

# Required Business Central configuration

To secure a smooth transfer of data between TimeLog and Business Central (BC) is there some setting in BC you should check or maybe configure. The below areas should get checked and configured.

Please be aware the BC is having limitations on the number of characters in the fields TimeLog is transferring data to.

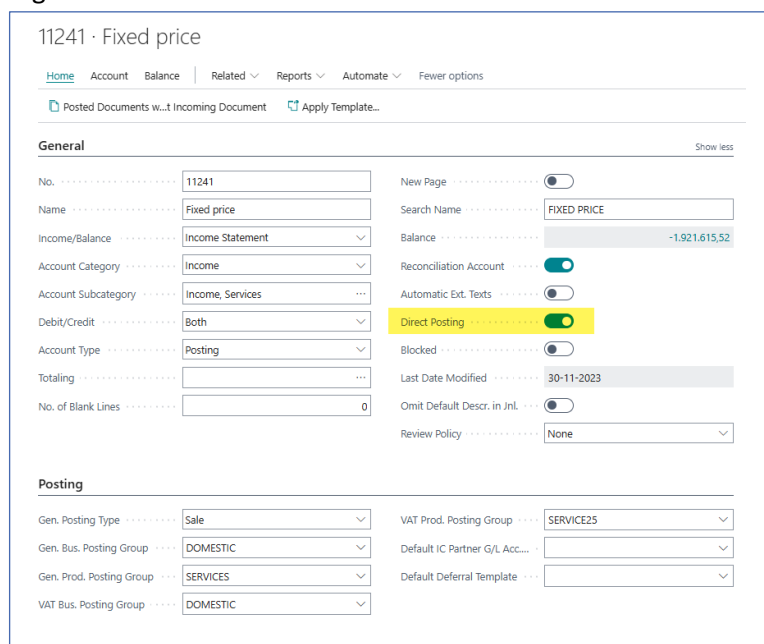
You will find the number of characters in our online document [Data transfer between TimeLog and Business Central](#) in TimeLog Help Center (help.timelog.com)

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## G/L Account setup

For TimeLog to be able to transfer invoice data to BC, is the used G/L accounts to have Direct Posting activated, and selections in the marked Posting section.



11241 · Fixed price

Home Account Balance Related Reports Automate Fewer options

Posted Documents w...t Incoming Document Apply Template...

**General** Show less

No. 11241 New Page

Name Fixed price Search Name FIXED PRICE

Income/Balance Income Statement Balance -1.921.615,52

Account Category Income Reconciliation Account

Account Subcategory Income, Services Automatic Ext. Texts

Debit/Credit Both **Direct Posting**

Account Type Posting Blocked

Totaling ... Last Date Modified 30-11-2023

No. of Blank Lines 0 Omit Default Descr. in Jnl.

Review Policy None

**Posting**

Gen. Posting Type Sale VAT Prod. Posting Group SERVICE25

Gen. Bus. Posting Group DOMESTIC Default IC Partner G/L Acc...

Gen. Prod. Posting Group SERVICES Default Deferral Template

VAT Bus. Posting Group DOMESTIC

Please do not select Settlement in Gen. Posting Type

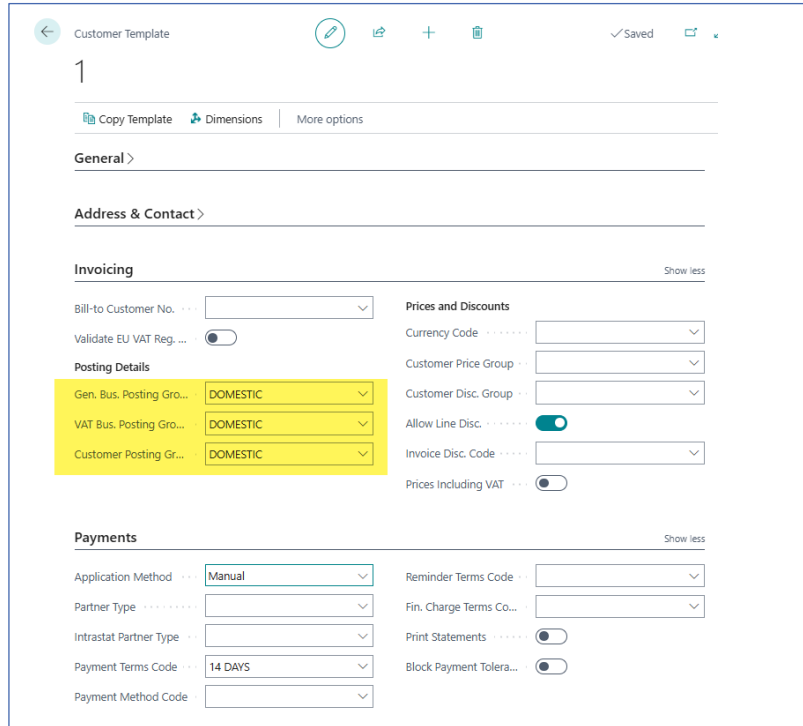


## Transfer of new customers from TimeLog to Business Central

If TimeLog is to be the master of new customers, it is important to add a standard customer template to be used when the new customers are transferred from TimeLog to BC and created as a new customer in BC.

The table of customer tables is found via the search icon, and the search keyword *customer templates*.

The screen dump is showing the areas that needs to have a selected information.



The screenshot displays the 'Customer Template' configuration interface. The 'Posting Details' section is highlighted in yellow, indicating the selected information. The fields in this section are:

- Gen. Bus. Posting Gro...: DOMESTIC
- VAT Bus. Posting Gro...: DOMESTIC
- Customer Posting Gr...: DOMESTIC

Other visible sections include:

- General**: Fields for Bill-to Customer No., Validate EU VAT Reg., Currency Code, Customer Price Group, and Customer Disc. Group.
- Prices and Discounts**: Fields for Allow Line Disc. (checked), Invoice Disc. Code, and Prices Including VAT.
- Payments**: Fields for Application Method (Manual), Partner Type, Intrastat Partner Type, Payment Terms Code (14 DAYS), Payment Method Code, Reminder Terms Code, Fin. Charge Terms Co..., Print Statements (checked), and Block Payment Tolera... (checked).

The standard customer template is to get selected in *TimeLog Setup* in your BC environment and get used when new TimeLog customers is transferred to BC.

The data in the new BC customer card is open for update, but the changes made in BC will no reflect in on the customer card in TimeLog, when TimeLog is configured as the master.

If BC is configured to become the master of new customers, is new BC customers and customer updates, automatically transferred to TimeLog.



## TimeLog transfer of VAT and invoice line amount

The setup of “Transfer VAT percentage and invoice line amount” have to be setup accordingly in BC TimeLog Setup.

**General configuration**

Allow the integration of organization no. ⓘ

Transfer VAT percentage and invoice line amount

**Configuration of customer data owner**

When the above setup isn't activated in the TimeLog integration, is the two settings in BC TimeLog setup not to be activated.

### TimeLog Setup

Actions ▾ Automate ▾

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**Generelt**

TimeLog PSA CORE v... 24.2.202424.95964 TimeLog Secret Key ...

TimeLog PSA extensi... TimeLog PSA DK Last Import ...

TimeLog PSA extensi... 24.2.202424.95960 Last Resource Import ...

Sync. Company Name ... Start Import af åbne ...

Business Central ID ... {8c4ca8bb-be97-4a29-b94!} ... Copy Incoming Attac...

TimeLog Host URL ...

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**Invoice Management**

Template Customer ... C00040 UoM Days ...

Template Employee ... UoM Km ...

Template Contact No. ... UoM Pieces ...

Template Invoice No. ... Use Contact Relation ...

UoM Udefined ... Transfer Amounts fro...

UoM Hours ... Transfer VAT% from T...

UoM Minutes ... Sales Price on Purcha...

## Transfer of Invoice contact – TimeLog Setup

When Business Central is the master of new customers, is it important to allow TimeLog to add new invoice contacts in BC.

In TimeLog BC integration configuration is the marked setting to get activated.

**Configuration of customer data owner**

Please select how customers and contacts are synchronised and transferred:

Customers are created in TimeLog and synchronized to Microsoft Dynamics 365 Business Central when transferring invoices

Customers are created in Microsoft Dynamics 365 Business Central and synchronized to TimeLog

Customers can be created in both systems and synchronized to both

Allow TimeLog to automatically link customers with matching VAT number and create customer contacts when transferring invoices to Business Central

In BC **TimeLog Setup** is the marked setting to be activated.

BC is then allowing TimeLog to add the invoice contact person to the contacts on the BC customer.

### TimeLog Setup

Actions ▾ Automate ▾

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## TimeLog Setup field description

### Invoice Management

- **Template Customer No.** - here you can specify the number of the customer, the fields of which will be copied into the cards of new customers being created. You can create a fictitious customer "Template TimeLog" and set the fields required for automatic filling.
- **Template Employee No.** - here you can specify the number of the employee, the fields of which will be copied into the cards of new employees being created.
- **Template Contact No.** - here you can specify the number of the contact, the fields of which will be copied into the cards of new contacts being created.
- **Use Contact Relation Mgr.** – must be activated in the current integration implementation for BC.
- **Transfer Amounts from TimeLog** - if activated, then the sums of invoice and credit memo lines are taken from the TimeLog and are not getting calculated by BC.
- **Transfer VAT% from TimeLog** - if activated, then the VAT% of invoice and credit memo lines are taken from the TimeLog and are not getting calculated by BC.

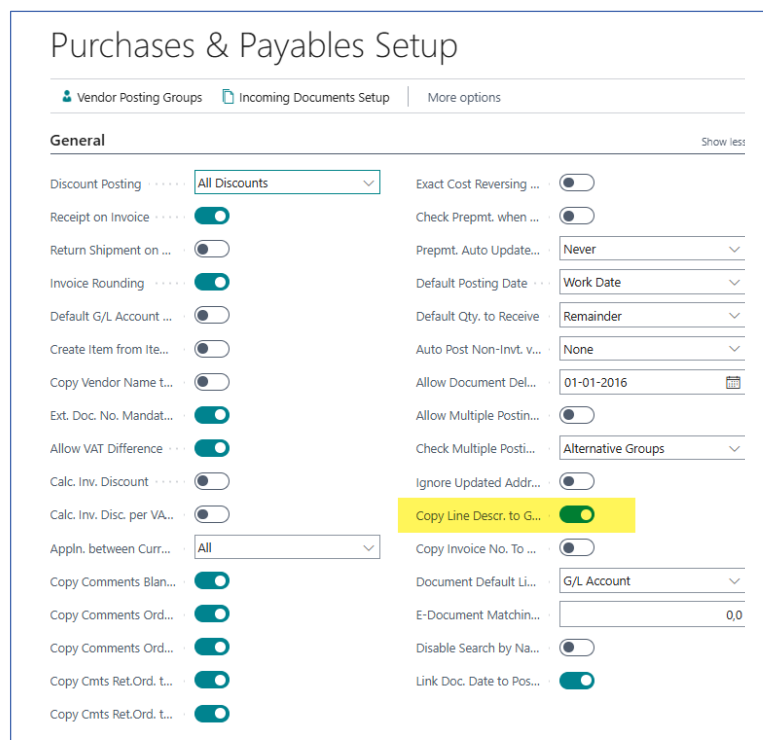
### Expense Management

- **Gen. Jnl. Expenses Template Name** - if, when transferring expense lines, the code of the journal template is not transferred from the TimeLog, then this template will be used.
- **Gen. Jnl. Expenses Batch Name** - if, when transferring expense lines, the code of the journal batch is not transferred from the TimeLog, then this batch will be used.
- **System is Allowed to Change Dimensions in Gen. Jnl.** - it is recommended to leave it disabled to prevent BC from updating the Dimension Values received for the expense line.

## Import expenses from Business Central

To be able to import the vendor invoice line description into TimeLog will you need to activate **Copy Line Desc. To G/L Entry** in the Business Central installation.

You will find the setup in  
**Manual configuration > Purchases & Payables Setup**



**Purchases & Payables Setup**

Vendor Posting Groups | Incoming Documents Setup | More options

**General** Show less

Discount Posting	All Discounts	Exact Cost Reversing	<input type="checkbox"/>
Receipt on Invoice	<input checked="" type="checkbox"/>	Check Prepm. when	<input type="checkbox"/>
Return Shipment on	<input type="checkbox"/>	Prepm. Auto Update	Never
Invoice Rounding	<input checked="" type="checkbox"/>	Default Posting Date	Work Date
Default G/L Account	<input type="checkbox"/>	Default Qty. to Receive	Remainder
Create Item from It...	<input type="checkbox"/>	Auto Post Non-Invt. v...	None
Copy Vendor Name t...	<input type="checkbox"/>	Allow Document Del...	01-01-2016
Ext. Doc. No. Mandat...	<input checked="" type="checkbox"/>	Allow Multiple Postin...	<input type="checkbox"/>
Allow VAT Difference	<input checked="" type="checkbox"/>	Check Multiple Posti...	Alternative Groups
Calc. Inv. Discount	<input type="checkbox"/>	Ignore Updated Addr...	<input type="checkbox"/>
Calc. Inv. Disc. per VA...	<input type="checkbox"/>	<b>Copy Line Desc. to G...</b>	<input checked="" type="checkbox"/>
Appln. between Curr...	All	Copy Invoice No. To ...	<input type="checkbox"/>
Copy Comments Blan...	<input checked="" type="checkbox"/>	Document Default Li...	G/L Account
Copy Comments Ord...	<input checked="" type="checkbox"/>	E-Document Matchin...	0,0
Copy Comments Ord...	<input checked="" type="checkbox"/>	Disable Search by Na...	<input type="checkbox"/>
Copy Cmts Ret.Ord. t...	<input checked="" type="checkbox"/>	Link Doc. Date to Pos...	<input checked="" type="checkbox"/>
Copy Cmts Ret.Ord. t...	<input checked="" type="checkbox"/>		

