



Open Door Technology Inc.	croach
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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 platform configuration and custom fields.

All users require the D365 BASIC Permission Set as this is a required assignment for Microsoft Dynamics 365 Business Central.

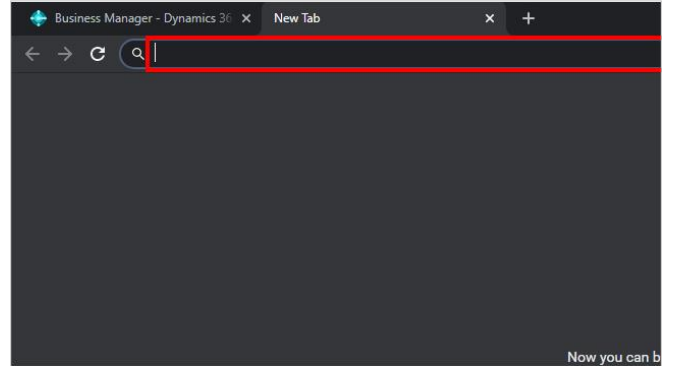
In addition to the D365 BASIC and the I2X INTEGRATION Permission Sets, users will also need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to Edit customers, edit and post sales documents.

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

2. i2x Integration Setup

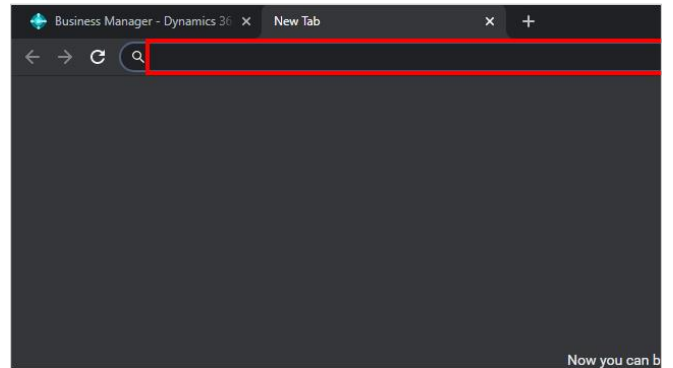
2.1. Download the i2x Integration Configuration Package

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

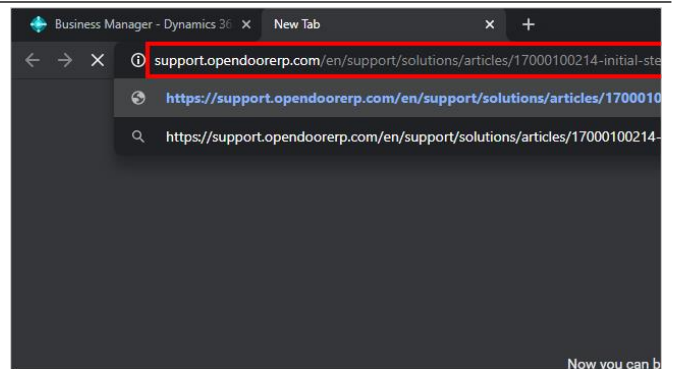


Use the support url link, <https://support.opendoorerp.com/en/support/solutions/articles/17000100214-initial-steps-to-configure-web-services-and-api-setup>

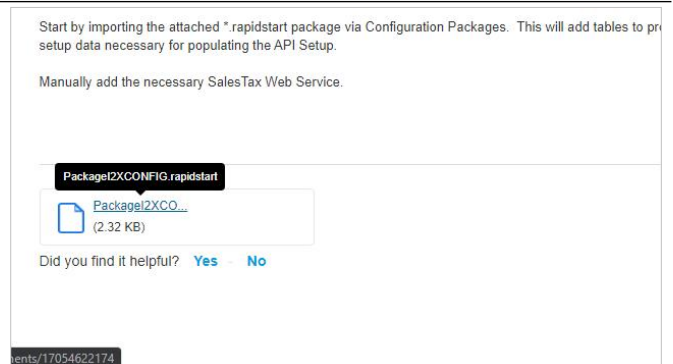
Press **CTRL+v**.



Press the **Enter** key.



Download the related RapidStart configuration package file.



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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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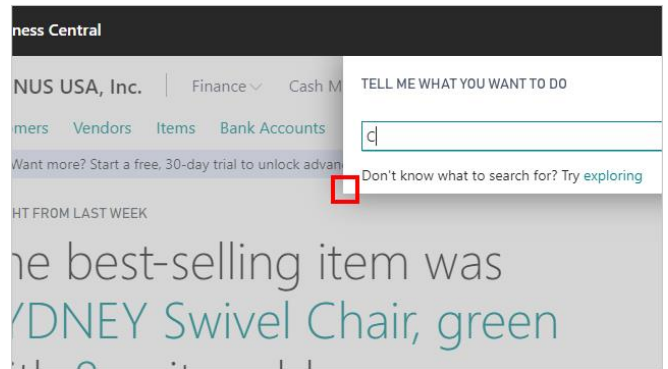
In addition to the D365 BASIC and the I2X INTEGRATION Permission Sets, users will also need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to Edit customers, edit and post sales documents.

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

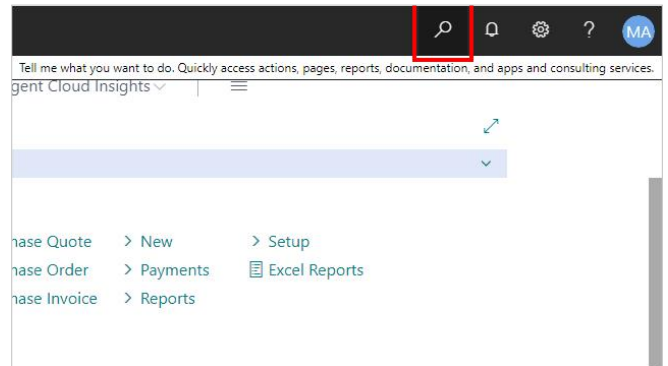
2.3. Configure i2x Web Services and API Setup

2.3.1. Import the i2x Configuration Package

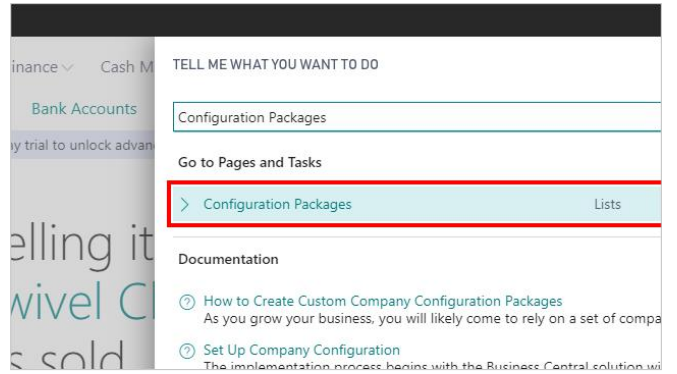
Enter **Configuration Packages**.



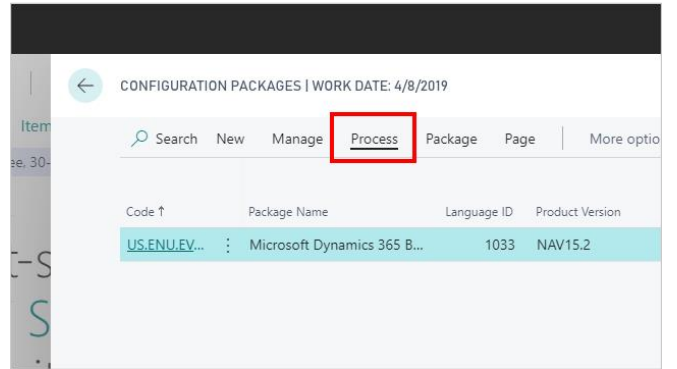
Click on the button



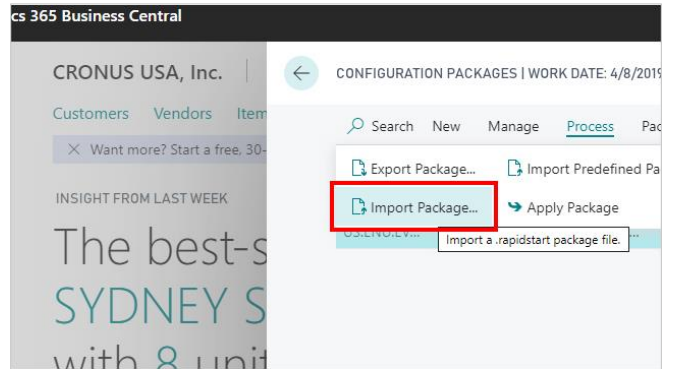
Click on **Configuration Packages Lists**



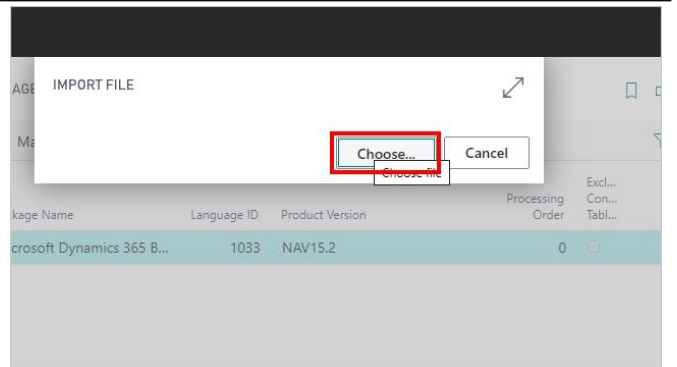
Click on the navigation menu item popup **Process**

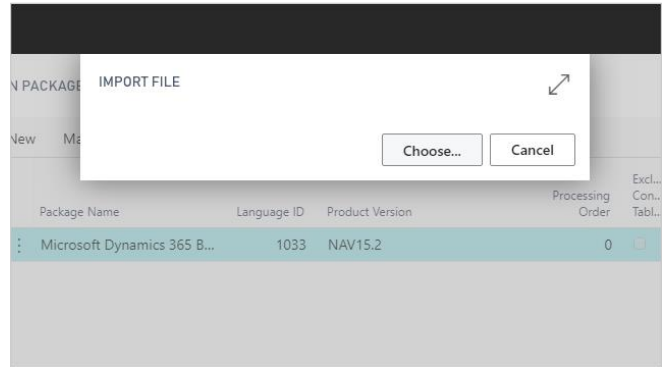
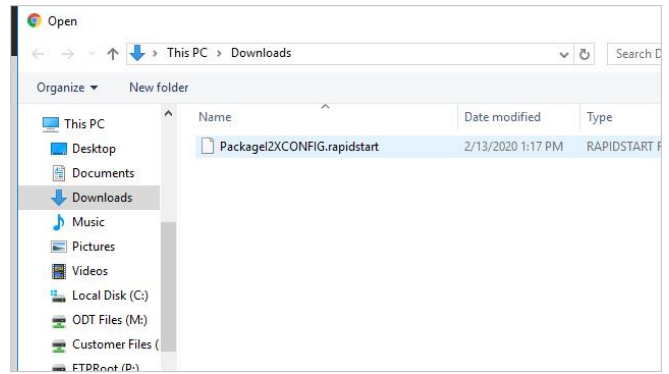


Click on the navigation menu item **Import Package...**



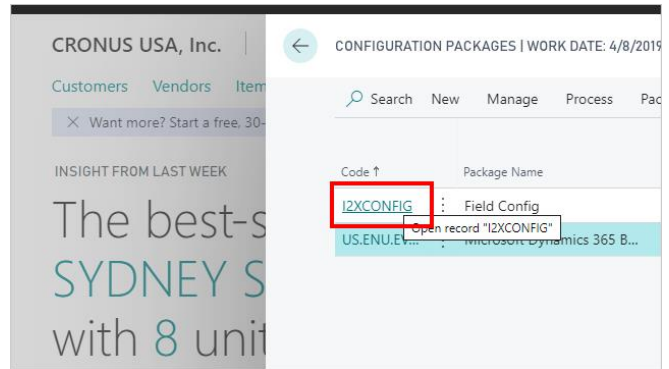
Click on the field **null**



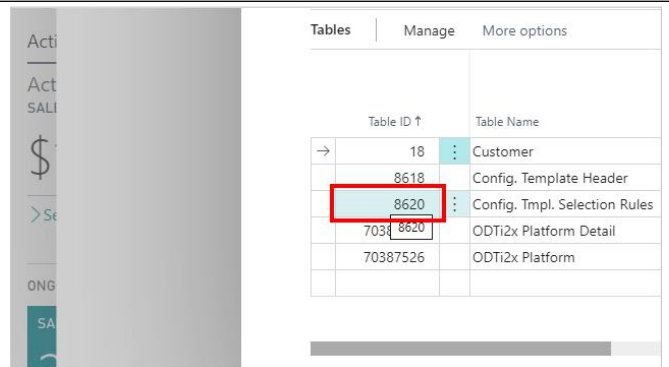


2.3.2. Apply Configuration Package Data

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**

The screenshot shows a software interface with a navigation menu on the left. The 'More options' button is highlighted with a red box. Below the button is a tooltip that says 'Reveal secondary actions'. The main area of the interface shows a table with columns 'Table ID ↑', 'Table Name', and 'Parent Table ID'. The table contains two rows: one with ID 18 and name 'Customer', and another with ID 8618 and name 'Config. Template Header'.

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

The screenshot shows the same software interface as the previous one, but the 'Functions' button in the navigation menu is highlighted with a red box. The main area of the interface shows a table with columns 'Table ID ↑', 'Table Name', 'Parent Table ID', and 'Data Temp'. The table contains two rows: one with ID 18 and name 'Customer', and another with ID 8618 and name 'Config. Template Header'.

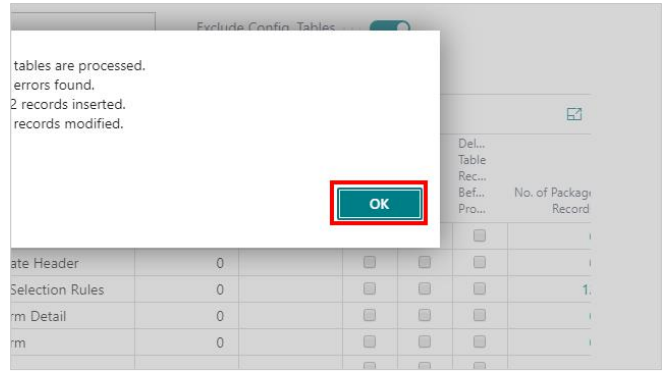
Click on the navigation menu item **Apply Data**

The screenshot shows the software interface with the 'Apply Data' button in the navigation menu highlighted with a red box. The main area of the interface shows a table with columns 'Table ID ↑', 'Table Name', 'Parent Table ID', 'Data Template', and 'Col...'. The table contains three rows: one with ID 18 and name 'Customer', one with ID 8618 and name 'Config. Template Header', and one with ID 8620 and name 'Config. Tmpl. Selection Rules'. The 'Apply Data' button is highlighted with a red box.

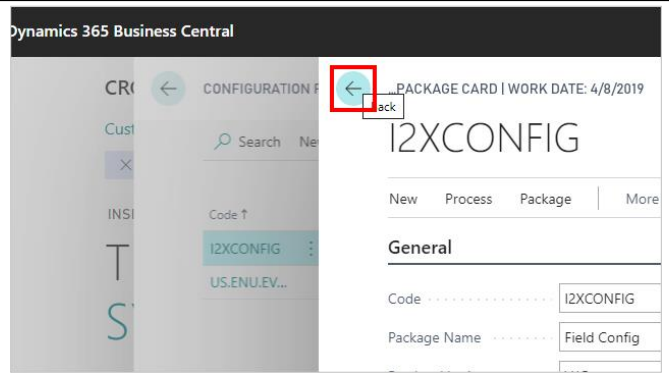
Click on the button **Yes**

The screenshot shows a confirmation dialog box with a question mark icon and the text 'One table has been selected. Do you want to continue?'. The 'Yes' button is highlighted with a red box. The background shows the same software interface as the previous screenshots, with the 'Apply Data' button highlighted.

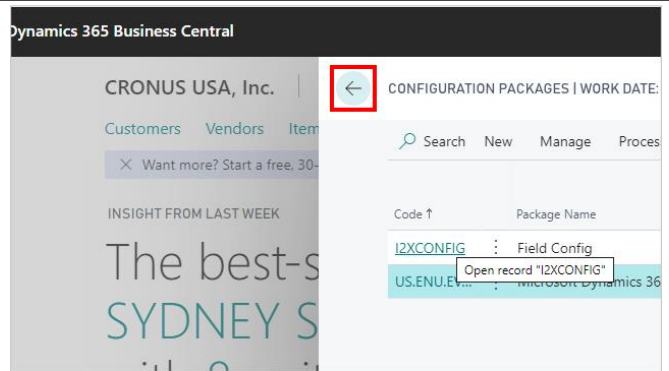
Click on the button **OK**



Click on the back button

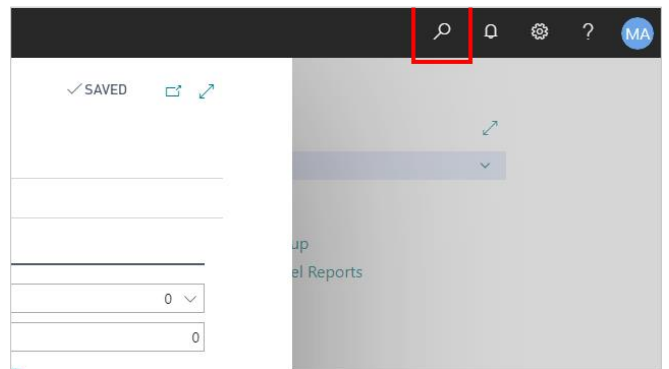


Click on the back button



2.3.3. Add the Web Service and Publish

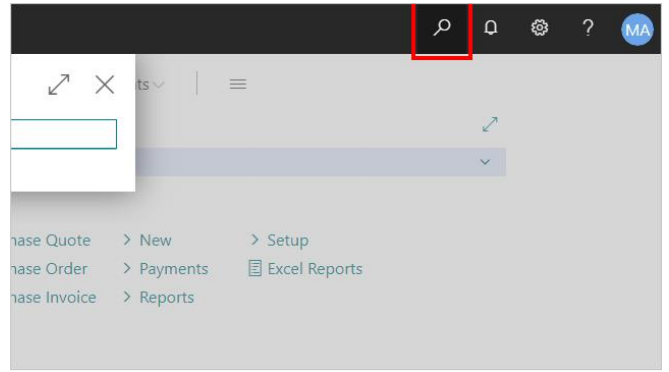
Click on the button



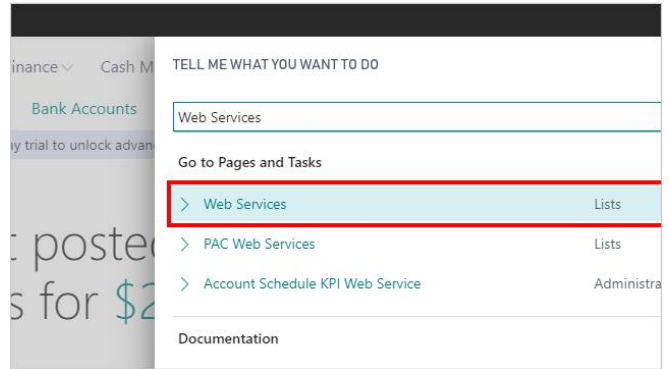


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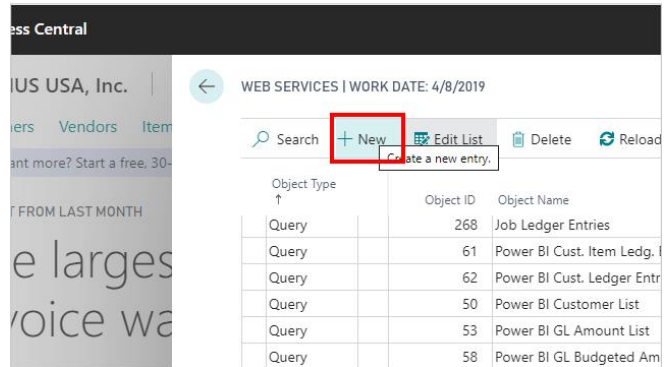
Enter **Web Services**.



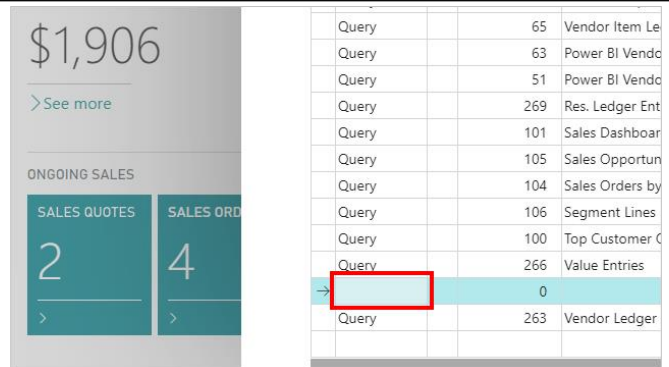
Click on **Web Services Lists**



Click on the navigation menu item **New**



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





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

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

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

The screenshot shows a list of queries in a table. The 'Codeunit' dropdown menu is open, and the value '0' is selected and highlighted with a red box. The table lists various queries such as 'Vendor Item Ledger Entries', 'Power BI Vendor Ledger Entries', etc.

Enter **Object ID**.

The screenshot shows the same list of queries. The 'Codeunit' dropdown menu is open, and the value '7' is selected and highlighted with a red box. The table lists various queries such as 'Vendor Item Ledger Entries', 'Power BI Vendor Ledger Entries', etc.

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

The screenshot shows the list of queries. A dialog box is open, displaying the ID '70387527' and the object caption 'ODTi2x TaxTable'. The ID is highlighted with a red box. Below the dialog box, the 'Codeunit' dropdown is set to '70387527'.



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Click on the cell **Service Name**

65	Vendor Item Ledger Entries	Power BI Vend. Item Ledg. Ent.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
63	Power BI Vendor Ledger Entries	Power BI Vendor Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51	Power BI Vendor List	Power BI Vendor List	<input type="checkbox"/>	<input checked="" type="checkbox"/>
269	Res. Ledger Entries	Res.LedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
101	Sales Dashboard	SalesDashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
105	Sales Opportunities	SalesOpportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
104	Sales Orders by Sales Person	SalesOrdersBySalesPerson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
106	Segment Lines	SegmentLines	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100	Top Customer Overview	TopCustomerOverview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
266	Value Entries	ValueEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
70387527	ODTi2x TaxTable		<input type="checkbox"/>	<input type="checkbox"/>
263	Vendor Ledger Entries	VendorLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Enter **i2xSalesTaxService**.

65	Vendor Item Ledger Entries	Power BI Vend. Item Ledg. Ent.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
63	Power BI Vendor Ledger Entries	Power BI Vendor Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51	Power BI Vendor List	Power BI Vendor List	<input type="checkbox"/>	<input checked="" type="checkbox"/>
269	Res. Ledger Entries	Res.LedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
101	Sales Dashboard	SalesDashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
105	Sales Opportunities	SalesOpportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
104	Sales Orders by Sales Person	SalesOrdersBySalesPerson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
106	Segment Lines	SegmentLines	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100	Top Customer Overview	TopCustomerOverview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
266	Value Entries	ValueEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
70387527	ODTi2x TaxTable		<input type="checkbox"/>	<input type="checkbox"/>
263	Vendor Ledger Entries	VendorLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click on **Published**

es	Power BI Vend. Item Ledg. Ent.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
Entries	Power BI Vendor Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	Power BI Vendor List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	Res.LedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	SalesDashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	SalesOpportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https/
son	SalesOrdersBySalesPerson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	SegmentLines	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	TopCustomerOverview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	ValueEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
	i2xSalesTaxService	<input type="checkbox"/>	<input type="checkbox"/>	Not ap
	VendorLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https/
		<input type="checkbox"/>	<input type="checkbox"/>	https/

Click on the back button

Dynamics 365 Business Central

CRONUS USA, Inc. | WEB SERVICES | WORK DATE: 4/8/2019

Customers Vendors Item

Want more? Start a free, 30-

INSIGHT FROM LAST MONTH

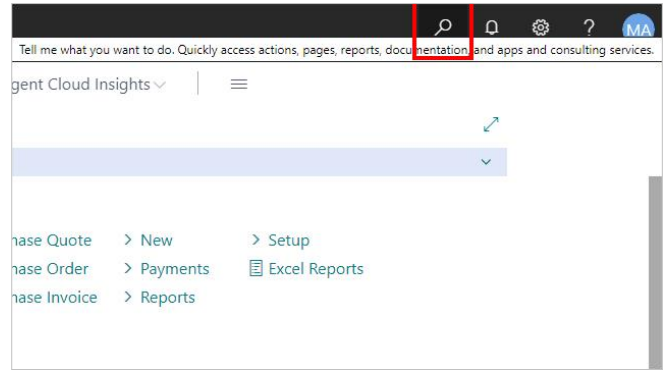
The largest invoice wa

Back

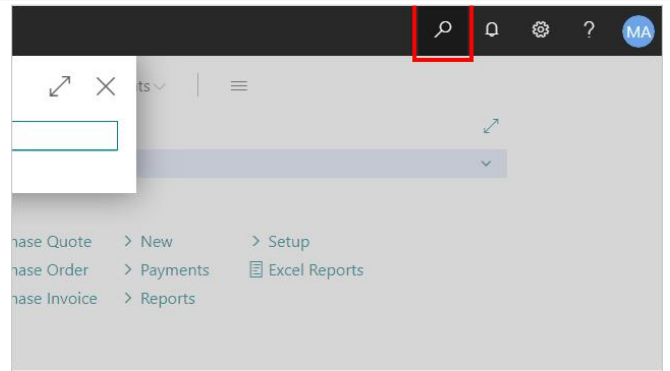
Object Type	Object ID	Ob
Query	61	Pov
Query	62	Pov
Query	50	Pov
Query	53	Pov
Query	58	Pov
Query	52	Pov

2.3.4. Update API Setup

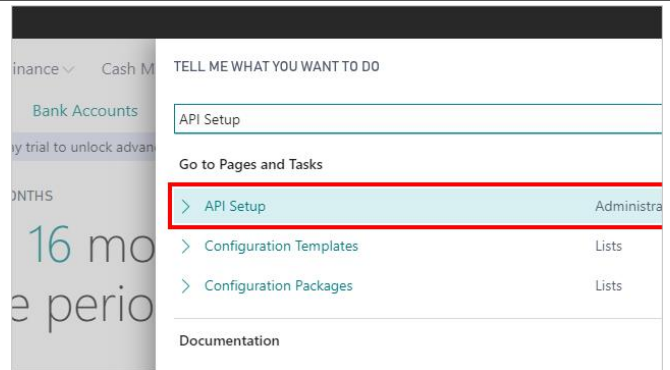
Click on the button



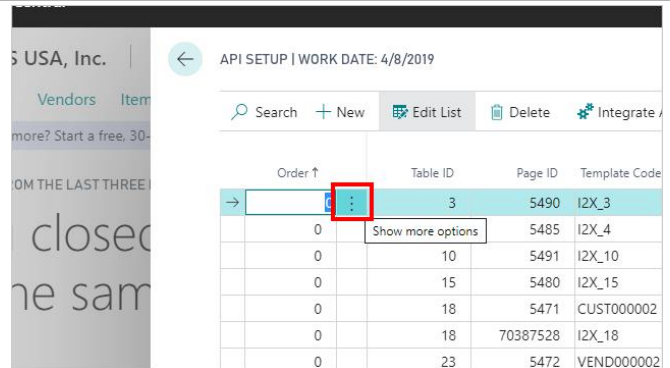
Enter .



Click on **API Setup Administration**



Click on the row menu button





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Click on the menu item **Select More**

INSIGHT FROM THE LAST THREE
You closed
in the sam
Activities

Order ↑	Table ID	Page ID
0	3	5490
0	4	5485
0	10	5491
0	15	5480
0	18	5471
0	18	70387528
0	23	5472
0	27	5470
0	27	5470
0	27	5470
0	36	70387525

Click on the column header **Selected**

65 Business Central
CRONUS USA, Inc. | API SETUP | WORK DATE: 4/8/2019
Customers Vendors Item
Want more? Start a free, 30-
INSIGHT FROM THE LAST THREE
You closed
in the sam

Selected	Order ↑	Table ID	Pa
<input checked="" type="checkbox"/>	0	3	
<input type="checkbox"/>	0	4	
<input type="checkbox"/>	0	10	
<input type="checkbox"/>	0	15	
<input type="checkbox"/>	0	18	
<input type="checkbox"/>	0	18	7038

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

API SETUP | WORK DATE: 4/8/2019
Search + New Edit List Delete
Integrate APIs Page More options
Integrates records to the associated integra

Order ↑	Table ID	Page ID	Template Code	Description
0	3	5490	I2X_3	i2x for T3
0	4	5485	I2X_4	i2x for T4
0	10	5491	I2X_10	i2x Fro T10
0	15	5480	I2X_15	i2x for T15
0	18	5471	CUST000002	Cash-Payment / Retail Cust
0	18	70387528	I2X_18	i2x API for T18

Click on the button **Yes**

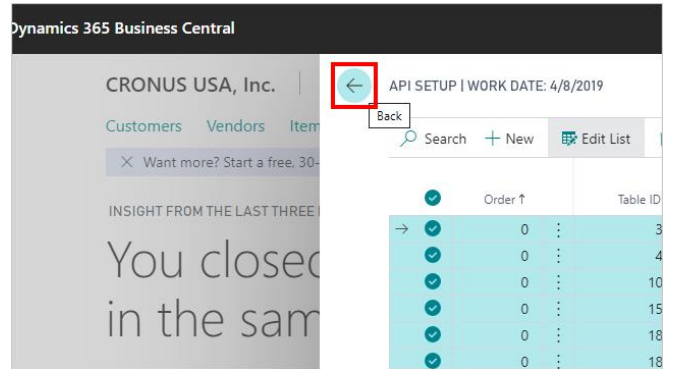
? This action will populate the integration tables for all APIs and may take several minutes to complete. Do you want to continue?

Yes No

Type: Inventory
Type: Service

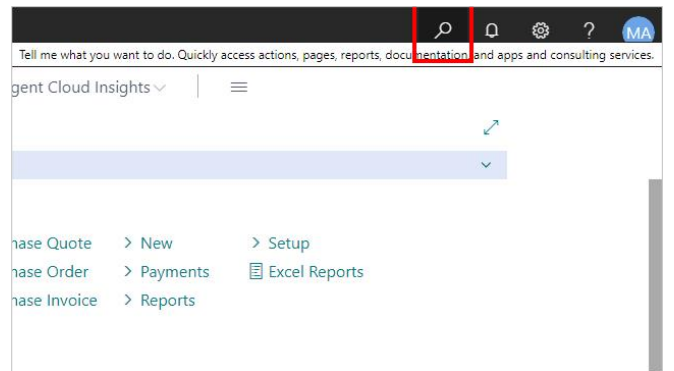
18	5471	CUST000002	Cash-Payment / Retail Custome...	...
18	70387528	I2X_18	i2x API for T18	...
23	5472	VEND000002	Cash-Payment Vendor (Cash)	...
289	5486	I2X_289	i2x for T289	...
318	5504	I2X_318	i2x for T318	...
321	5481	I2X_321	i2x for T321	...

Click on the back button

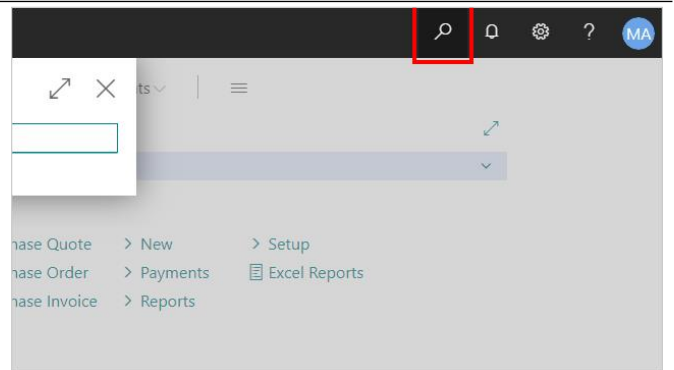


2.4. Configure Web Access Key for Integration User Account

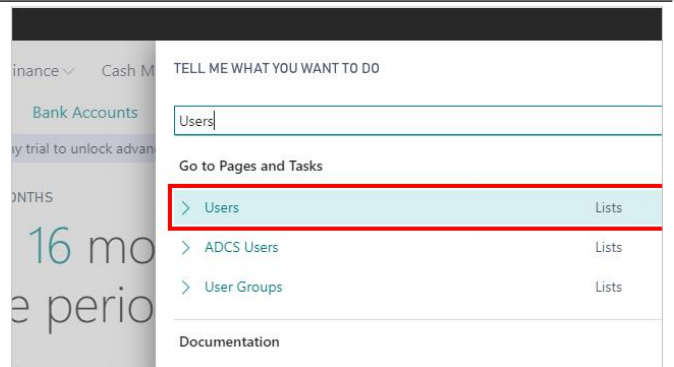
Click on the button



Enter **Users**.



Click on **Users Lists**

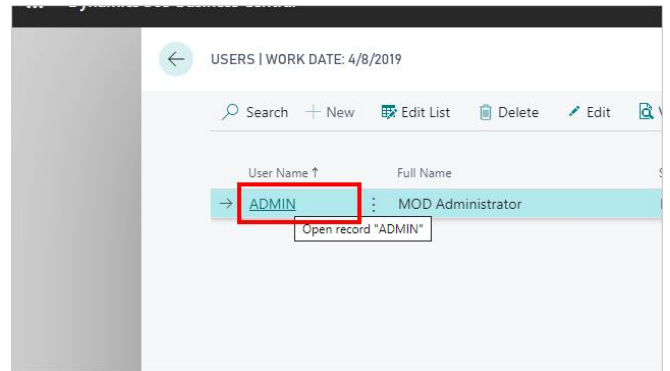


Select the user account to configure for use with i2x Integration services.

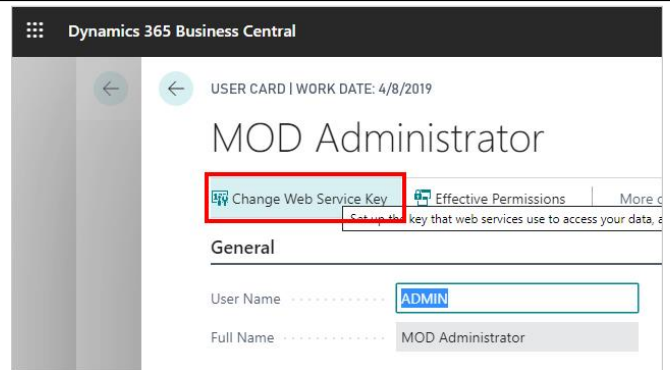


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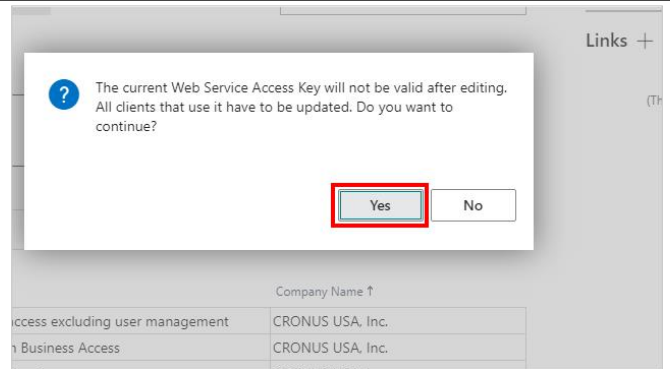
Click on the link in cell **User Name** with the value **ADMIN**



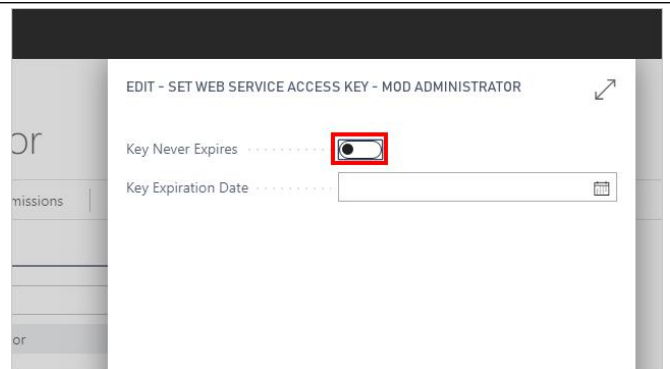
Click on the navigation menu item **Change Web Service Key**



Click on the button **Yes**



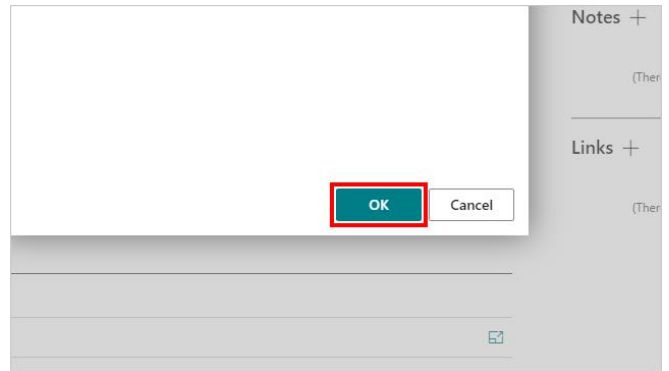
Click on the toggle field **Key Never Expires**



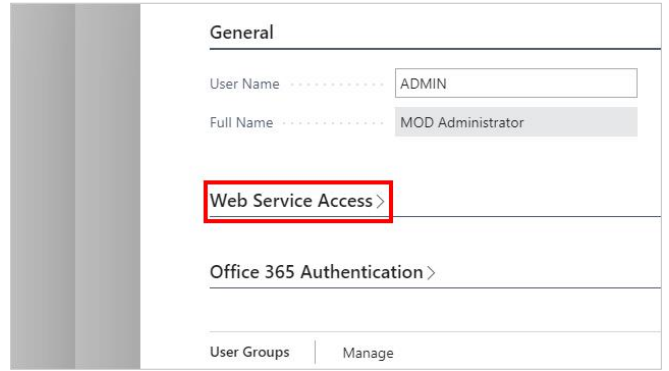


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Click on the button **OK**



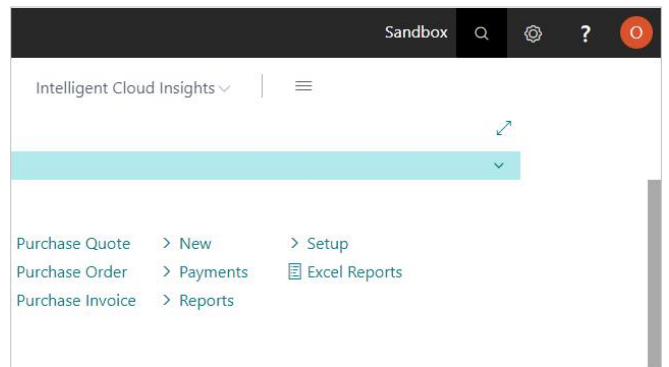
Click on **Web Service Access**



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



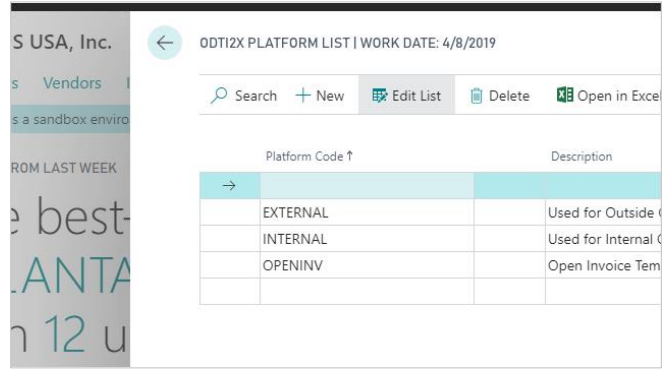
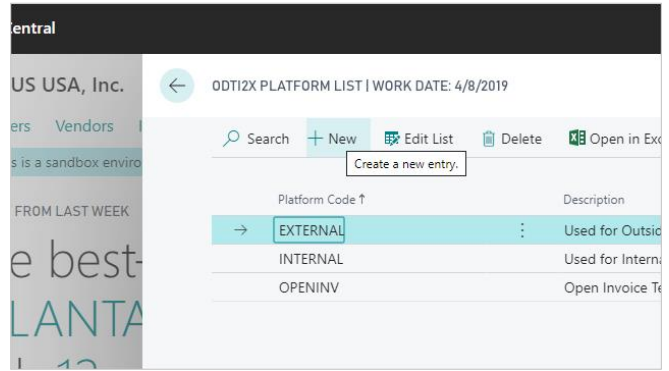
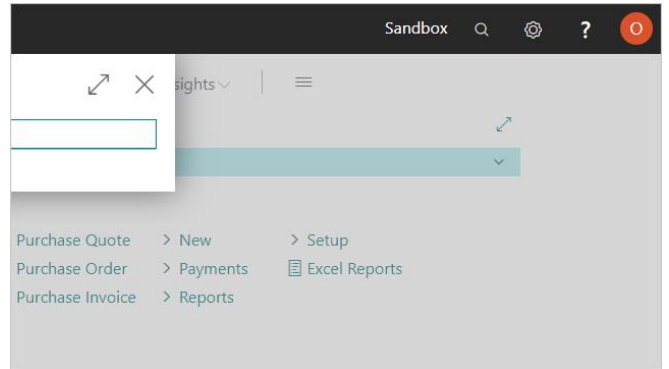
2.5. Create i2x Platform Codes



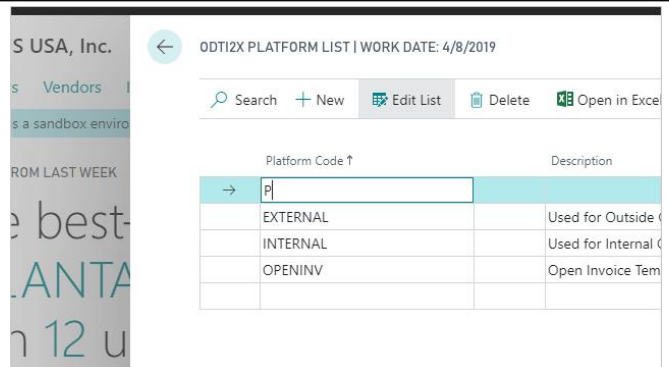


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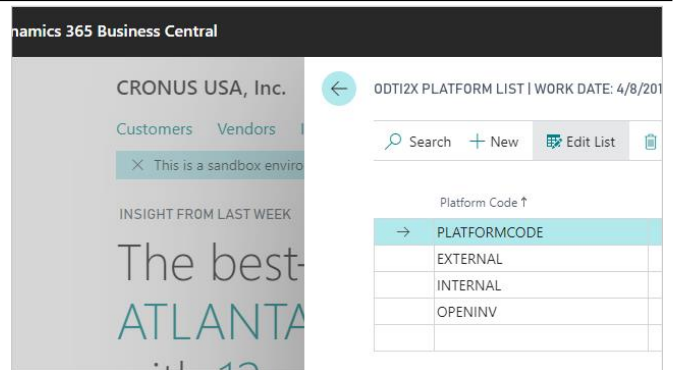
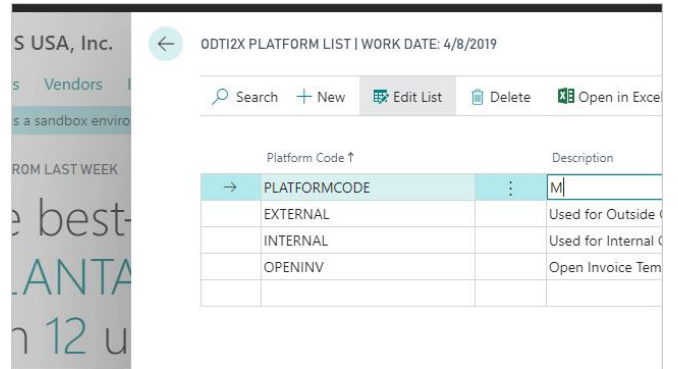
Enter the text **ODTi2x Platform**. Press the **Enter** key.



Enter the text **PLATFORMCODE**. Press the **TAB** key.

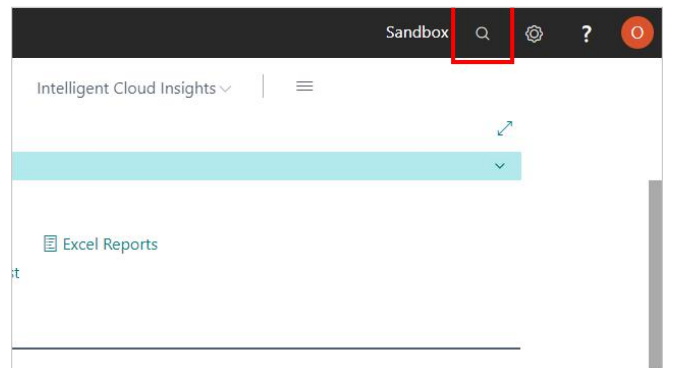


Enter the text **My Operator's Platform**.

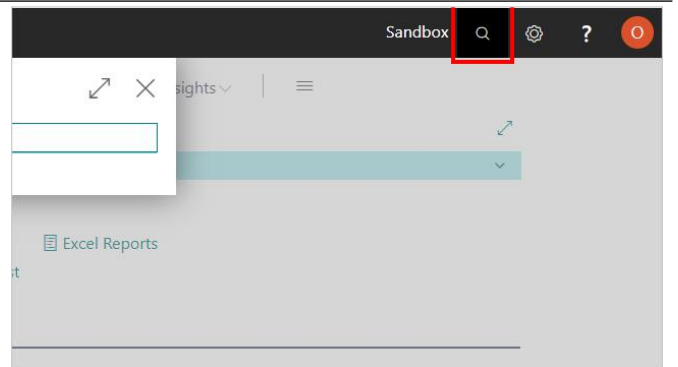


2.6. Adding Platform Details

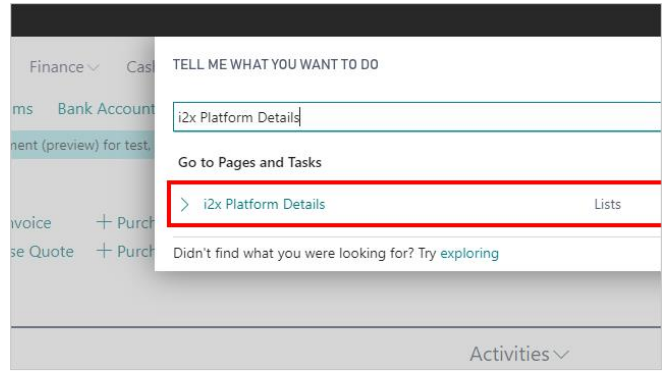
Click on the link **Tell me what you want to do**.
Quickly access actions, pages, reports, documentation, and apps and consulting services.



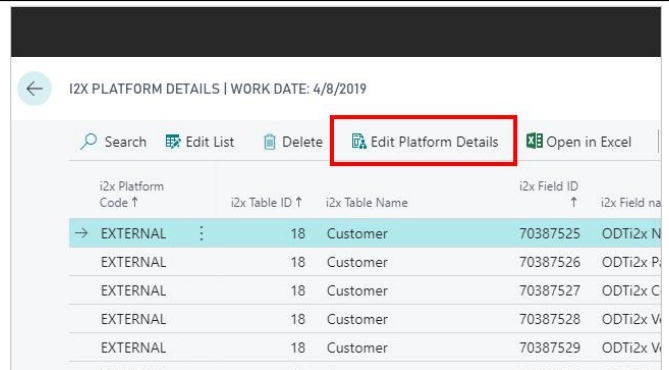
Enter the text **i2x Platform Details**.



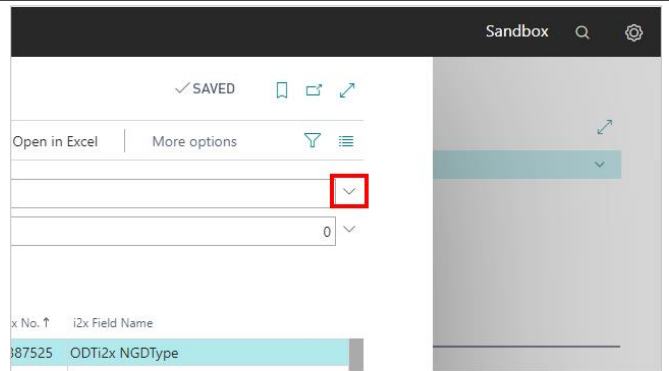
Click on **i2x Platform Details Lists**



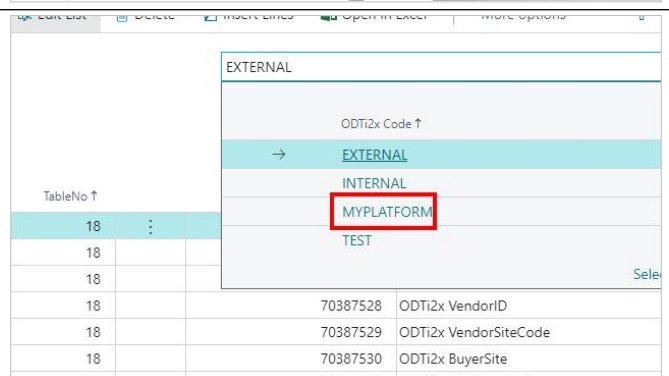
Click on the navigation menu item **Edit Platform Details**



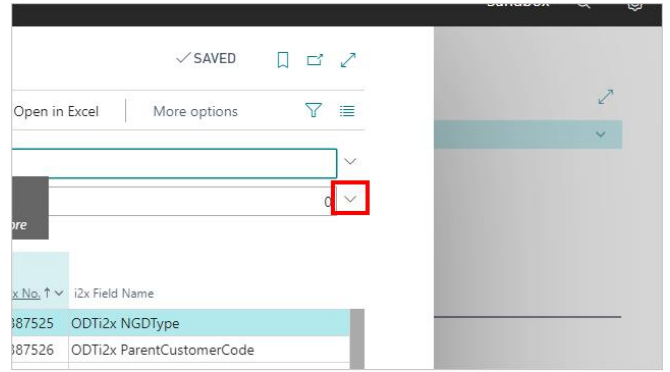
Click on the lookup button **i2x Platform Code**



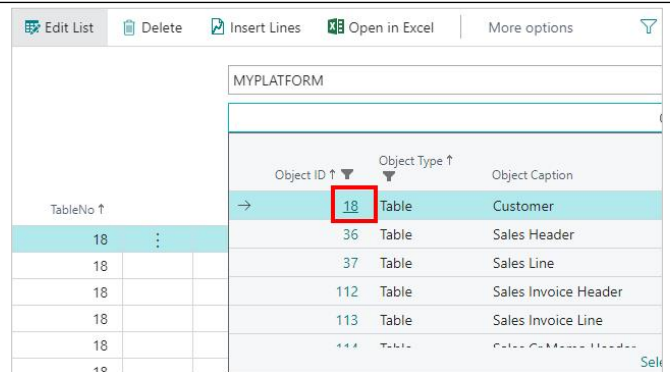
Click on the link in cell **ODTi2x Code** with the value **MYPLATFORM**



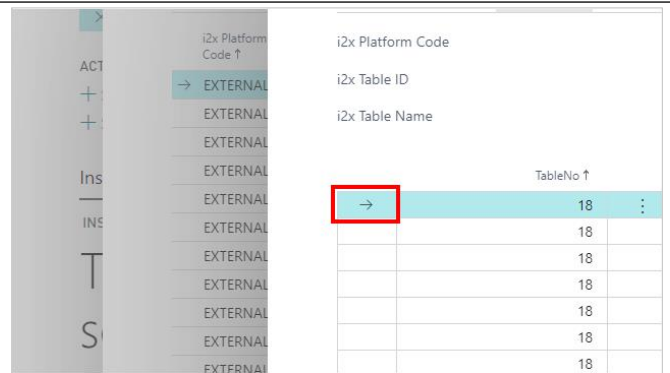
Click on the lookup button **i2x Table ID**



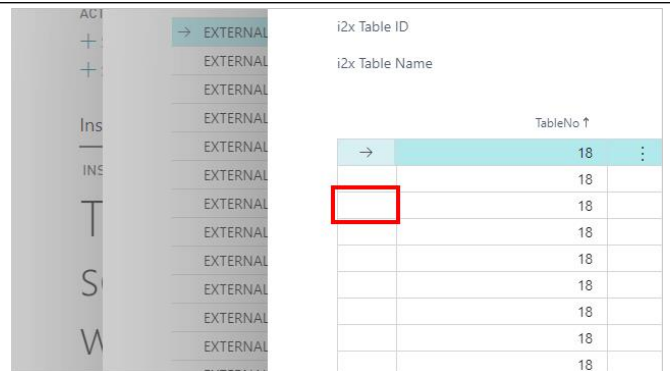
Click on the link in cell **Object ID** with the value **18**



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



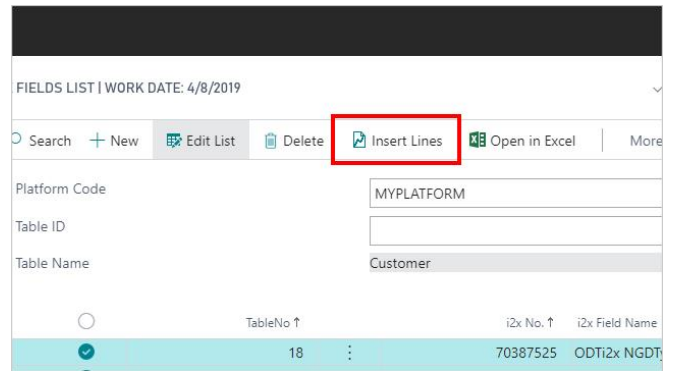
Press and hold the **Shift** key down.
Click on **TableNo = 18**, **i2x No. = 70387527**, **i2x Field Name = ODTi2x CompanyCode**





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Click on the link **Insert Lines**



Click on the back button

