1. Overview

1.1. i2x Integration Solution

1.1.1. Overview

The i2x Integration app for Microsoft Dynamics 365 Business Central, extends specific tables and adds fields for use with i2x Integration Solution by NextGen Software.

Using API web services in Business Central, i2x enables easy, fast, secure electronic invoice submission and processing for both operators and suppliers. Using i2x, you can upload invoices from Business Central with 1-Click™ and securely transmit them directly to your customers portal.

Save time, eliminate paper, improve data accuracy and reduce costs by integrating your supplier's portal with Business Central Today!

1.2. i2x Permissions Setup

1.2.1.1. Assign Permissions

In order to configure and use the i2x Integration Solution for Microsoft Dynamics 365 Business Central, Permissions must be given to the user.

i2x Integration has a specific Permission Sets called "I2X INTEGRATION" which must be added to any users' Permission Sets who require access to configure and use the i2x plaform configuration and custom fields.

All users require the D365 BASIC Permission Set as this is a required assignment for Microsoft Dynamics 365 Business Central.
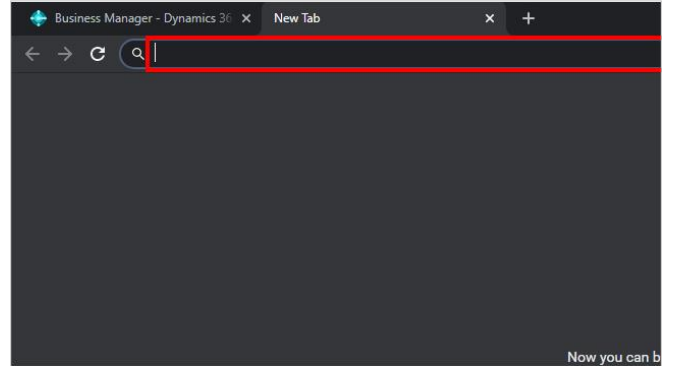
In addition to the D365 BASIC and the I2X INTEGRATION Permission Sets, users will also need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to Edit customers, edit and post sales documents.

For information on assigning Permission Sets to Users or User Groups, see the Dynamics 365 Business Central help.
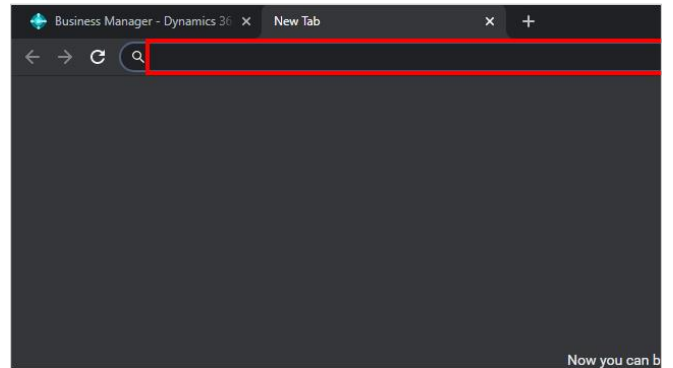
2. i2x Integration Setup

2.1. Download the i2x Integration Configuration Package

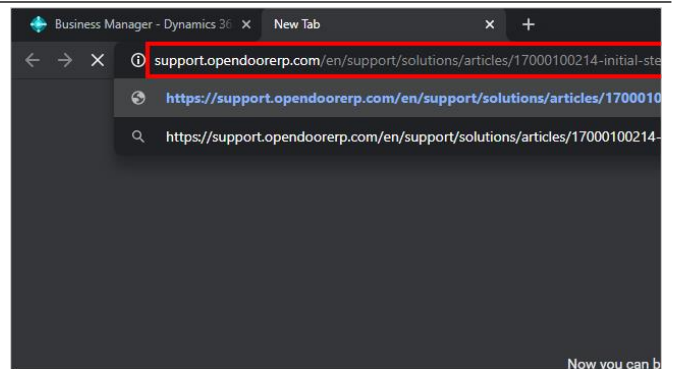Click on the input field **Address and search bar**.
You may also press **Ctrl+L**.

Use the support url link, https://support.opendoorerp.com/en/support/solutions/articles/17000100214-initial-steps-to-configure-web-services-and-api-setup
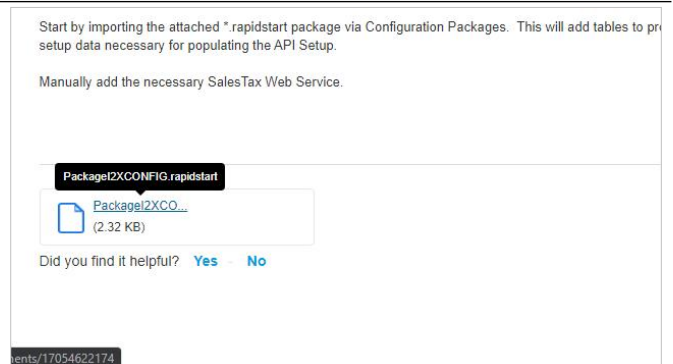
Press **CTRL+v**.

Press the **Enter** key.

Download the related RapidStart configuration package file.

2.2. i2x Permissions Setup

2.2.1.1. Assign Permissions

In order to configure and use the i2x Integration Solution for Microsoft Dynamics 365 Business Central, Permissions must be given to the user.

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For information on assigning Permission Sets to Users or User Groups, see the Dynamics 365 Business Central help.

2.3. Configure i2x Web Services and API Setup

2.3.1. Import the i2x Configuration Package

Enter **Configuration Packages**.
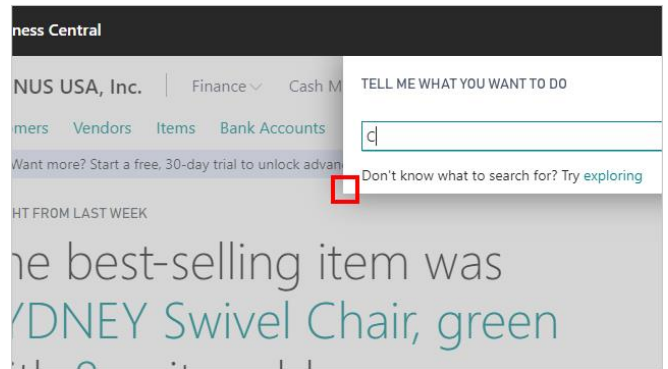
Click on the button
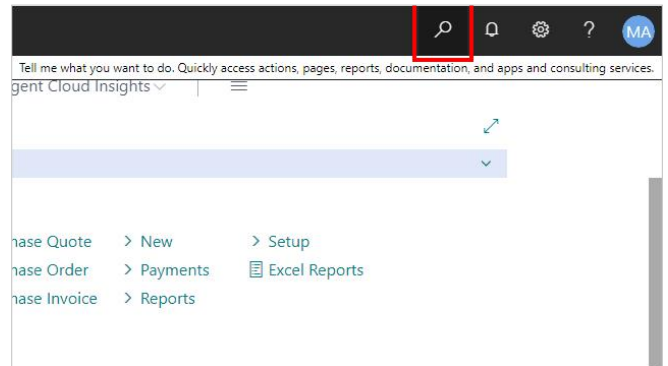
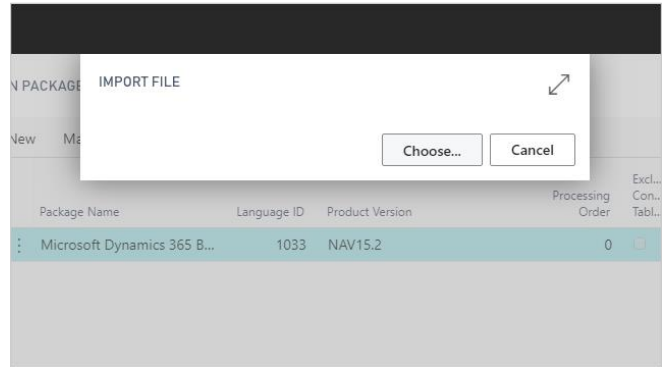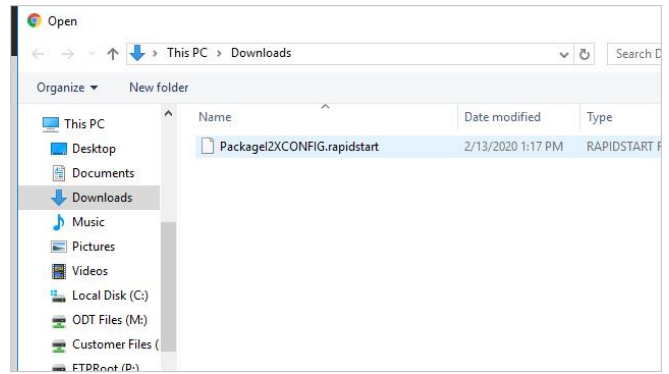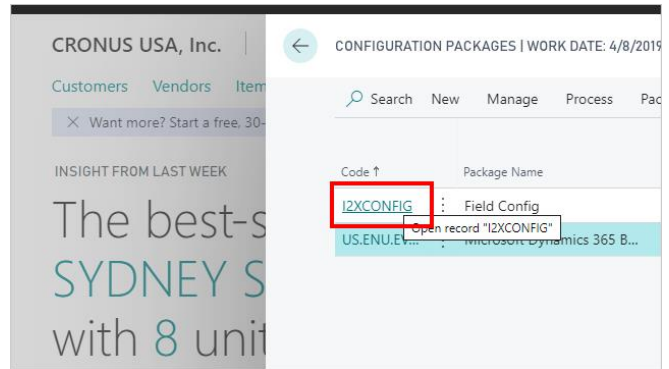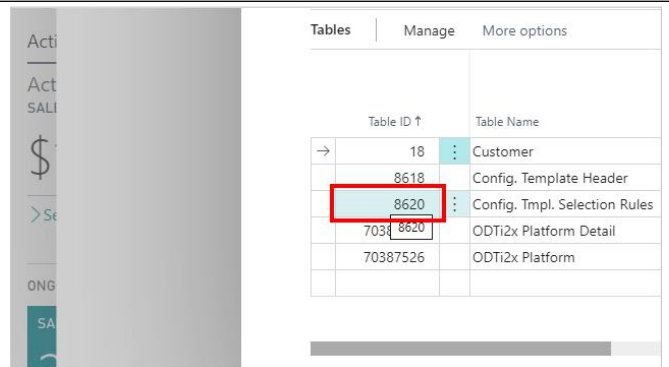|	
Click on **Configuration Packages Lists** ☐	
Click on the navigation menu item popup **Process**	
Click on the navigation menu item **Import Package...**	
Click on the field **null**	
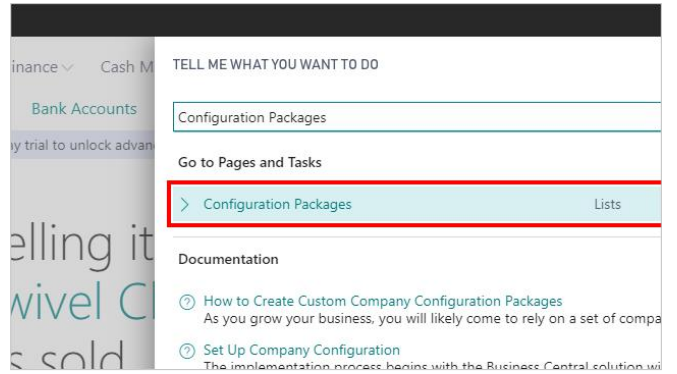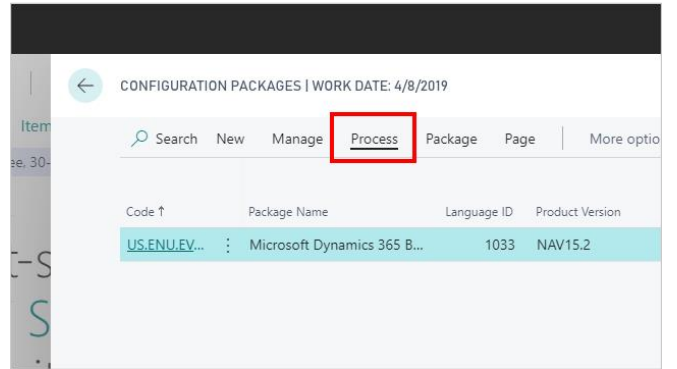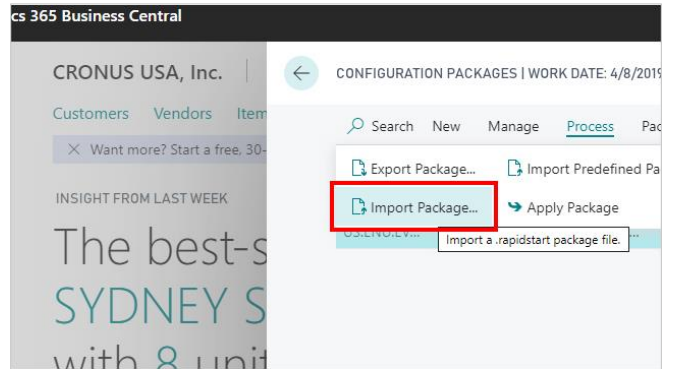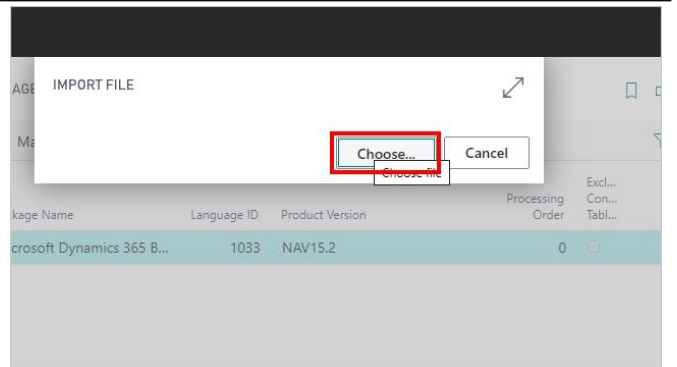
2.3.2. Apply Configuration Package Data

Click on the link in cell **Code** with the value **I2XCONFIG**

Click on the cell **Table ID** with the value **8620**

Click on the navigation menu item **More options**

Click on the navigation menu item popup **Functions**

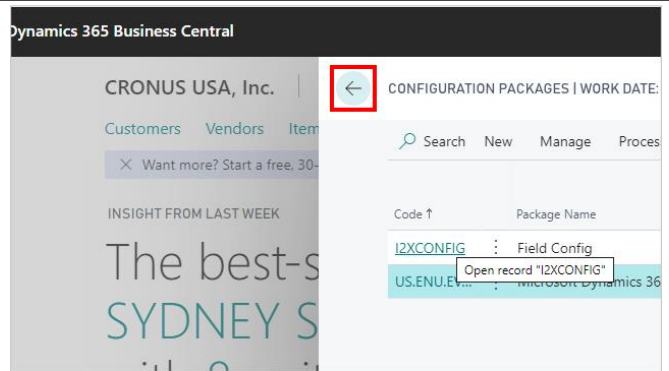Click on the navigation menu item **Apply Data**

Click on the button **Yes**

Click on the button **OK**

Click on the back button
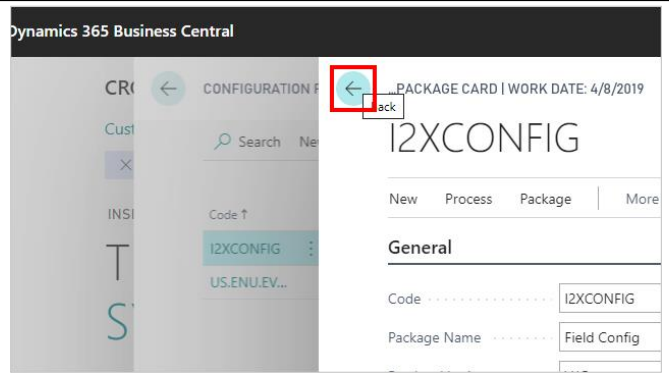
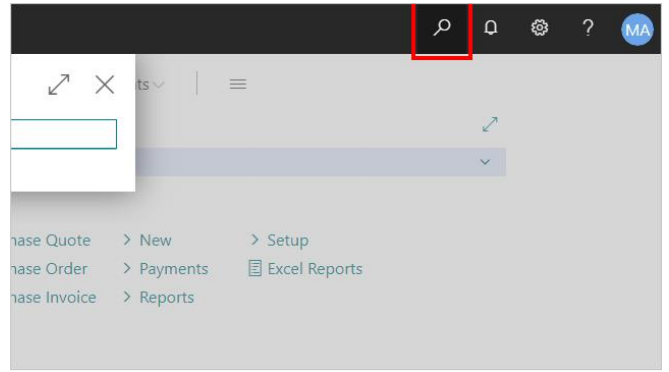Click on the back button

2.3.3. Add the Web Service and Publish

Click on the button
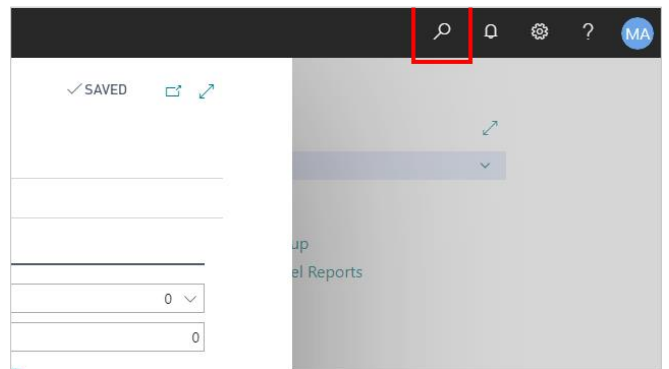
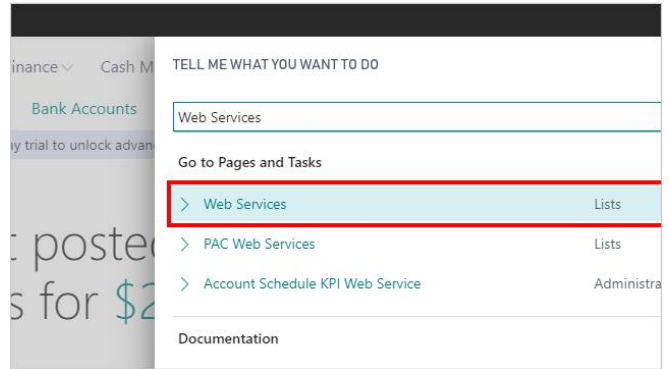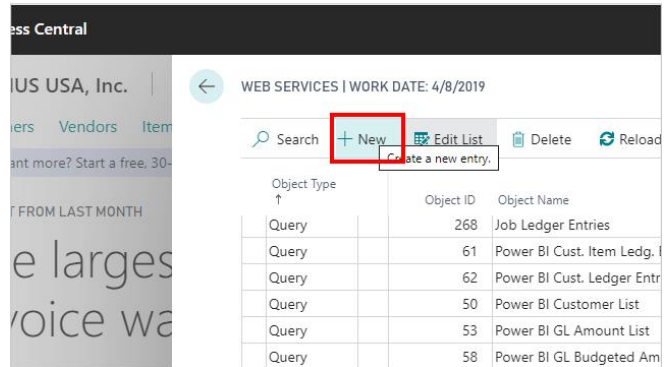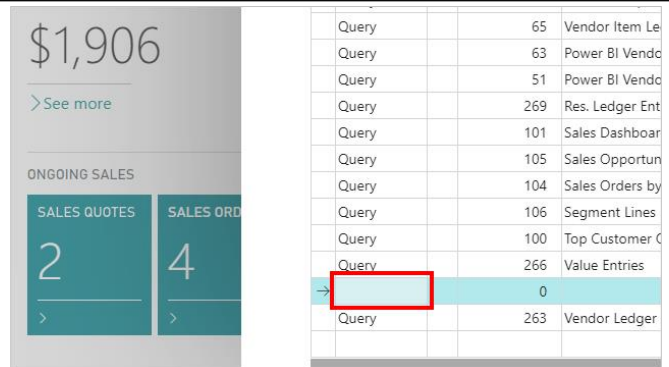Enter **Web Services**.

Click on **Web Services Lists** □

Click on the navigation menu item **New**

Click on the cell **Object Type** with the value **Codeunit Page Query**

Click on the cell **Object Type** with the value **Codeunit Page Query**

65	Vendor Item Ledger Entries	Power BI Vend. Item Ledg. Ent.	☐	☑	http
63	Power BI Vendor Ledger Entries	Power BI Vendor Ledger Entries	☐	☑	http
51	Power BI Vendor List	Power BI Vendor List	☐	☑	http
269	Res. Ledger Entries	Res.LedgerEntries	☐	☑	http
101	Sales Dashboard	SalesDashboard	☑	☑	http
105	Sales Opportunities	SalesOpportunities	☑	☑	http
104	Sales Orders by Sales Person	SalesOrdersBySalesPerson	☑	☑	http
106	Segment Lines	SegmentLines	☐	☑	http
100	Top Customer Overview	TopCustomerOverview	☑	☑	http
266	Value Entries	ValueEntries	☐	☑	http
0			☐	☐	
263	Vendor Ledger Entries	VendorLedgerEntries	☐	☑	http
			☐	☐	http

Click on the cell **Object ID** with the value **0**

	Query	65	Vendor Item Ledger Entries	
	Query	63	Power BI Vendor Ledger Entries	
	Query	51	Power BI Vendor List	
	Query	269	Res. Ledger Entries	
	Query	101	Sales Dashboard	
	Query	105	Sales Opportunities	
	Query	104	Sales Orders by Sales Person	
	Query	106	Segment Lines	
	Query	100	Top Customer Overview	
	Query	266	Value Entries	
→	Codeunit ▾	0		
	Query		Ledger Entries	

Look up value

Enter **Object ID**.

	Query	65	Vendor Item Ledger Entries	
	Query	63	Power BI Vendor Ledger Entries	
	Query	51	Power BI Vendor List	
	Query	269	Res. Ledger Entries	
	Query	101	Sales Dashboard	
	Query	105	Sales Opportunities	
	Query	104	Sales Orders by Sales Person	
	Query	106	Segment Lines	
	Query	100	Top Customer Overview	
	Query	266	Value Entries	
→	Codeunit	7 ⌄		
	Query	263	Vendor Ledger Entries	

Click on the link in cell **ID** with the value **70387527**

	Query	65	Vendor Item Ledger Entries	Power E
	Query	63	Power BI Vendor Ledger Entries	Power E
	Query	51	Power BI Vendor List	Power E
	Query	269	Res. Ledger Entries	Res.Led
	Query	101	Sales Dashboard	SalesDa
	Query			
	Query			

	ID ↑	Object Caption
→	70387527	ODTi2x TaxTable

Select record "70387527"

→	Codeunit	70387527 ⌄
	Query	263	Vendor Ledger Entries	Vendor

430-bc8e-28b99b8d80e6?company=CRONUS...

Click on the cell **Service Name**

Enter **i2xSalesTaxService**.

Click on **Published**

Click on the back button

2.3.4.   Update API Setup

Click on the button

Enter .

Click on **API Setup Administration**
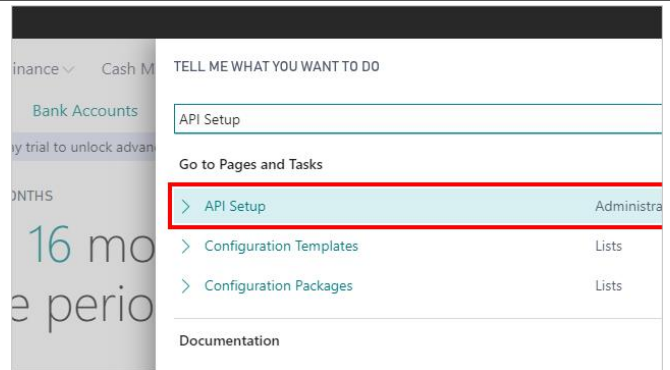
Click on the row menu button
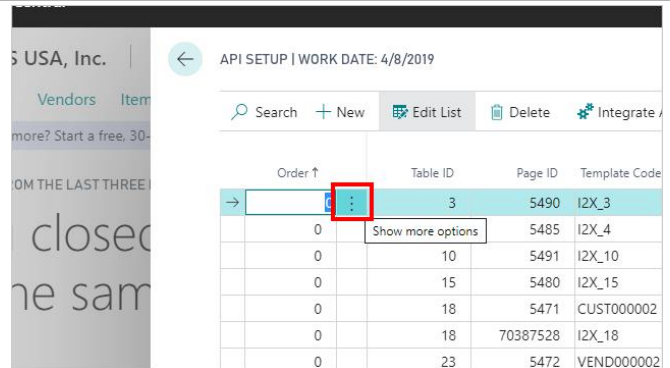
Click on the menu item **Select More**

Click on the column header **Selected**

Click on the navigation menu item **Integrate APIs**

Click on the button **Yes**
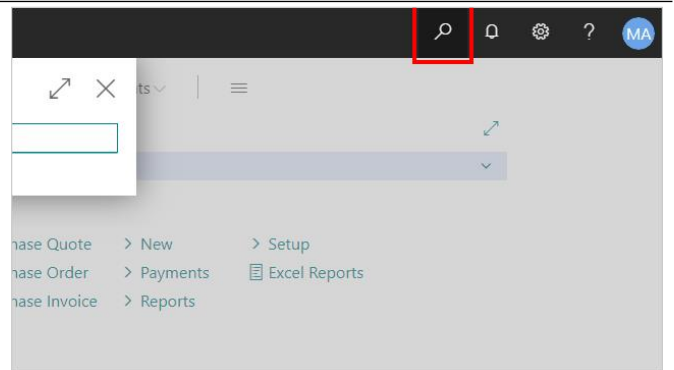
Click on the back button

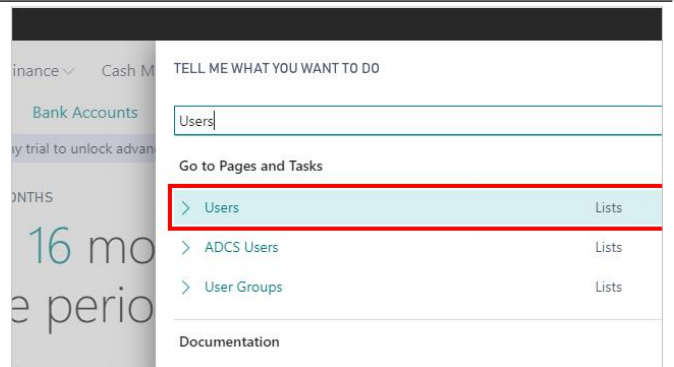## 2.4. Configure Web Access Key for Integration User Account

Click on the button ▢
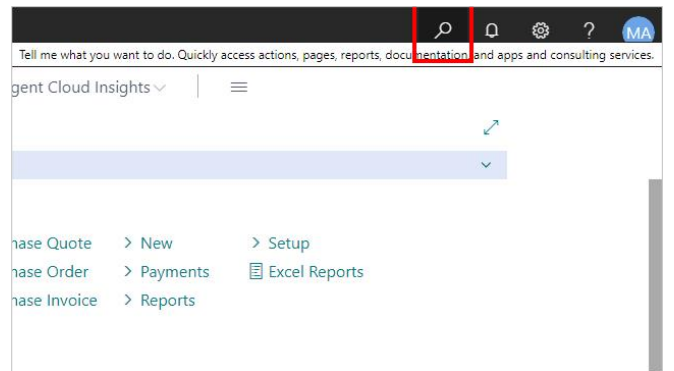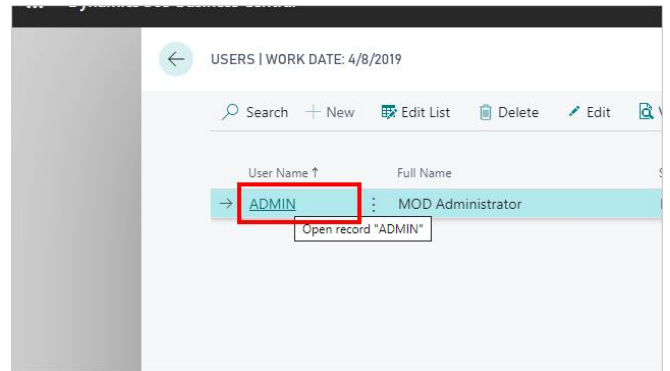
Enter **Users**.

Click on **Users Lists** ▢

Select the user account to configure for use with i2x Integration services.
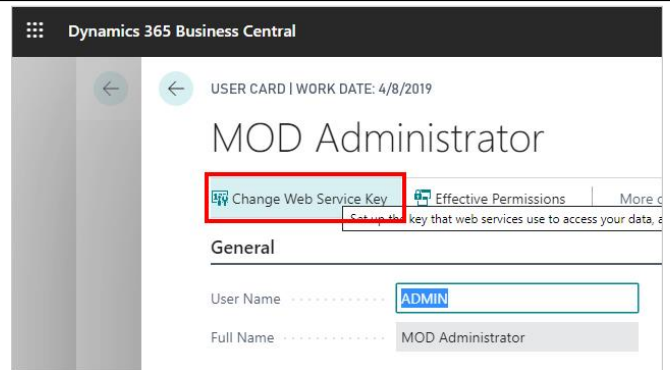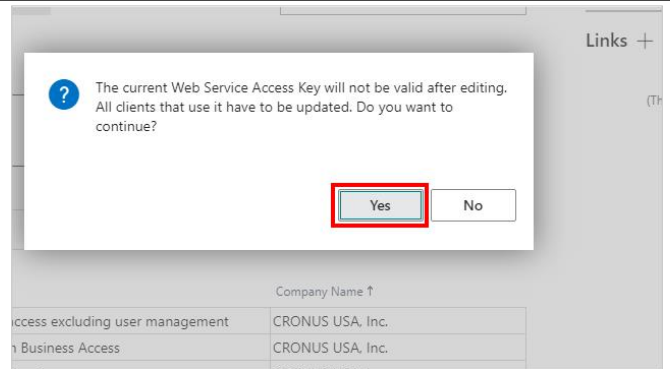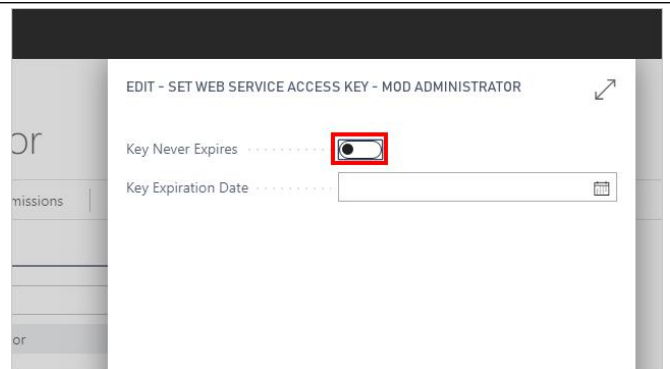
Click on the link in cell **User Name** with the value **ADMIN**

Click on the navigation menu item **Change Web Service Key**
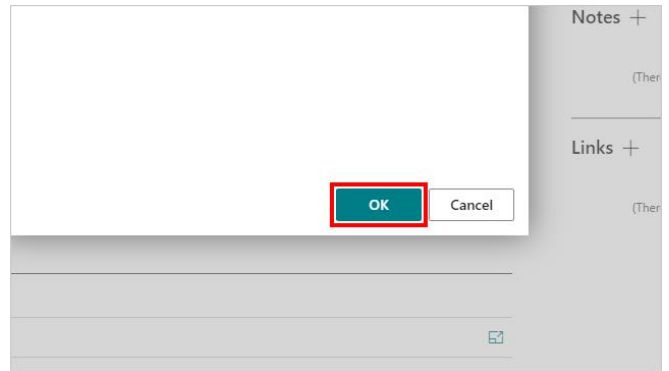
Click on the button **Yes**

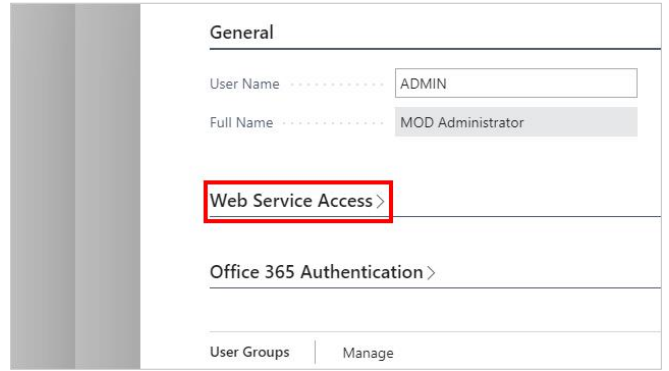Click on the toggle field **Key Never Expires**
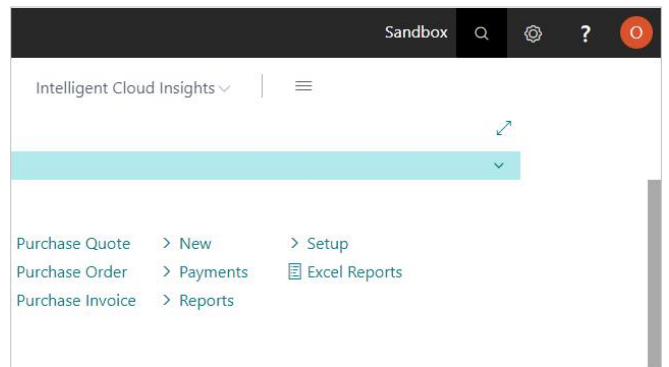
Click on the button **OK**

Click on **Web Service Access**

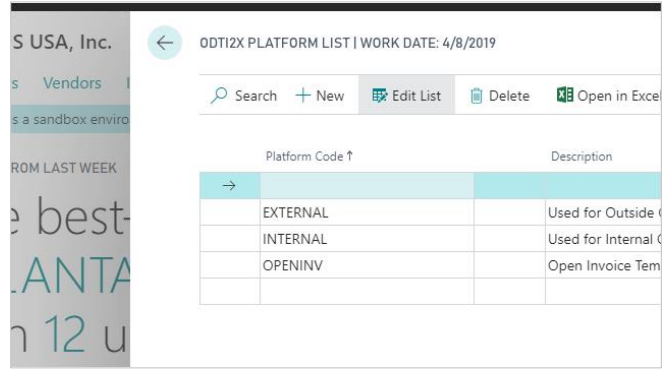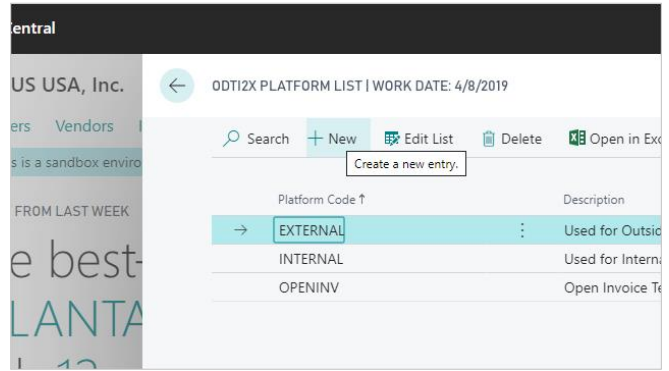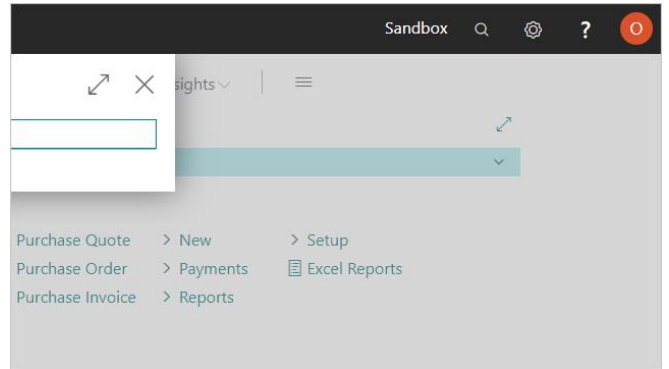Note the Web Services key (note that you must ensure to copy the entire key string)

2.5. Create i2x Platform Codes

Enter the text **ODTi2x Platform**. Press the **Enter** key.

Enter the text **PLATFORMCODE**. Press the **TAB** key.
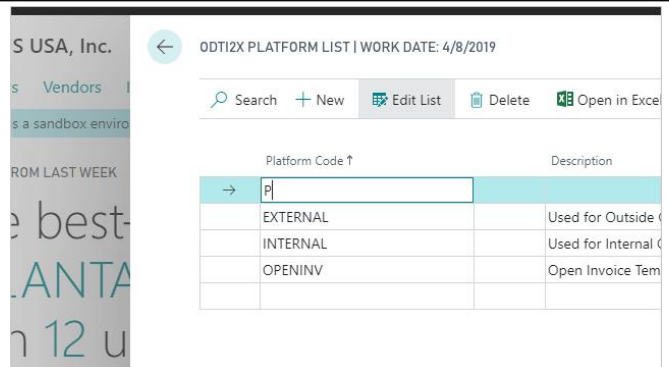
Enter the text **My Operator's Platform**.

2.6. Adding Platform Details

Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**
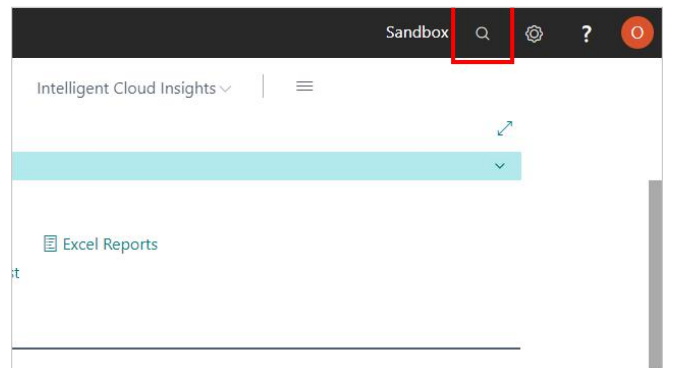
Enter the text **i2x Platform Details**.
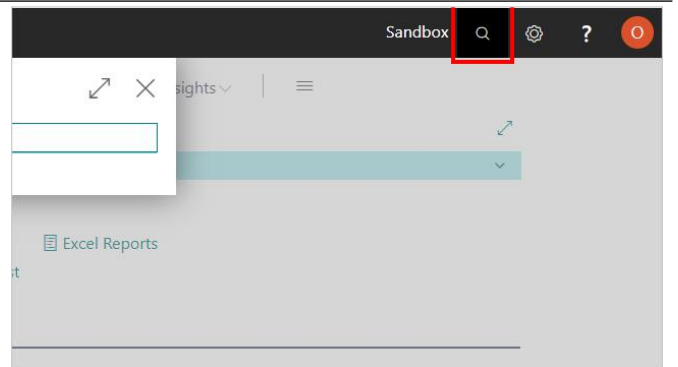
Click on **i2x Platform Details Lists** 🗆
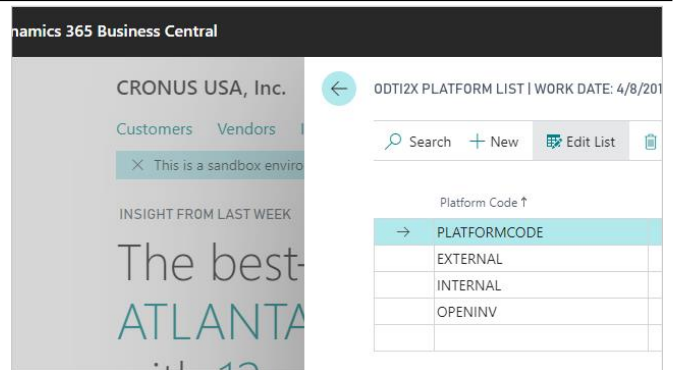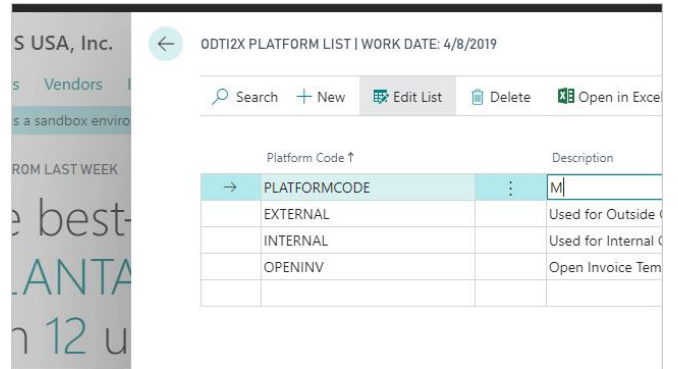
Click on the navigation menu item **Edit Platform Details**
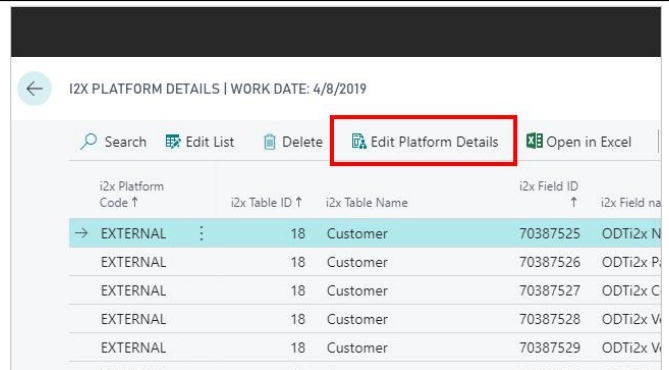
Click on the lookup button **i2x Platform Code**
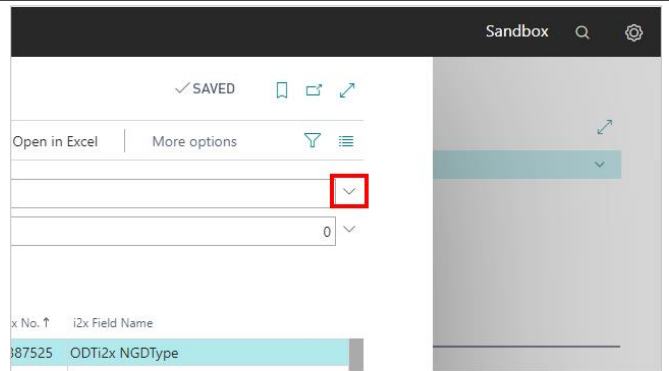
Click on the link in cell **ODTi2x Code** with the value **MYPLATFORM**
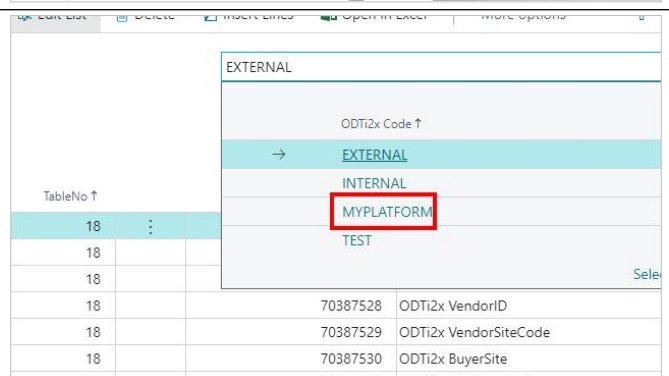
Click on the lookup button **i2x Table ID**

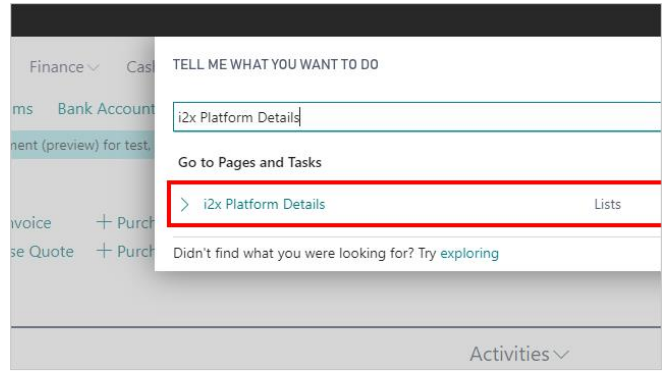Click on the link in cell **Object ID** with the value **18**

Click on **TableNo = 18, i2x No. = 70387525, i2x Field Name = ODTi2x NGDType**

Press and hold the **Shift** key down.
 Click on **TableNo = 18, i2x No. = 70387527, i2x Field Name = ODTi2x CompanyCode**

Click on the link **Insert Lines**

FIELDS LIST | WORK DATE: 4/8/2019

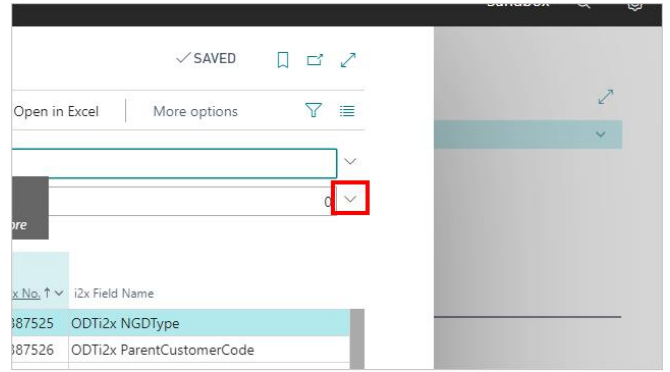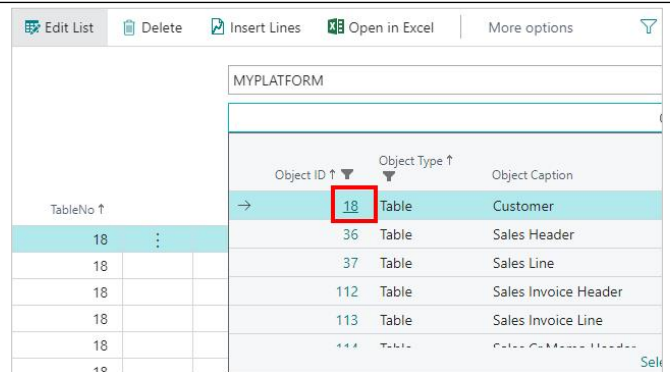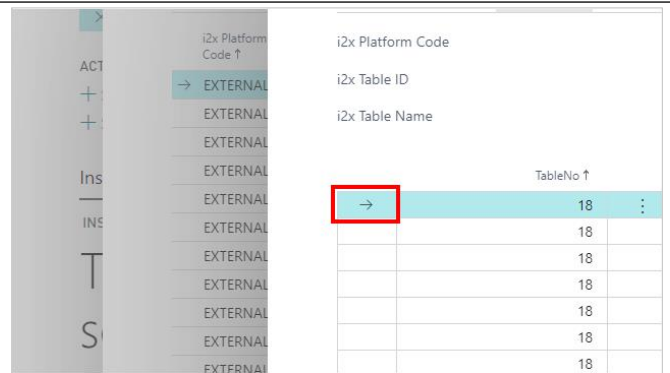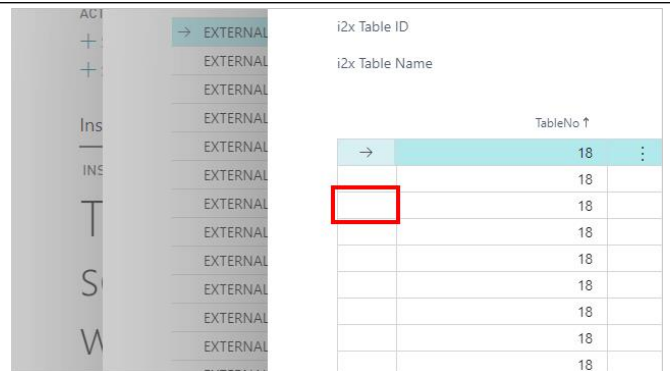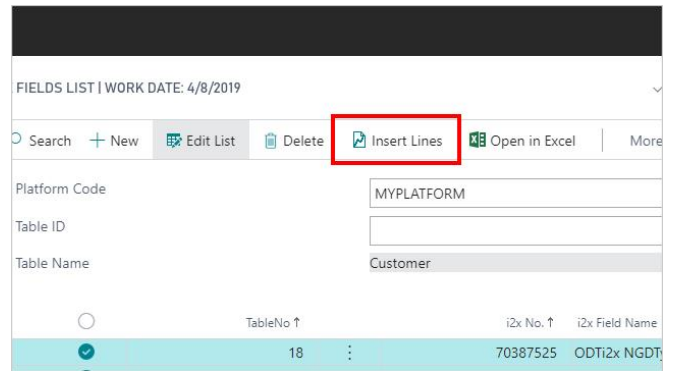Search　+ New　Edit List　Delete　Insert Lines　Open in Excel　More

Platform Code　　　　　　　　MYPLATFORM

Table ID

Table Name　　　　　　　　　Customer

	TableNo ↑		i2x No. ↑	i2x Field Name
✓	18	⋮	70387525	ODTi2x NGDT

Click on the back button

Dynamics 365 Business Central

CRONUS USA, Inc.　　　←　I2X PLATFORM DETAILS | WORK DATE: 4/8/

Customers　Vendors

✕ This is a sandbox enviro

ACTIONS

+ Sales Quote　+ Sales

+ Sales Order　+ Purch

Insights

INSIGHT FROM LAST WEEK

Search　Edit List　Delete

i2x Platform Code ↑		i2x Table ID ↑	i2x
→ EXTERNAL	⋮	18	Cu
EXTERNAL		18	Cu
EXTERNAL		18	Cu
EXTERNAL		18	Cu
EXTERNAL		18	Cu