

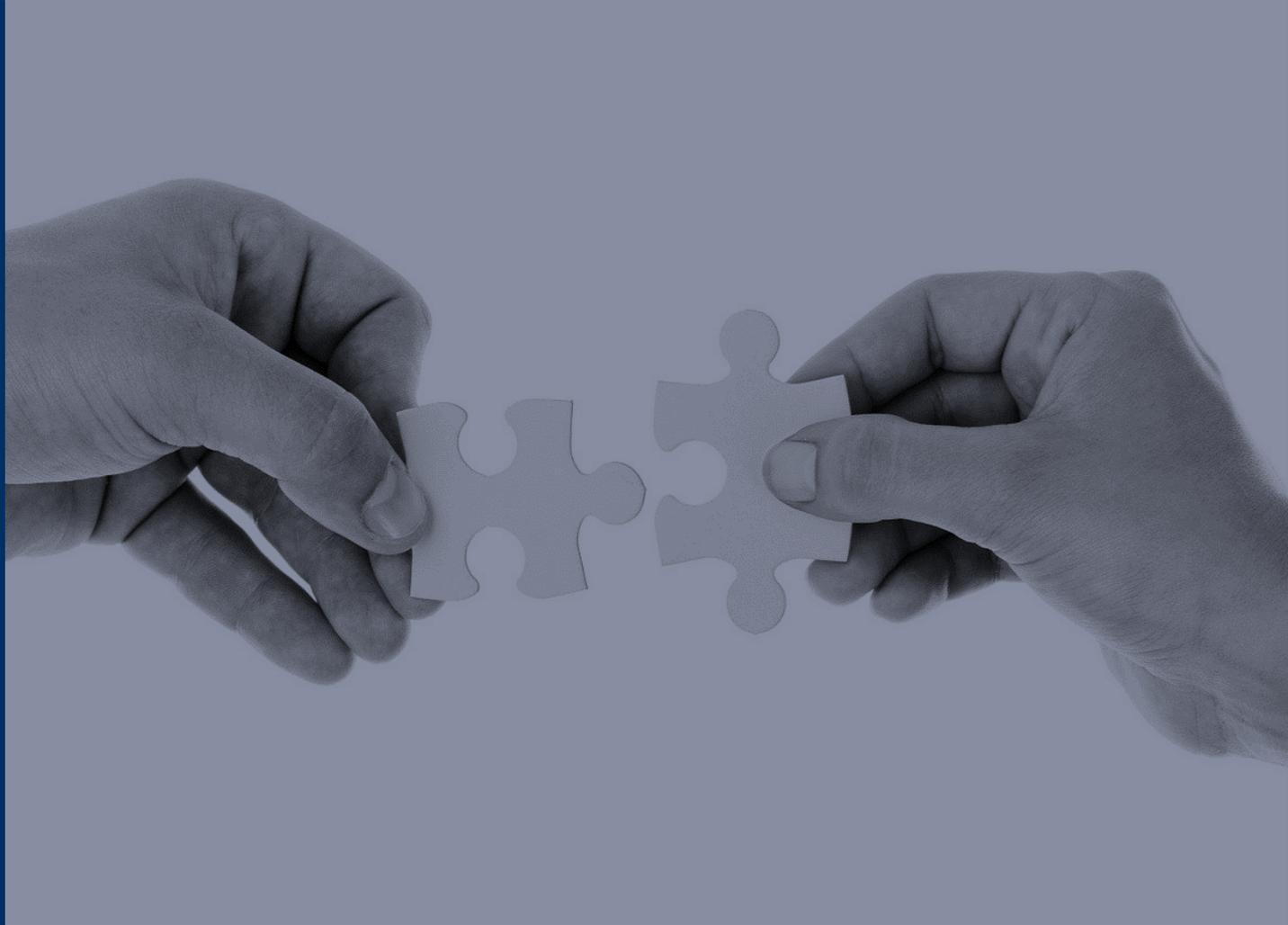
# ExpandIT Connector

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Guide to installing ExpandIT Connector in Business Central Cloud

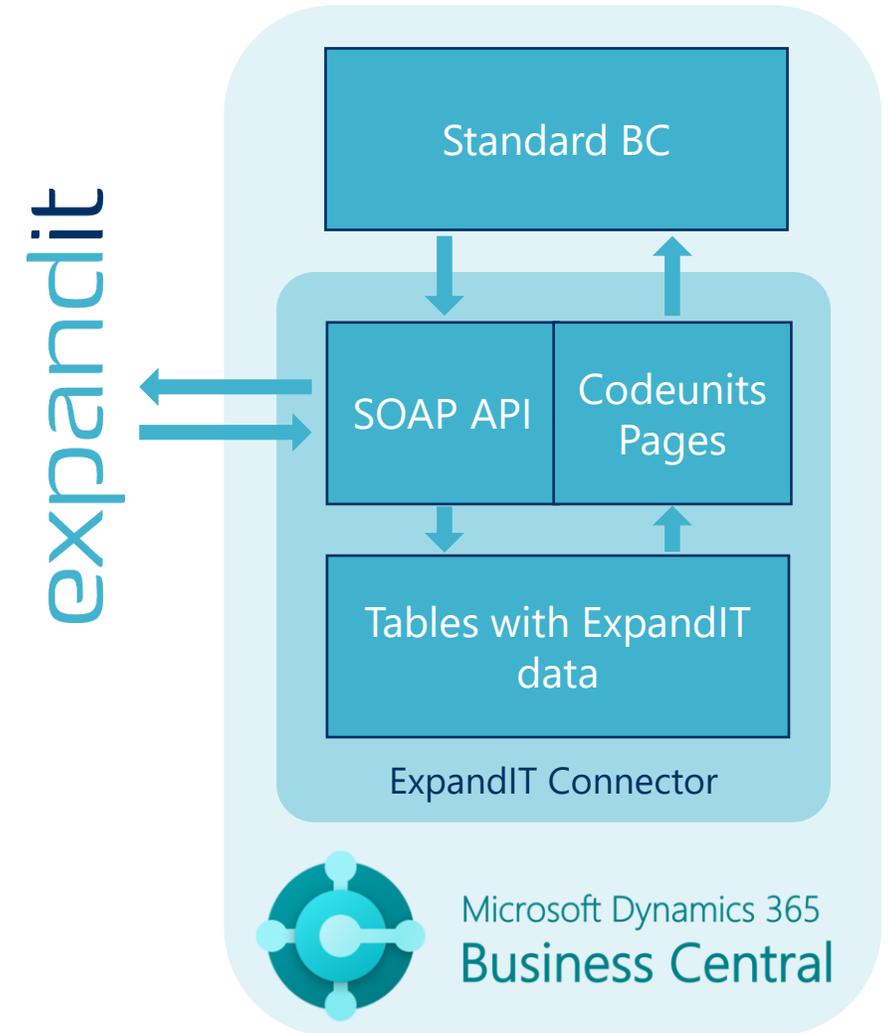
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# Introduction

- ExpandIT Connector extends Business Central with pages (screens), codeunits (logic) and tables (data) and an API
- Certified and distributed by Microsoft - AppSource
- The SOAP API is the web service that provides the link between ExpandIT and Business Central
- Three steps involved
  1. Install the extension
  2. Enable the Web Service
  3. Enable ExpandIT to access to the web service

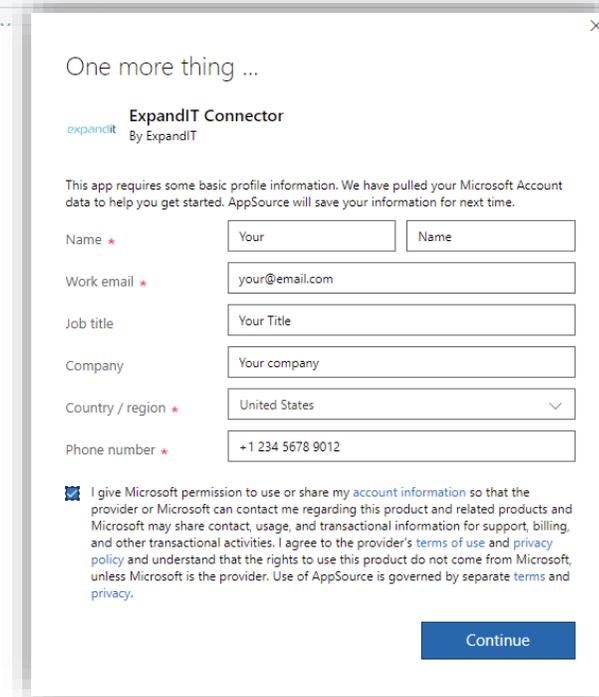
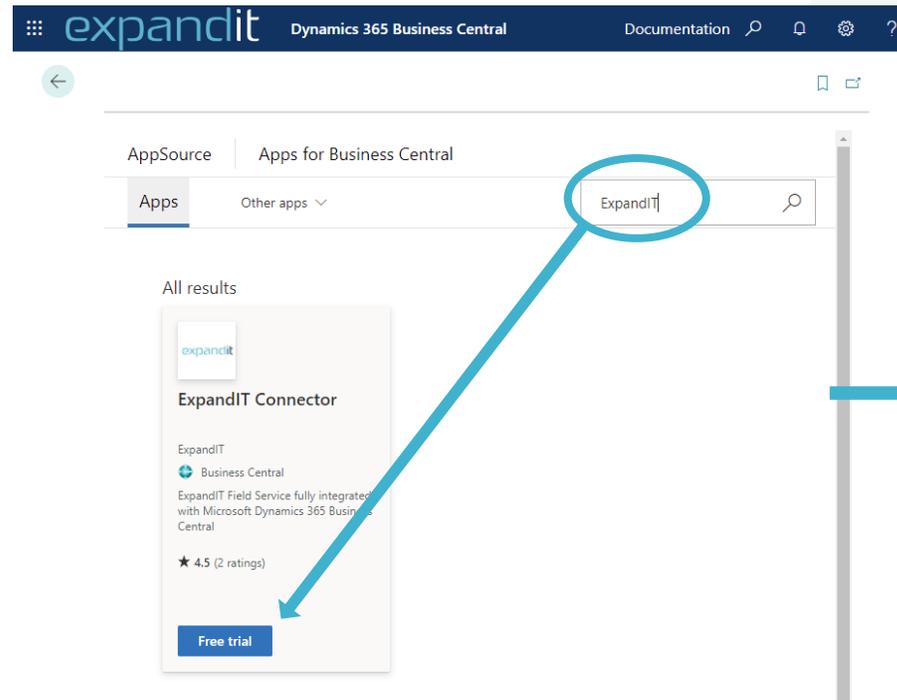
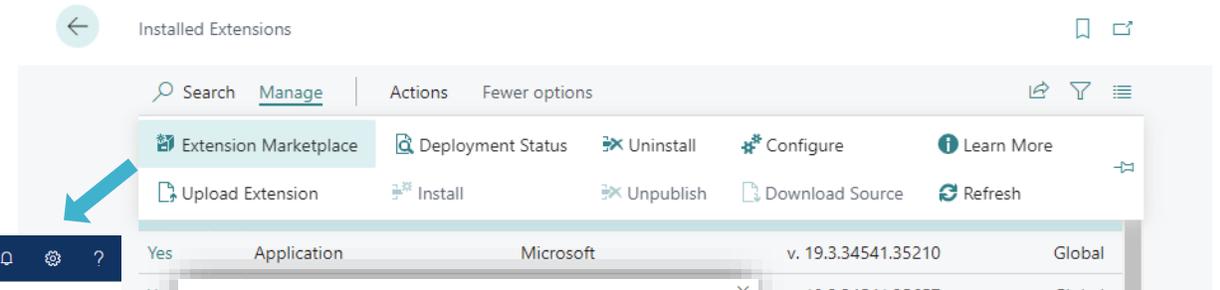
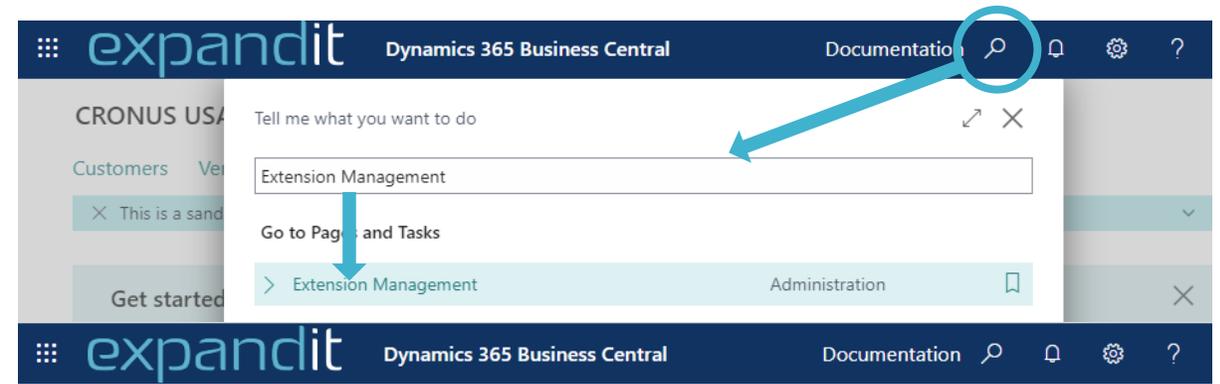


Available on  
Microsoft AppSource

expandit

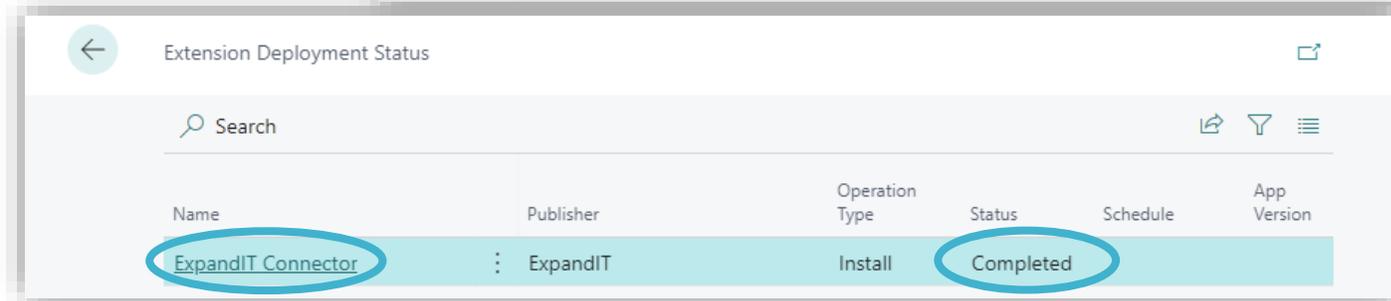
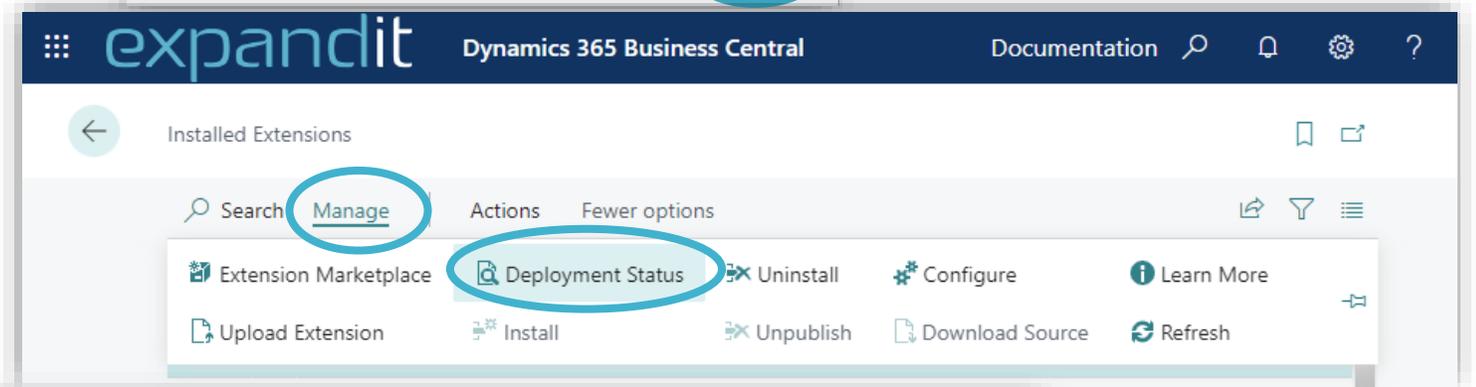
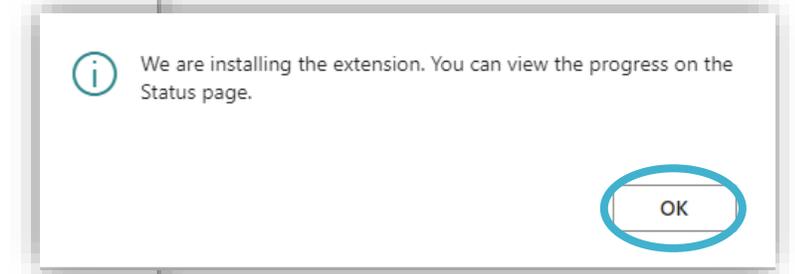
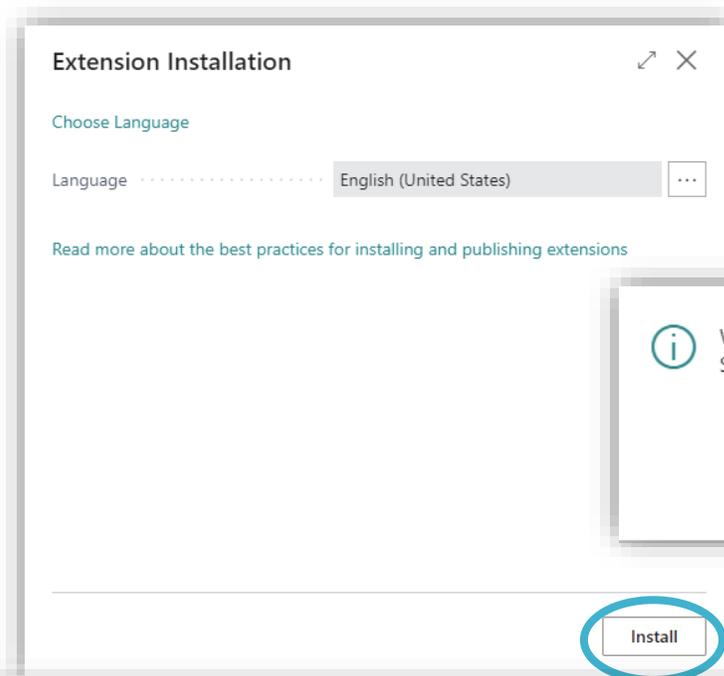
# Install the extension

- Open Business Central and search for 'Extension Management' and click on the search result
- Click 'Manage' and 'Extension Marketplace'
- Search for 'ExpandIT' and click the 'Free trial' button
- Enter your contact information, give permission to Microsoft and click 'Continue'



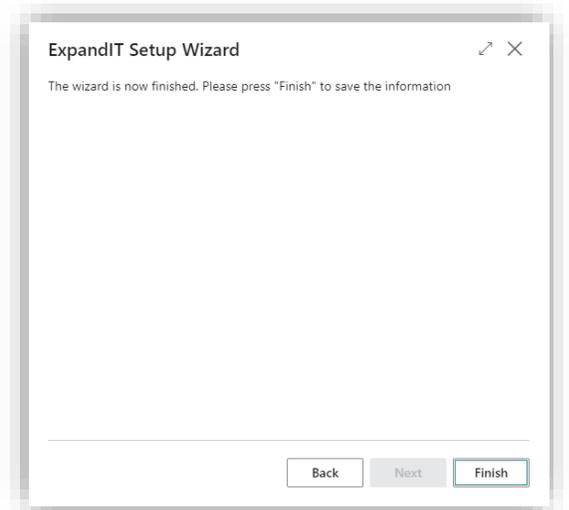
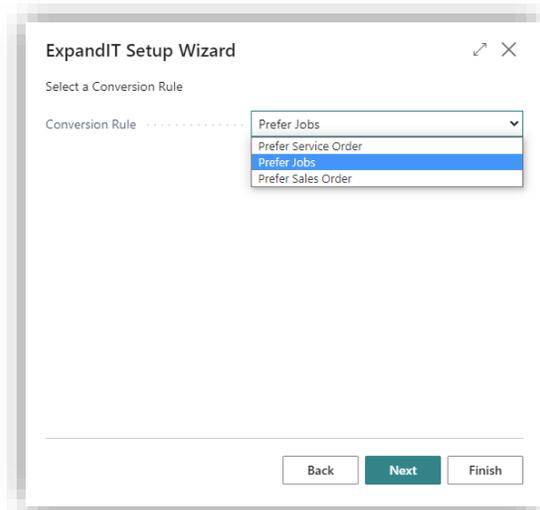
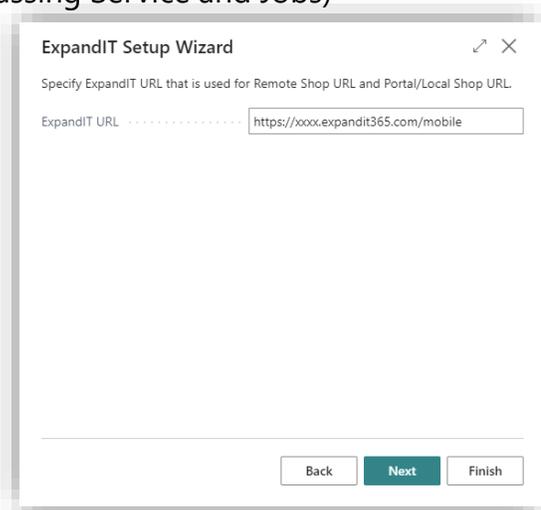
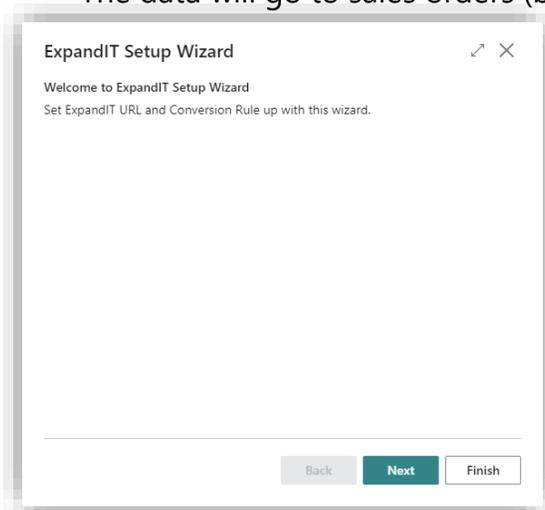
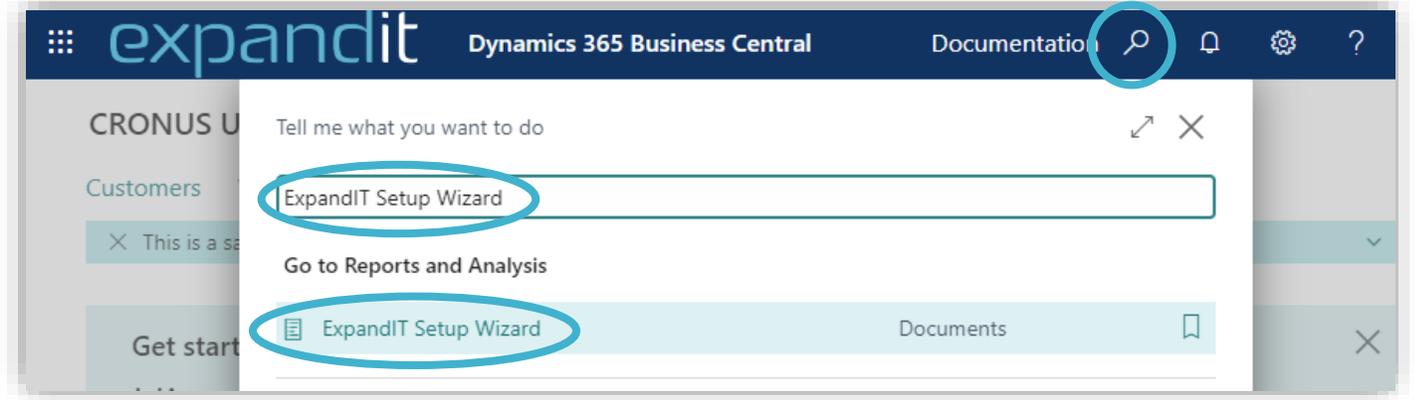
# Install the extension - 2

- Select your preferred language and click 'Install'
- Click 'OK' to the message that the extension is being installed
- Go back and click 'Manage' and 'Deployment Status'
- When the installation is complete, the status will be 'Completed' on the 'ExpandIT Connector'  
This may take a few minutes
- Once completed, you will have to reload Business Central



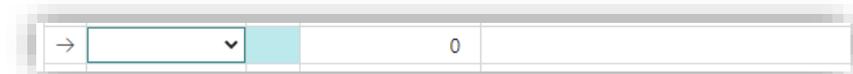
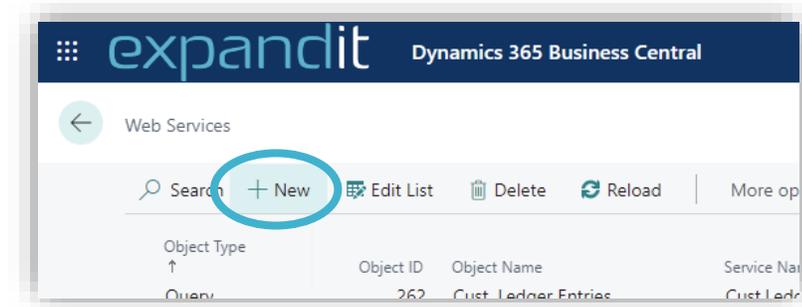
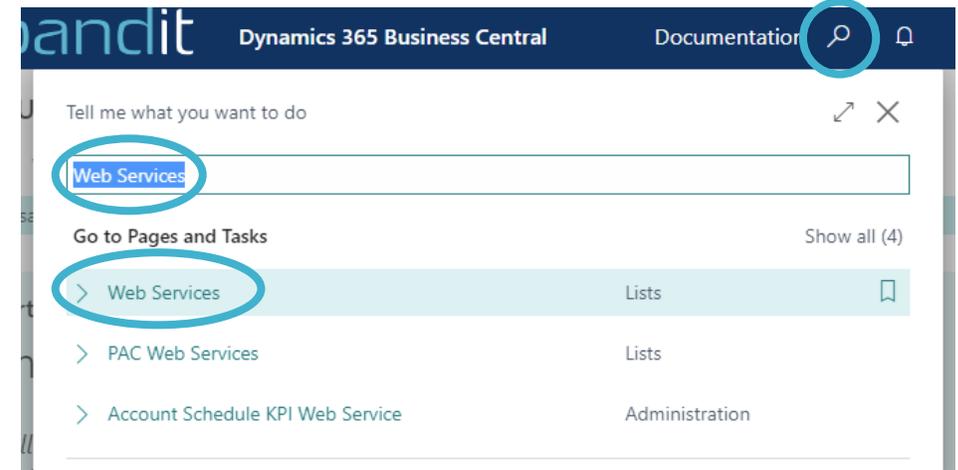
# Configure the extension

- Search for 'ExpandIT Setup Wizard' and click the result
- Follow the steps and provide the values:
- **ExpandIT URL**  
The address of the ExpandIT server followed by /mobile
- **Conversion Rule**  
*Prefer Service Order* will send as much data to the Business Central Service module  
*Prefer Jobs* will send data with Job and Job Task information to Job Journals, the remaining data to the Service Module  
*Prefer Sales Order*  
The data will go to sales orders (bypassing Service and Jobs)



# Configure the Web Service

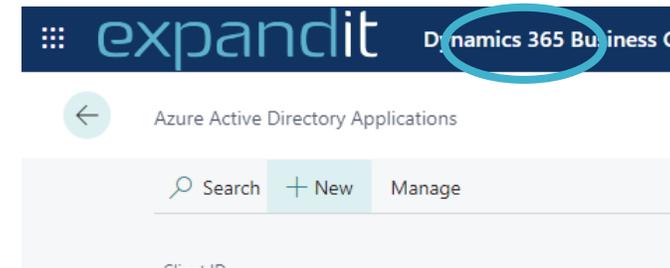
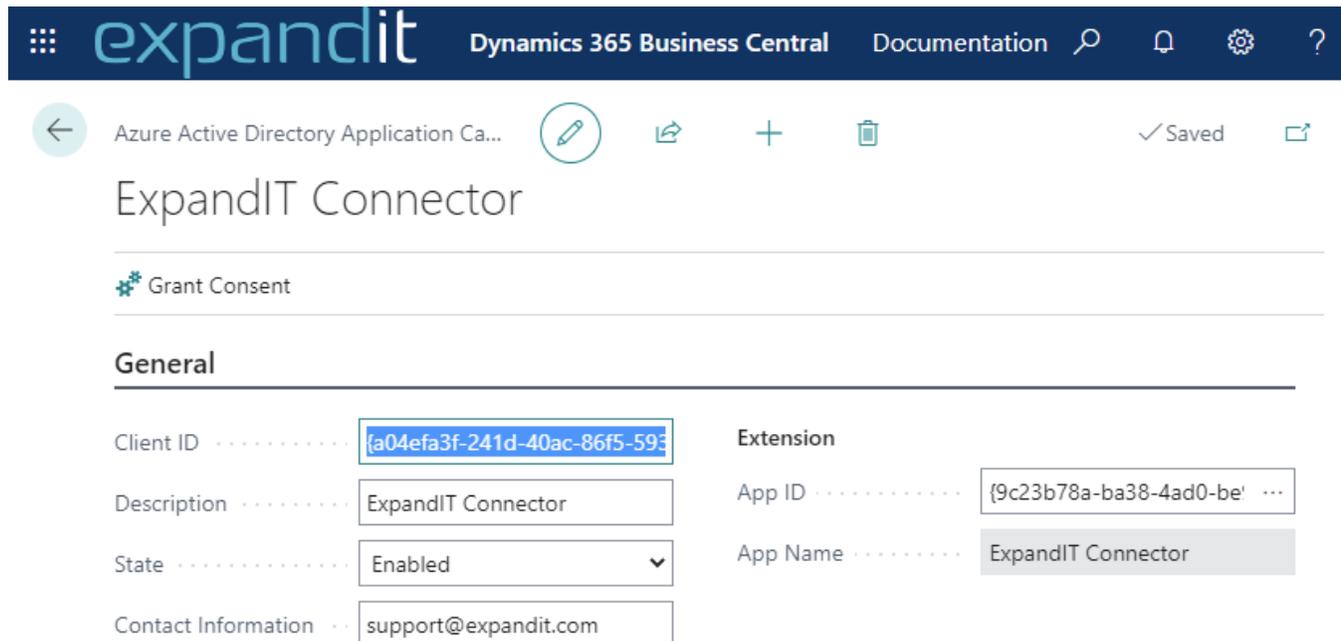
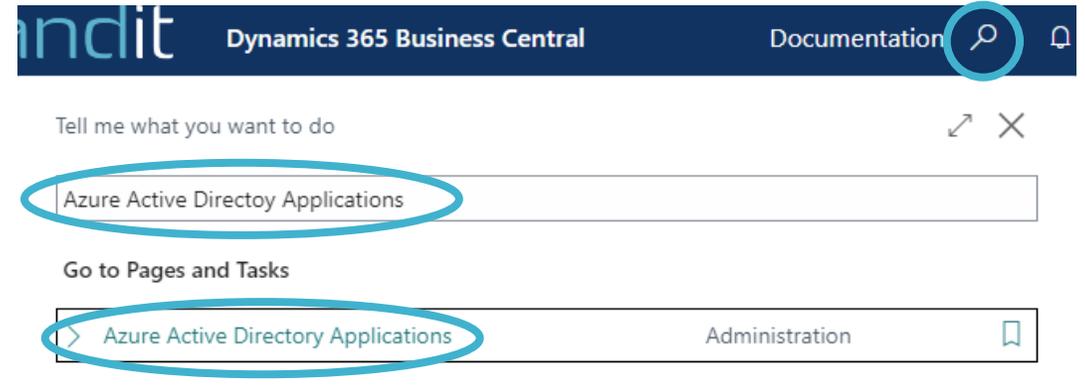
- Search for 'Web Services' and click the result
- In the Web Services page, click '+New'
- Find the newly added line (it will be empty and have 0 in Object No.)
- Fill in the following values
  - Object Type: **Codeunit**
  - Object ID: **6038762**
  - Service Name: **ExpandITAPI**
  - Publish: **Yes**
- When the row has been modified, the SOAP URL should populate with a value. Copy this value, and send it to your ExpandIT representative



Object Type ↑	Object ID	Object Name	Service Name ↑	All Tenants	Publis...	OData V4 URL	SOAP URL
→ Codeunit	6038762	ExpandITAPI	ExpandITAPI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://go.microsoft.com/fwlink/?linkid=...	https://api.businesscentral.dynamics.co...

# Give ExpandIT access to the API

- Search for 'Azure Active Directory Applications' and click the result
- Click the '+ New' button
- On the page, enter the following values
  - Client ID: **{a04efa3f-241d-40ac-86f5-593548959436}**
  - Description: **ExpandIT Connector**
  - State: **Enabled**
  - App ID: **Look up 'ExpandIT Connector'**



# Give ExpandIT access to the API - 2

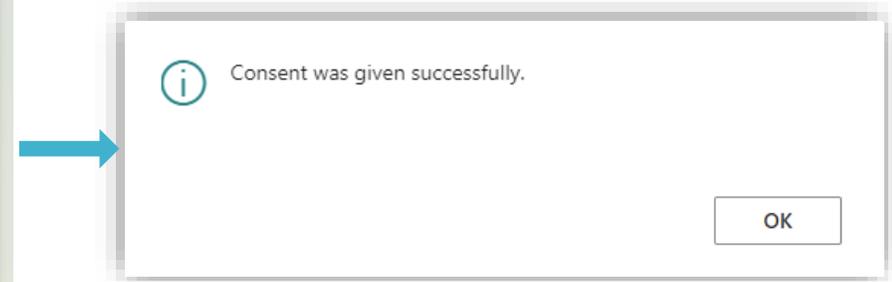
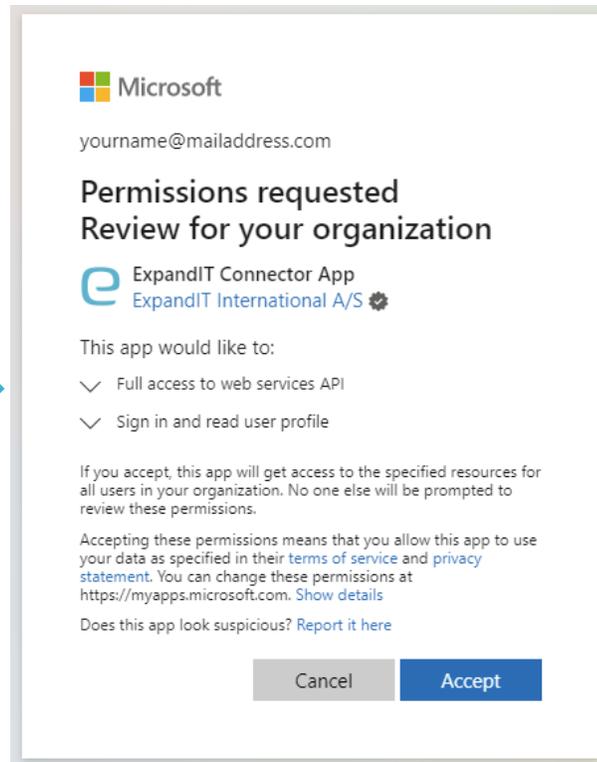
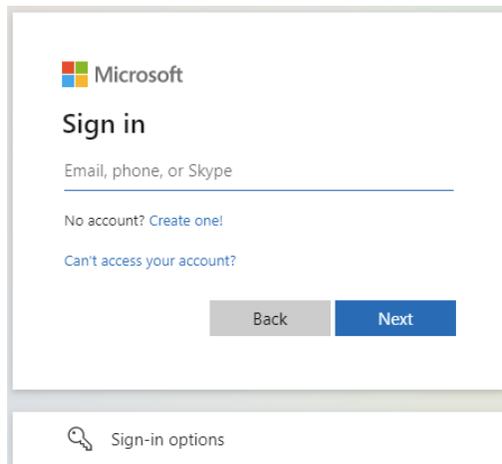
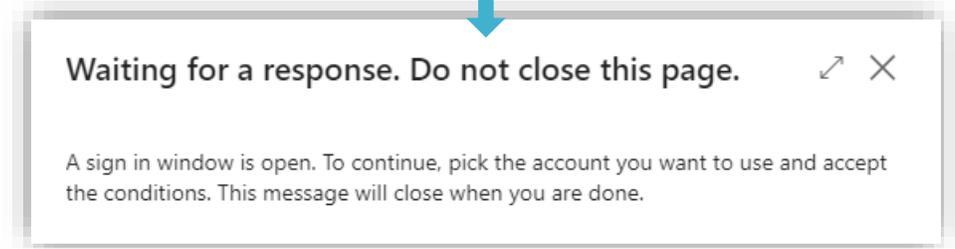
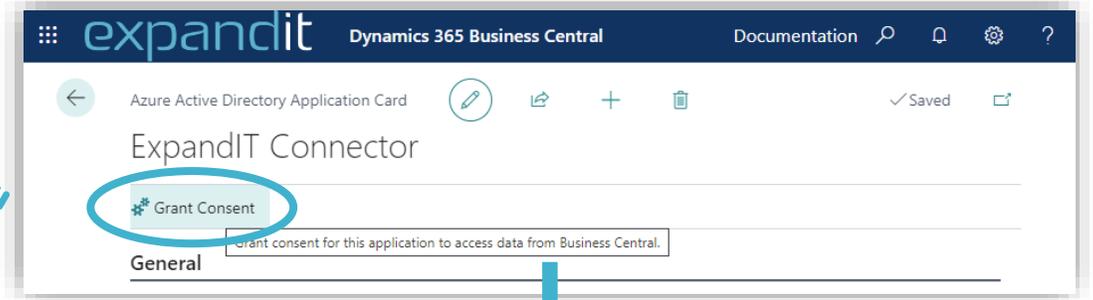
- Under 'User Groups' add a line with 'D365 TEAM MEMBER'
- Under 'User Permission Sets' 3 lines will show
- Add a 4<sup>th</sup> line with Permission Set 'EXP'

User Groups				Manage		
Code ↑		Name		Company Name ↑		
 D365 TEAM MEMBER		Team Member		CRONUS USA, Inc.		

User Permission Sets						Manage		
Permission Set ↑		Description	Company ↑	Extension Name		Permission Scope		
D365 READ		Dyn. 365 Read a...	CRONUS USA, Inc.	Base Application		System		
D365 TEAM ...		Dynamics 365 Te...	CRONUS USA, Inc.	Base Application		System		
 EXP		EXP Connector		ExpandIT Connector		Tenant		
LOCAL		Country/region-...	CRONUS USA, Inc.	Base Application		System		

# Grant consent to ExpandIT Connector

- **These steps must be performed using an administrator account on the same Azure Active Directory (tenant) as the Business Central instance**
- Click the 'Grant Consent' button
- A message is displayed in the background , and a new window appears asking for your login information
- When prompted for acceptance, click 'Accept'
- You should see the 'Consent was given successfully' message



Having questions?

Contact us today: [sales@expandit.com](mailto:sales@expandit.com)

# The ExpandIT Team

We are here to help you succeed!

