Wipfli has compiled answers to some frequently asked questions potential clients have before choosing InvoiceConnect for D365 Business Central (BC).

Where does InvoiceConnect integrate invoice vouchers?

It integrates them as Purchasing Invoice vouchers.

Does InvoiceConnect work in a multi-company environment?

Yes, IC works in multi-company environments. It is installed as a shared application and can be configured from Concur data as to which company invoices are imported into.

Does InvoiceConnect work with Intercompany Accounts?

Yes, it does.

What are the IT requirements for installing InvoiceConnect into BC?

There are no IT requirements. InvoiceConnect is a cloud-based application that installs directly into your BC environment from Microsoft App Source. New versions can be updated from App Source, too.

Does InvoiceConnect also integrate with Concur Expense?

Wipfli has a separate product called ExpenseConnect which integrates with Concur Expense. Talk to a Wipfli sales associate for more details about ExpenseConnect.

Can InvoiceConnect work with multiple instances of Concur?

No, InvoiceConnect only works when there is one instance of Concur to one instance of BC. If you have multiple instances of Concur that you need integrated into a single instance of BC, you will need to work with Concur to consolidate them into a single instance of Concur first.

InvoiceConnect can be setup in a BC sandbox company first and then transitioned to a production company. That is not a problem.

Can InvoiceConnect work with a Concur test site (implementation site)?

InvoiceConnect cannot be setup in a Concur test site because Concur no longer allows their test sites to access the App Center which is essential for InvoiceConnect to establish the connection between BC and Concur.

How did companies do this integration before InvoiceConnect?

Concur can be configured to export all invoice lines into a flat file they call the Standard Accounting Extract (SAE) file. Past integrators would take the data from this file and manipulate it to fit into a BC template and then import that file. This was a non-trivial endeavor as the SAE file is a 256 column, pipe-delimited, header-less file. So typically, a middleware solution would be needed to stream an SAE file into an BC template file. InvoiceConnect improves upon this situation several ways.

1. There are no files to manipulate. InvoiceConnect is a direct bridge between Concur and BC.
2. InvoiceConnect keeps records of when each integration took place. In the past, once you successfully imported a template file, you could forget which reports were on that file and potentially re-import them. InvoiceConnect keeps track of what you have imported and therefore prevents importing duplicates.

What do I need to do to install and use InvoiceConnect?

InvoiceConnect installs into BC as an extension application from the MS App Source. So on the BC side you will need:

- An admin user who can administer BC extensions and install them from the App Source.
- An admin user who can create a web service token in BC assigned to an administrative user account

In Concur you will need:

- An admin user who can access to the Concur App Center

How can I tell which Concur Version I have?

If you find a tab labeled "Setup" in your Concur administrative section, you are on Concur Standard. Otherwise, you are on Advanced Configuration by Concur / Enterprise. If you do not know, you probably are on Concur Standard. A potential customer should ask their Concur account rep if they are unsure.

Does InvoiceConnect interface with ADP or any other 3rd party payroll system?

No, InvoiceConnect does not directly interface with any payroll system. It only interfaces directly with Concur and BC. Concur does have a direct integration with ADP which can be setup by your Concur implementer (not Wipfli).

Can custom Concur fields defined in a user record or on a report be integrated to BC?

Yes, custom fields can be mapped to either standard PI/GL fields or to custom BC dimension fields.

Can InvoiceConnect synchronize BC vendors into Concur?

Yes, IC has a feature to synchronize vendors into Concur.

How can I synchronize other BC dimension data into Concur?

Wipfli is working on building a BC dimension to Concur list sync. It will synchronize BC dimensions to Concur custom lists.

Does InvoiceConnect only pull invoices from Concur or will it also affect invoices in Concur?

InvoiceConnect only pulls data from Concur. It does not act on, change, or modify invoices in Concur in any way.

Will InvoiceConnect pull receipt images?

It can be configured to pull a pdf of the invoice. It will attach that into a BC voucher using the BC attachment features.

What Authentication / Security does InvoiceConnect use?

- Concur uses OAuth 2.0 which is an industry standard. Wipfli has implemented InvoiceConnect based on Concur API security guidelines as indicated here:
  https://developer.concur.com/api-documentation/oauth-20-0
  ** Here is general documentation on the OAuth standard:
  http://oauth.net/about/
- The BC API calls use a secure token created on a user account record in BC. InvoiceConnect does not store these credentials outside of BC.
- All API communication between BC and Concur happens securely with HTTPS. The programming is done in accordance with both BC and Concur's API guidelines.

Assurances:

- InvoiceConnect only moves your invoice data between Concur and BC. It does not re-store or house your data.
- InvoiceConnect does not store username / password credentials. It uses existing API token-based systems created by Concur and BC for authentication and authorization.
- Wipfli cannot run InvoiceConnect remotely for clients. Only clients who have successfully authenticated into BC can run InvoiceConnect.