

# Configuration & Administration

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# Permission sets

In order to use the modules, the appropriate authorization set must be assigned to the respective users.

The following are supplied with:

- DXP Core Admin - DEXPRO Core Administrator
- DXP Core User - DEXPRO Core User
- DXP BREEZE Admin - DEXPRO BREEZE Administrator
- DXP BREEZE User - DEXPRO BREEZE User

# DEXPRO Core

The DEXPRO Core manages the individual DEXPRO apps and their documents per client.

All documents that have been entered and processed via the various DEXPRO modules in Microsoft Dynamics 365 Business Central are displayed. A global number series, which is used across all DEXPRO apps, is used to complete individual documents. This offers the advantage that users only have to work with one number series per document.

Further information can be found [here](#).

# Breeze Interface Setup

In the Breeze Interface setup, processing is set up within the app.

## Process

### Copy Setup

This copies the setup to other clients.

## Navigation

### Document class setup

Via this menu item you reach the setup for the [document classes](#).

### Target Template Setup

This menu item is used to access the [target templates setup](#). Target templates for the Breeze interface are managed here.

## General

In this FastTab you can enable/disable the use of this app.

Activated .....

## No. Series

The number series for the Breeze Interface documents is stored here.





Document Nos. ....  ▼


# Document Class Setup

In the document class setup, the mapping between the respective document class and your export interface is done. Furthermore, the field mapping of each document class is downloaded here, creating a set of standard fields and their usage in Microsoft Dynamics 365 Business Central.

The document class setup is cross-app and is managed via the DEXPRO Core.

## Process





 Search  New  Edit List  Delete Process Navigation


 Download Field Mapping

## Download field mapping

This downloads the field structure of the SQUEEZE document class. These are needed for the [metadata mapping](#).

## Navigation

 Search  New  Edit List  Delete Process Navigation

 Metadata Mappings

## Metadata mapping

Via this menu item you reach the [metadata mapping](#). This defines which fields are to be transferred to Microsoft Dynamics 365 Business Central and how.

## List

### Document classes

This overview lists all the document classes that have been set up.

	Document Class ↑		SQUEEZE Document Class ID	SQUEEZE Export Interface ID
→	Invoice / Credit Memo	⋮	1	1

# Card

## Document class

Here, each document class is set up individually.

# General

### General

Document Class ..... Invoice / Credit Memo    Next Process Step ..... Standard document

In this fastab the name of the document class, the next process step, as well as the automatic enrichment of the positions is set up.

# Breeze

### Breeze Interface

Target Template ..... Purchase Document

Here you can set the default target template for this document class.

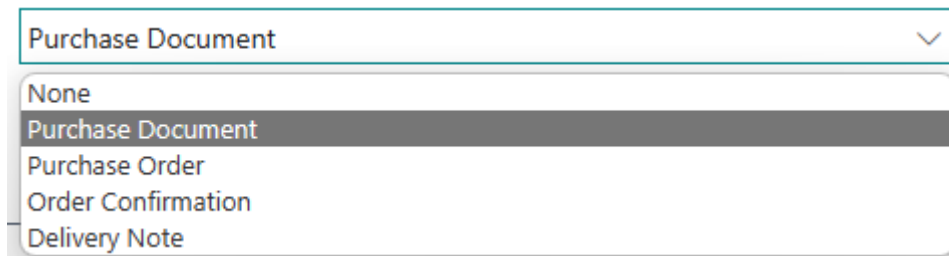
The following are available as standard:

Purchase Document

- None
- Purchase Document**
- Purchase Order
- Order Confirmation
- Delivery Note

# Target Template Setup

Target templates for the Breeze interface are managed here. These templates are available by default:



A screenshot of a dropdown menu. The top bar shows 'Purchase Document' with a downward arrow. The menu is open, showing a list of options: 'None', 'Purchase Document' (highlighted with a dark background), 'Purchase Order', 'Order Confirmation', and 'Delivery Note'.

## Purchase Document

---

### General

---

Target Template .....

### Plausibility Check

---

Disable Amounts Check

Disable Posting Date ...

## General

Here you can see which target template is currently being edited.

## Plausibility Check

Here, certain plausibility checks per target template can be deactivated.

# Generic Custom Fields

Customer-specific fields can be added here that extend or deviate from our standard template. This mapping ensures that this additional content is assigned to the right places.

Generische Zusatzfelder

✓ Gespeichert



JSON Feld Name ↑		Zuweisen zu Tabellennr.	Zuweisen zu Tabellenbezeichnung	Zuweisen zu Feldnr.	Zuweisen zu Feldbezeichnung
→	description2	39	Einkaufszeile	12	Beschreibung 2

The corresponding BC field is assigned to each technical JSON field name.

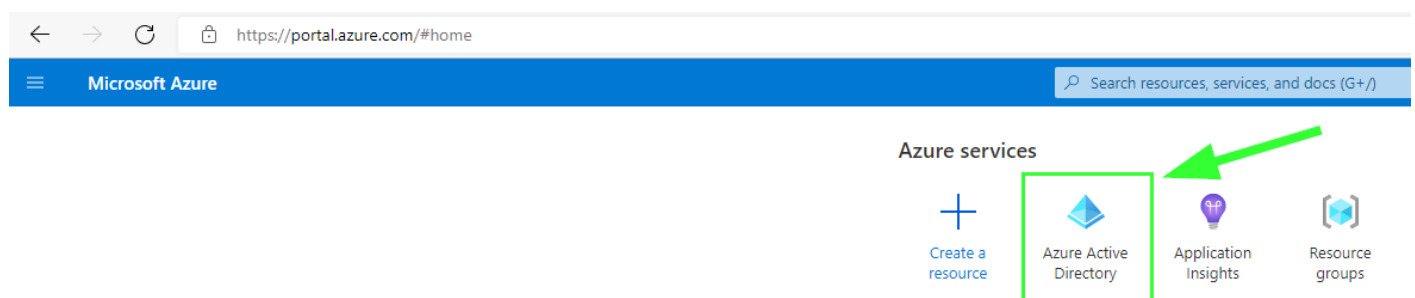
On the [Breeze side](#), the fields must be added via the additionalFields.

# OAuth 2.0 setup (for SaaS only)

Access to web services in Microsoft Dynamics 365 Business Central (BC) in the SaaS version is only possible via OAuth 2.0. The necessary setup of the app in Azure Active Directory and its link to BC is described below.

## Azure Portal

Launch Azure Portal and open **Microsoft Entra ID**



Create a new app under **App registrations**

Home >

# DEXPRO Solutions GmbH | Overview

Azure Active Directory

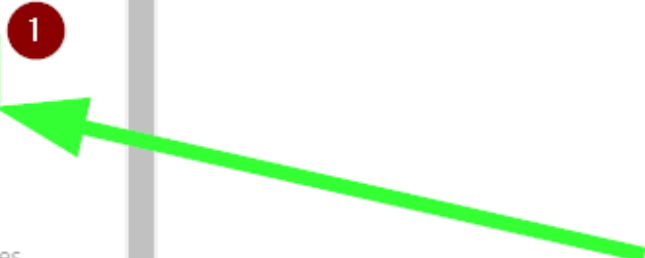
- Overview
- Preview features
- Diagnose and solve problems
- Manage**
- Users
- Groups
- External Identities
- Roles and administrators
- Administrative units
- Delegated admin partners
- Enterprise applications
- Devices
- App registrations**
- Identity Governance
- Application proxy
- Custom security attributes (Preview)
- Licenses
- Azure AD Connect

**2** + Add Manage tenants What's new Preview fe

[Microsoft Entra has a simpler, integrated experience for managing all](#)

**Overview** Monitoring Properties Tutorials

Search your tenant






## Register an application ...

### \* Name

The user-facing display name for this application (this can be changed later).

DEXPRO BC App 

### Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (DEXPRO Solutions GmbH only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- Personal Microsoft accounts only

[Help me choose...](#)

### Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Select a platform 

e.g. <https://example.com/auth>

## Create API permissions

The **Application (client) ID** can already be copied and stored at this point (will be needed later)

# DEXPRO BC App

Search

Delete Endpoints Preview features

Overview

Quickstart

Integration assistant

## Manage

Branding & properties

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

Owners

Roles and administrators

Manifest

Support + Troubleshooting

Got a second? We would love your feedback on Microsoft identity platform (previously Azure AD for developer). →

### Essentials

Display name : [DEXPRO BC App](#)

Application (client) ID : [XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX](#)

Object ID : [XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX](#)

Directory (tenant) ID : [XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX](#)

Supported account types : [My organization only](#)

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (AD).

Get Started Documentation














The Microsoft identity platform is an authentication ser

# Request API permissions

Select an API

Microsoft APIs   APIs my organization uses   My APIs

Commonly used Microsoft APIs

 <b>Microsoft Graph</b> Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.		
 <b>Azure Communication Services</b> Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams	 <b>Azure DevOps</b> Integrate with Azure DevOps and Azure DevOps server	 <b>Azure Key Vault</b> Manage your key vaults as well as the keys, secrets, and certificates within your Key Vaults
 <b>Azure Rights Management Services</b> Allow validated users to read and write protected content	 <b>Azure Service Management</b> Programmatic access to much of the functionality available through the Azure portal	 <b>Azure Storage</b> Secure, massively scalable object and data lake storage for unstructured and semi-structured data
 <b>Data Export Service for Microsoft Dynamics 365</b> Export data from Microsoft Dynamics CRM organization to an external destination	 <b>Dynamics 365 Business Central</b> Programmatic access to data and functionality in Dynamics 365 Business Central	 <b>Dynamics CRM</b> Access the capabilities of CRM business software and ERP systems
		

# Request API permissions



[< All APIs](#)

Dynamics 365 Business Central  
<https://dynamics.microsoft.com/business-central/overview/> [Docs](#)

What type of permissions does your application require?

### Delegated permissions

Your application needs to access the API as the signed-in user.

### Application permissions

Your application runs as a background service or daemon without a signed-in user.



# Request API permissions



[< All APIs](#)

Dynamics 365 Business Central  
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What type of permissions does your application require?

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Select permissions

[expand all](#)

Permission	Admin consent required
Other permissions	
<input type="checkbox"/> app_access ⓘ Access according to the application's permissions in Dynamics 365 Business Central	Yes
AdminCenter	
<input type="checkbox"/> AdminCenter.ReadWrite.All ⓘ Full access to Admin Center API	Yes
API (1)	
<input checked="" type="checkbox"/> API.ReadWrite.All ⓘ Full access to web services API	Yes
Automation	
<input type="checkbox"/> Automation.ReadWrite.All ⓘ Full access to automation	Yes



# Create **Client secret** and store it in a secure location

Microsoft Azure

Home > DEXPRO Solutions GmbH | App registrations > DEXPRO BC App

## DEXPRO BC App | Certificates & secrets

Search << Got feedback?

- Overview
- Quickstart
- Integration assistant

Manage

- Branding & properties
- Authentication
- Certificates & secrets**
- Token configuration
- API permissions

Application registration certificates, secrets and federated credentials can be found

Certificates (0) **Client secrets (3)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token

+ New client secret

### Add a client secret

Description: This is a new Client Secret

Expires: Recommended: 6 months

Add Cancel

## Business Central

Open **Microsoft Entra Applications** and create a new entry

Tell me what you want to do



1  
microsoft en

Go to Pages and Tasks

Show all (4)

- 2 > Microsoft Entra Applications Administration
- > Set up access with Microsoft 365 licenses Administration
- > Users Administration

Search for 'microsoft en'

Search company data

Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

← Microsoft Entra Applications



**+ New** Manage



## Set up Microsoft Entra Application

1. Enter the Client ID
2. Enter description (description is a bit misleading. This is rather a user name).
3. Assign user permission set(s) individually.
4. (Optional)
5. Activate application

# DEXPROAzureApp

Grant Consent | [More options](#)

## General

Client ID	{9683c7ad-6beb-415a-88cc-026...}	<b>1</b>	<b>User information</b>
Description	DEXPROAzureApp	<b>2</b>	User ID
State	Enabled	<b>5</b>	User Name
Contact Information			User Telemetry ID
<b>Extension</b>		<b>4</b>	You must set the State field to Disabled before you can mak...
App ID	{00000000-0000-0000-0000-00...}		
App Name			

**3** **User Permission Sets** 
 New Line Delete Line Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ D365 BUS PREMIUM	Dyn. 365 Prem. ...		Base Application	System
SUPER (DATA)	Superuser of data		System Application	System



# Breeze Workflow

To connect our Breeze Invoice Workflow to Dynamics 365 BC please read this [manual](#).