KwixApp

SUBSCRIPTION MANAGEMENT

FOR D365 BUSINESS CENTRAL

Help Documentation

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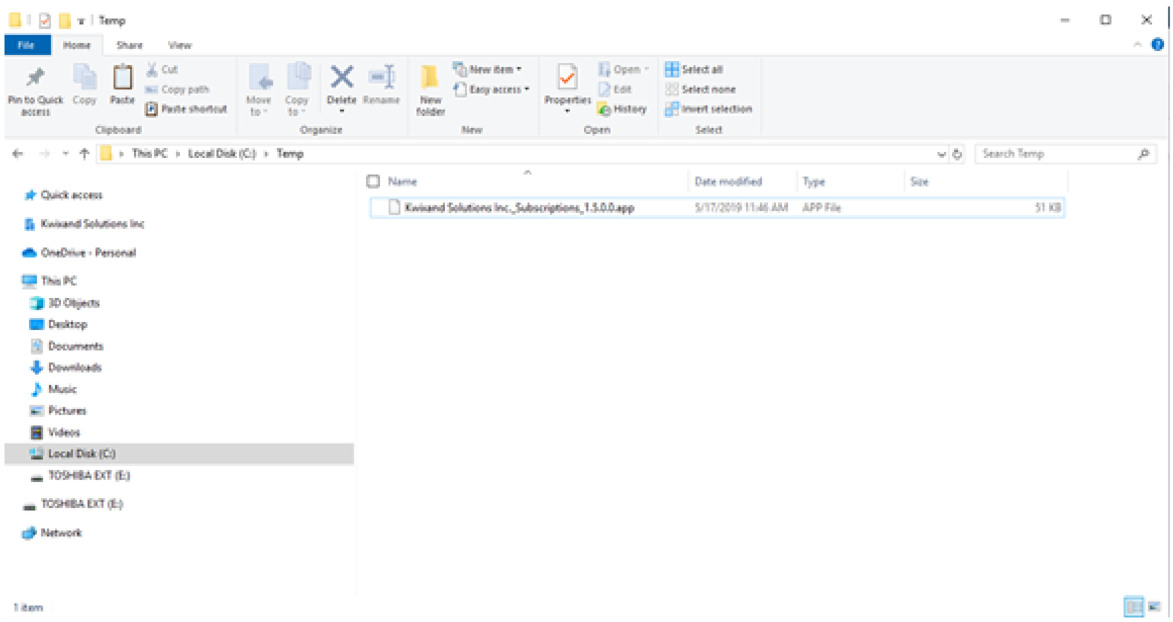
Kwixand
Solutions

Setup

Install the Extension

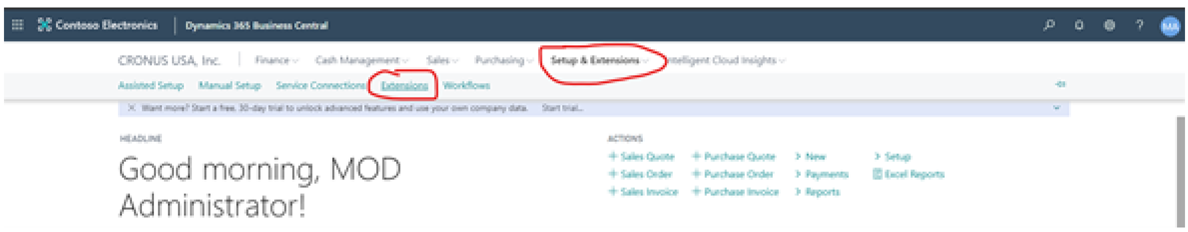
**Note: it is recommended to install the extension on your sandbox environment for testing before deploying to your production environment.

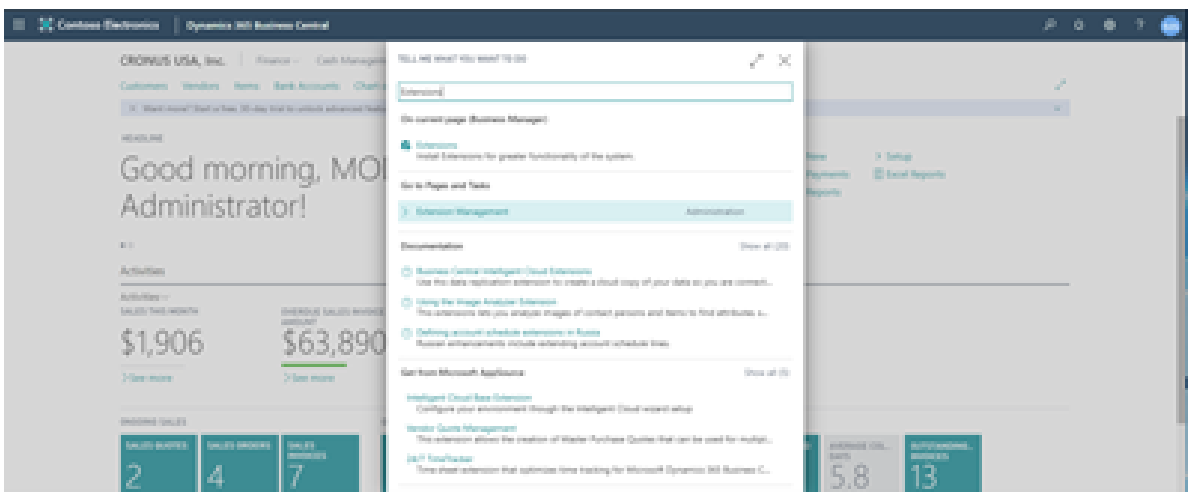
1. Save the .app file to an accessible location. In our scenario, it is saved in C:\Temp



2. Login to Business Central as a Super User

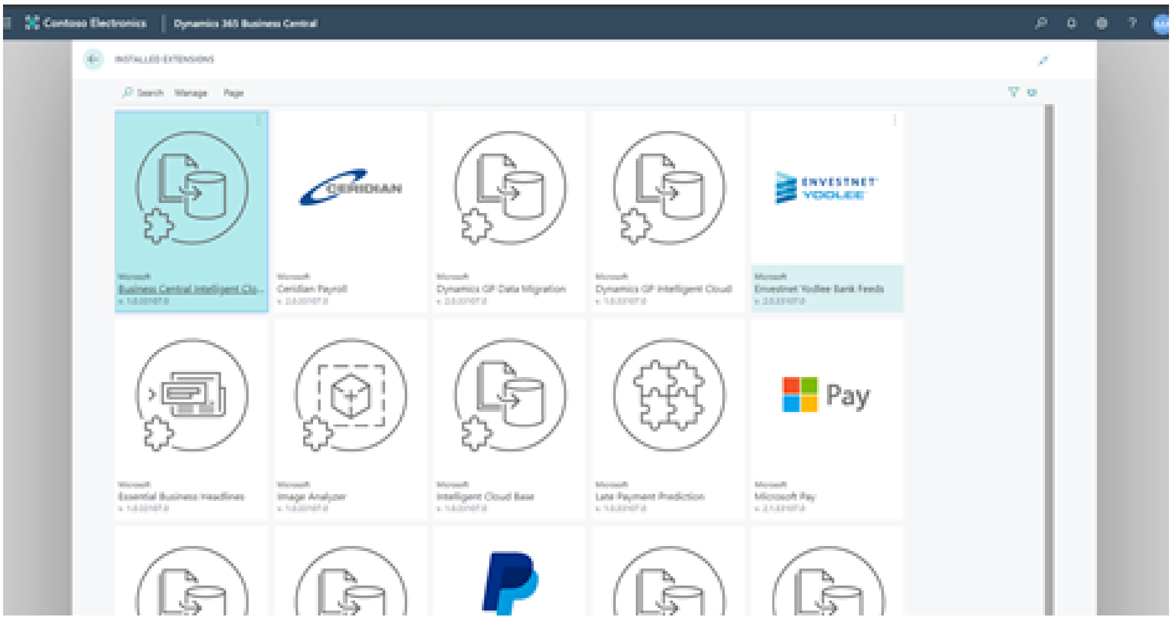
3. Go to Setup and Extensions > Extensions. Alternatively, if Setup and Extensions is not on your screen, Search and goto Extension Management



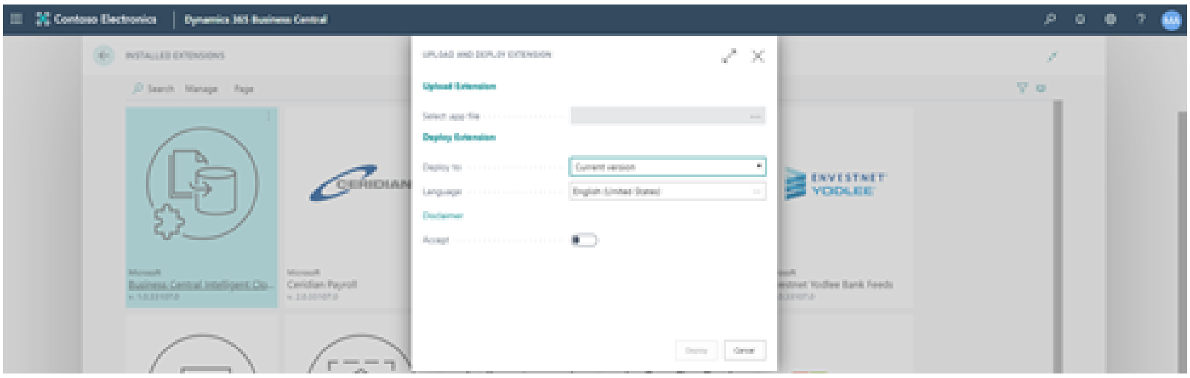


Setup

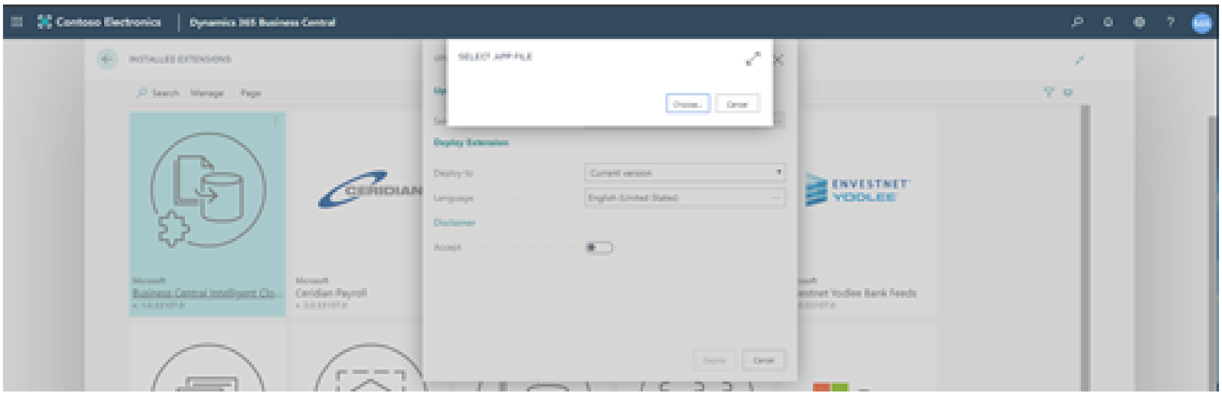
4. You will be taken to this screen. Click Manage > Upload Extension



5. Click the 3 dots beside the Select .app file field.

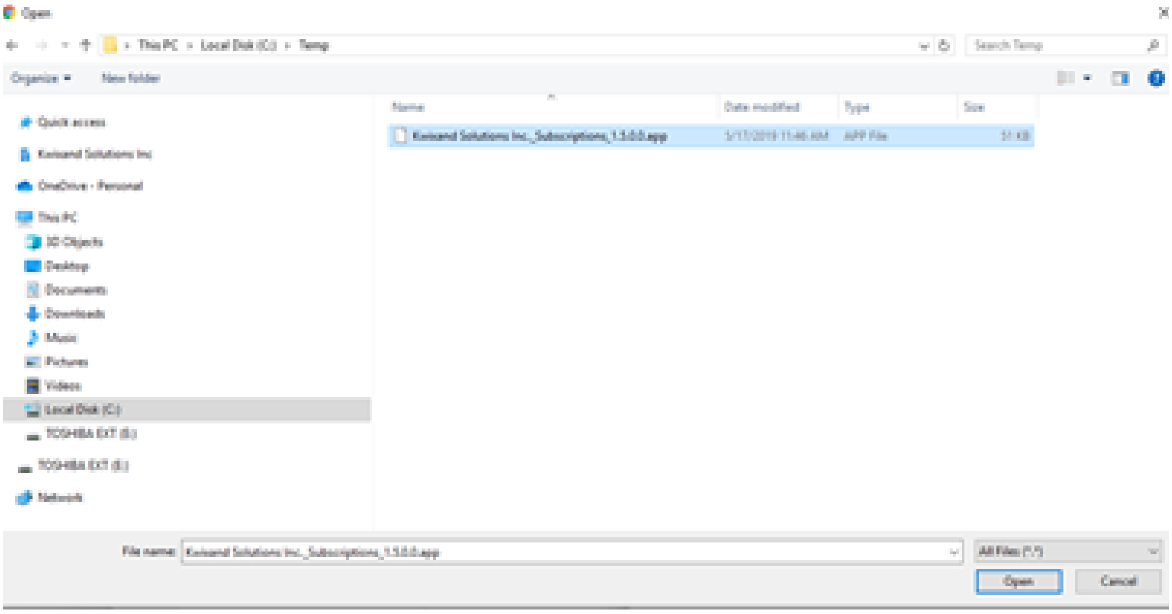


6. Click choose file on the pop-up window.

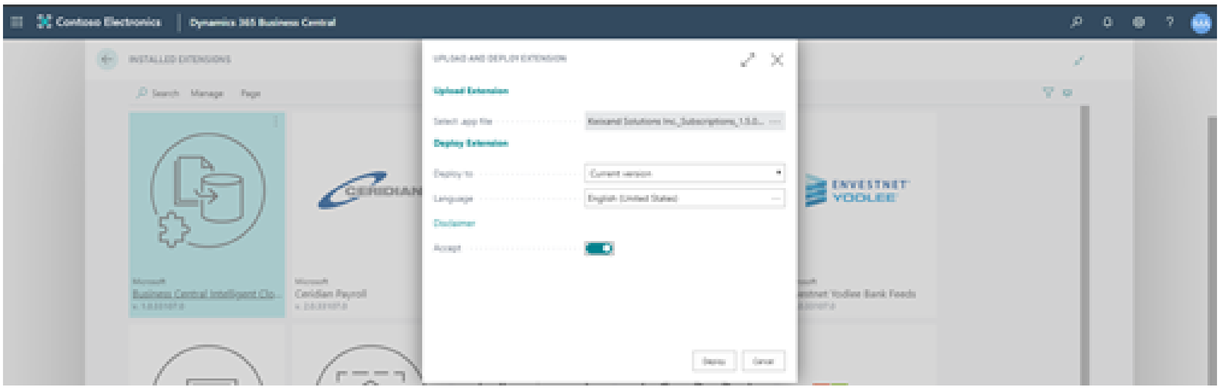


Setup

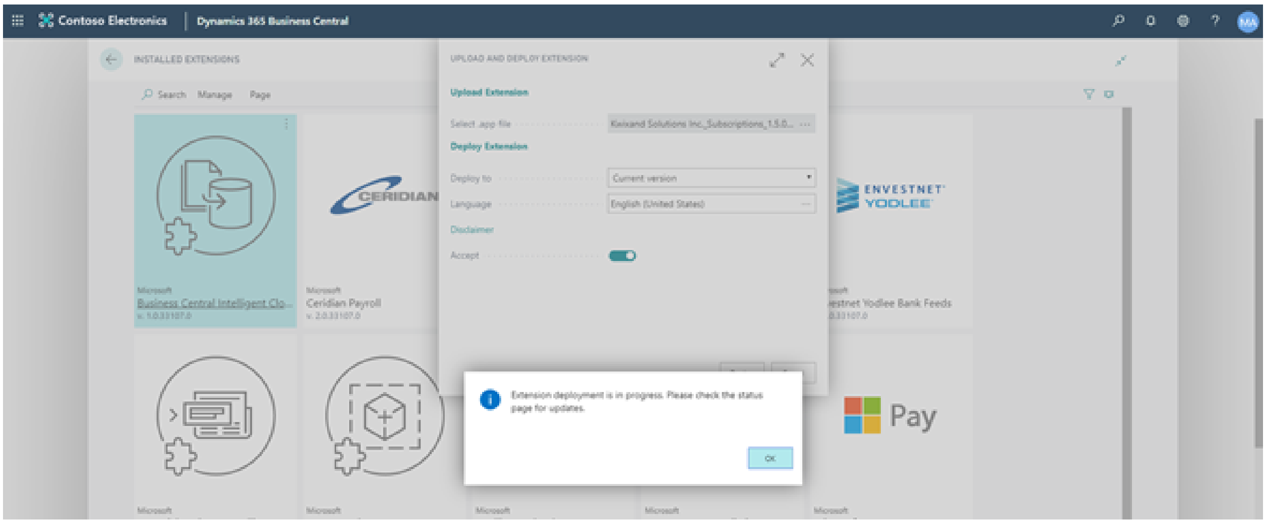
7. Go to the location where the app file is stored and select the file and click open.



8. You can leave the rest of the defaults and you must accept the disclaimer and click Deploy.

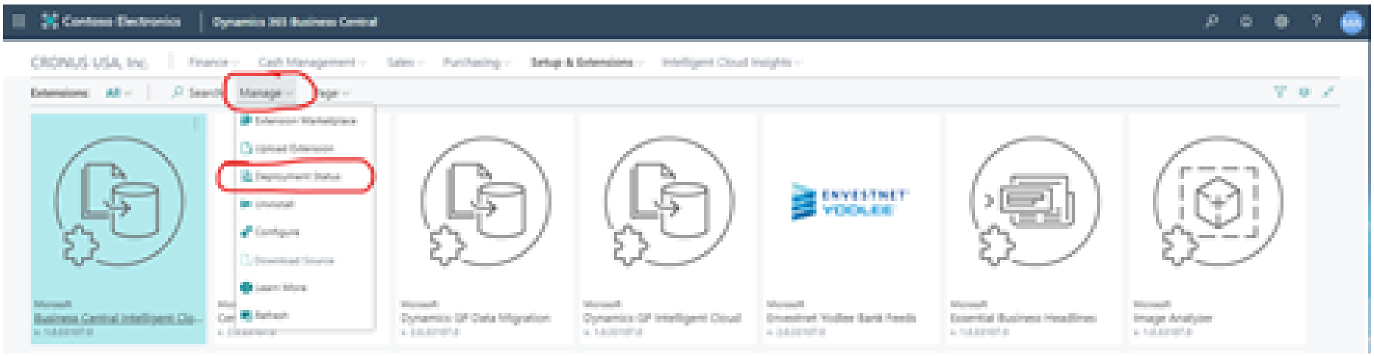


9. You will receive a confirmation message that the Extension is loading.

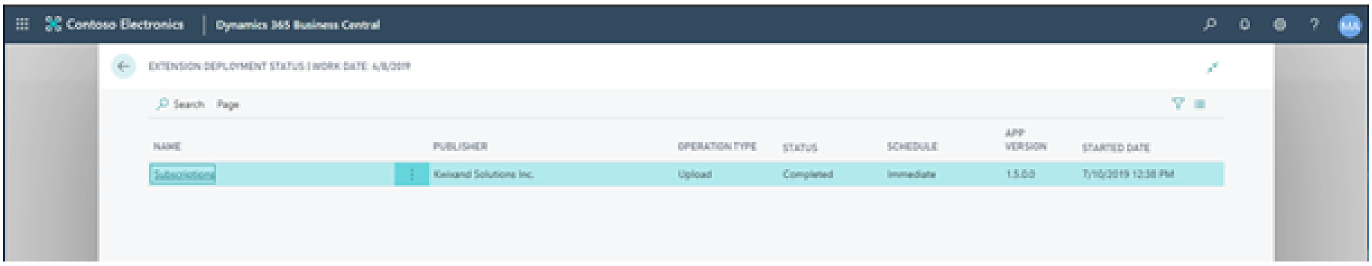


Setup

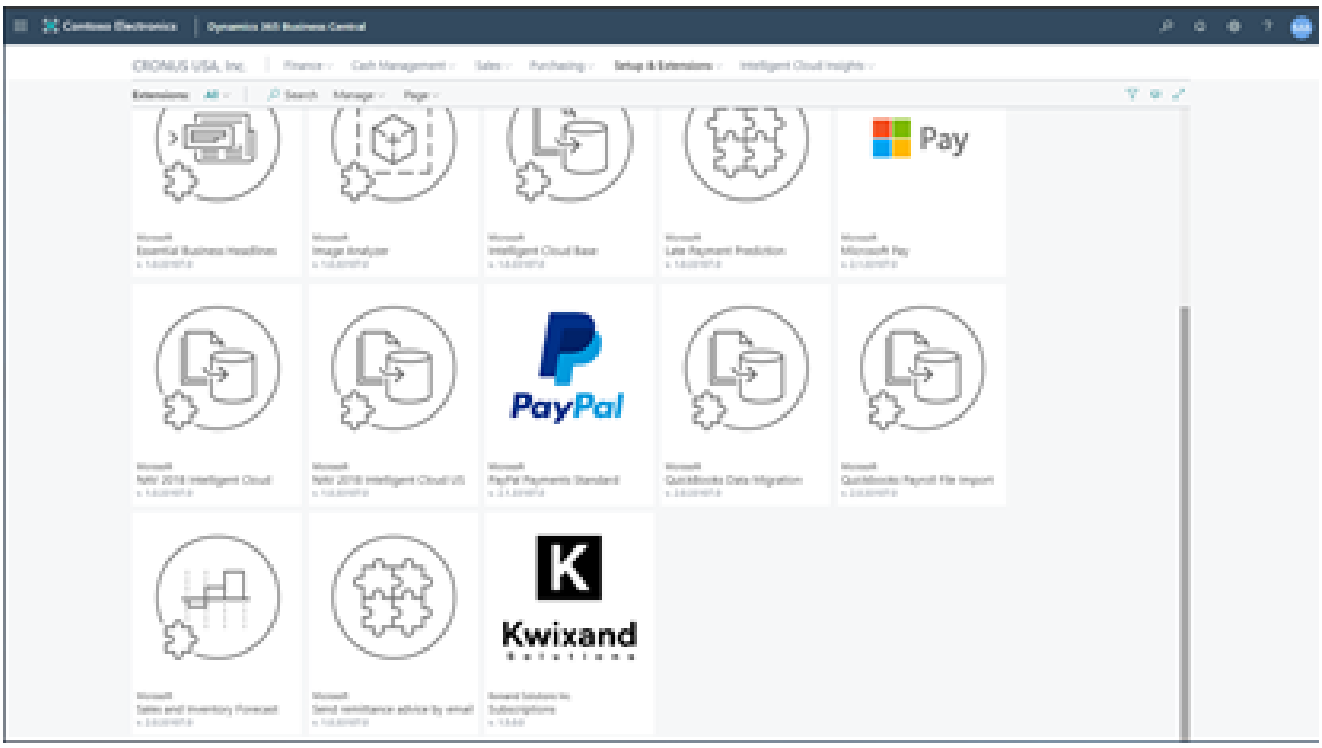
10. Go to Manage > Deployment Status



11. Check the Status of the Extension deployment. Once the Status shows “Completed”, the extension is ready for use.

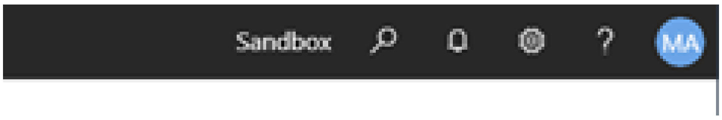


13. The Extension will then be visible in the extensions.



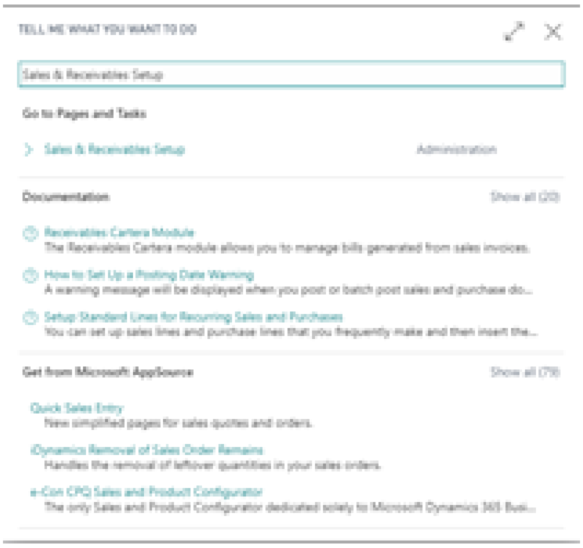
Setup Number Sequences

1. In the top right corner of the screen, click the magnifying glass to search.

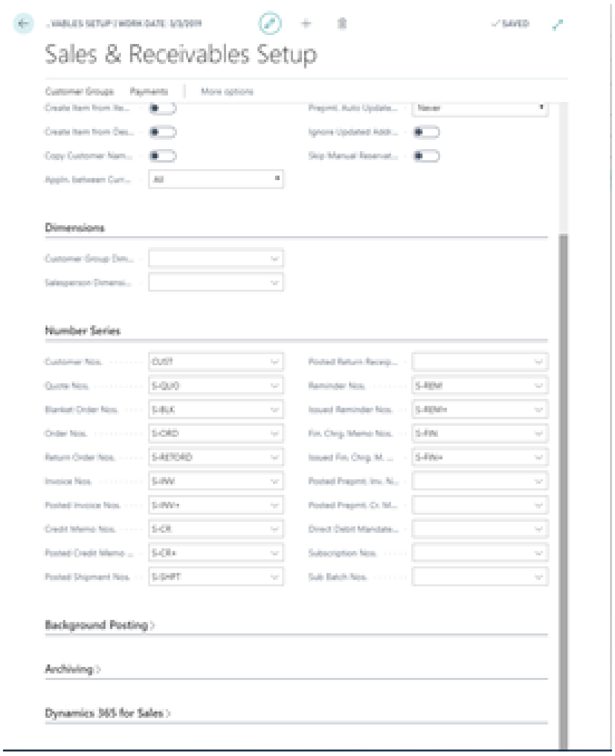


2. Type Sales & Receivables Setup.

3. Under Go to Pages and Tasks, select Sales & Receivables Setup.

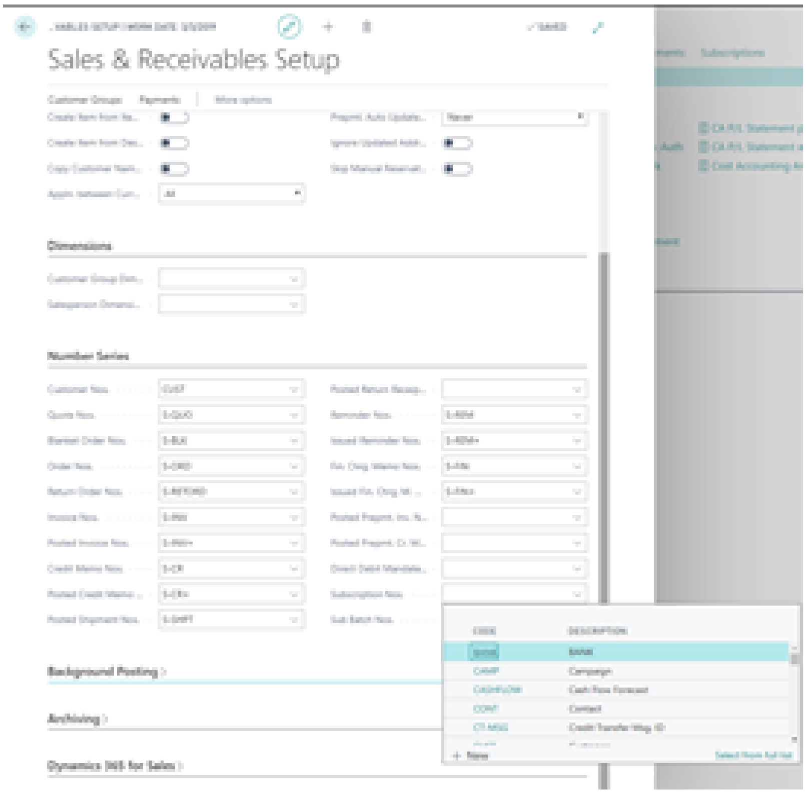


4. In Sales & Receivables Setup, expand the Number Series fast tab.

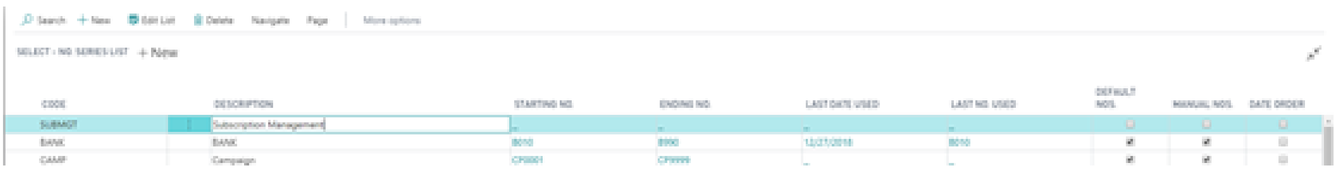


Setup Number Sequences

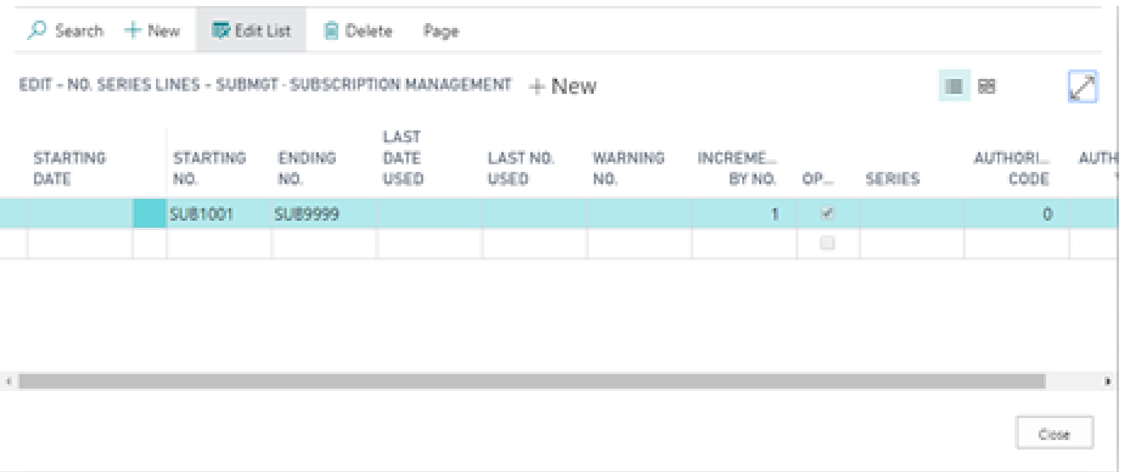
5. Click New.



6. Create a new No. series.

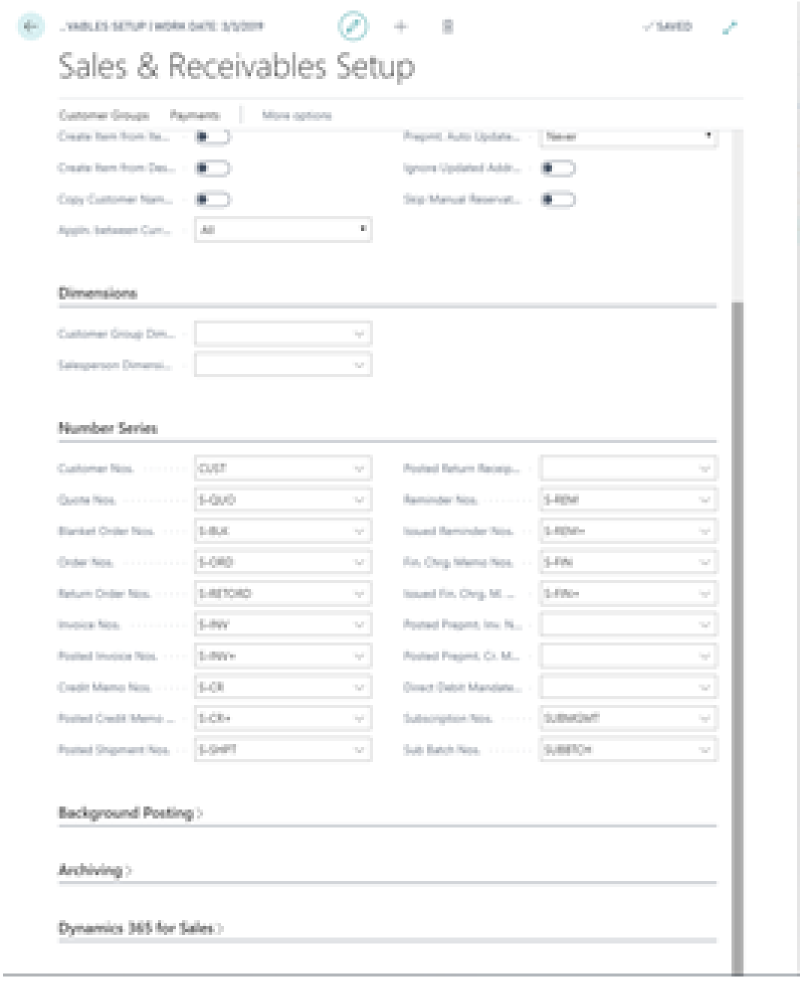


7. Click on the Starting No. and enter the No. Series Lines information.



8. Set the default Nos. check box and if you want to allow manual numbers, click the manual Nos. check box.

9. Repeat the process for the Subscription Batch No series.

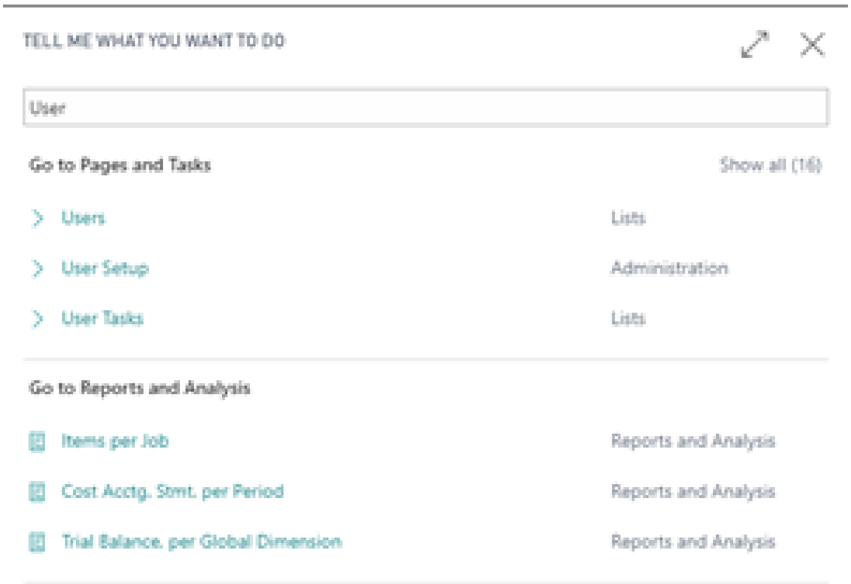


10. The Subscription Numbers are used to assign subscription Ids when creating new subscriptions. The Sub Batch Numbers used when processing the subscriptions for creation and posting to keep track of the history and the subscriptions that were posted in each batch.

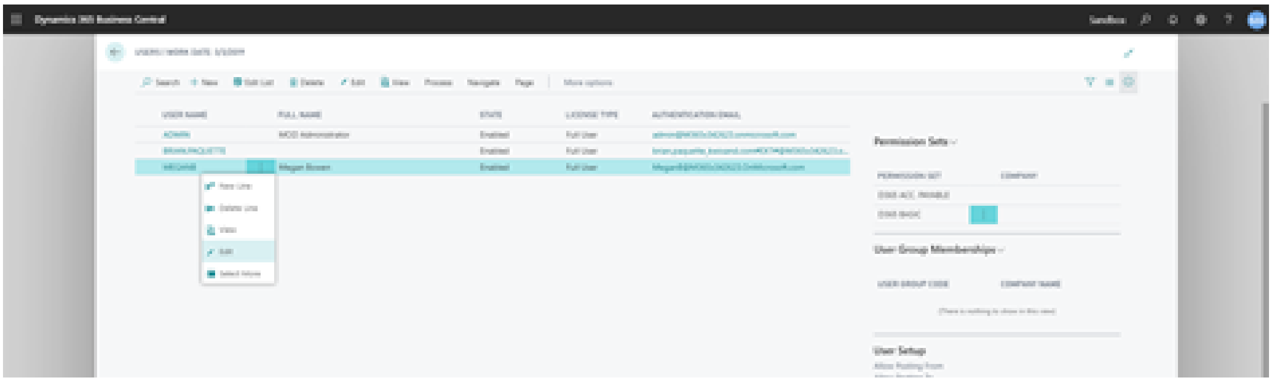
Security

During install, a Permission Set/Role called Subscriptions is added. Any users who do not have escalated permissions that need access to this functionality must have this Permission set added to their user setup.

1. To add the role to a user, go to the Users List page.



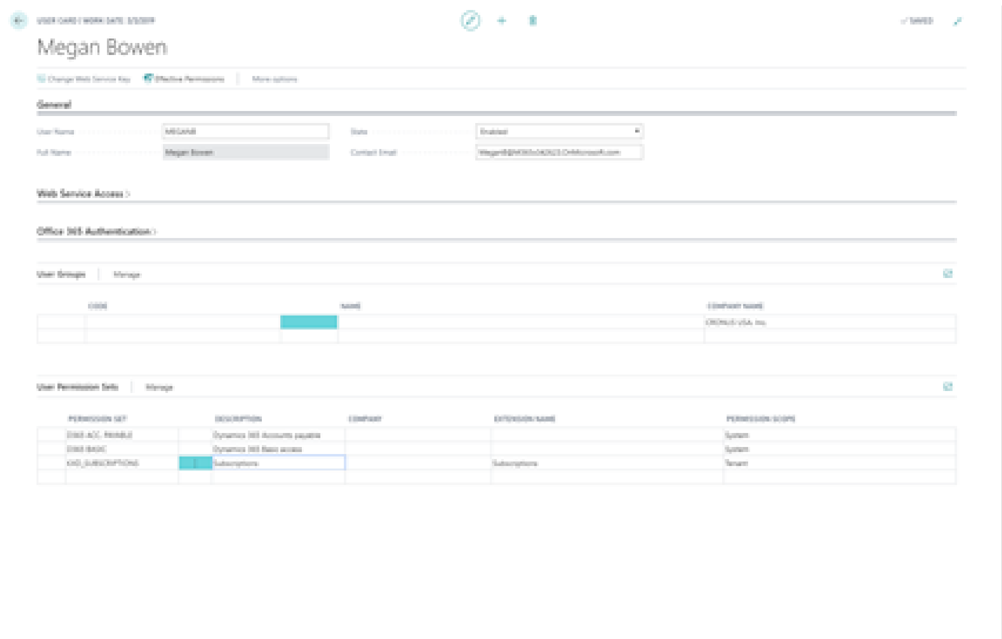
2. Select the user you want to add the permission set to and click on Edit.



Security

3. In the Users Card, under the Permission sets, Browse and add the KXD_SUBSCRIPTIONS Permission set.

4. The user now has the Subscriptions Permission set attached to their user account and will have access to the Subscriptions functionality.

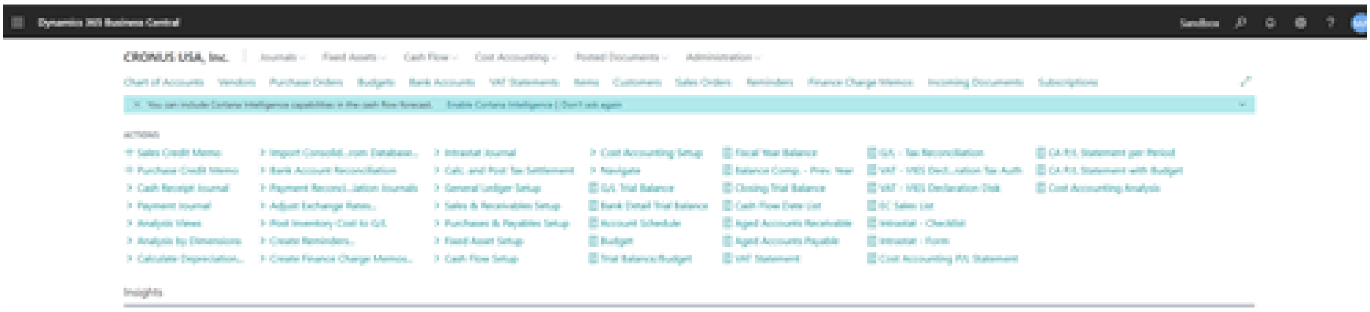


Navigation: Accessing Subscriptions

The Subscriptions Menu item is added by default to the following roles:

- Accounting Manager
- Accountant
- Book Keeper
- ·Order Processor

1. If you belong to one of those roles, you will see the Subscriptions menu item in the Navigation bar at the top of your screen.



2. If you are not part of a role where the Subscriptions Menu shows in the Navigation Bar, search for Subscriptions to access the Subscriptions List Page.