



# User Guide for the Legacy Dynamics NAV Integration

Note: This integration is in Legacy status. You can read more about that [here](#).

The Mobius Connect for Dynamics NAV Integration allows you to import your Manage accounting data directly into your Dynamics NAV application.

## [Feature Summary](#)

### [Configuration](#)

#### [System Requirements](#)

#### [ConnectWise Manage Configuration](#)

##### [Configuration of Manage Login](#)

##### [Configuration of Integrator Login](#)

##### [Option 1: APIKey Authentication](#)

##### [Option 2: MemberImpersonation Authentication](#)

##### [Configuration of GL Accounts](#)

##### [Configuration of the Accounting Package](#)

#### [Dynamics NAV Configuration](#)

##### [OData Setup](#)

##### [OData Services Activation](#)

##### [Exposing OData Endpoints](#)

##### [OData Endpoint Entry Example](#)

##### [Additional OData Configuration for NAV](#)

#### [Dynamics Web Service Access](#)

#### [Mapping Corresponding Data](#)

##### [Customers](#)

##### [Vendors](#)

##### [Members](#)

##### [GL Accounts](#)

##### [Multi-Segmented GL Accounts](#)

##### [Tax Codes](#)

- [Receivable Invoices](#)
- [Credit Memos](#)
- [Expenses](#)
- [Products](#)
- [Item Receipts](#)
- [Inventory Transfers & Adjustments](#)
- [Terms](#)
- [Warehouses](#)
- [Clearing Transactions](#)
- [Installation](#)
- [Logging In](#)
- [Connecting to OData Endpoints](#)

## [Using the Application](#)

- [Connecting the OData Endpoints](#)
- [The Main Screen](#)
- [Running a New Batch](#)
  - [Setting up the Batch](#)
  - [Selecting Specific Invoices](#)
  - [Selecting Specific Expenses](#)
  - [Selecting Specific Inventory Transactions](#)
  - [Select a Batch ID](#)
  - [Run the Batch](#)
- [Validating a Batch](#)
  - [Invoices](#)
  - [Expenses](#)
    - [With Transfer as Bill Enabled](#)
    - [With Transfer as Bill Disabled](#)
  - [Inventory](#)
  - [Inventory Adjustments & Transfers](#)
  - [Credit Memos](#)
- [Rerunning an Existing Batch](#)
- [Un-posting Transactions](#)
  - [Invoices](#)
  - [Batches](#)
- [Synchronizing Invoice Payments](#)
- [Modules](#)
  - [Multi-Currency Module](#)

## [Customer Support](#)

- [Contact Us](#)

## Feature Summary

Below is a quick list of features available with this integration:

1	Create Customers	✓
2	Create Vendors	✓
3	Create Products	✓
4	Multiple currency	✓
5	Standard Invoices	✓
6	Agreement Invoices	✓
7	Miscellaneous Invoices	✓
8	Down Payment Invoices	✓
9	Credit Memos	✓
10	Expenses	
a.	Transfer with Expense as Bill Option	✓
b.	Transfer without Expense as Bill Option	✓
11	Procurement	
a.	Item receipts	✓
b.	Inventory Adjustments	✓
c.	Inventory Transfers (Multiple Warehouses if available)	✓
12	Sync Invoice Payments	✓
Feature is fully implemented		✓
Feature is partially implemented		⚠
Feature is not available		✗
		Feature will be added in future release
		Accounting package does not support feature
		NA

## Configuration

### System Requirements

In order to use the Mobius Connect for Dynamics NAV Integration, you must have the following installed on your network and/or your machine(s):

- Your Manage software must be setup up with login credentials that have access to the Accounting features of Manage. Additionally, your Manage software must have its Accounting Package configured. See ConnectWise Manage Configuration.
- Dynamics NAV software must be installed.
- Your Dynamics NAV software must be set up with login credentials that have access to write to the Dynamics NAV system that will be used. See Dynamics NAV Configuration.


- .NET 4.0 Framework or Higher must be installed on your system. If this is not installed, you will be prompted to automatically install it when you attempt to install the integration application.
- Internet Access: While it is not required to have access to the internet every time you wish to run the integration, updates will automatically download as they become available. Therefore, an internet connection is recommended.

## ConnectWise Manage Configuration

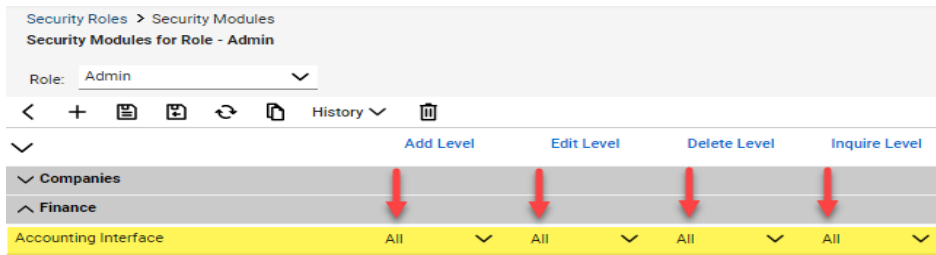
Before using the integration application, you must ensure that Manage is configured to allow the integration program access to the accounting system.

### Configuration of Manage Login

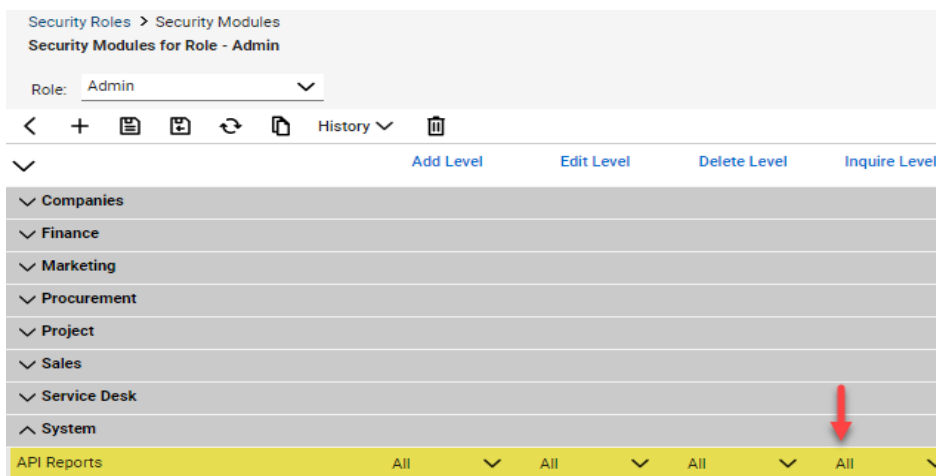
In order for the Member to be able to work with the accounting information, they must be assigned as a security role that allows access to the GL Interface. With a default installation, the "Role ID" field must be set to "Admin".

<b>Role ID*</b> Admin 	<b>Location*</b> Tampa Office	<input type="checkbox"/> Restrict to this Location	<b>Employee ID</b> <hr/>
<b>Level*</b> Corporate	<b>Business Unit*</b> Professional Services	<input type="checkbox"/> Restrict to this Business Unit	<b>Vendor Number</b> ADM1XREF
<b>Name*</b> Corporate	<b>Reports To</b> Admin1 Training	<input checked="" type="checkbox"/> Manage Administrator	<b>Type</b> ▼

If, instead, you wish to create your own role rather than use the Manage defaults, you need to ensure that the security role levels setting is set to "All" for "Add Level ", "Edit Level ", "Delete Level" and "Inquire Level" on the "Accounting Interface" line within the Finance Module, as depicted below:



Additionally, you need to ensure that the security role levels setting is set to “All” for “Inquire Level” on the “API Reports” line within the System Module, as depicted below.

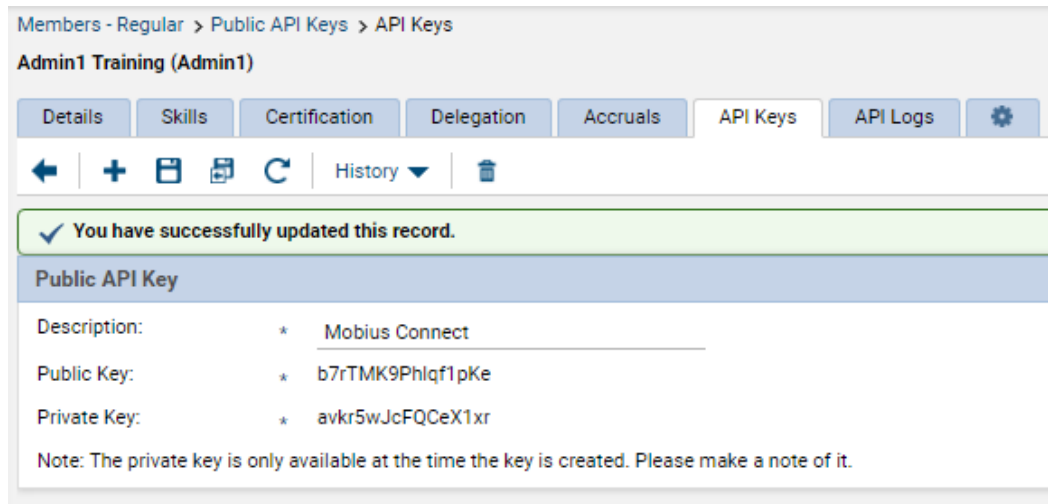


## Configuration of Integrator Login

In addition to accessing the Manage Accounting System, the integration also requires credentials to access the REST API. There are two options for providing credentials to access the REST API: APIKey and MemberImpersonation

### Option 1: APIKey Authentication

To setup APIKey Authentication in Manage, navigate to the “API Keys” tab on the member setup for accessing the Accounting System. Enter a description and click Save to generate a Public/Private key-pair. You may want to save the Private Key somewhere as it will not be visible again once you close the API Keys screen.



Members - Regular > Public API Keys > API Keys

Admin1 Training (Admin1)

Details Skills Certification Delegation Accruals **API Keys** API Logs ⚙️

← + 📁 📄 ↺ History ▾ 🗑️

✓ You have successfully updated this record.

**Public API Key**

Description: \* Mobius Connect

Public Key: \* b7rTMK9Phlqf1pKe

Private Key: \* avkr5wJcFQCeX1xr

Note: The private key is only available at the time the key is created. Please make a note of it.

## Option 2: MemberImpersonation Authentication

To setup MemberImpersonation Authentication in Manage, open the Integrator Login setup table by navigating to System > Setup Tables and searching for “Integrator Login”. Click to create a new Integrator Login. Provide a Username and Password, select “All records” for Access Level, and click to enable the “Member API”

Setup Tables > Integrator Login List > Integrator Login

**Integrator Login**

← + 📄 📁 🗑️

**i** New integration login

Username:

Password:

Access Level:

**Enable Available API(s)**

<input type="checkbox"/>	<input type="checkbox"/> Use legacy callback format
<input type="checkbox"/>	Opportunity Conversion API
<input checked="" type="checkbox"/>	Member API
<input type="checkbox"/>	Marketing API
<input type="checkbox"/>	Purchasing API

Callback URL:

☐ Use legacy callback format

## Configuration of GL Accounts

Your company will need to have their GL Accounts properly configured in order for Manage to provide the integration application with the correct information. Because this process is largely specific to your Company, the exact details of this configuration are outside of the scope of this document. [This article may help you start.](#) Please visit the [ConnectWise University](#) before beginning to set up your GL Accounts, or speak with your ConnectWise Consultant at [Consulting@ConnectWise.com](mailto:Consulting@ConnectWise.com) for more information.

## Configuration of the Accounting Package

Once your accounts are set up, you will need to set up the Accounting Package. This describes to Manage how your accounts will be exported to Dynamics NAV. It has a number of options, some of which are specific to other accounting software (such as QuickBooks). You can set up this screen at System > Setup Tables > Accounting Package using the following steps:

The screenshot shows the 'Accounting Package Setup' form with the following sections and settings:

- Accounting Package:** \* Other (indicated by red box 1)
- Invoice Options:**
  - Include Invoices: ☒ (indicated by red box 2)
  - Invoice Format: Default
- Expense Options:**
  - Include Expenses: ☒ (indicated by red box 3)
  - Transfer Expense as a Bill: ☒ (indicated by red box 3)
  - Expense Format: Bonded
- Miscellaneous Options:**
  - Suppress Memo Entry: ☒ (indicated by red box 5)
  - Sync Payment Info From Accounting Package: ☐
- Sales Tax Options:**
  - Include Sales Tax: ☒ (indicated by red box 2)
  - Enable Tax Groups: ☐
  - Set Zero Dollar Tax Amounts to Non-Taxable: ☒
- Product Options:**
  - Include Procurement Items: ☒ (indicated by red box 4)
  - Inventory SOH Option: ☒ (indicated by red box 4)
  - Send Component Amount: ☐
  - Send UOM with Products: ☐
  - Include COGS Entries: ☒ (indicated by red box 5)
  - Include COGS and Inventory on Drop Ship Items: ☐
- Account Segments:**
  - Segments: 2 (indicated by red box 6)
  - 1: Account (indicated by red box 7)
  - Class
- COGS Segments:**
  - Segments: 1
  - 1: COGS
  - Account

1. Set the "Accounting Package Setup" dropdown to "Other."
2. In the Sales Tax Options section, ensure that "Include Sales Tax" is checked.
3. If you will be transferring Expenses, ensure that "Transfer Expense as a Bill" is checked.
4. In the Product Options section, ensure that "Inventory SOH Option" is checked.
5. If you will be transferring Costing, ensure that "Include COGS Entries" is checked.
6. In the Account Segments section, choose the maximum number of segments an account in your company will have. Ensure that each segment to be a part of your GL Account structure has a type of "Account." (Please note that Classes may be used in certain circumstances.)
7. In the COGS Segments section, choose the maximum number of segments a COGS account in your company will have. Ensure that each segment to be a part of your GL Account structure has a type of "Account."



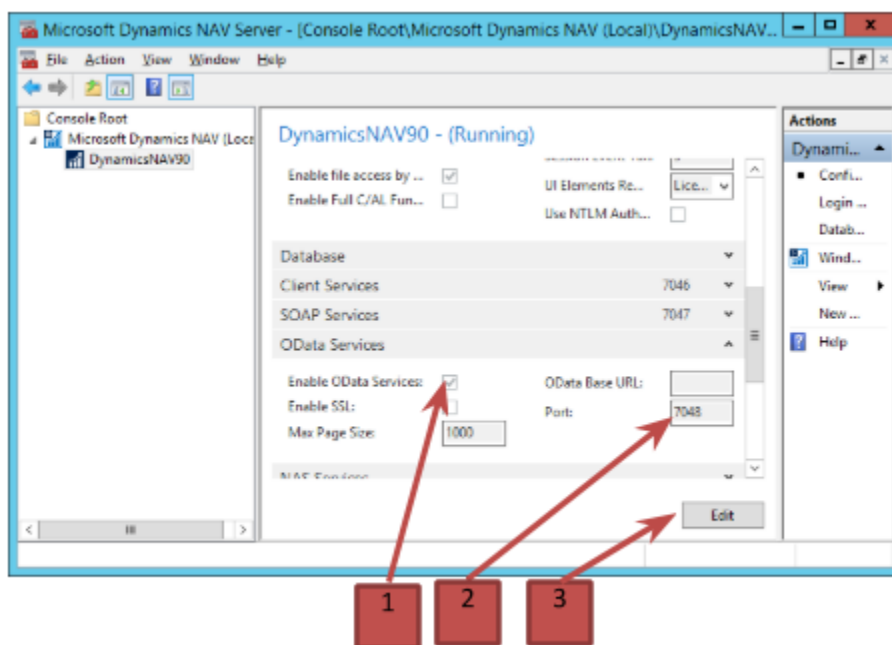
You'll notice there are a few other options in the Accounting Package that we have not explicitly mentioned, such as "Include Invoices," "Include Expenses" and "Include Procurement Items." Some of these fields only affect the default values of the Accounting Integration screen built into Manage. This integration does not use that screen; so, these options will have no effect on the integration.

## Dynamics NAV Configuration

The integration requires a collection of OData Web Service “endpoints” to be exposed in order to function. OData is a web service protocol that allows the integration to read and write data to the Dynamics NAV database and must be activated using the Dynamics NAV Administration tool.

### OData Setup

OData Services Activation



1. Ensure OData Services is enabled. This checkbox must be checked.
2. Note the Port value. This will be required in the URL to access exposed OData endpoints.
3. Edit button to enable editing if OData Services is NOT enabled.

## **Exposing OData Endpoints**

After OData Services have been enabled, Dynamics NAV must have the following list of endpoints exposed. In the Dynamics NAV client the Web Services interface can be opened by navigating to Departments > Administration > IT Administration > Services > Web Services. Create a new "Page" Object Type for each Object ID in the following table and ensure that each new entry has the Published column checked. The Object Name represents the interface to be exposed. The Service Name can be any URL safe value that represents the interface being exposed. Each defined Service Name should be unique to the Object Name.

Object ID	Object Name
4	Payment Terms
5	Currencies
14	Salespeople/Purchasers
15	Location List
18	G/L Account List
20	General Ledger Entries
21	Customer Card
22	Customer List
25	Customer Ledger Entries
26	Vendor Card
27	Vendor List
30	Item Card
31	Item List
38	Item Ledger Entries
40	Item Journal
43	Sales Invoice
44	Sales Credit Memo
45	Sales List
51	Purchase Invoice
53	Purchase List
110	Customer Posting Groups
111	Vendor Posting Groups
112	Inventory Posting Groups
132	Posted Sales Invoice
138	Posted Purchase Invoice
209	<u>Unites of Measure</u>
254	Purchase Journal
312	Gen. Business Posting Groups
313	Gen. Product Posting Groups
470	Tax Business Posting Groups
471	Tax Product Posting Groups

## OData Endpoint Entry Example

The following screenshot illustrates an example entry for Object ID 43, Sales Invoice.

Web Services ▾					43   Object ID ▾ 🔍
Object Type	Object ID ▲	Object Name	Service Name	Published	OData URL
Page	43	Sales Invoice	ARInvoice	<input checked="" type="checkbox"/>	http://vagrant-2012-r2:7048/DynamicsNAV90/OData/Company('CRONUS%20USA%2C%20Inc.)/ARInvoice

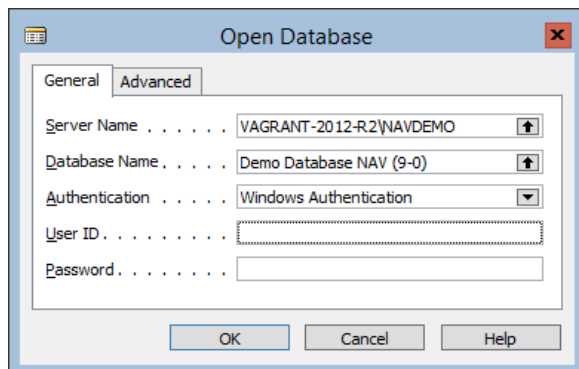
The Service Name of “ARInvoice” will be applied to the OData URL upon publishing. Confirm that the OData Web Service is working by navigating to the OData URL in your browser.

### **Additional OData Configuration for NAV**

Depending on the Dynamics NAV version and/or release, there may be additional fields that need to be added to the “Page” from within the Dynamics NAV Development environment. The integration requires “mapping” to all required user defined endpoint service names before any data can be transferred into Dynamics NAV. This Endpoint Mapping interface attempts to validate the available fields for each endpoint and will log any issues if they exist. See Integration Configuration, for details on the integrations

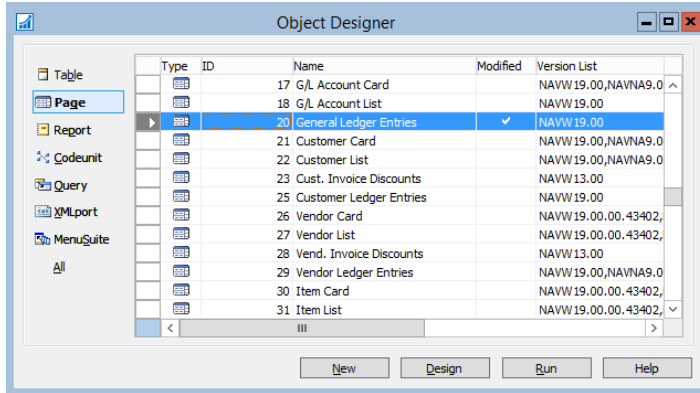
### **Endpoint Mapping Module.**

As an example, if your General Ledger Entries endpoint (object ID 20) does not have the “External\_Document\_Number” field available, it will need to be added using the Dynamics NAV Development Environment. Open the NAV Development Environment and open the proper database by navigating to File > Database > Open

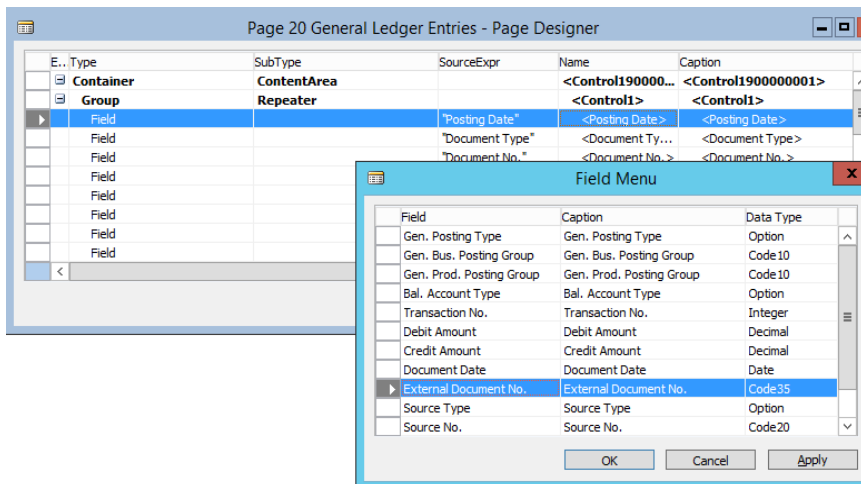


Select the proper Database Name and click OK. This should open the Object Designer. If the Object Designer is not visible it can be opened by navigating to Tools > Object Designer.

Make sure the “Page” Object Type is selected then find the Object Name or ID needed (in this case General Ledger Entries, ID 20). Select the row and click Design to open the Page Designer.



Select the first available field record then Navigate to View > Field Menu to open the Field Menu list.

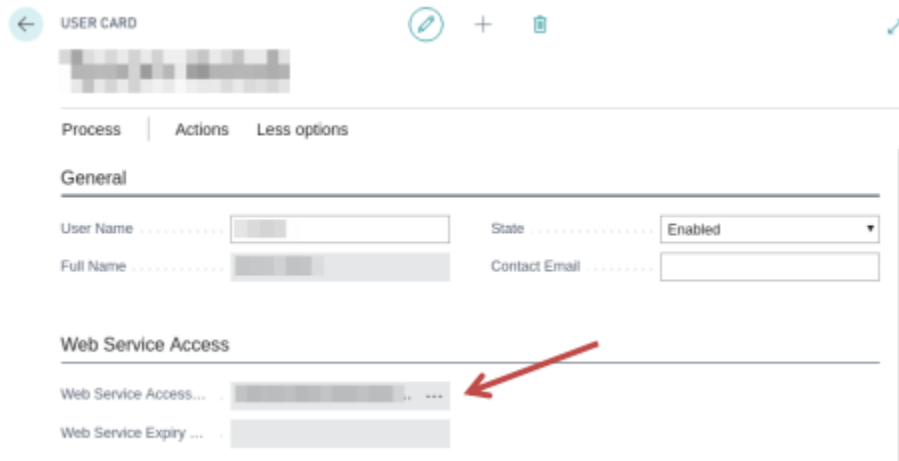


Scroll until the Field necessary is found (in this case External\_Document\_Number), select the row, and click OK. Click Yes to the Confirmation prompt to add the field(s) that is selected. Navigate to Tools > Compile to update the Dynamics NAV database to complete adding the missing field to the Page.

## Dynamics Web Service Access

(This step is optional.)

You will need to enable a Web Service Access Key for the Dynamics User that will be used to authenticate with the Dynamics web services. Open up the User Card for the desired Dynamics User and click the ellipsis on Web Service Access to generate a key.



The screenshot shows the 'USER CARD' interface for a Dynamics user. At the top, there are navigation icons: a back arrow, a pencil (edit), a plus sign, and a trash can. Below the header, there are tabs for 'Process', 'Actions', and 'Less options'. The 'General' tab is selected, showing fields for 'User Name', 'Full Name', 'State' (set to 'Enabled'), and 'Contact Email'. Below this is the 'Web Service Access' section, which contains two fields: 'Web Service Access...' and 'Web Service Expiry...'. A red arrow points to the ellipsis icon next to the 'Web Service Access...' field.

## Mapping Corresponding Data

There is data in Manage that will have corresponding data in Dynamics NAV. For example, when you create an invoice in Manage for the Company "Acme Inc.", the integration program will need to create an Invoice in Dynamics NAV for the Customer "Acme Inc.". In order to know against which Dynamics NAV Customer this invoice will be created, Manage needs some way to associate the "Acme Inc." in Manage with the "Acme Inc." in Dynamics NAV. This process of associating data is known as mapping.

The following sections will describe what data needs to be mapped. When an improper mapping is found, the integration program will fail before attempting to export any data, giving you the information needed to fix the mapping.

## Customers

**Companies** in Manage are mapped to **Customers** in Dynamics NAV. The “Account Number” field on the Manage Finance > Company Finance screen must match the “No” field on the Departments > Financial Management > Receivables > Customers interface in Dynamics NAV. If a Customer in Manage has an invoice to be imported into Dynamics NAV and the customer does not exist in Dynamics NAV, a new Customer will be created in Dynamics NAV automatically.

The screenshot displays two windows from the Dynamics NAV interface. The top window, titled "Company: Gold Test Company", shows fields for Company, Type, Status, Company ID, Phone, Fax, and Web Site. The "Finance Details" section includes "Account ID" (highlighted with a red box and containing "GTCXREF"), "Vendor ID", "Tax ID", "Tax Code", "Billing Terms", "Invoice Template", "Email Template", and "Pricing Schedule". The bottom window, titled "Edit - Customer Card - GTCXREF - Gold Test Company", shows the "General" tab with fields for No. (highlighted with a red box and containing "GTCXREF"), Name, Address, City, State / ZIP Code, ZIP Code, Country/Region Code, Phone No., Primary Contact No., Contact, Search Name, Balance (\$), Credit Limit (\$), Salesperson Code, Blocked, and Last Date Modified. A red arrow points from the "Account ID" field in the top window to the "No." field in the bottom window, indicating the mapping between the two systems.

## Vendors

**Companies flagged as Vendors** in Manage are mapped to **Vendors** in Dynamics NAV. The “Vendor Xref” field on the Manage Finance > Company Finance screen must match the “No” field on the Departments > Financial Management > Payables > Vendors interface in Dynamics NAV. If a Vendor in Manage has a PO to be imported into Dynamics NAV and the

Vendor does not exist in Dynamics NAV, a new Vendor will be created in Dynamics NAV automatically.

**Company: Gold Test Vendor**

Company: \* Gold Test Vendor Phone: (555) 555-5555  
Type: \* Vendor Fax: (555) 555-5555  
Status: \* Active Web Site:  
Company ID: \* GTV

**Finance Details**

Account ID: Billing Terms: Net 10  
Vendor ID: GTVXREF Invoice Template:  
Tax ID: Email Template:  
Tax Code: Complexington Sales Tax Pricing Schedule: Test

**Edit - Vendor Card - GTVXREF - Gold Test Vendor**

HOME ACTIONS NAVIGATE REPORT CRONUS USA, Inc.

Purchase Invoice Purchase Order View Apply Template... Open Vendor Entries Request Approval Vendor Purchases History Send To Show Attached Page

**GTVXREF - Gold Test Vendor**

**General**

No.: GTVXREF Phone No.: (555) 5555555  
Name: Gold Test Vendor Primary Contact No.: CT000151  
Address: 123 Fake St Contact: Contact McGee  
Address 2: Line 2 Search Name: GOLD TEST VENDOR  
City: Springfield Balance (\$): 0.00  
State / ZIP Code: ZIP Code: 01010 Purchaser Code:  
Country/Region Code: US Blocked: Last Date Modified: 1/20/2016

**Vendor Statistics**

Vendor No.: GTVXREF  
Balance (\$): 0.00  
Outstanding Ord...: 0.00  
Amt. Rcd. Not Inv...: 0.00  
Outstanding Invo...: 497.95  
Total (\$): 497.95  
Overdue Amount...: 0.00  
Invoiced Prepay...: 0.00

**Buy-from Vendor Hi...**

Vendor No.: GTVXREF  
Quotes: 0

## Members

With the Expenses: Transfer as Bill option checked in the Manage Accounting Package setup table, **billable expenses** will be created as **Purchase Invoices** in Dynamics NAV. Therefore, **Members** on an expense will map to **Vendors** in Dynamics NAV. The "Vendor Nbr" field on the Manage System > Members screen needs to match the "No" field on the Departments > Financial Management > Payables > Vendors interface in Dynamics NAV.



Members - Regular > Detail  
New Member

Overview

Login

Member ID\*  
Admin1

License Class\*  
Regular

Password\*

Confirm\*

Disable Online

Enable Mobile Edition

Profile

First Name\*  
Admin1

Middle Initial

Last Name\*  
Training

Hire Date\*

Title

Country

Time Zone\*  
US Eastern

Report Card

Photo

BROWSE

System

Role ID\*  
Admin

Division\*

Level\*  
Corporate (Level 1)

Name\*  
Corporate

Restrict to this Division

Restrict to this Department

Manage Administrator

Employee ID

Vendor Number  
ADM1XREF

Type

Edit - Vendor Card - ADM1XREF - Admin1 T. Training

HOME ACTIONS NAVIGATE REPORT

Purchase Invoice  
Purchase Order

Payment Journal  
Purchase Journal

Open Vendor Entries

Request Approval

Vendor

Purchases

History

Send To

Show Attached

Page

ADM1XREF - Admin1 T. Training

General

No.:  
ADM1XREF

Name:  
Admin1 T. Training

Address:

Phone No.:  
(813) 111-1111

Primary Contact No.:

Contact:

Vendor Statistics

Vendor No.:  
ADM1XREF

Balance (\$):  
0.00

Outstanding Ord...:  
0.00

Amt. Rcd. Not Inv...:  
0.00

## GL Accounts

The "Account" field for a GL Account in the System > Setup Tables > GL Accounts table in Manage must be consistent with the "No" field for a GL Account in the Departments > Financial Management > General Ledger > Chart of Accounts interface in Dynamics NAV.

Note that Accounts will not be automatically created in Dynamics NAV if they are not found. An error message will be raised during the validation phase halting the transfer.

The screenshot displays two windows from the Dynamics NAV interface. The top window, titled 'GL Account Setup', shows the configuration for a new GL account. The 'Account Subcategory' field is highlighted with a red box and contains the value '11000'. The bottom window, titled 'Edit - G/L Account Card - 11000 - Account Recievable', shows the details of the selected account. The 'No.' field is also highlighted with a red box and contains the value '11000'. A red arrow points from the 'Account Subcategory' field in the top window to the 'No.' field in the bottom window, indicating the mapping between the two.

**GL Account Setup**

Account Type:	* Accounts Receivable	Product ID:	
Table:	* My Company: Owner	Inventory:	
Record:	* mobius	Sales Code:	
Account Subcategory:	11000	COGS:	

**Edit - G/L Account Card - 11000 - Account Recievable**

**General**

No.:	11000	Search Name:	ACCOUNT RECIEVABLE
Name:	Account Recievable	Balance:	0.00
Income/Balance:	Income Statement	Reconciliation Account:	<input type="checkbox"/>
Debit/Credit:	Both	Automatic Ext. Text:	<input type="checkbox"/>
Account Type:	Posting	Direct Posting:	<input checked="" type="checkbox"/>
Totaling:		Blocked:	<input type="checkbox"/>
No. of Blank Lines:	0	Last Date Modified:	11/24/2015
New Page:	<input type="checkbox"/>	Omit Default Descr. in Jnl.:	<input type="checkbox"/>

## Multi-Segmented GL Accounts

The subaccounts of a multi-segmented GL Account in Manage can be mapped to Dynamics NAV Dimension codes which can be applied to transaction line details. Dynamics NAV supports up to 8 Dimension codes per line detail. The integration will only consider the first 8 subaccount segments of a GL Account coming from Manage. The number of segments for GL Accounts in Manage is defined on the Accounting Package setup table by navigating to System > Setup Tables and searching for "Accounting Package". **Please note** that a

multi-segment GL Account mapping setup requires **all segments of a GL Account in Manage to have a value if any subaccount segments will be mapped.**

In the following example, we will be mapping a 3-part multi-segmented GL Account in Manage to Dynamics NAV. The root, or the first part, of the GL Account will map to the Dynamics NAV Chart of Accounts as detailed in the GL Accounts section. The “Department” and “Project” segments will map to Dynamics NAV Dimension Codes. The Segment Type must be “Account”.

Account Segments		
Segments:	3	
1:	Account	Account
2:	Department	Account
3:	Project	Account

The order of account segments in Manage should match the order of Dimension Codes in Dynamics NAV General Ledger setup found at *Departments > Financial Management > Setup > Administration > General Ledger Setup* under “Dimensions”.

General Ledger Setup	
General	
Numbering	
Dimensions	
Global Dimension 1 Code:	DEPARTMENT
Global Dimension 2 Code:	PROJECT
Shortcut Dimension 1 Code:	DEPARTMENT
Shortcut Dimension 2 Code:	PROJECT
Shortcut Dimension 3 Code:	CUSTOMERGROUP
Shortcut Dimension 4 Code:	AREA
Shortcut Dimension 5 Code:	BUSINESSGROUP
Shortcut Dimension 6 Code:	SALESCAMPAIGN
Shortcut Dimension 7 Code:	
Shortcut Dimension 8 Code:	

Please note that, while it is not necessary for the Dimension codes to match the Account segment caption, the order is important. Therefore, it is recommended to name each accordingly for clarity.

After establishing the number of segments for GL Accounts in Manage, the GL account segments must be established for each GL Account in the GL Account setup table found at *System > Setup Tables > GL Accounts*. The subaccount segments defined for a GL Account

in Manage map to Dimension Code values for the Dimension Code of the segment in Dynamics NAV. In this example, we will map a Department subaccount segment “D01” and a Project subaccount segment “P01” to Dimension Code values for Dimension Codes Department and Project in Dynamics NAV respectively.

GL Account Setup

Account Type: \* Revenue

Table: \* My Company: Owner

Record: \* mobius\_f

Account: 41000

Department: D01

Project: P01

Dimension setup can be found in Dynamics NAV by navigating to *Departments > Financial Management > Setup > Administration > Dimensions*. To enter Dimension Code Values for a Dimension Code, click on the Dimension Code and then click Dimension Values to open the Dimension Value interface.

Edit - Dimensions

HOME ACTIONS

New Edit List Delete Map to IC Dim. with Same Code Dimension Values Account Type Translations Notes Links Refresh Find

Dimension Default Dim. Show Attached Page

Dimensions

Code

AREA

BUSINESSGROUP

CUSTOMERGROUP

DEPARTMENT

PROJECT

PURCHASER

REVENUECLASS

SALESCAMPAIGN

SALESPERSON

Edit - Dimension Values - DEPARTMENT - Department

HOME ACTIONS

New View List Edit List Delete Show as List Show as Chart Notes Links Refresh Clear Filter Find

Dimension Values

Type to filter (F3) Code

Filter: DEPARTMENT

Code	Name	Dimension Value Type	Totaling	Bloc...
ADM	Administration	Standard		<input type="checkbox"/>
ARCLASS	AR Class	Standard		<input type="checkbox"/>
D01	D01	Standard		<input type="checkbox"/>
PROD	Production	Standard		<input type="checkbox"/>
SALES	Sales	Standard		<input type="checkbox"/>

The Dynamics NAV Dimension Code Value must match the Manage account segment value. Add a Dimension Code Value of P01 to the Project Dimension Code to complete this mapping example.

## Tax Codes

**Tax Codes** in Manage map to **Tax Areas** in Dynamics NAV. A Dynamics NAV Tax Area consists of one or more Tax Jurisdictions. Each Tax Jurisdiction in Dynamics NAV requires a TAXABLE and NONTAXABLE Tax Detail. This section details the mapping process of a multi-level tax configuration in Manage. A single level tax configuration can be implemented following these same steps with just one Manage Tax Level mapping to one Dynamics NAV Tax Jurisdiction. Consider the following Manage Tax Code:

<b>Tax Code*</b> COMPLEX	Caption on Invoice* Sales Tax	<input type="checkbox"/> Default
Name* Complexington Sales Tax	Effective Date* Sat, 12/1/2012	<input type="checkbox"/> Display each level on the invoice
Country United States	Cancel Date	<input type="checkbox"/> Calculate PST on GST (Canada)

**Tax Level 1**

Rate Type Percent	<input checked="" type="checkbox"/> Tax Products	<input type="checkbox"/> Apply Single Unit Limit
Tax Rate 0.01	<input checked="" type="checkbox"/> Tax Services	Unit Minimum
Taxable Max 0	<input checked="" type="checkbox"/> Tax Expenses	Unit Maximum
Caption COMPLEX1		
Tax Code Cross Reference COMPLEX	Agency Cross Reference COMAGNC1	

**Tax Level 2**

Rate Type Percent	<input checked="" type="checkbox"/> Tax Products	<input type="checkbox"/> Apply Single Unit Limit
Tax Rate 0.02	<input checked="" type="checkbox"/> Tax Services	Unit Minimum
Taxable Max 0	<input checked="" type="checkbox"/> Tax Expenses	Unit Maximum
Caption COMPLEX2		
Tax Code Cross Reference COMPLEX	Agency Cross Reference COMAGNC2	

**Tax Level 3**

Rate Type Percent	<input checked="" type="checkbox"/> Tax Products	<input type="checkbox"/> Apply Single Unit Limit
Tax Rate 0.03	<input checked="" type="checkbox"/> Tax Services	Unit Minimum
Taxable Max 0	<input checked="" type="checkbox"/> Tax Expenses	Unit Maximum
Caption COMPLEX3		
Tax Code Cross Reference COMPLEX	Agency Cross Reference COMAGNC3	

The color coding will be used to assist and simplify the mapping process. First, there must be a Tax Area defined in Dynamics NAV with a Code that matches the Manage Tax Code value of COMPLEX. It is recommended to have each Manage Tax Level Tax Code Xref value match the Tax Code (consider the color coding). To define a Tax Area in Dynamics NAV,

navigate to Departments > Financial Management > Setup > Sales Tax > Tax Areas and click New.

CRONUS USA, Inc.

HOME

View New Edit Delete Manage

Notes Links Show Attached

Refresh Clear Filter Page

Go to Previous Next

**Tax Area**

**General**

Code: **COMPLEX**

Description:

Country/Region: US

Round Tax: To Nearest

Use External Tax Engine: ☐

**Lines**

New Find Filter Clear Filter

Tax Jurisdic...	Jurisdiction Description	Calculation Order
		0

OK

Next, Tax Jurisdictions need to be applied as Tax Area lines. These lines map to Manage Tax Levels. Click New under Lines to add a Tax Jurisdiction. If the Tax Jurisdiction does not already exist it will need to be created first. Click on the drop down for Tax Jurisdiction and click New.

CRONUS USA, Inc.

HOME

View New Edit Delete Manage

Notes Links Show Attached

Refresh Clear Filter Page

Go to Previous Next

**COMPLEX**

**General**

Code: COMPLEX

Description:

Country/Region: US

Round Tax: To Nearest

Use External Tax Engine: ☐

**Lines**

New Find Filter Clear Filter

Tax Jurisdic...	Jurisdiction Description	Calculation Order
		0

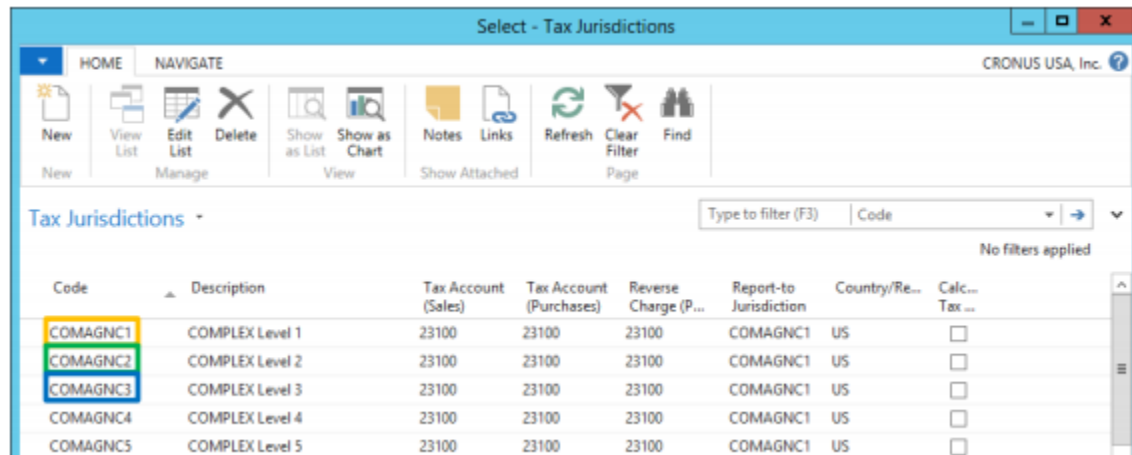
Co... Description

- COMAGNC1 COMPLEX Level 1
- COMAGNC2 COMPLEX Level 2
- COMAGNC3 COMPLEX Level 3
- COMAGNC4 COMPLEX Level 4
- COMAGNC5 COMPLEX Level 5
- FL State of Florida
- FLDADE Dade County, FL

New Advanced Set as default filter column

OK

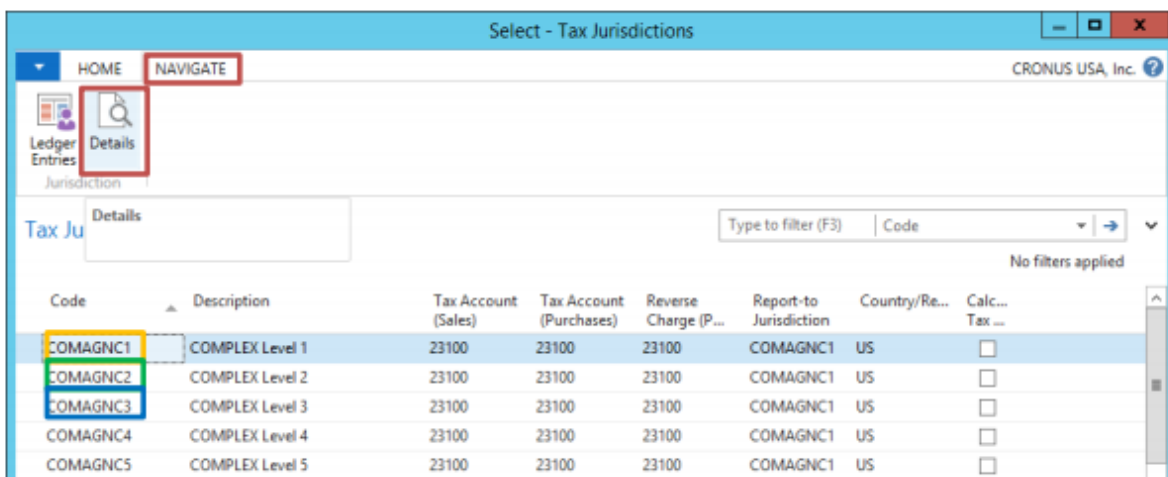
Create a Tax Jurisdiction for each Tax Level in Manage mapping the Manage Tax Agency Xref to the Dynamics NAV Tax Jurisdiction Code.



Code	Description	Tax Account (Sales)	Tax Account (Purchases)	Reverse Charge (P...	Report-to Jurisdiction	Country/Re...	Calc... Tax ...
COMAGNC1	COMPLEX Level 1	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC2	COMPLEX Level 2	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC3	COMPLEX Level 3	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC4	COMPLEX Level 4	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC5	COMPLEX Level 5	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>

Note the Tax Account (Sales) column. This is where the Tax Payable can be specified for each tax level. These accounts would map from the Manage GL Account setup table. Depending on your Manage setup, each level may or may not use the same GL Account.

Once all Tax Jurisdictions have been defined the integration requires Tax Details for both a TAXABLE and NONTAXABLE Tax Group Code. For each Tax Jurisdiction mapping to the Tax Area, select the Tax Jurisdiction line, click the NAVIGATE tab, and click Details to open the Tax Details interface.



Code	Description	Tax Account (Sales)	Tax Account (Purchases)	Reverse Charge (P...	Report-to Jurisdiction	Country/Re...	Calc... Tax ...
COMAGNC1	COMPLEX Level 1	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC2	COMPLEX Level 2	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC3	COMPLEX Level 3	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC4	COMPLEX Level 4	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>
COMAGNC5	COMPLEX Level 5	23100	23100	23100	COMAGNC1	US	<input type="checkbox"/>



On the Tax Details for each level, add a detail for each required Tax Group Code. On the TAXABLE Tax Group Code line, enter the Manage tax rate for the corresponding Tax Level. On the NONTAXABLE Tax Group Code line, enter 0. Note that the Manage tax rate is a decimal value. Dynamics NAV expects a percentage tax rate. Therefore .01 in Manage should be entered as 1 in Dynamics NAV.

Tax Jurisdiction...	Tax Group Code	Tax Type	Effective Date	Tax Below Maximum	Maximum Amount/Qty.	Tax Above Maximum	Expense/Capitalize
COMAGNC1	NONTAXABLE	Sales and Use Tax	1/1/2015	0.00	0.00	0.00	<input type="checkbox"/>
COMAGNC1	TAXABLE	Sales and Use Tax	1/1/2015	1.00	0.00	0.00	<input type="checkbox"/>

After completing the Tax Jurisdiction entries and their Tax Details for each Manage Tax Level, complete the Tax mapping by applying the Tax Jurisdiction Codes as Tax Area Lines on the Tax Area interface.

Tax Jurisdiction...	Jurisdiction Description	Calculation Order
COMAGNC1	COMPLEX Level 1	0
COMAGNC2	COMPLEX Level 2	0
COMAGNC3	COMPLEX Level 3	0
COMAGNC4	COMPLEX Level 4	0
COMAGNC5	COMPLEX Level 5	0

When an invoice flagged as taxable transfers through the integration, the Tax Code applied to that invoice will be assigned as the Tax Area Code on the Sales Invoice Header in Dynamics NAV and the Tax Liabe flag will be set to true. For all taxable lines on the invoice, the TAXABLE Tax Group Code will be used for the line in Dynamics NAV. All non-taxable lines on the invoice will use the NONTAXABLE Tax Group Code. If an invoice coming through from Manage is not marked as taxable, a Tax Area Code will not be applied to the Sales Invoice Header and the Tax Liabe flag will be set to false.

### Receivable Invoices

**Receivable Invoices** in Manage will be created as **Sales Invoices** in Dynamics NAV listed on the Departments > Financial Management > Receivables > Sales Invoices interface.

### Credit Memos

**Credit Memos** in Manage will be created as **Sales Credit Memos** in Dynamics NAV listed on the Departments > Financial Management > Receivables > Sales Credit Memos interface.

### Expenses

If the Expense: Transfer as Bill option is checked in the Manage Accounting Package setup table, **Expenses** will be created as **Purchase Invoices** in Dynamics NAV listed on the Departments > Financial Management > Payables > Purchase Invoices interface.

If the Expense: Transfer as Bill option is NOT checked in the Manage Accounting Package setup table, **Expenses** will be created as **DEFAULT batch Purchase Journal Entries** in Dynamics NAV listed on the Departments > Financial Management > Payables > Purchase Journals interface.

### Products

The "Product ID" field on the Procurement > Product Catalog list in Manage will map to the "No." field on the Item Card screen in Dynamics NAV. If a Product in Manage does not exist in Dynamics NAV, it will be created automatically. Please note that integration does not support serialization of products; so, any serialized products in Manage will be created in Dynamics NAV as non-serialized.

Product Overview	
Product ID:	* 10ft Patch Cable
Description:	* Patch Cable - 10ft
Category:	* Hardware
Subcategory:	* Network Device
UOM:	* Each
Unit Price:	
Unit Cost:	

10FT PATCH CABLE - Patch Cable, 10ft	
General	
No.:	10FT PATCH CABLE
Description:	Patch Cable, 10ft
Base Unit of Measure:	EA
Assembly BOM:	No

## Item Receipts

**Item Receipts** in Manage will be created as **Purchase Invoices** in Dynamics NAV listed on the Departments > Financial Management > Payables > Purchase Invoices interface.

It is important to note a few points on closing and batching Item Receipts out of Manage:

- a. An Item Receipt represents the receipt of an item on a purchase order.
- b. Item Receipts can be batched immediately after the item has been received and the line item on the Manage Purchase Order has been closed.
- c. Item Receipts will be broken into multiple Dynamics NAV Purchase Invoices if
  - d. Line items are received, closed, and batched separately and/or
  - e. Line items have differing Packing Slip values.
4. Freight will not be accounted for until the Manage Purchase Order itself is closed.
  - a. Freight will be created as a separate Dynamics NAV Purchase Invoice if the Freight Packing Slip value does not match the PO Number or any line item Packing Slip values.
5. Since Dynamics NAV Purchase Invoice No. values must be unique, the following outline the convention used to create unique Purchase Invoice No. values when Item Receipts are split into multiple Dynamics NAV Purchase Invoices.

- If the Packing Slip value matches the PO Number, the PO Number will be used.
- If the Packing Slip value does NOT match the PO Number, the PO Number + Packing Slip values will be used in the following format: [PO Number]-[Packing Slip]

Therefore, it is necessary to use different Packing Slip values per item if batching line items separately.

## Inventory Transfers & Adjustments

**Inventory Transfers & Adjustments** in Manage will be created as **DEFAULT batch Item Journal Entries** in Dynamics NAV listed on the Departments > Warehouse > Inventory > Item Journals interface.

## Terms

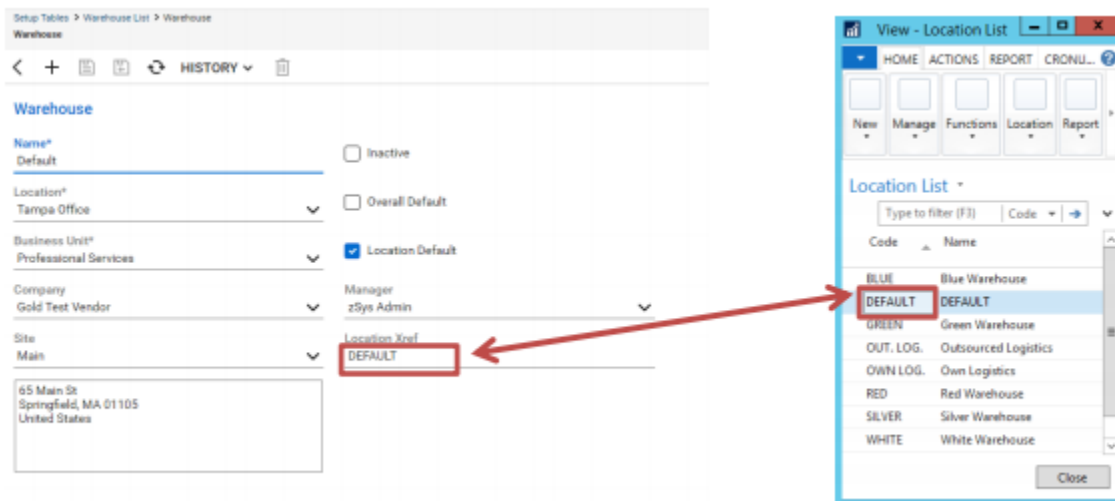
**Billing Terms** in Manage will be created as **Payment Terms** in Dynamics NAV. The “Terms Xref” field in the System > Setup Tables > Billing Terms screen in Manage will be the “Code” field on the Payment Terms screen in Dynamics NAV. The “Due Days” field in Manage will be the amount in the “Due Date Calculation” field + the letter “D” (to indicate days) in Dynamics NAV. The “Description” field in Manage will be the “Description” field in Dynamics NAV.

The screenshot shows the 'New - Payment Terms' window in Dynamics NAV. On the left, the 'Billing Terms' form has three fields: 'Description\*' (containing 'Net 10'), 'Due Days\*' (containing '10'), and 'Terms Xref' (containing '10'). On the right, the 'Payment Terms' table has columns: 'Code', 'Due Date Calculation', 'Discount Date Ca...', 'Discount %', 'Calc. Prin...', and 'Description'. Arrows indicate the mapping: a red arrow from 'Description\*' to 'Description', a green arrow from 'Due Days\*' to 'Due Date Calculation', and a purple arrow from 'Terms Xref' to 'Code'. The 'Payment Terms' table shows a single record with 'Code' 10, 'Due Date Calculation' 10D, 'Discount %' 0, and 'Description' Net 10.

Code	Due Date Calculation	Discount Date Ca...	Discount %	Calc. Prin...	Description
10	10D		0		Net 10

## Warehouses

**Warehouses** in Manage will be mapped to **Locations** in Dynamics NAV. The “LocationXref” field in the System > Setup Tables > Warehouse List > Warehouse screen in Manage will be the “Code” field on the Dynamics NAV Departments > Warehouse > Setup > Locations screen in Dynamics NAV.



## Clearing Transactions

If you do not have any transactions in Manage that you have already exported to an accounting package, you can skip this section.

If you currently have transactions in Manage that you have either manually created in Dynamics NAV (or otherwise created in accounting software, and therefore have no need to account for them in Dynamics NAV), you will not want the integration application to export those transactions into Dynamics NAV again.

To remove unnecessary records from Manage so that the integration does not attempt to export them, navigate to the Finance > Accounting Interface. Go to the Unposted tab to remove unnecessary records. Select the transactions, then click “Actions” > “Remove Records”.

Unposted Invoices					
Unposted Invoices					
Creation	Unposted Invoices	Unposted Expenses	Unposted Procurement	Open Batches	⚙️
Actions ▾	SEARCH	CLEAR	Export	View (No View) ▾	🔍 < 1 - 50 of 102 ▾ >
Remove Records	Date	Description	Account	Amount	Company Name
All ▾					
<input type="checkbox"/> 1017	01/16/2012	Accounts Receivable	200-2000-20	\$4,800.00	GoDaddy
<input type="checkbox"/> 1022	01/16/2012	Accounts Receivable	200-2000-20	\$2,000.00	Bell South
<input type="checkbox"/> 1042	02/13/2012	Accounts Receivable	200-2000-20	\$750.00	Bell South
<input type="checkbox"/> 1052	02/27/2012	Accounts Receivable	200-2000-20	\$1,125.00	Bell South
<input type="checkbox"/> 1083	01/16/2012	Accounts Receivable	200-2000-20	\$1,394.84	Bell South
<input type="checkbox"/> 1158	03/16/2013	Accounts Receivable	200-2000-20	\$458.50	Der Waffle Haus
<input type="checkbox"/> 1175	03/16/2013	Accounts Receivable	200-2000-20	\$1,001.00	Bell South

You will receive a pop up to confirm this action. Please enter a Batch Number and click "Save".

### Remove Records



Removing records will not transfer to the accounting package or export to a file. To bring records back, please go to the Open Batches tab to delete the batch.

Enter Batch Number: \*

SAVE

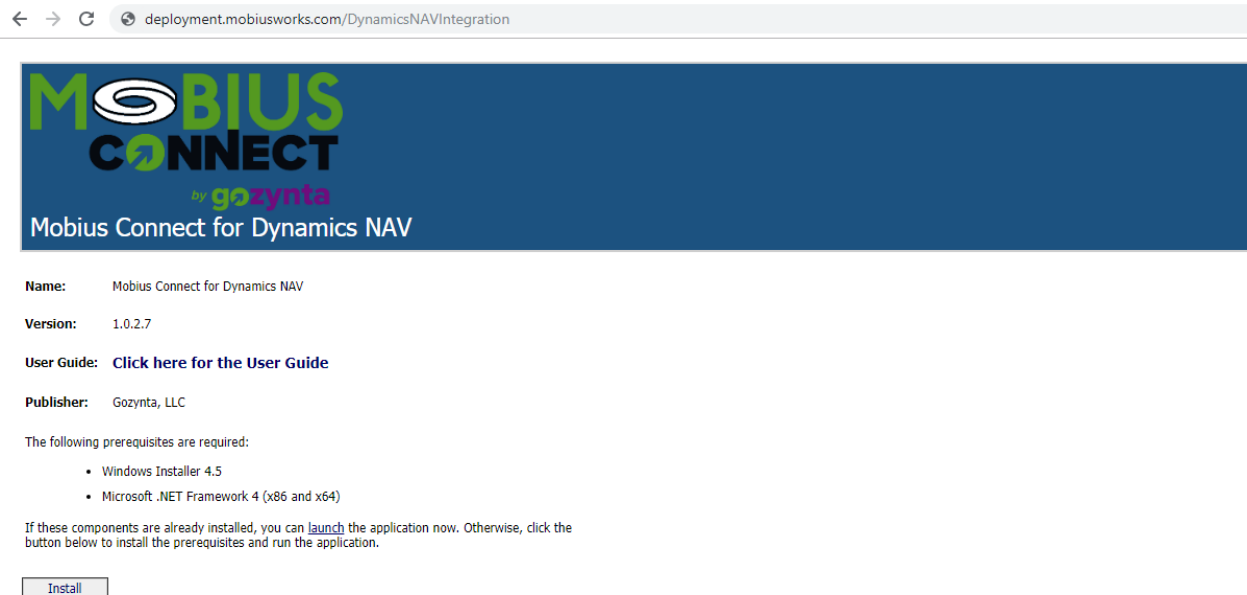
CANCEL

## Installation

To install the Mobius Connect for Dynamics NAV Integration, follow the instructions below. Note that the steps and screen shots are from a machine that already had the .NET Framework installed.

1. Go to the installation page:

[deployment.mobius-connect.com/DynamicsNAVIntegration](https://deployment.mobius-connect.com/DynamicsNAVIntegration)



2. Download the Dynamics NAV Extension

Right click the link and choose "save link as"



**Name:** Mobius Connect for Dynamics NAV

**Version:** 1.0.3.3

**User Guide:** [Click here for the User Guide](#)

**Publisher:** Gozynta, LLC

The following prerequisites are required:

- Windows Installer 4.5
- Microsoft .NET Framework 4 (x86 and x64)

If these components are already installed, you can [launch](#) the application now. Otherwise, click the button below to install the prerequisites and run the application.

**Integrating with Business Central 365?** The following extension needs to be installed. [See the docs](#)

- Gozynta\_mobius-connect\_1.0.0.5.app

Install

[ClickOnce and .NET Framework Resources](#)

3. Click **Install**.



**Publisher cannot be verified.**  
**Are you sure you want to install this application?**



**Name:**

ConnectWise-Dynamics NAV Integration

**From (Hover over the string below to see the full domain):**

deployment.mobius-connect.com

**Publisher:**

Unknown Publisher

Install

Don't Install

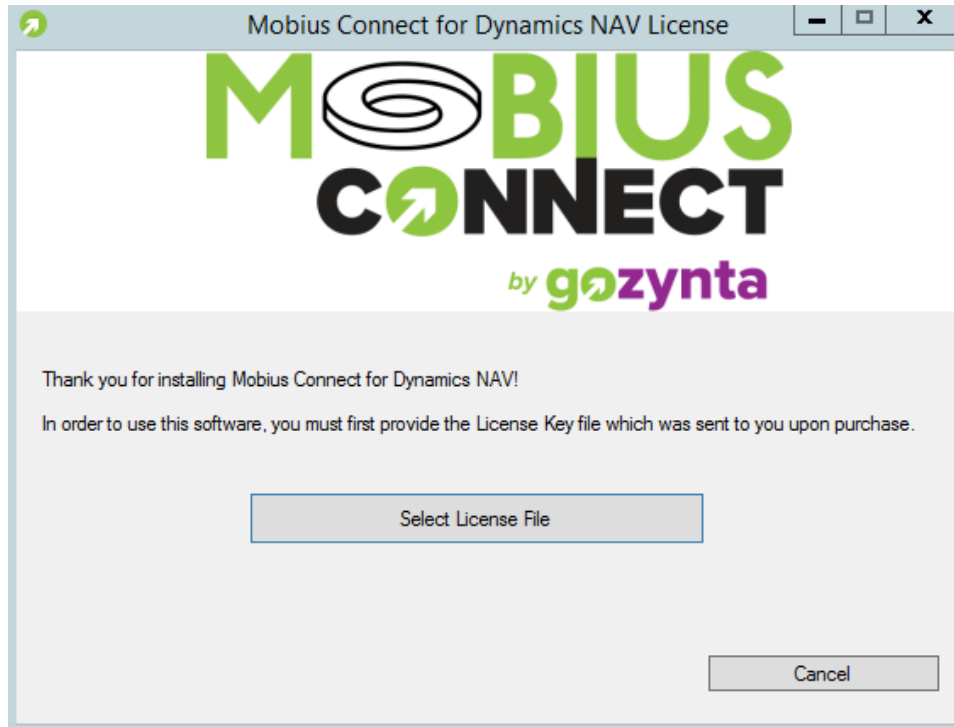


While applications from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. [More Information...](#)

The installation creates a Mobius Connect for Dynamics NAV Integration desktop icon.



The application will open immediately after installation. You will be required to activate the integration with the license key file. Click "Select License File" to install your license file and activate the integration.



If you do not have a license file, please contact your ConnectWise Account Manager at [AccountManager@ConnectWise.com](mailto:AccountManager@ConnectWise.com).

## Logging In

The first time you run the application, you will be prompted for both your Dynamics NAV and Manage credentials. They will be retained on the Login screen for your convenience when you run the application the next time.

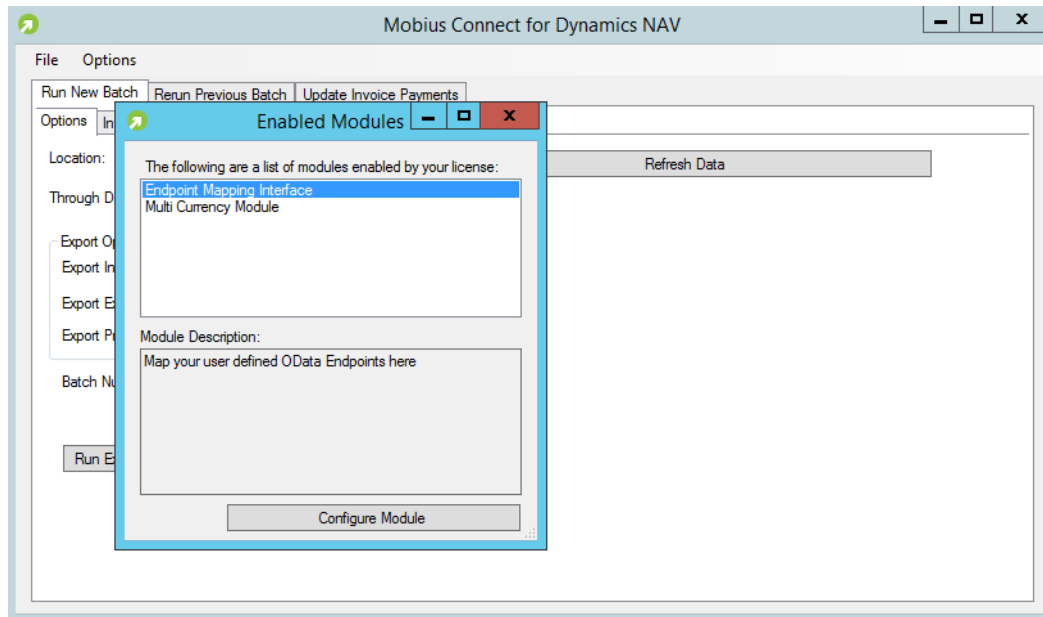
1. Enter the following Dynamics NAV information in the Login screen:
  - **OData URL:** URL representing the root of the OData web service.
  - **Company ID:** This is the Dynamics NAV company database.
  - **Credential Type:**
  - **Username & Password:** This is a username and password for an account that has sufficient privileges in Dynamics NAV. If using Windows Authentication as the Credential Type, Username & Password are not required.
2. Enter the following ConnectWise Manage information in the Login screen:

- **Site:** The domain name of the Manage site. For example, "connectwise.mycompany.com".
- **Company ID:** Your company database ID as assigned by Manage
- **Auth Type:** Select the method of Authentication setup in ConnectWise Manage Configuration
- - **MemberImpersonation:** If using MemberImpersonation **AuthType**, enter your **Member, Integrator User, and Integrator Pass**
  - **APIKey:** If using APIKey **AuthType**, enter your **Public Key** and **Private Key**
- 3. **Save Password:** Check this box if you would like your Dynamics NAV and Manage passwords saved for the next time you run the application.
- 4. Click **Login**.

Your passwords will be encrypted using Window's built-in cryptography system. Therefore, the saved password will only be allowed to be used by the currently logged in user on the same machine.

## Connecting to OData Endpoints

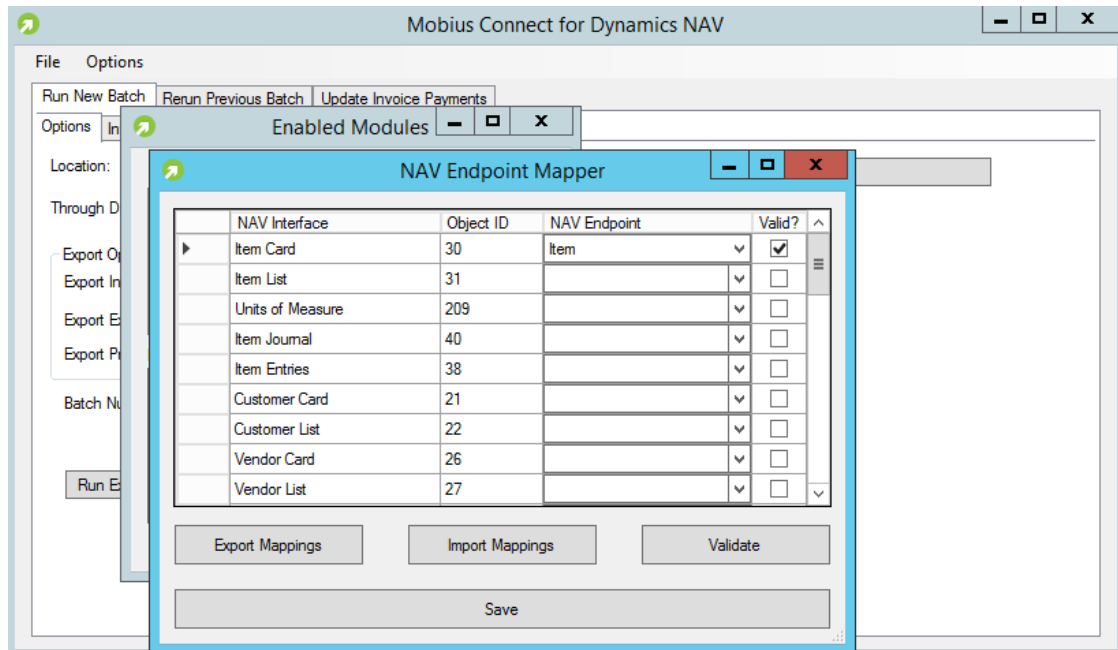
Before you can begin using the integration you must map to the user defined OData endpoints. From the integration interface, navigate to Options > View Modules to open the Enabled Modules screen. Select the Endpoint Mapping Interface and click Configure Module.



When the Endpoint Mapping Interface opens, it will attempt to validate your mappings. There are 3 possible validation responses.

1. Not all Endpoints have been mapped.
2. At least 1 endpoint failed to validate. Would you like to save a log?
3. Validation PASSED

This validation can also be run manually after the NAV Endpoint Mapper has opened by clicking the Validate button. To begin mapping to exposed NAV endpoints, click to select the NAV Endpoint for each required NAV Interface.



As you populate the NAV Endpoint mappings, validation logic will run and check off the Valid? checkbox for each row. If a row does not check the Valid? checkbox, you can use the Validate button to generate a log containing details. In this case response #2 will display providing the option to save a log. Review of this log will indicate why the validation for a particular endpoint may have failed. Generally, this occurs when a field is missing from the endpoint's Page object.

After completing the Endpoint mappings, it is recommended to use the Export Mappings button to store your defined mappings. This allows for quickly importing your mappings back into the integration using the Import Mappings button. This is useful in the event that the integration needs to be installed on a new workstation or reinstalled for any reason. We recommend storing your mappings.json export in the same location as the integration's activation license.

## Using the Application

The first time you run the application, you will be prompted for both your Dynamics NAV and Manage credentials. They will be retained on the Login screen for your convenience when you run the application the next time.

Mobius Connect for Dynamics NAV 1.0.2.7

Dynamics NAV

OData URL:

Company ID:

Credential Type:

Username:

Password:

ConnectWise

Site:

Company ID:

Auth Type:

Member:

IntegratorUser:

IntegratorPass:

☒ Save Password

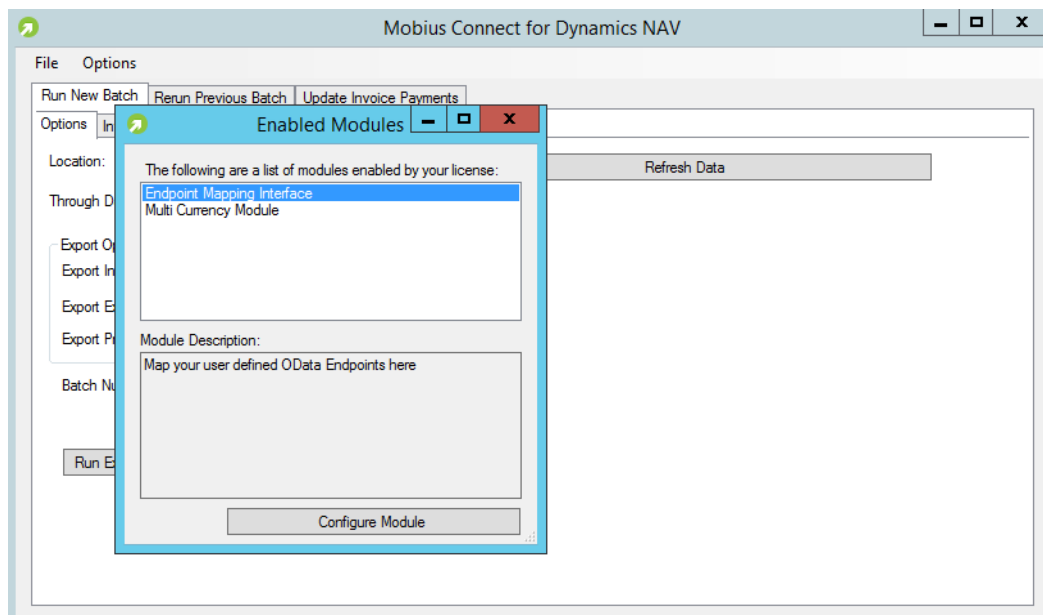
Login

1. Enter the following Dynamics NAV information in the Login screen:
  - OData URL: URL representing the root of the OData web service.
  - Company ID: This is the Dynamics NAV company database.
  - Credential Type:
  - Username & Password: This is a username and password for an account that has sufficient privileges in Dynamics NAV. If using Windows Authentication as the Credential Type, Username & Password are not required.
2. Enter the following ConnectWise Manage information in the Login screen:
  - Site: The domain name of the Manage site. For example, "connectwise.mycompany.com".
  - Company ID: Your company database ID as assigned by Manage
  - Auth Type: Select the method of Authentication setup in ConnectWise Manage Configuration
    - MemberImpersonation: If using MemberImpersonation AuthType, enter your Member, Integrator User, and Integrator Pass

- APIKey: If using APIKey AuthType, enter your Public Key and Private Key
- 3. Save Password: Check this box if you would like your Dynamics NAV and Manage passwords saved for the next time you run the application.
- 4. Click Login.

## Connecting the OData Endpoints

Before you can begin using the integration you must map to the user defined OData endpoints. From the integration interface, navigate to Options > View Modules to open the Enabled Modules screen. Select the Endpoint Mapping Interface and click Configure Module.

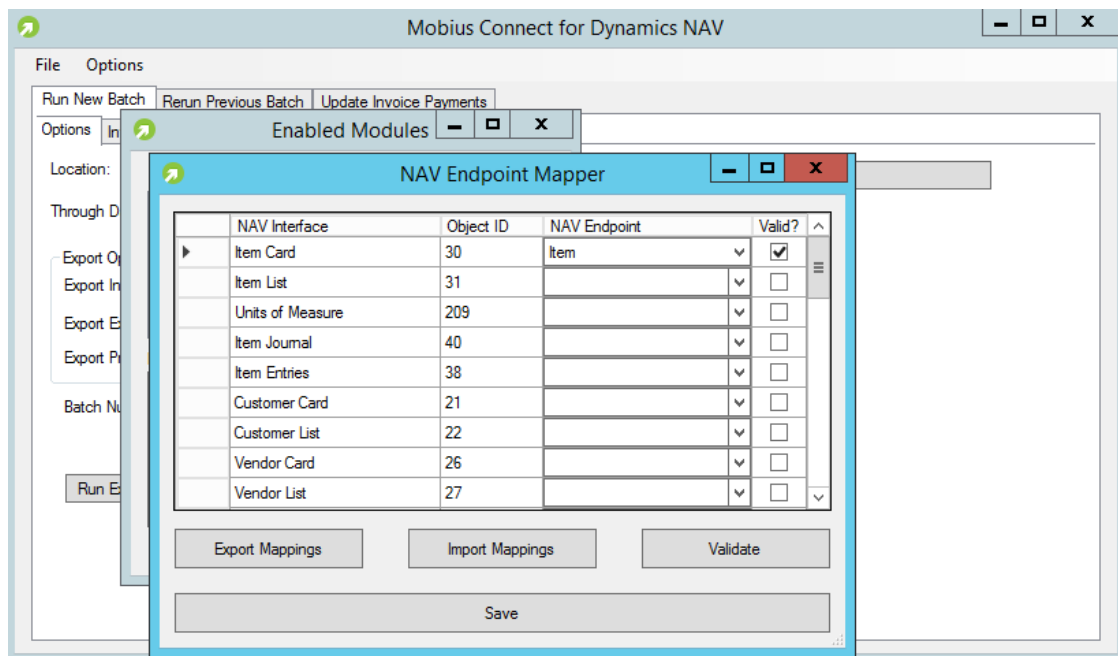


When the Endpoint Mapping Interface opens, it will attempt to validate your mappings. There are 3 possible validation responses.

1. Not all Endpoints have been mapped.

2. At least 1 endpoint failed to validate. Would you like to save a log?
3. Validation PASSED

This validation can also be run manually after the NAV Endpoint Mapper has opened by clicking the Validate button. To begin mapping to exposed NAV endpoints, click to select the NAV Endpoint for each required NAV Interface.



As you populate the NAV Endpoint mappings, validation logic will run and check off the Valid? checkbox for each row. If a row does not check the Valid? checkbox, you can use the Validate button to generate a log containing details. In this case response #2 will display providing the option to save a log. Review of this log will indicate why the validation for a particular endpoint may have failed. Generally, this occurs when a field is missing from the endpoint's Page object.

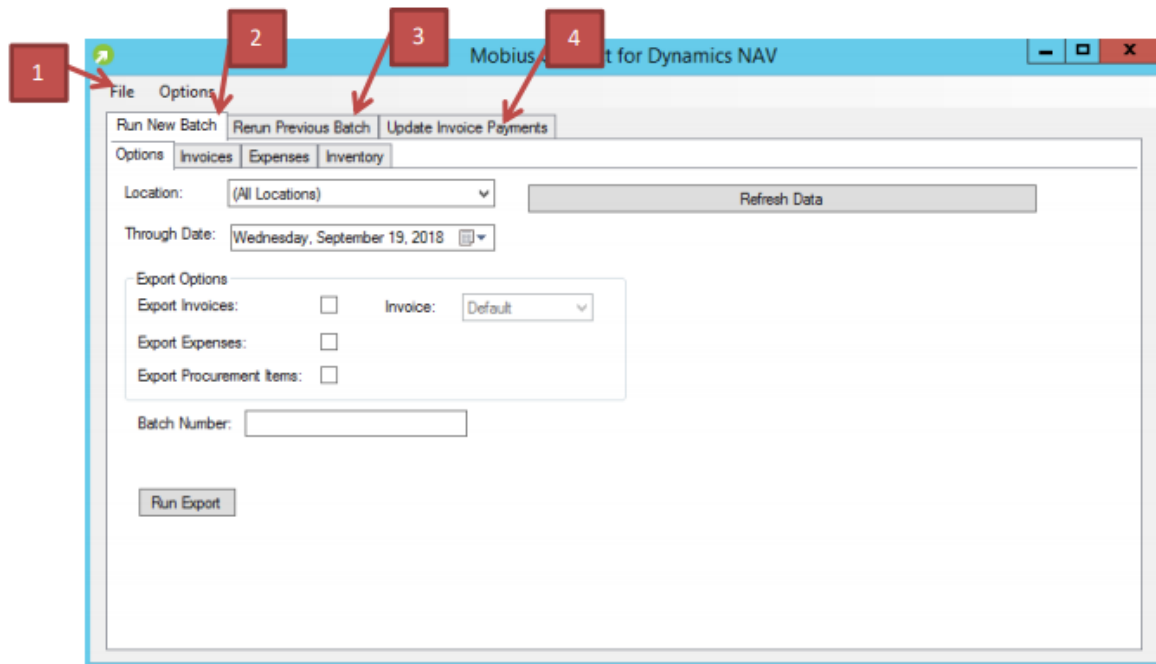
After completing the Endpoint mappings, it is recommended to use the Export Mappings button to store your defined mappings. This allows for quickly importing your mappings back into the integration using the Import Mappings button. This is useful in the event that the integration needs



to be installed on a new workstation or reinstalled for any reason. We recommend storing your mappings.json export in the same location as the integration's activation license.

## The Main Screen

The following is a guide of the various parts of the Main Screen.



1. **File Menu:** The file menu gives you the ability to exit the application, install a new license, or logout and return to the login form.
2. **Run New Batch Tab:** This tab allows you to select transactions and options needed to run a batch, which will export a list of transactions from Manage and import them into Dynamics NAV.
3. **Rerun Previous Batch:** This tab allows you to select a batch that was previously run. This is useful for running a batch that successfully imported to Dynamics NAV, but for reasons (such as a backup restore on the Dynamics NAV system), needs to be run again.

4. **Update Invoice Payments:** This will look for updated balances on Accounts Receivable invoices in Dynamics NAV and update the corresponding Manage invoice with the amount that has been paid.

## Running a New Batch

### Setting up the Batch

The following explains how to use the integration application to run a new batch. This operation will export transactions that you select from Manage and import them into Dynamics NAV. When the operation finishes, a new “Batch” is created in Manage that remembers the transactions that were part of the batch.

1. **Select Location** – If you are going to import records from a specific office location, choose the location from the dropdown box. To import records from all available locations, leave the field blank. If you have a location that is not present in the combo box, then that location does not have any transactions to export.
2. **Select Through Date** – If you wish to only select transactions that occurred up to a certain date, select that date as the “through date”. Transactions that occurred after the “Through Date” will not show as transactions that you can select for the batch.
3. **Select Export Options** – Select the various options that will control the export. These options are described below:
  - a. **Export Invoices** – Check this box to have AR Invoices exported as part of the batch. Leaving this box unchecked means that AR Invoices will not be exported as part of the batch.
  - b. **Invoice** - This dropdown allows you to select the level of detail that is shown on an invoice line. For example, the invoice line for a Service Ticket in Manage might show in its description “Ticket #1234 – Set up computer for new hire”. With “Default” selected, this invoice line will

simply say "Service." The "Condensed" option will provide brief details and the "Detailed" option will provide extensive details.

- c. **Export Expenses** – Check this box to have reimbursable exported as part of the batch.
- d. **Export Inventory** – Check this box to have inventory transactions (Item Receipts, Inventory Adjustments, and Inventory Transfers) included as part of the batch.

You may sometimes find that a transaction you expected to be listed is not because of a missed step somewhere along the way (such as an invoice never having been marked as "Closed"). After performing this step, you can press "Refresh Data" in order for that transaction to show up in the list of transactions.

Note that transactions in Manage are set up to use the accounts as they existed at the time the transaction was closed. For example, if the Manage GL Setup Table has 1100 set for Accounts Receivable account in the Manage GL Setup Table to 1200, the Invoice will STILL use the old status, save the change, then set it back to a "Closed" status, and save again. This will effectively "reset" the GL accounts against which the invoice is set.

### Selecting Specific Invoices

By clicking on the "Invoices" tab, you can explicitly control which invoices you want to include in the batch.

Mobius Connect for Dynamics NAV

File Options

Run New Batch Rerun Previous Batch Update Invoice Payments

Options Invoices Expenses Inventory

	Include	InvoiceNumber	InvoiceDate	Description	Amount	Account
	<input checked="" type="checkbox"/>	961	2/2/2018	Accounts Receivable	609.98	11000:D01:P01
	<input checked="" type="checkbox"/>	960	1/10/2018	Accounts Receivable	322.00	11000:D01:P01
	<input checked="" type="checkbox"/>	958	11/17/2017	Accounts Receivable	13.30	11000:D01:P01
	<input checked="" type="checkbox"/>	957	11/1/2017	Accounts Receivable	679.48	11000:D01:P01
	<input checked="" type="checkbox"/>	956	9/25/2017	Accounts Receivable	1,035.00	11000:1235
	<input checked="" type="checkbox"/>	954	5/25/2017	Accounts Receivable	957.38	11000:D01:P01
	<input checked="" type="checkbox"/>	953	4/17/2017	Accounts Receivable	100.00	11000:D01:P01
	<input checked="" type="checkbox"/>	951	2/15/2017	Accounts Receivable	-262.03	11000:D01:P01
	<input checked="" type="checkbox"/>	950	2/7/2017	Accounts Receivable	4,138.85	11000:D01:P01
	<input checked="" type="checkbox"/>	946	1/12/2017	Accounts Receivable	840.09	11000:ARClass
	<input checked="" type="checkbox"/>	944	12/19/2016	Accounts Receivable	115.00	11000:D01:P01
	<input checked="" type="checkbox"/>	943	12/5/2016	Accounts Receivable	562.03	11000:D01:P01
	<input checked="" type="checkbox"/>	942	11/30/2016	Accounts Receivable	16,772.50	11000:1235
	<input checked="" type="checkbox"/>	940	11/23/2016	Accounts Receivable	520.00	11000:D01:P01

Select All Deselect All

Checking the checkbox in the “Include” column will cause the transaction to be included in the batch. Conversely, unchecking the checkbox in the “Include” column will cause the transaction to NOT be included in the batch. You may also click the “Select All” or “Deselect All” buttons to check or uncheck all transactions, respectively.

### Selecting Specific Expenses

By clicking on the “Expenses” tab, you can explicitly control which reimbursable expenses you want to include in the batch.

Mobius Connect for Dynamics NAV

File Options

Run New Batch Rerun Previous Batch Update Invoice Payments

Options Invoices Expenses Inventory

	Include	Date	Description	Account	Amount	Member	Expense Type
	<input checked="" type="checkbox"/>	9/25/2017	External Expenses	70550:D01:P01	15.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	11/30/2016	External Expenses	70550:D01:P01	503.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	9/21/2016	External Expenses	70550:D01:P01	200.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	9/21/2016	External Expenses	70550:D01:P01	100.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	9/14/2016	External Expenses	50000:ExpenseCl...	50.00	vartopsa	Purchases
	<input checked="" type="checkbox"/>	9/14/2016	External Expenses	70560:D01:P01	150.00	Admin1	Hotel
	<input checked="" type="checkbox"/>	9/14/2016	External Expenses	70570:ParkingClass	15.00	Admin1	Parking & Tolls
	<input checked="" type="checkbox"/>	9/14/2016	External Expenses	70550:D01:P01	150.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	8/19/2016	External Expenses	50000:ExpenseCl...	50.00	Admin1	Purchases
	<input checked="" type="checkbox"/>	8/19/2016	External Expenses	70550:D01:P01	150.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	6/1/2016	External Expenses	70550:D01:P01	150.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	6/1/2016	External Expenses	70550:D01:P01	150.00	Admin1	Entertainment
	<input checked="" type="checkbox"/>	12/3/2015	External Expenses	50000:ExpenseCl...	25.00	Admin1	Meals
	<input checked="" type="checkbox"/>	11/30/2015	External Expenses	70550:D01:P01	20.00	Admin1	Entertainment

Select All Deselect All

Checking the checkbox in the “Include” column will cause the transaction to be included in the batch. Conversely, unchecking the checkbox in the “Include” column will cause the transaction to NOT be included in the batch. You may also click the “Select All” or “Deselect All” buttons to check or uncheck all transactions, respectively.

### Selecting Specific Inventory Transactions

By clicking on the “Inventory” tab, you can explicitly control which Item Receipts, Inventory Adjustments, and/or Inventory Transfers you want to include in the batch.

Mobius Connect for Dynamics NAV

File Options

Run New Batch Rerun Previous Batch Update Invoice Payments

Options Invoices Expenses Inventory

	Include	RecID	Description	Date	Amount	VendorInvoiceDate	VendorInvoiceNumb
	<input checked="" type="checkbox"/>	158-148-purchase	PO #148, Packin...	5/3/2018 2:38 AM	51.75	2016/04/20 12:0...	15544
	<input checked="" type="checkbox"/>	176-746-purchase	PO #746, Packin...	4/13/2018 9:59 ...	288.21		
	<input checked="" type="checkbox"/>	118-107-purchase	PO #107, Packin...	2/21/2017 11:27 ...	15.50	2014/12/05 12:0...	88949
	<input checked="" type="checkbox"/>	117-106-purchase	PO #106, Packin...	2/21/2017 11:26 ...	110.25	2014/12/03 12:0...	51841
	<input checked="" type="checkbox"/>	175-164-purchase	PO #164, Packin...	2/15/2017 12:23 ...	76.15		
	<input checked="" type="checkbox"/>	116-105-purchase	PO #105, Packin...	12/19/2016 10:2...	15.50	2014/11/30 12:0...	1251
	<input checked="" type="checkbox"/>	173-162-purchase	PO #162, Packin...	11/29/2016 12:4...	203.48		
	<input checked="" type="checkbox"/>	171-160-purchase	PO #160, Packin...	10/11/2016 12:1...	36.23		
	<input checked="" type="checkbox"/>	169-158-purchase	PO #158, Packin...	9/20/2016 10:16 ...	75.90	2016/09/20 12:0...	
	<input checked="" type="checkbox"/>	167-156-purchase	PO #156, Packin...	9/7/2016 10:44 ...	4.00	2016/09/07 12:0...	
	<input checked="" type="checkbox"/>	166-155-purchase	PO #155, Packin...	6/28/2016 12:14 ...	0.00	2016/06/28 12:0...	
	<input checked="" type="checkbox"/>	163-153-purchase	PO #153, Packin...	5/13/2016 10:22 ...	263.24	2016/05/13 12:0...	
	<input checked="" type="checkbox"/>	162-152-purchase	PO #152, Packin...	5/13/2016 10:06 ...	324.40	2016/05/12 12:0...	
	<input checked="" type="checkbox"/>	161-151-purchase	PO #151, Packin...	5/4/2016 9:40 AM	0.00	2016/05/04 12:0...	

Select All Deselect All

Checking the checkbox in the “Include” column will cause the transaction to be included in the batch. Conversely, unchecking the checkbox in the “Include” column will cause the transaction to NOT be included in the batch. You may also click the “Select All” or “Deselect All” buttons to check or uncheck all transactions, respectively.

## Select a Batch ID

Once you select the transactions that you want to export in the batch, you must pick a Batch Number.

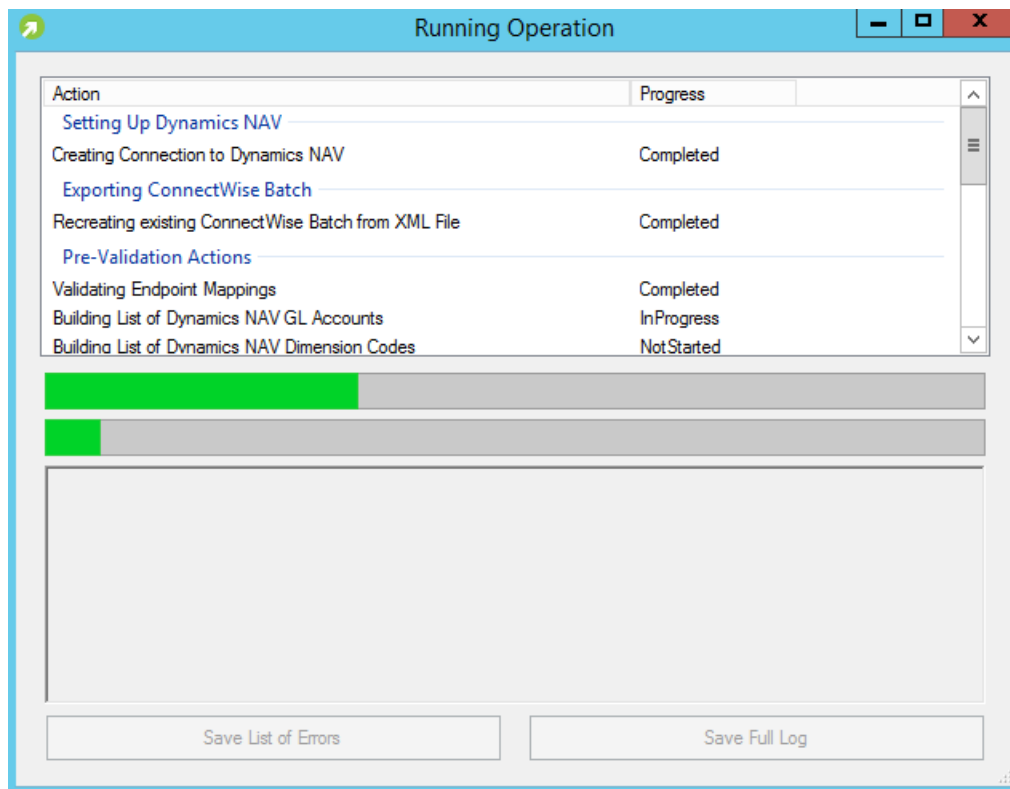
Manage recommends that you use a separate batch for Invoice, Expense, and Inventory transactions. In order to ensure that your batch numbers stay unique and easy to understand, a naming convention is also recommended. A common naming convention might be the date, initials of the person running the batch, and the type of batch being run. For example, if John Doe were to run three batches on January 1<sup>st</sup> of 2013, he might run the integration three times with the following batch numbers:

- 20130101JD-I (Used for all invoice transactions)
- 20130101JD-E (Used for all reimbursable expense transactions)
- 20130101JD-P (Used for all inventory transactions. "P" stands for "Procurement")

Determine which Batch Number you wish to use and type it into the "Batch Number" field.

## Run the Batch

Click "Run Export". This will start the export process.



Once started, a screen will appear that provides the status of the export process. When the export process completes, you will have a description of the results in the lower part of the screen. At this point, you can save a log of the results:

- Click “Save List of Errors” to create a file that contains the list of errors that occurred. You might have to fix issues with various transactions and then rerun. Having this list of errors is helpful for listing those errors.
- Click “Save Full Log” to create a file that contains much more information on the errors and the cause of those errors. This log is useful if you have a question on a specific error message and would like to send it to a Mobius Works support technician, as it provides us a great deal of information that helps us discover what happened.

When the export finishes, you will be left in one of three states. You should read the text in the output screen to determine the results of your batch. In general, you will experience one of three results:

### **1. The batch failed**

In this case, an error occurred before any transactions started to be imported into Dynamics NAV. These errors might be as simple as not being able to connect to either Manage or Dynamics NAV.

Additionally, this integration performs a number of validation checks before starting to push transactions to Dynamics NAV. An example validation is to check to make sure that a Vendor has been mapped successfully and the Vendor ID it was mapped to exists in the Dynamics NAV system. If any such validations fail, the batch will fail entirely.

You should fix whatever the error messages indicate and try to run the batch again. Because no transactions were exported, just as if you had never run the batch.

### **2. The batch completed successfully**

In this case, the batch was run successfully. All selected transactions were exported to Dynamics NAV and no errors occurred. Additionally, Manage was updated with the information of all the transactions, creating a new “Batch” with the Batch ID provided that stores the list of transactions that were selected. These transactions will no longer show in



the integration screen since they are considered to have been transferred to Dynamics NAV.

### **3. The batch completed, but some transactions contained errors**

In this case, all the validation passed, and at least one transaction was successfully imported into Dynamics NAV. However, there were some transactions that failed. In this case, a batch is still created with the transactions that did successfully transfer. Since a batch was created for the successful transactions, another batch will need to be created once the unsuccessful transactions are corrected based on the suggestion(s) in the error message.

For example, assume that John Doe ran batch “20130101JD-I”, which pushed 25 successful invoices to Dynamics NAV, but failed on three invoices. John should correct the issues described by the error messages, and then create another batch for these last three. This new batch number could be called “20130101JD-I-1”

## **Validating a Batch**

Although the integration program itself performs a number of validations (such as checking to make sure that an account specified on a transaction is an account in Dynamics NAV), it is a good idea to check some of the data to ensure that things have worked reliably.

### **Invoices**

To verify invoices in Dynamics NAV, navigate to Home > Sales Invoices:

Sales Invoices - Microsoft Dynamics NAV

CRONUS USA, Inc. > Home > Sales Invoices

HOME ACTIONS NAVIGATE

New Edit View Delete Release Reopen Post Post and Send... Post Batch... Statistics Comments Dimensions Show as List Show as Chart Notes Links Refresh Clear Filter

Role Center

- Sales Orders
- Dynamics CRM Sales Orders
- Sales Quotes
- Blanket Sales Orders
- Sales Invoices**
- Sales Return Orders
- Sales Credit Memos
- Items
- Customers
- Item Journals
- Sales Journals
- Cash Receipt Journals

Home

Posted Documents

Departments

Sales Invoices

Type to filter (F3) No.

Limit totals: ",.0"

No.	▲	Sell-to Custom...	Sell-to Customer Name	External Docume...	Location Code	Assigned User ID
1002		GTCXREF	Gold Test Company			
611		GTCXREF	Gold Test Company			
612		GTCXREF	Gold Test Company			
613		GTCXREF	Gold Test Company			
614		GTCXREF	Gold Test Company			
615		GTCXREF	Gold Test Company			
616		GTCXREF	Gold Test Company			
617		GTCXREF	Gold Test Company			
618		GTCXREF	Gold Test Company			
619		GTCXREF	Gold Test Company			
620		GTCXREF	Gold Test Company			
621		GTCXREF	Gold Test Company			
622		GTCXREF	Gold Test Company			
623		GTCXREF	Gold Test Company			

CRONUS USA, Inc. Thursday, January 26, 2017 VAGRANT-2012-R2\VAGRANT

## Expenses

### With Transfer as Bill Enabled

To verify expenses in Dynamics NAV, navigate to Home > Sales Credit Memos > Purchase Invoices:

Purchase Invoices - Microsoft Dynamics NAV

CRONUS USA, Inc. ▶ Home ▶ Purchase Invoices

HOME ACTIONS NAVIGATE

New Edit View Delete Release Reopen Post Post and Print Post Batch... Statistics Dimensions Comments Microsoft Excel Send To

Role Center

- ▶ Sales Orders
  - Dynamics CRM Sales Orders
- ▶ Sales Quotes
  - Blanket Sales Orders
  - Sales Invoices
- ▶ Sales Return Orders
- ▶ Sales Credit Memos
  - Items
  - Customers
  - Item Journals
  - Sales Journals
  - Cash Receipt Journals
  - Purchase Invoices**

Home Posted Documents Departments

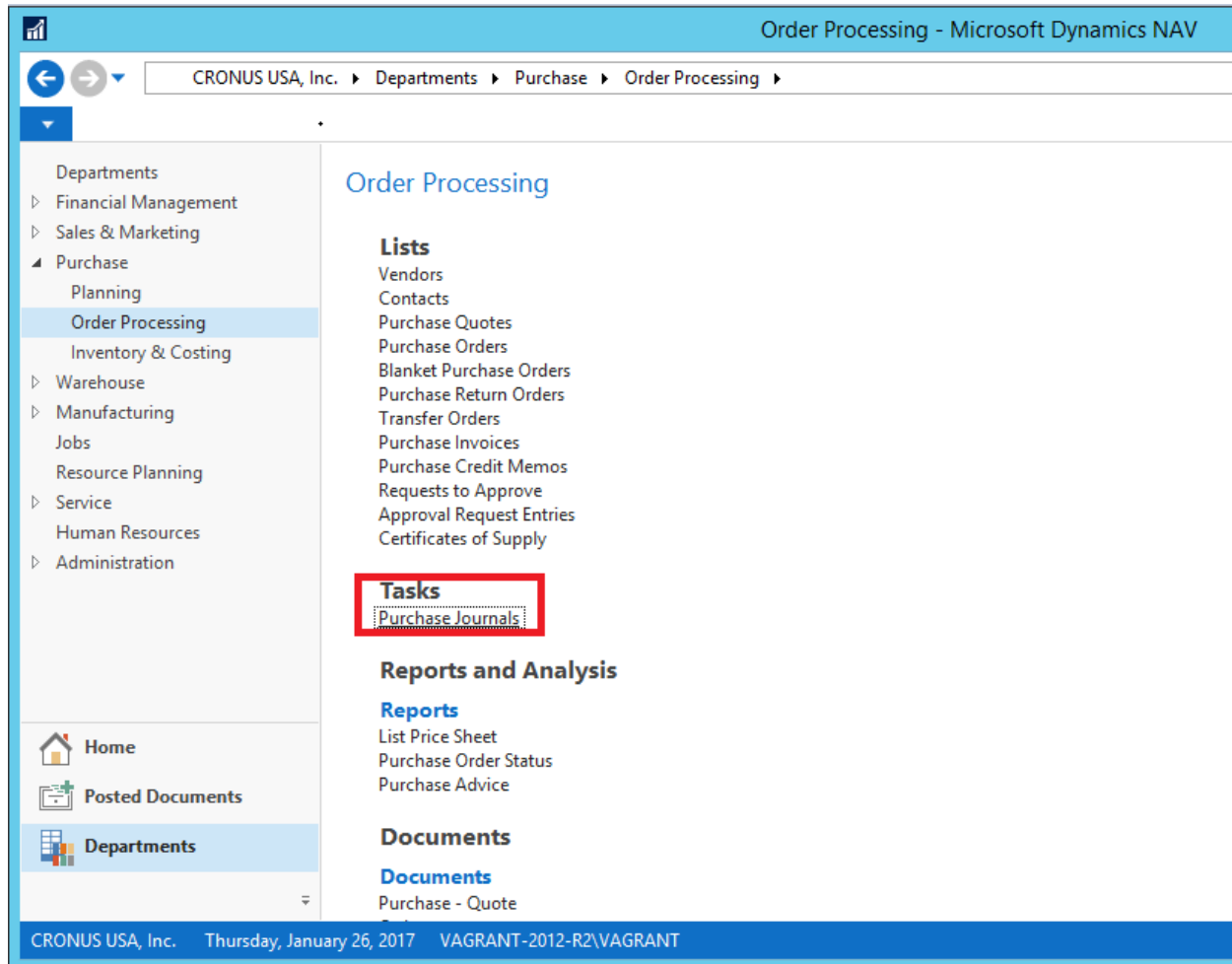
Purchase Invoices ▼

No.	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authoriza...	Location Code	Ass Use
134	GTVXREF	Gold Test Vendor			
1340-134	GTVXREF	Gold Test Vendor			
1341-134	GTVXREF	Gold Test Vendor			
1342-134	GTVXREF	Gold Test Vendor			
1343-134	GTVXREF	Gold Test Vendor			
1344-134	GTVXREF	Gold Test Vendor			
1345-134	GTVXREF	Gold Test Vendor			
1346-134	GTVXREF	Gold Test Vendor			
1347-134	GTVXREF	Gold Test Vendor			
1348-134	GTVXREF	Gold Test Vendor			
1349-134	GTVXREF	Gold Test Vendor			
1350-134	GTVXREF	Gold Test Vendor			
1351-134	GTVXREF	Gold Test Vendor			
1352-134	GTVXREF	Gold Test Vendor			

CRONUS USA, Inc. Thursday, January 26, 2017 VAGRANT-2012-R2\VAGRANT

### With Transfer as Bill Disabled

To verify expenses not created as an AP Invoice in Dynamics NAV, navigate to Departments > Order Processing > Tasks:



## Inventory

To verify inventory in Dynamics NAV, navigate to Home > Sales Credit Memos > Items:

CRONUS USA, Inc. ▶ Home ▶ Items

HOME ACTIONS NAVIGATE REPORT REPORT - INVENTORY REPORT - SALES REPORT - PURCHASES REPORT - FINANCE & C REPORT - MANUFACTU

New

Manage

Inventory

Sales

Purchases

History

Report

Send To

Item Availability by

Item Journal

Statistics

Sales Prices

Orders

Returns Orders

Prices

Vendors

Requisition Worksheet

Orders

Return Orders

Entries

Comments

Inventory Availability

Price List

Inventory Cost and Price List

Microsoft Excel

Role Center

Sales Orders

Dynamics CRM Sales Orders

Sales Quotes

Blanket Sales Orders

Sales Invoices

Sales Return Orders

Sales Credit Memos

Pending Approval

Approved

Sales Credit Memos - Open

Items

Customers

Item Journals

Home

Posted Documents

Departments

Items

Type to filter (F3)

No.

No filters applied

No.	Description	As... BO...	Base Unit of Measure	Cost is ...	Unit Cost	Unit Price	Vendor No.	Search Description	Bloc...	Pre Gr
1000	Bicycle	No	PCS	<input type="checkbox"/>	350.595	4,000.00		BICYCLE	<input type="checkbox"/>	
1001	Touring Bicycle	No	PCS	<input checked="" type="checkbox"/>	350.595	4,000.00		TOURING ...	<input type="checkbox"/>	
1100	Front Wheel	No	PCS	<input type="checkbox"/>	129.671	1,000.00	20000	FRONT W...	<input type="checkbox"/>	
1110	Rim	No	PCS	<input checked="" type="checkbox"/>	1.05	0.00	01587796	RIM	<input type="checkbox"/>	
1120	Spokes	No	PCS	<input checked="" type="checkbox"/>	2.00	0.00	01587796	SPOKES	<input type="checkbox"/>	
1150	Front Hub	No	PCS	<input checked="" type="checkbox"/>	12.441	500.00		FRONT HUB	<input type="checkbox"/>	
1151	Axle Front Wheel	No	PCS	<input checked="" type="checkbox"/>	0.45	0.00	32456123	AXLE FRO...	<input type="checkbox"/>	
1155	Socket Front	No	PCS	<input checked="" type="checkbox"/>	0.77	0.00	32456123	SOCKET F...	<input type="checkbox"/>	
1160	Tire	No	PCS	<input checked="" type="checkbox"/>	1.23	0.00	01587796	TIRE	<input type="checkbox"/>	
1170	Tube	No	PCS	<input checked="" type="checkbox"/>	1.75	0.00	01587796	TUBE	<input type="checkbox"/>	
1200	Back Wheel	No	PCS	<input type="checkbox"/>	129.682	1,200.00		BACK WH...	<input type="checkbox"/>	
1250	Back Hub	No	PCS	<input checked="" type="checkbox"/>	12.452	1,100.00		BACK HUB	<input type="checkbox"/>	
1251	Axle Back Wheel	No	PCS	<input checked="" type="checkbox"/>	0.33	0.00	01587796	AXLE BAC...	<input type="checkbox"/>	

CRONUS USA, Inc.

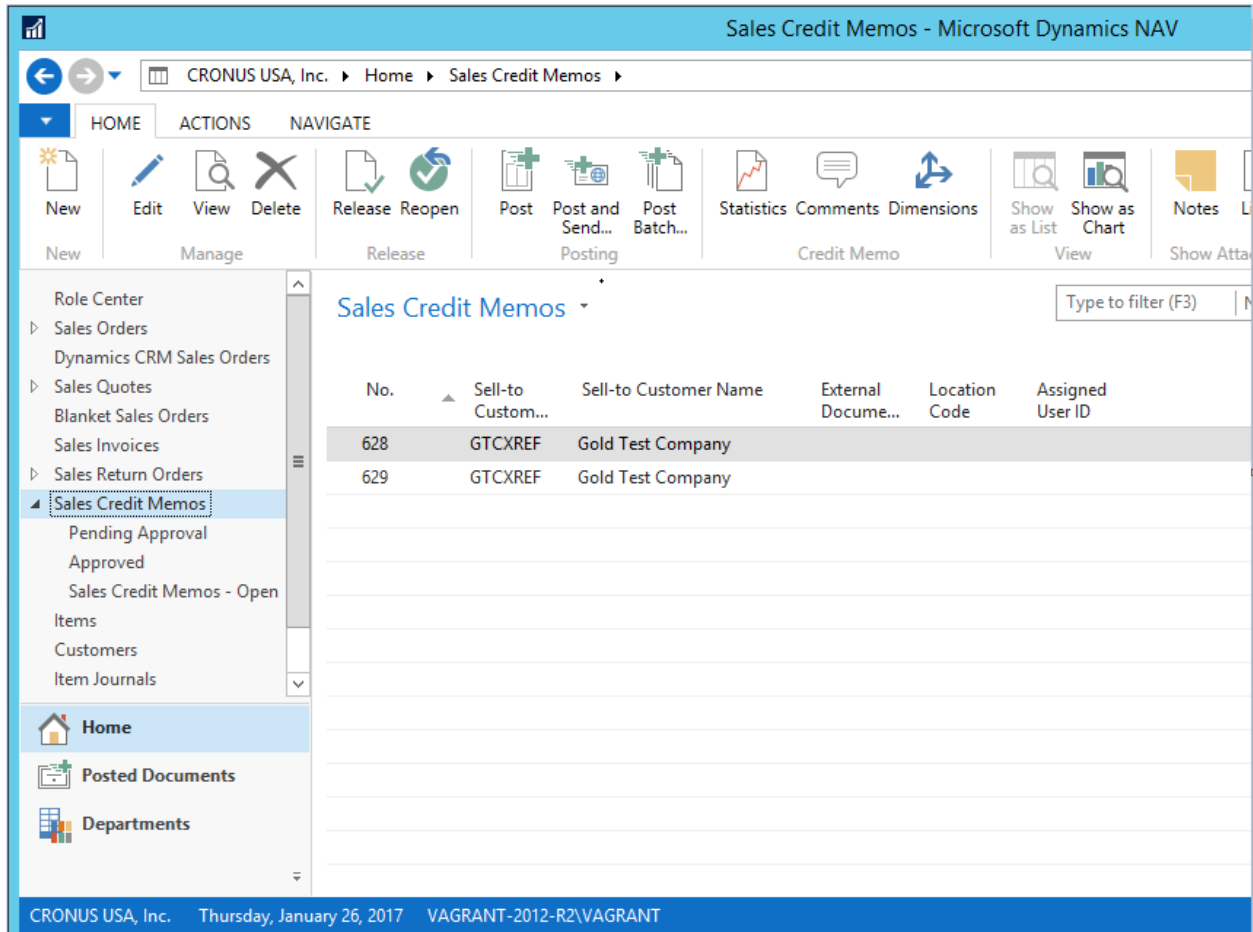
Thursday, January 26, 2017

VAGRANT-2012-R2\VAGRANT

## Inventory Adjustments & Transfers

To verify inventory adjustments and transfers in Dynamics NAV, navigate to Home > Sales Credit Memos > Item Journals:

To verify credit memos in Dynamics NAV, navigate to Home >Sales Credit Memos:



## Rerunning an Existing Batch

There might be a rare case where you have previously run a batch, and you wish to run that batch against your Dynamics NAV software again. For example, you might have run a batch successfully, only to have the Dynamics NAV software require to be restored from a backup, thus losing all of the changes. In this case, you'd want to rerun the batch.

One way to do this would be to use the Accounting Interface screen in Manage to delete the batch, but this means that you would have to carefully select the transactions again, which could be error-prone.

Another possibility is to click the "Rerun Existing Batch" tab in the integration program. In this tab, you would type in the Batch ID, then click "Run" rerun the batch. The batch is then rerun against the Dynamics NAV database.

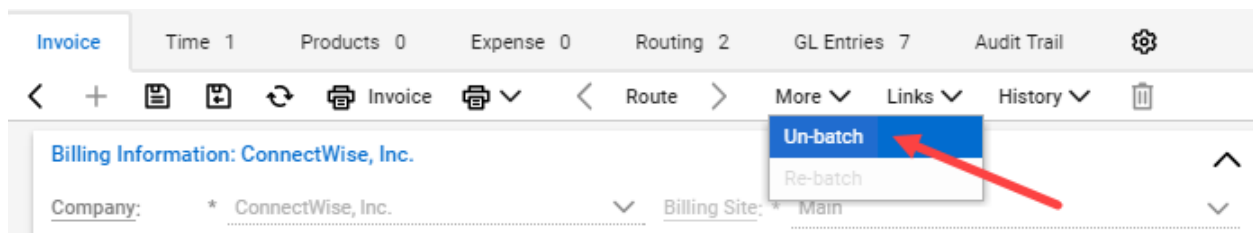
**WARNING:** While this can be useful, this feature can be used to duplicate transactions in the Dynamics NAV system. This could occur if the transactions created in the Dynamics NAV system, as a result of the first run of the batch, still exist in the Dynamics NAV system when the batch is rerun!

**Use caution when rerunning batches!**

## Un-posting Transactions

### Invoices

If you feel you've made an error on a particular invoice, you have the ability to un-batch it individually. Go to the Invoice and click on "More" > "Un-batch".

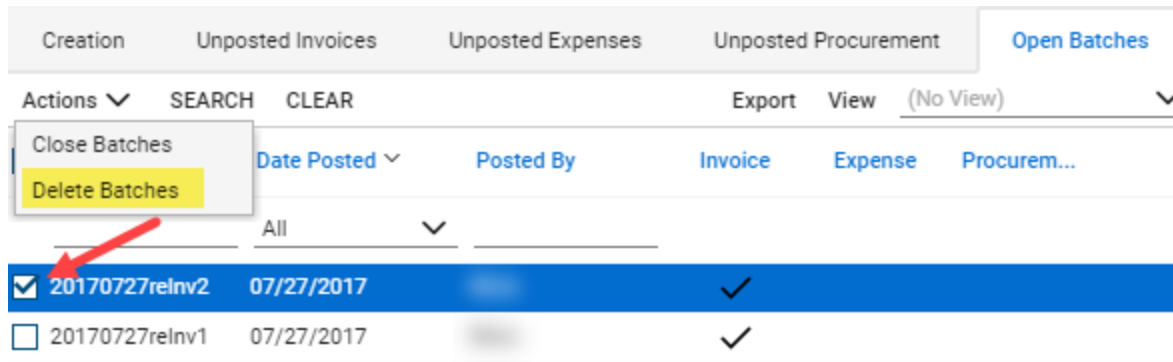


Click OK to the verification message. The invoice will then be un-batched and will return to the unposted Invoices list in the integration, ready to be exported. Please note that this did not delete the invoice from your accounting package. You will need to do that manually.

### Batches

If you feel you have made an error and need to restore some of the transactions that have been previously batched from the "Unposted" tabs, you can delete the batch in Manage at Finance > Accounting Interface > Open Batches. Click the checkmark next to the batch, then click "Actions" > "Delete Batches".





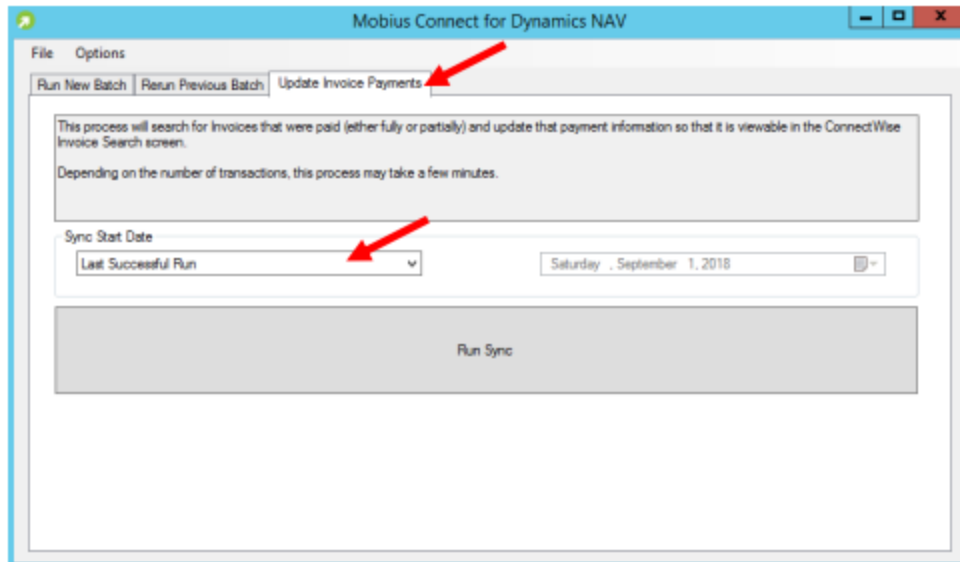
Click OK to the verification message. The batch will then be deleted, and the transactions are again listed on the "Unposted" tabs, ready to be exported. Please note that this did not delete the transactions from your accounting package. You will need to do that manually.

If you choose Close instead of Delete, then the transactions will stay posted and you will no longer be able to see the batch, in this case, you will need to contact your ConnectWise Consultant at [Consulting@ConnectWise.com](mailto:Consulting@ConnectWise.com) to restore it for you if you ever need it again. As a result, it is recommended to never Close a Batch in Manage.

## Synchronizing Invoice Payments

Your typical workflow will include creating invoices in Manage, and exporting those invoices to Dynamics NAV. However, when you receive payments from customers, you will use Dynamics NAV to record that the payment was received. Since it is useful to be able to look at an invoice in Manage and know if that invoice has been paid without needing to access Dynamics NAV, the integration program allows you to synchronize payment updates so that Manage shows you what payments have been made to invoices. Use the following steps to accomplish this:

1. At the integration main form, click on the "Update Invoice Payments" tab.



2. Select the “Start Date”. You will have the following options for a Start Date:

- **Last Successful Run:** Will synchronize all invoices that were updated with new payment info in Dynamics NAV since the last time the current user ran a synchronization on the current computer.
- **Past Week:** Will synchronize all invoices that were updated with new payment info in Dynamics NAV in the past 7 days.
- **Past Two Weeks:** Will synchronize all invoices that were updated with new payment info in Dynamics NAV in the past 14 days.
- **Past Month:** Will synchronize all invoices that were updated with new payment info in Dynamics NAV since the current day in the past month (e.g., if today is the 10<sup>th</sup> of April, all invoices updated on March 10<sup>th</sup> and later will be synced).
- **Custom Date:** Will synchronize all invoices that were updated with new payment info in Dynamics NAV since a date of your choosing up until today.

3. Click “Run Sync”.

All invoices that were updated on or after the Start Date will have their payment info updated in Manage. This info includes the total amount that has been paid, and the date that the invoice was paid in full. You can view these results in Manage "Invoice Search" screen, by accessing Finance -> Invoice Search. Each invoice will have a "Paid Amount" and "Date Paid" field. Note that the "Date Paid" field will only be filled with a date if the invoice was paid in full.

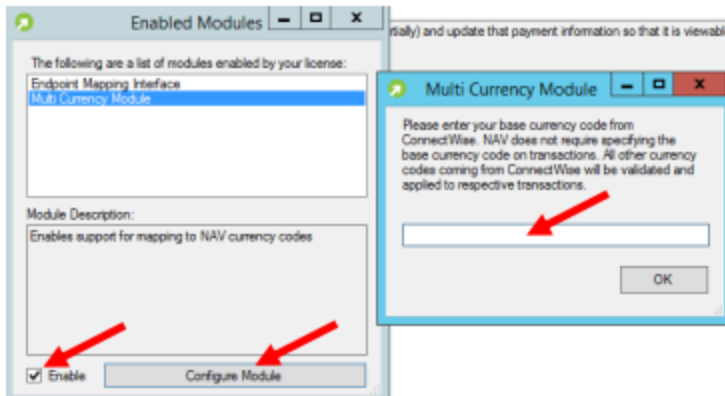
**Unlike transactions, it is perfectly valid to update an invoice even after it has been updated. If an invoice has a \$50 payment received on March 1, 2020, and you run the invoice synchronization more than once over that day, the second time will just leave the paid amount in Manage at \$50, and no harm will be done. Therefore, if you are unsure of the last date that a synchronization was run, it is better to pick a date far in the past.**

Note: At this time the integration has no way to distinguish invoices from Manage generated by the integration and invoices created manually in Dynamics NAV that do not correspond to an invoice in Manage. It is possible during payment sync that the integration will find payments made against invoices that do not exist in Manage. If this happens, you will receive errors stating an invoice(s) could not be found in Manage. While this may be disconcerting, the payment sync action will continue to run and update invoices that do exist in Manage.

## Modules

### Multi-Currency Module

If you would like to support multi-currency, navigate to Options > View Modules and select the Multi Currency Module. Check the "Enable" box if you would like to support multi-currency. Conversely, uncheck this box to disable multi-currency support. If enabled, a "Configure Module" button will appear to set your base currency.



## Customer Support

If you have any questions, please feel free to contact our consulting team at [Help@ConnectWise.com](mailto:Help@ConnectWise.com) or [www.ConnectWise.com/chat](http://www.ConnectWise.com/chat).

## Contact Us

For more information about any of our products or services, please feel free to contact your Account Manager at [AccountManager@ConnectWise.com](mailto:AccountManager@ConnectWise.com).

Don't have an Account Manager yet? No problem! Please feel free to contact us at <http://www.connectwise.com/contact-us>.

**Please note that these requests go directly to ConnectWise as part of your support agreement with them; these requests do not go to Gozynta.**

