CreditSolution2Dynamics

User manual

Version 1.0.0.0

Status 09/2023

Table of contents

Introduction

CreditSolution2Dynamics is an interface management for the ERP system Microsoft Dynamics BC.

Available application languages

CreditSolution2Dynamics is available in German and English. The selection works via the language selection of the Dynamics client.

Integration in the NAV BC- Standard

CreditSolution2Dynamics extends the Dynamics standard with additional fields and ActionItems in three lists and three card. Furthermore, the department menu has been extended by the *CreditSolution2Dynamics* section.

Standard page extensions (list + card)

- The following lists and cards are extended:
  - Customer list and card
  - Vendor list and card
  - Contact list and card
  - Sales order list and card
  - Sales quote list and card
- Extensions for contact, customer and vendor are analogous.
- Extensions for sales orders and sales offers are analogous.

Columns CreditSolution2Dynamics

CreditSolution2Dynamics extends the above lists by six columns. This is a subset of the fields from the *CreditSolution2Dynamics* tab, which will be discussed in the following chapter.

Tab CreditSolution2Dynamics

CreditSolution2Dynamics adds a tab to the above cards.

General:

Business partner no.	Internal identification number of the company. Pulled from the set up number series (-> see set up)
Active order	Shows the last, still active or not yet delivered, order. A click on [...] opens the ordered information.

Links :

Contact	Displays the contact no. of the linked contact, if it exists. A click on [...] opens the corresponding contact card.
Customer	Displays the customer no. of the linked customer, if it exists. A click on [...] opens the corresponding customer card.
Vendor	Displays the vendor no. of the linked vendor, if it exists. A click on [...] opens the corresponding vendor card.

Last information:

Status	Shows whether there is already information in the system for this company.
Information no.	Displays the information no. of the last delivered information . A click on [...] opens the corresponding information card.
Service	Indicates from which service the last information originated.
Provider	Indicates which provider delivered the last Skyminder information.
Product	Indicates what type of information the last report was.
Created	Indicates when the information was ordered.
Normalized valuation	Shows the creditworthiness index of the last report normalized by CRIF (1 to 5, integer). The best score is a 1.
Evaluation	Displays the creditworthiness index assigned by the **provider in** the last report (for German companies, according to school grades from 1.0 to 6.0)

ActionItems CreditSolution2Dynamics

Start Skyminder request	Starts a Skyminder query. If no assignment has been made yet, a search is started beforehand
Information	Opens a list of ready information about this company.
Todos	Opens a list of the unclosed ToDo's of this company.

Factboxes CreditSolution2Dynamics

CreditSolution2Dynamics adds a factbox with seven fields to the above sales order and sales quote list and card.

Setup

This section describes a standard setup of *CreditSolution2Dynamics.*

The prerequisite for setting up and later using the interface is that you have already been provided with access data by CRIF.

In addition, the setup requires a user who can access the BC task queue.

General facility

The general setup of CreditSolution2Dynamics is divided into sections corresponding to the tabs of the setupcard.

The setupcard can only be opened by users with the CreditSolution Admin permission set, because the setup is not user specific but global for the client.

Rider number series

Four number series are required for CreditSolution2Dynamics. These number series can either be entered in the fields of the respective series or be created automatically by the ActionItem in the menu ribbon. The ActionItem creates the number series one after the other and asks for each series if it should be inserted.

Search function tab

The "Max. number of search results" field can be used to specify the maximum number of search results that can be displayed for a search. The less relevant search results will not be displayed. If no number is specified, the limit for search results is set to 100 for technical reasons.

Rider traffic light

The CreditSolution2Dynamics traffic light setup is divided into two fields. These fields determine the threshold of the traffic light, i.e. when it turns from green to yellow and from yellow to red. These thresholds are applied to the "Normalized Rating" of an information and are by default 2.40 for "traffic light green/yellow" and 4.50 for "traffic light yellow/red" - but this can be changed at will.
As a rule, the traffic light accesses the normalized rating of a piece of information - for German companies, the provider rating is used.

Rider Services

Here the services supported by CreditSolution2Dynamics are selected. Here the checkbox for CreditSolution must be marked.

CreditSolution Options tab

This tab is only available when CreditSolution is enabled as a service.
For the CreditSolution service, a default setting can be made here, if the b.One layout should be delivered as PDF instead of the CreditSolution layout for German business partners. This setting determines whether the checkbox "Local PDF instead of CreditSolution PDF" is prefilled for an information request or not.

Active CreditSolution Todo tab

In the tab "Active CreditSolution Todo" it can be configured if system message todo should be created. The types of system message todo are given by CRIF and are implemented by CreditSolution2Dynamics in Dynamics.

Tab Cleanup

The "Cleanup" tab ensures that obsolete PDFs, JSONs and HTMLs are deleted. For this purpose, you can set how old the data may become before it is deleted. For this purpose, the fields are filled with a number , which represents the maximum number of days.
For PDFs and HTMLs, the cleanup type can also be selected. This determines whether, instead of deleting the PDFs or HTMLs after a period of time , all PDFs or HTMLs except the current one for a business partner should be deleted.

Rider version
The "Version" tab displays information about the version of CreditSolution2Dynamics.

Menu buttons
- "Create number series" automatically creates number series and assigns them (-> Number series tab)
- "User" opens the user setup card of CreditSolution2Dynamics (-> User Setup).
- "Countries/Regions" opens the country list (-> Countries/Regions)
- "Currency Mapping" opens the currency mapping list
- "Text Templates" opens the todo text template list (-> Text Templates)

User setup
In the user setup, all users who are to be allowed to start queries or process todos are created. For this purpose the users are entered in the list and if they are to make requests they are provided with password and login of the service.

Create CreditSolution2Dynamics user
To create a user, the user setup list must be opened. This can be done from the setup card or from the "CreditSolution" section.
A new user is created in the list by pressing the "New" action item. Then the desired Dynamics user must be selected in the user ID and confirmed with "OK". Then the access of the desired service must be entered in the list entry.
Each Dynamics user that is to be entered in a "CreditSolution" todo must be entered here. Each Dynamics user that is to make additional requests , must be entered here with service user and service password. From the user setup list, the connection to the service can be tested via the ActionItems "Test CreditSolution Connection".

Countries/ Regions
The "Countries/Regions" list is the list of countries that "CreditSolution2Dynamics" uses.
It also provides a link between standardized country codes and the BC country list.
This list is necessary because a country must be provided to CRIF in the form of a standardized country code when a request is made.
The country identifiers in the BC standard are unsuitable for this purpose, since the BC country identifiers can be freely defined and thus no unique identification of the countries is possible outside the BC system.
In the column "BC country code" an assignment of the BC country code to the standardized country codes can be made. This can be entered in the corresponding cell or selected from a list using the down arrow.
This connection is not necessary and is only used to pre-fill the country field in the search query card (-> Starting a search query).
The other columns are used to describe the country by name, description and three standardized abbreviations .

Country list import

When opening the list for the first time, the country list must be loaded into the BC system via the "Download country list" ActionItem.
Alternatively, the country list can also be imported, but for this the list must be available as a document.

Currency mapping

In the currency mapping list, the currencies supplied by CRIF are mapped to the currencies present in the Microsoft Dynamics 365 Business Central system.

Create currency mapping list

To create the list, the "Download List" ActionItem must be pressed. This will fill the list with all ISO currencies. After that you can assign the system currencies manually or partially automatically. This automatic assignment is done by the ActionItem "Currency Mapping". This ActionItem automatically assigns the currencies with the same currency codes to the ISO currencies. This assignment can be completed or changed manually.

Text templates

The text template list can be opened from the department or from the setup card.
In the text templates list dynamic text templates for todo comments (-> Todo - System) can be created.
These templates consist of a keyword (template) and a text.
These templates are used to create a comment from a keyword in a todo comment.
In this way, a comment does not always have to be rewritten, but only a keyword has to be entered. For example, the entry "insolvent" could be assigned to the comment "The company has filed for insolvency".

Setting up text templates is not absolutely necessary and only serves to shorten the time needed to enter routine texts in Todo.
The creation, deletion and editing of the templates can only be done by a user with CreditSolution Admin rights, a user with CreditSolution User rights can only view this list.

Initial setup procedure

The following is an example outline of the initial setup procedure along with suggested values.

- Select desired company
- Open the setup card
    - Press on the action item "Edit", if you are not in edit mode
    - Press the ActionItem "Create number series" and follow the displayed instructions
    - In the "Services" tab, check the box next to CreditSolution.
    - Check the version once, whether "All is well" is displayed in the Status field
    - Close the setup card
- Open the user setup list by clicking on "CreditSolution2Dynamics user setup".
    - Press the "New" action item
    - Press on User ID field
    - Select the desired user from the list
    - Enter CreditSolution user and CreditSolution password in the user line
    - Press the "Test CreditSolution Connection" button once during initial setup. In case of problems with the login, a list of common errors is available. (-> Common errors)
    - Close the user facility
- Open countries/regions list by pressing "Countries/Regions
    - Press the "Import country list" action item during initial setup.
    - For frequently used countries for queries, enter the BC country identifier in the list
    - Close countries/regions list
- Open the currency assignment list by pressing "Currency Assignment
    - Press the "Download currency list" action item during initial setup.
    - For frequently used currencies, enter the BC currency code in the list
    - Close currency assignment list

This completes the exemplary initial setup.

Periodic activities

Periodic activities is a BC report that automatically fetches new reports provided by CreditSolution. To avoid triggering the report manually, it is recommended to include the report in the task queue.

Include in the task queue

Queueing is done in the setup card via the "CreditSolution Job Queue" slider.
As soon as the slider is activated, the "periodic activities" report is automatically executed in periodic intervals.

Help in case of support

For problems or errors with the BC interface that require assistance in resolving, contact support@mse365.de .

For problems with the reports and its content as well as conditions and contract details, please contact the CRIF contact person.

In any case, please note the following things in the email:
The support request should

- Describe your problem in detail or how the error occurred (preferably with a screenshot).
- describe what happened before the error is triggered
- in case of errors with a report provide the CreditSolution document ID, the identification number and the name of the company

In this way, the support request can be processed as quickly as possible and thus help can be provided as early as possible.

Common mistakes

Problem	Possible solutions
CreditSolution2Dynamics does not work	• Please check the installation in the Version tab in the CreditSolution2Dynamics setup (-> Version tab).
The connection test for the CreditSolution Connection failed	• Verify username and password • Make sure that the firewall does not block the connection.
A user cannot start CreditSolution requests	• Make sure that the user is also created in the user setup with user name and password (-> User setup).