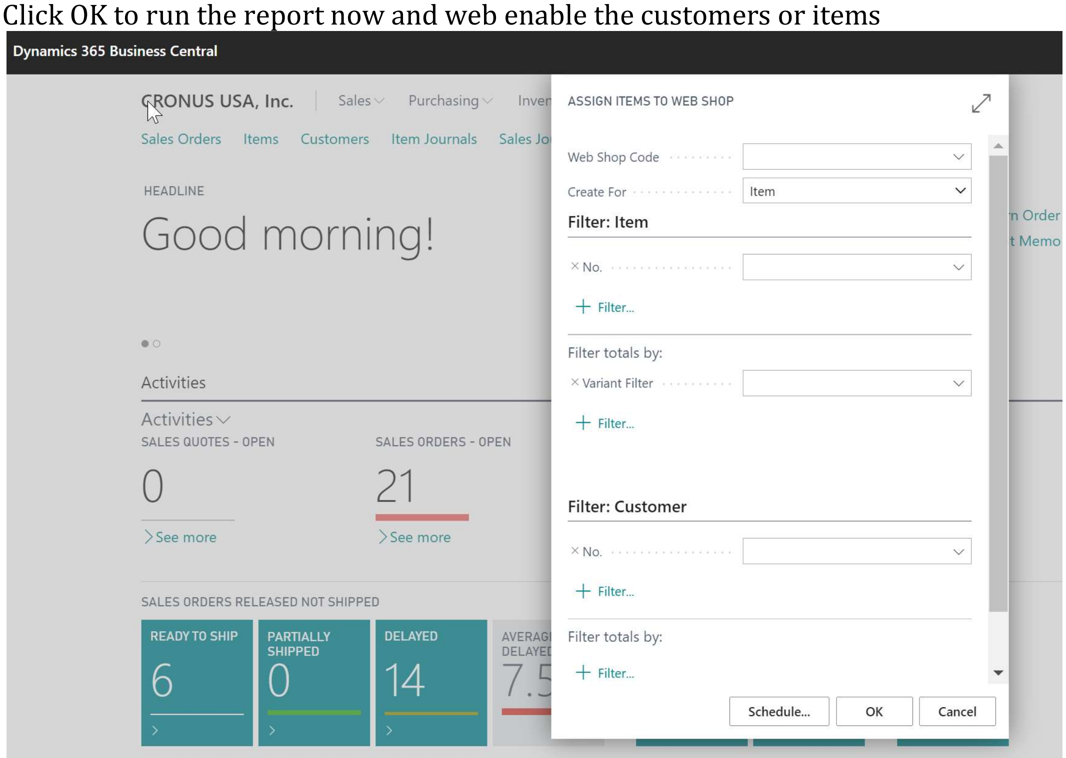
B. Mass web enable Customers/Items

1. Search for assign and select the report Assign Items to Web Shop



2. Set the Web Shop code field to the Store No. from the MC webshop setup table to the customers/items you filter on.
3. Select if you are web enabling the items or customers in the “Create For” field.
4. For Items, fill in the filters you wish to use to web enable the correct items
5. For customers, fill in the filters you wish to use to web enable the correct customers.
6. Click schedule if you wish to set this report to run at a later time
7. Click OK to run the report now and web enable the customers or items



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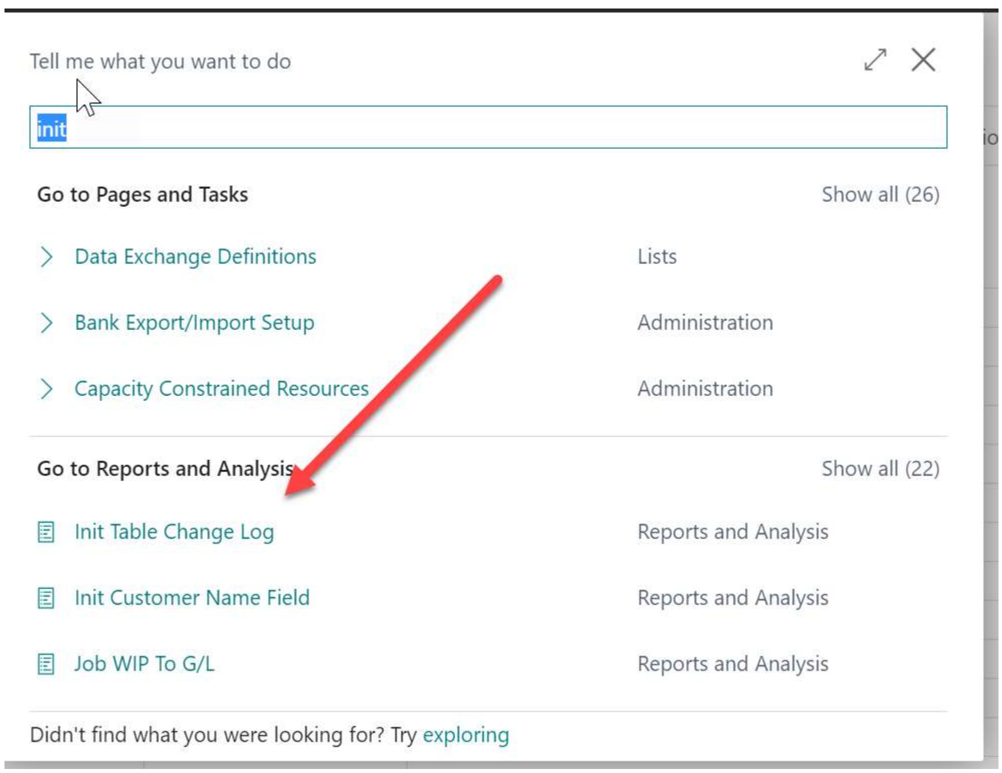
C. Mass initiate re-sync of all Customers, Items, Sales Prices, Inventory

In Business Central data will only re-sync if something changes in Business Central. Take for example, customers. A customer will sync over the first time it is created and marked web enabled but it will not sync over again unless something on the customer is changed. For inventory, an item will only sync over if there is a posted change that hits the item ledger entry table.

There could be times you may want to sync all customers, inventory, etc. over even if there has not been a change in Business Central that would automatically trigger this.

This report will allow you to select what you want to sync over in mass. Note: A re-sync of all data can be time consuming depending on the amount of data.

1. Search for INIT and click on the report Init Table Change log



2.

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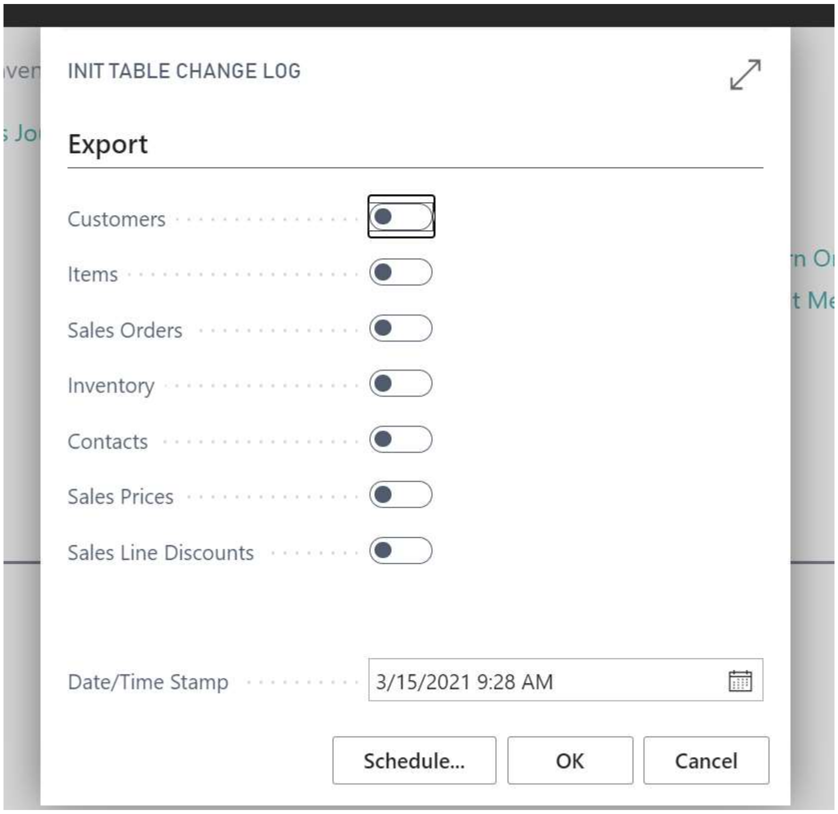
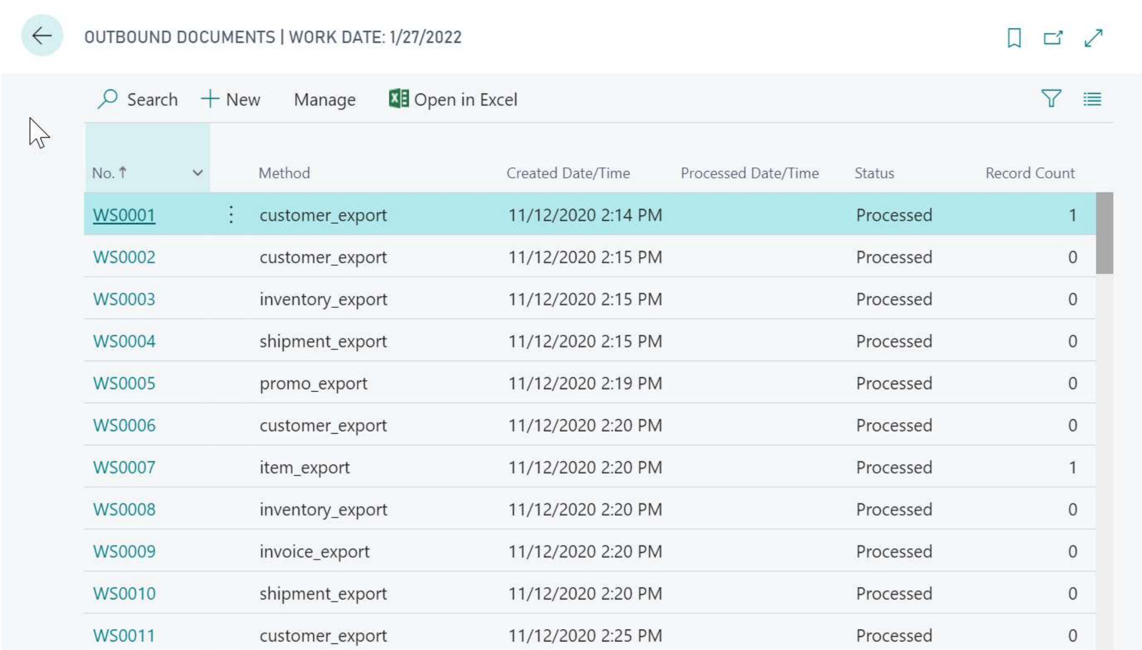
Click on the appropriate files and trigger the resync to E-Commerce



Outbound Documents

A. Tracks all the data and processes that have been sent from Business Central to E-Commerce.

Search for Outbound and you view the below list screen with data exports

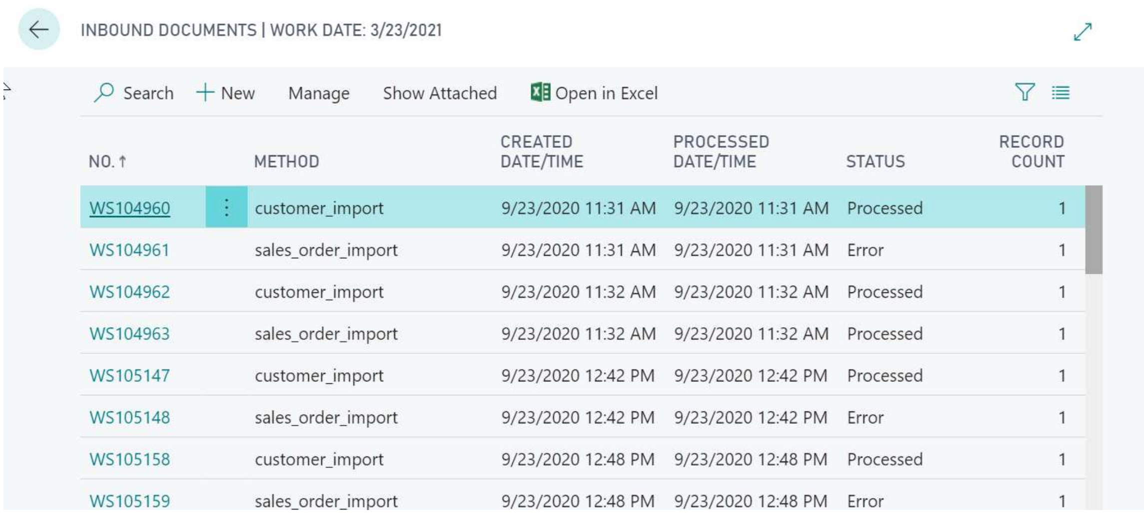


No.	Method	Created Date/Time	Processed Date/Time	Status	Record Count
WS0001	customer_export	11/12/2020 2:14 PM		Processed	1
WS0002	customer_export	11/12/2020 2:15 PM		Processed	0
WS0003	inventory_export	11/12/2020 2:15 PM		Processed	0
WS0004	shipment_export	11/12/2020 2:15 PM		Processed	0
WS0005	promo_export	11/12/2020 2:19 PM		Processed	0
WS0006	customer_export	11/12/2020 2:20 PM		Processed	0
WS0007	item_export	11/12/2020 2:20 PM		Processed	1
WS0008	inventory_export	11/12/2020 2:20 PM		Processed	0
WS0009	invoice_export	11/12/2020 2:20 PM		Processed	0
WS0010	shipment_export	11/12/2020 2:20 PM		Processed	0
WS0011	customer_export	11/12/2020 2:25 PM		Processed	0

Inbound Documents

A. Tracks all the data and processes that have been sent from E-Commerce to Business Central.

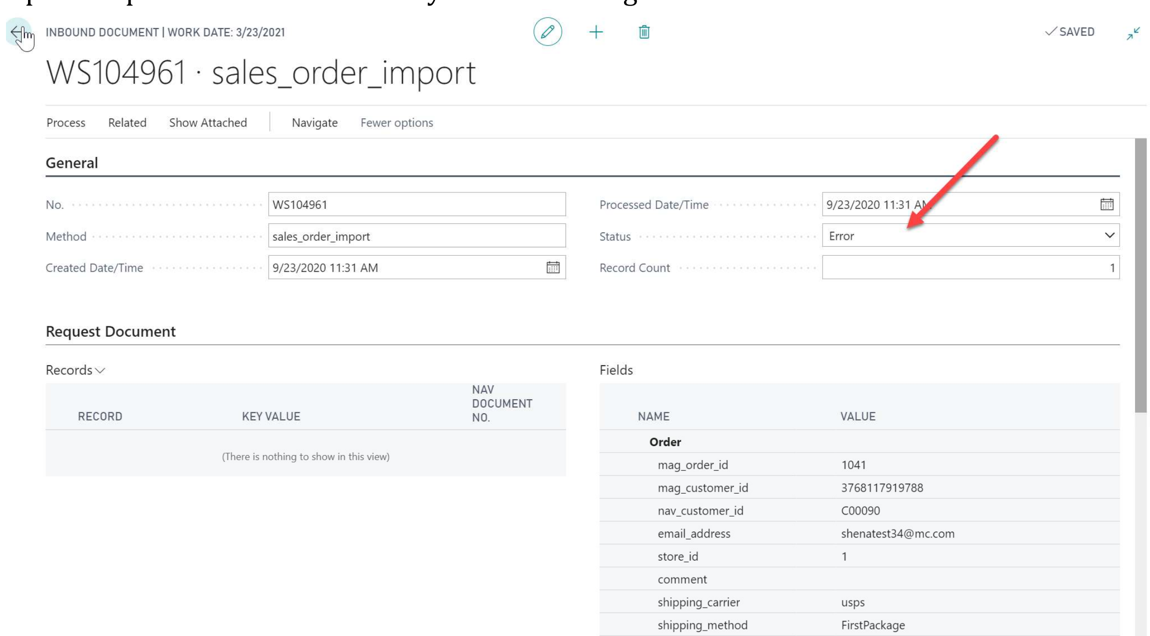
Search for inbound and view a list of processes and errors


INBOUND DOCUMENTS | WORK DATE: 3/23/2021

Search + New Manage Show Attached Open in Excel

NO. ↑	METHOD	CREATED DATE/TIME	PROCESSED DATE/TIME	STATUS	RECORD COUNT
WS104960	customer_import	9/23/2020 11:31 AM	9/23/2020 11:31 AM	Processed	1
WS104961	sales_order_import	9/23/2020 11:31 AM	9/23/2020 11:31 AM	Error	1
WS104962	customer_import	9/23/2020 11:32 AM	9/23/2020 11:32 AM	Processed	1
WS104963	sales_order_import	9/23/2020 11:32 AM	9/23/2020 11:32 AM	Processed	1
WS105147	customer_import	9/23/2020 12:42 PM	9/23/2020 12:42 PM	Processed	1
WS105148	sales_order_import	9/23/2020 12:42 PM	9/23/2020 12:42 PM	Error	1
WS105158	customer_import	9/23/2020 12:48 PM	9/23/2020 12:48 PM	Processed	1
WS105159	sales_order_import	9/23/2020 12:48 PM	9/23/2020 12:48 PM	Error	1

1. To resolve errors:
   a. Open the process with the error by double clicking on the line



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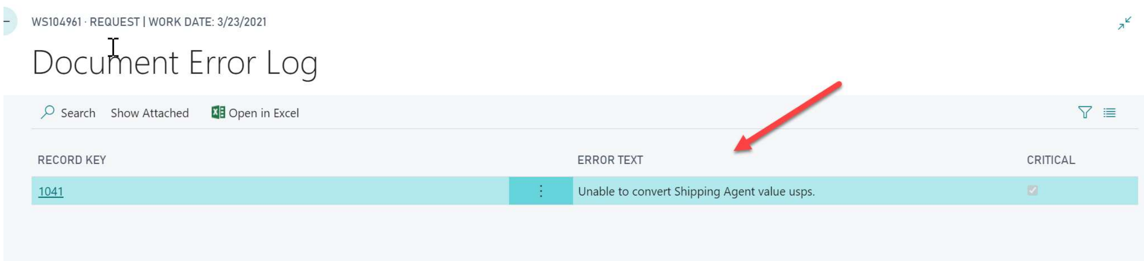
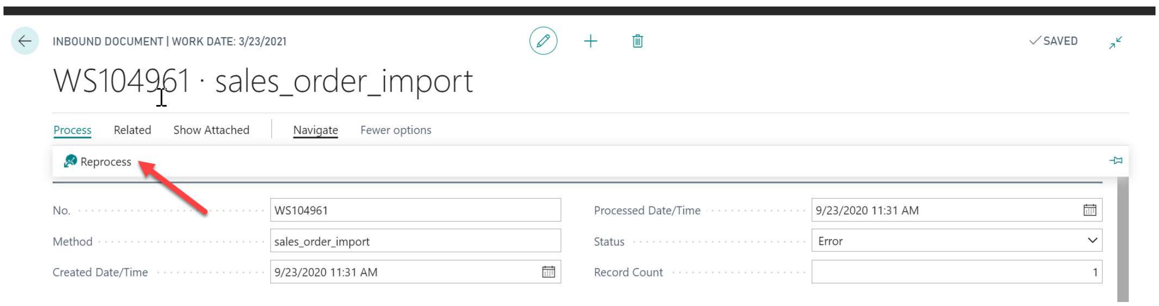
a. Click on Navigate and "View errors" to see the error

b. Resolve the error as appropriate



a. Once resolved, click on "Process" and then "Reprocess" to allow the order/customer to be created



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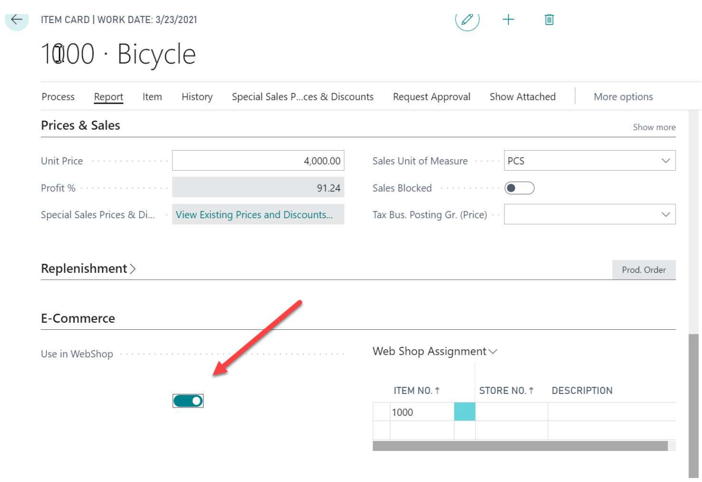
Sync Processes – Business Central to E-Commerce

A. Item

Search for item and click on the appropriate item from the list view. To sync this item to E-Commerce, check the "Use in Webshop"



E-Commerce tab
For Magento you can select which E-Commerce website this product should sync to. If left blank the item will sync to all websites within that Magento database; not supported for any other web platform

To re-sync the same product make a change to the item to re-trigger the same product to sync

B. Customer

To Sync a Customer to E-Commerce search for customer and select the appropriate customer from the list view. Click on "Web Enabled" to synch this customer to E-Commerce

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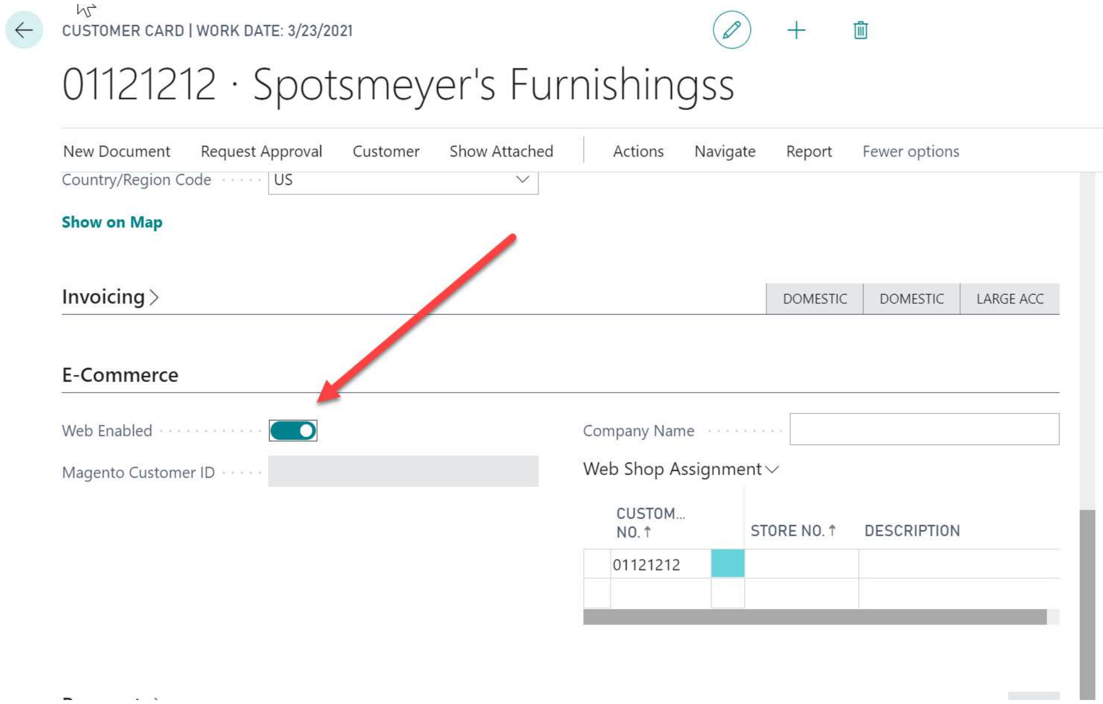

For Magento you can select which E-Commerce website this product should sync to. If left blank the item will sync to all websites within that Magento database; not supported for any other web platform

Note: The customer must have a unique email address to be created in E-Commerce

To re-sync the same customer make a change to the customer to re-trigger the same customer sync

C. Sales Order

Search for "Sales" and select the sales order from the list view Ecommerce tab. An order synced from E-Commerce will have Created by WS checked and the E-Commerce order number will be displayed

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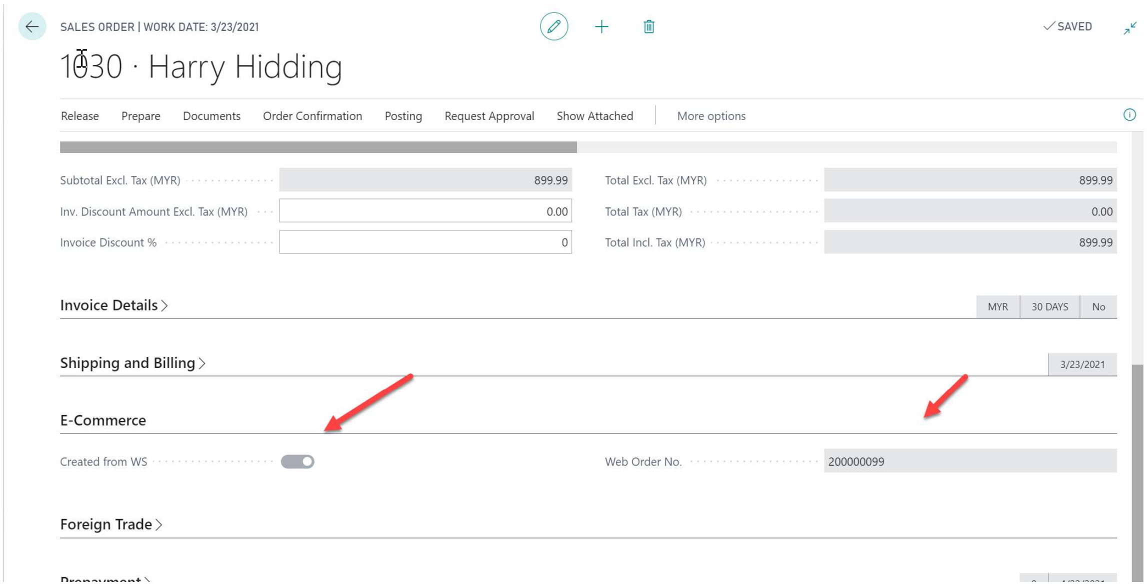

D. Shipment

1. All settings and options are set in E-Commerce
2. When an E-Commerce order is synced from Business Central, the item no., qty., tracking number, and carrier information are sent back to E-Commerce
3. A shipment is created in E-Commerce with the details provided
4. If standard E-Commerce functionality is used for credit cards:
    a. The credit card will be captured for the amount that was shipped
    b. A Magento invoice is also created
    c. If the order shipped complete, the E-Commerce order status will be marked complete
    d. If the order partially shipped, the remaining quantity would remain open until shipped complete

E. Invoice

5. If the order has payment terms:
    a. When the invoice is created in Business Central, an invoice will be created in E-Commerce for the quantity invoiced
    b. If the order shipped/invoiced complete, the E-Commerce order status will be marked complete

F. Customer Specific Pricing

6. The Sales price table is synchronized to E-Commerce

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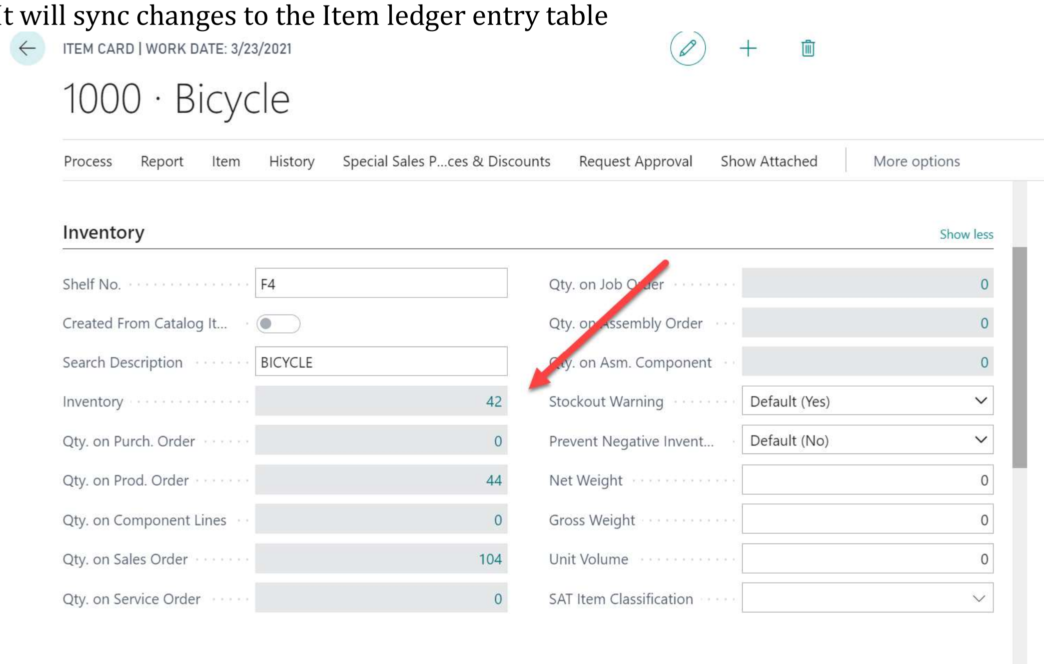
7. In E-Commerce, the prices are adjusted to match Business Central price calculation based on customer price group and specific price for a specific item/customer combination. This will also take into account the start/end date specified in the Business Central table

G. Inventory

8. Standard functionality will sync Qty. on Hand from Business Central to E-Commerce
9. It will sync changes to the Item ledger entry table



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