



agiles

From Aptean

User Documentation AppSource

agiles EDI app

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Important additional information:

- The User Documentation was done in a W1 database in Microsoft Dynamics 365 Business Central Wave2 2020 (BC17).
- User Role is set to Sales Order Processor.
- User has assigned following Permission Sets:

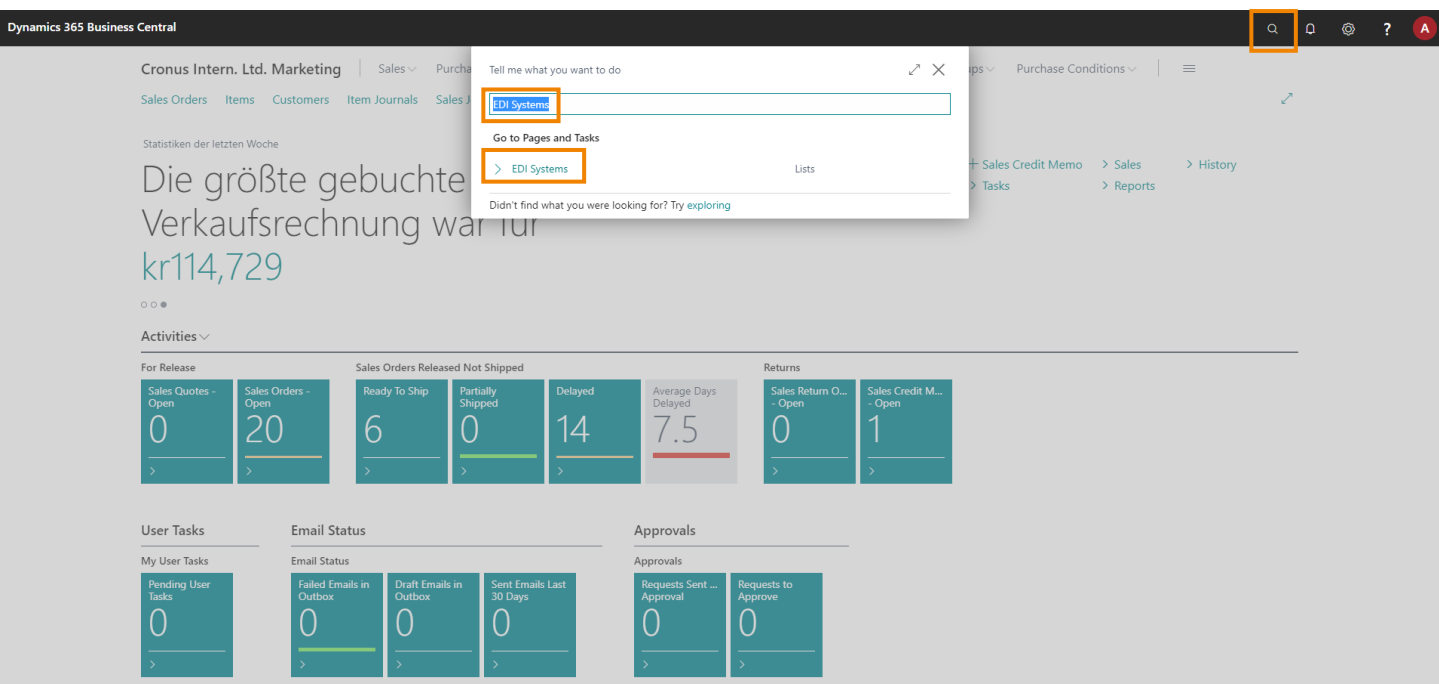
AGB AGILES SYSTEM	agiles System Application
AGB EDI BASE	agiles EDI
D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.



Basic Setup

Basic Setup

- 1) Click on „Tell me what you want to do“ and search for **EDI Systems**
- 2) Click on **EDI Systems**



The screenshot shows the Dynamics 365 Business Central interface. At the top right, the search icon is highlighted with an orange box. A search dialog box is open, with the search bar containing 'EDI Systems' and a list of results below it, where 'EDI Systems' is also highlighted with an orange box. The background shows a dashboard with various metrics and activities.

Activities

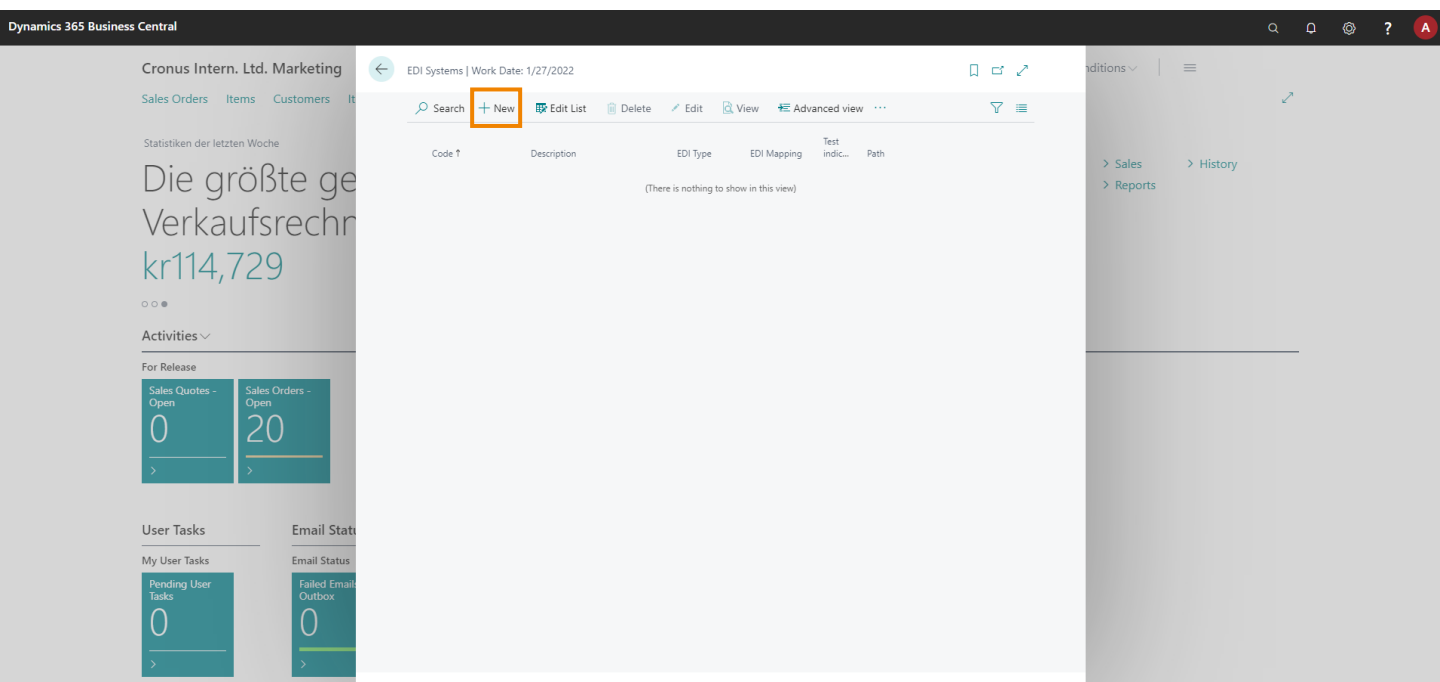
For Release		Sales Orders Released Not Shipped			Returns		
Sales Quotes - Open	Sales Orders - Open	Ready To Ship	Partially Shipped	Delayed	Average Days Delayed	Sales Return O... - Open	Sales Credit M... - Open
0	20	6	0	14	7.5	0	1

User Tasks

User Tasks	Email Status			Approvals	
Pending User Tasks	Failed Emails in Outbox	Draft Emails in Outbox	Sent Emails Last 30 Days	Requests Sent ... Approval	Requests to Approve
0	0	0	0	0	0

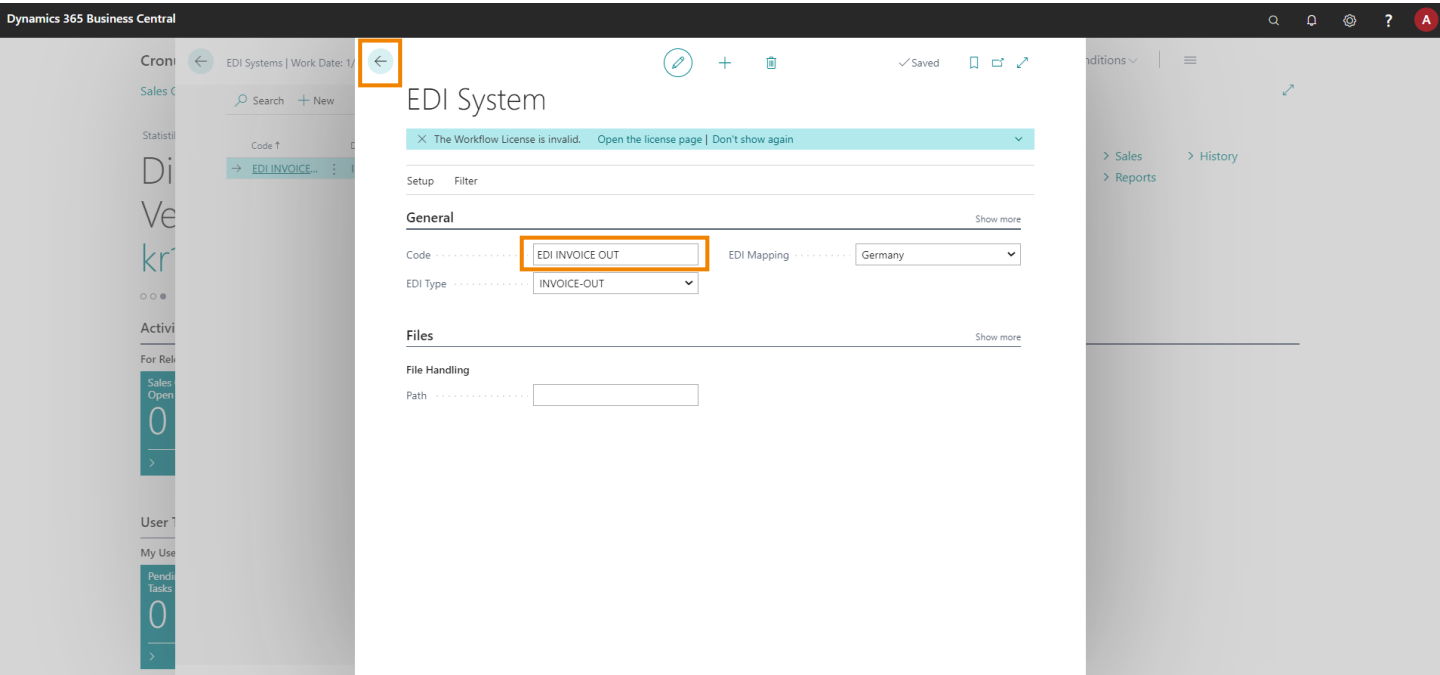
Basic Setup

- 1) Click on **+New**



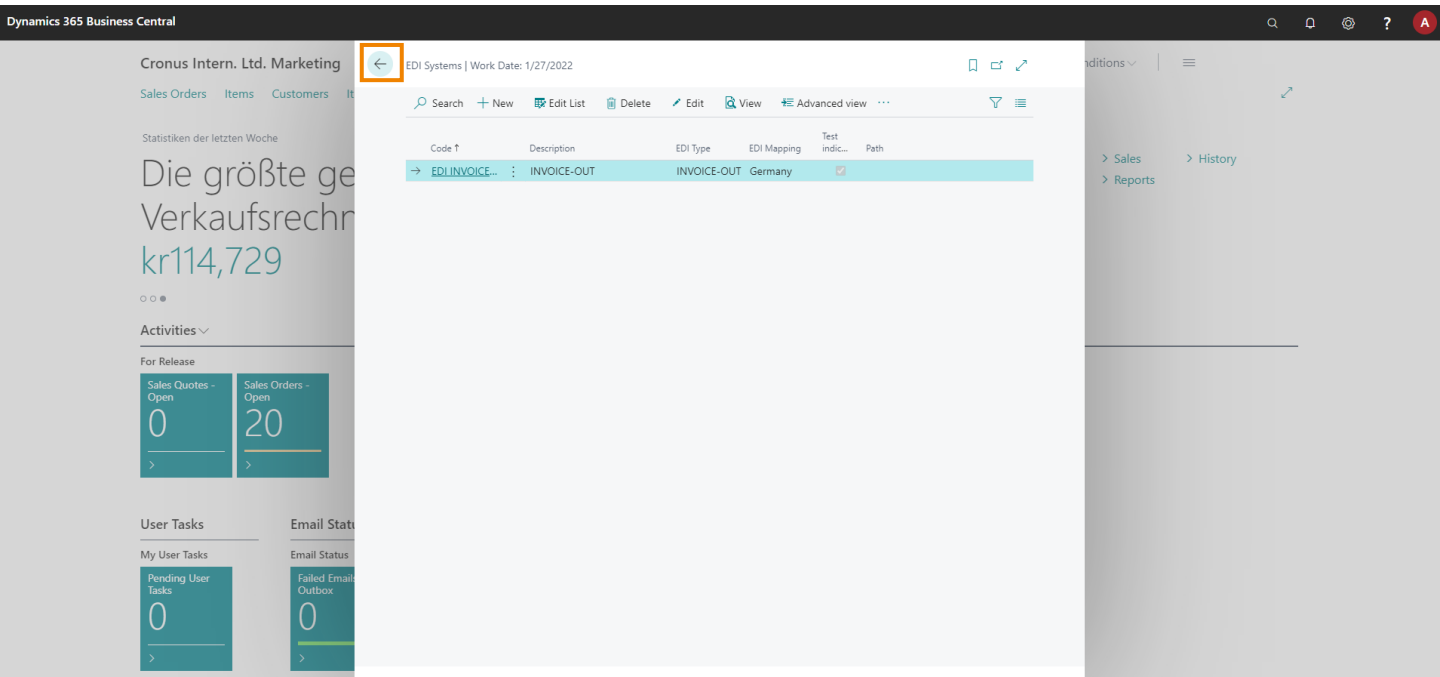
Basic Setup

- 1) Click in field Code and enter **EDI INVOICE OUT**
- 2) Go back one page



Basic Setup

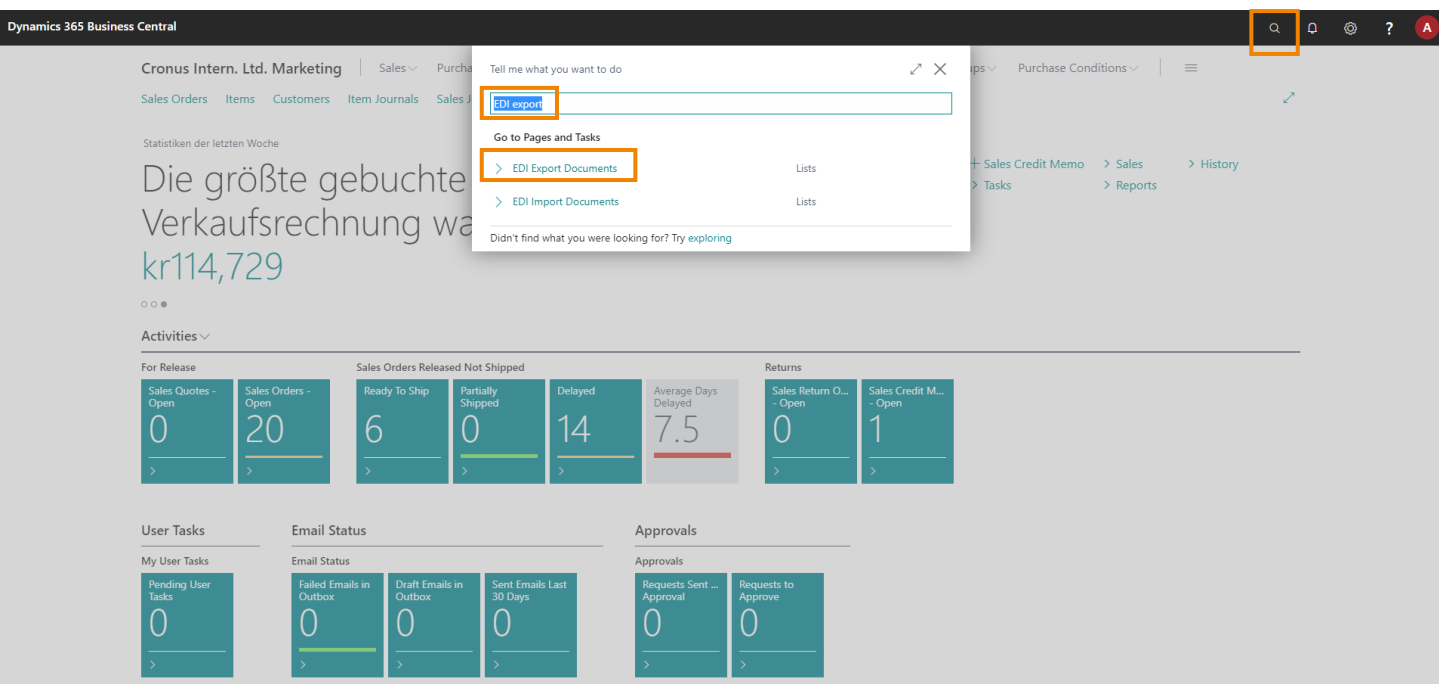
- 1) Go back one page



Create an Invoice Export / Invoice Out

Create an Invoice Export / Invoice Out

- 1) Click on „Tell me what you want to do“ and search for **EDI Export**
- 2) Click on **EDI Export Documents**



The screenshot shows the Dynamics 365 Business Central interface. At the top right, there is a search icon (magnifying glass) highlighted with an orange box. Below it, a search bar contains the text "EDI export", also highlighted with an orange box. A dropdown menu is open, showing search results. The first result is "EDI Export Documents" with a right-pointing arrow and the word "Lists" to its right, highlighted with an orange box. Below it is "EDI Import Documents" with "Lists" to its right. At the bottom of the dropdown, there is a link that says "Didn't find what you were looking for? Try exploring". The background of the screenshot shows a dashboard with various metrics and charts, including "Sales Quotes - Open" (0), "Sales Orders - Open" (20), "Ready To Ship" (6), "Partially Shipped" (0), "Delayed" (14), "Average Days Delayed" (7.5), "Sales Return O... - Open" (0), and "Sales Credit M... - Open" (1). There are also sections for "User Tasks", "Email Status", and "Approvals".

Create an Invoice Export / Invoice Out

- 1) Click on **Provide Invoice / Credit Memo**

Dynamics 365 Business Central

ED I Export Documents | Work Date: 1/27/2022

Search Edit List Delete **Provide Invoice / Credit Memo** Export Document Open in Excel More options

Entry No. ↑	Document Date	Document Type	Document No.	No.	Name	Amount	Status	EDI Info Text
(There is nothing to show in this view)								

Notes ↓

Note

(There is nothing to show in this view)

Line Info

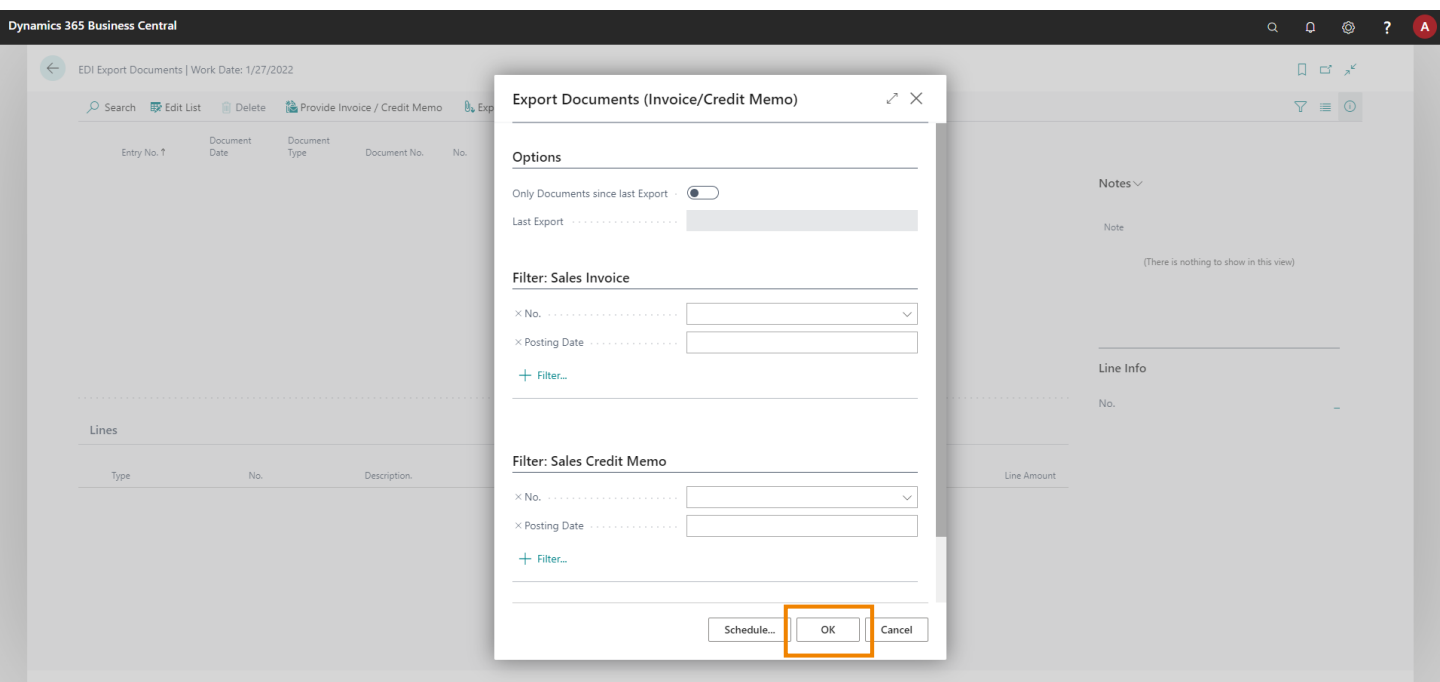
No.

Lines

Type	No.	Description	Quantity	Unit of Measure Code	Price	Line Amount
(There is nothing to show in this view)						

Create an Invoice Export / Invoice Out

- 1) Click on **OK**



Create an Invoice Export / Invoice Out

- 1) See your displayed invoices
- 2) Select the first invoice
- 3) Click on **Export Document**

EDT Export Documents | Work Date: 1/27/2022

Search Edit List Delete Provide Invoice / Credit Memo **Export Document** Open in Excel More options

Entry No. ↑	Document Date	Document Type	Document No.	No.	Name	Amount	Status	EDI Info Text
→ 1	1/24/2022	Sales Invoice	103001	10000	The Cannon Group PLC	7,438.50	To Export	
2	1/24/2022	Sales Invoice	103002	20000	Selangorian Ltd.	6,337.98	To Export	
3	1/24/2022	Sales Invoice	103003	30000	John Haddock Insurance Co.	5,454.00	To Export	
4	1/6/2022	Sales Invoice	103005	49525252	Beef House	1,548.47	To Export	
5	1/6/2022	Sales Invoice	103006	49525252	Beef House	7,742.33	To Export	
6	1/6/2022	Sales Invoice	103007	49858585	Hotel Pferdesee	5,264.78	To Export	
7	1/6/2022	Sales Invoice	103008	49858585	Hotel Pferdesee	5,264.78	To Export	
8	1/6/2022	Sales Invoice	103009	49858585	Hotel Pferdesee	10,529.56	To Export	
9	1/6/2022	Sales Invoice	103010	49633663	Autohaus Mielberg KG	6,271.29	To Export	
10	1/6/2022	Sales Invoice	103011	43687129	Designstudio Gmunden	4,349.00	To Export	

Notes

Note

(There is nothing to show in this view)

Line Info

No.

Lines

Type	No.	Description	Quantity	Unit of Measure Code	Price	Line Amount
→ --	TIMOTHY	Assembling Furniture, January	25	HOUR	54.00	1,350.00
--	TIMOTHY	Assembling Furniture, January	120	MILES	54.00	6,480.00

Create an Invoice Export / Invoice Out

- 1) A **download** was created
- 2) If you would like to open the document you have to use Notepad

Dynamics 365 Business Central

EDl Export Documents | Work Date: 1/27/2022

The Workflow License is invalid. [Open the license page](#) | Don't show again

Search Edit List Delete Provide Invoice / Credit Memo Export Document Open in Excel More options

Entry No.	Document Date	Document Type	Document No.	No.	Name	Amount	Status	EDI Info Text
→ 1	1/24/2022	Sales Invoice	103001	10000	The Cannon Group PLC	7,438.50	Done	
2	1/24/2022	Sales Invoice	103002	20000	Selangorian Ltd.	6,337.98	To Export	
3	1/24/2022	Sales Invoice	103003	30000	John Haddock Insurance Co.	5,454.00	To Export	
4	1/6/2022	Sales Invoice	103005	49525252	Beef House	1,548.47	To Export	
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7	1/6/2022	Sales Invoice	103008	49858585	Hotel Pferdesee	5,264.78	To Export	
8	1/6/2022	Sales Invoice	103009	49858585	Hotel Pferdesee	5,264.78	To Export	

Notes

Note

```

UNA:+?
'UNB+UNOC:3+:14+8712345000004:14+
210218:1404+1+++++EANCOM+1'UNH
+1+INVOIC:D:01B:UNE:EA010'BGM+380
+103001+9'DTM+137:20220124:102'DT
  
```

Line Info

No.

Type	No.	Description	Quantity	Unit of Measure Code	Price	Line Amount
→ --	TIMOTHY	Assembling Furniture, January	25	HOUR	54.00	1,350.00
--	TIMOTHY	Assembling Furniture, January	120	MILES	54.00	6,480.00

INVOICE-OUT0000....edi

Alle anzeigen