ExpandIT Connector

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 disitributed 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



Install the extension

- Open Business Central and search for 'Extension Management' and click on the search result
- Click 'Manage' and 'Extension Marketplace'

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- Search for 'ExpandIT' and click the 'Free trial' button
- Enter your contact information, give permission to Microsoft and click 'Continue'

AppSource

Apps

All results

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ExpandIT Business Central ExpandIT Field Service fully integra with Microsoft Dynamics 365 Busi

Central

ExpandIT Connector

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Other apps $\, \smallsetminus \,$

Apps for Business Central

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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

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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)

ExpandIT Setup Wizard Welcome to ExpandIT Setup Wizard Set ExpandIT URL and Conversion Rule up with this wizard.	ExpandIT Setup Wizard	ExpandIT Setup Wizard Select a Conversion Rule Conversion Rule Prefer Jobs Prefer Service Order Prefer Sales Order	ExpandIT Setup Wizard \checkmark X The wizard is now finished. Please press "Finish" to save the information
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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:CodeunitObject ID:6038762Service Name:ExpandITAPIPublish: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

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- 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'



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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 4th line with Permission Set 'EXP'



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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

Sign in			
Email, phone, or	Skype		_
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https://docs.microsoft.com/en-us/azure/active-directory/manage-apps/grant-admin-consent

Having questions? Contact us today: sales@expandit.com

The ExpandIT Team

We are here to help you succeed!

