

Gorilla Expense - Great Plains 2010 (and above) Integration Setup Instructions

Installing Web Services

Gorilla Expense Integrates with GP using the Web Services provided by GP. The first step is to install GP Web Services.

Run the main MS Dynamics GP installer, from the menu of available options, click on web services to install the web service components. If eConnect is not installed, installing web services will automatically install eConnect – so a separate installation is not required. Follow the **WSInstallGuide.pdf** for detailed steps associated with installing the web service. The most important things to consider are (in addition to GP2010/13) -

- 1) Restart the server
- 2) Make sure the installation files for GP and GP web services are same. A lot of times users had a higher service pack in production, but still end up downloading the RTM version for installing web services.
- 3) Each web service installation service pack comes with its own installation PDF called **WSInstallGuide.pdf**, please verify **all pre-requisites** on that PDF are installed. You may not need Active Directory Light Weight Role, if you are not migrating from GP 10.

During installation, the installer will prompt to create a web service security database. This is the SQL database where all GP Web Services related security information is stored. Provide any name like DynamicsGPSecurity or GPWebServiceSecurity and complete the installation.

After installing the web services, the web service configuration wizard starts automatically. Please refer the **WSInstallGuide.pdf** (Chapter 4 – Initial Configuration of Web Services Section) for the steps involved. Make sure the ISO codes for currencies are setup. Click next till you finish the installation.

If the web service configuration wizard does not start automatically, you can start by going to Start->All Programs->MS Dynamics -> Web Service for MS Dynamics->GP Web Service Configuration Wizard

Run the web services management tools setup from the main MS Dynamics GP Installer menu.

To verify installation, Go to Start-> All Programs -> Admin Tools - > Services do the following

- 1) Verify if “Microsoft Dynamics GP Service Host” is installed and running
- 2) Verify if “eConnect for Microsoft Dynamics” is installed and running.

Next, you need to verify if that Dynamics GP Service Legacy endpoint is up and running. This can be done by making sure the following pages load up –

Dynamics GP Web Service -

<http://<MachineName>:48620/DynamicsGPWebServices/DynamicsGPService.asmx> or
<http://<MachineName>:48620/DynamicsGPWebServices>

Dynamics Admin Service - <http://<MachineName>:48621/DynamicsAdminService.asmx> or
<http://<MachineName>:48621>

Please provide the **above Dynamics GP Web Service links** to Gorilla Expense team along with the company ID found using [this SQL](#)

```
SELECT cmpanyid, cmppynam, interid  
FROM DYNAMICS.dbo.SY01500
```

Run the above script on the SQL server where dynamics database is installed and provide the result to Gorilla Expense team.

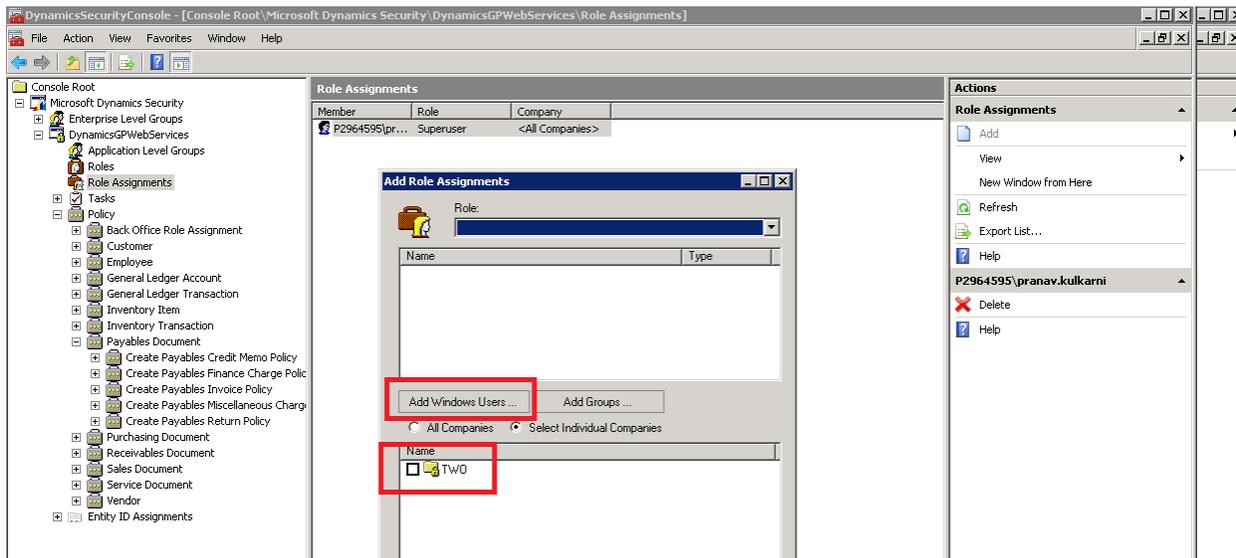
Configuring Security Roles

Go to Administrative Tools - > Dynamics Security Console

Actions-> Select Applications - > Security Admin Service - > Security Service - > Check Dynamics GP Web Service - > Click OK.

Expand Microsoft Dynamics Security - > DynamicsGPWebServices-> Role Assignments -> Add and Select the windows user who will be responsible for running the Gorilla Expense Integration Manager to post invoices to GP.

Also, select the desired company.

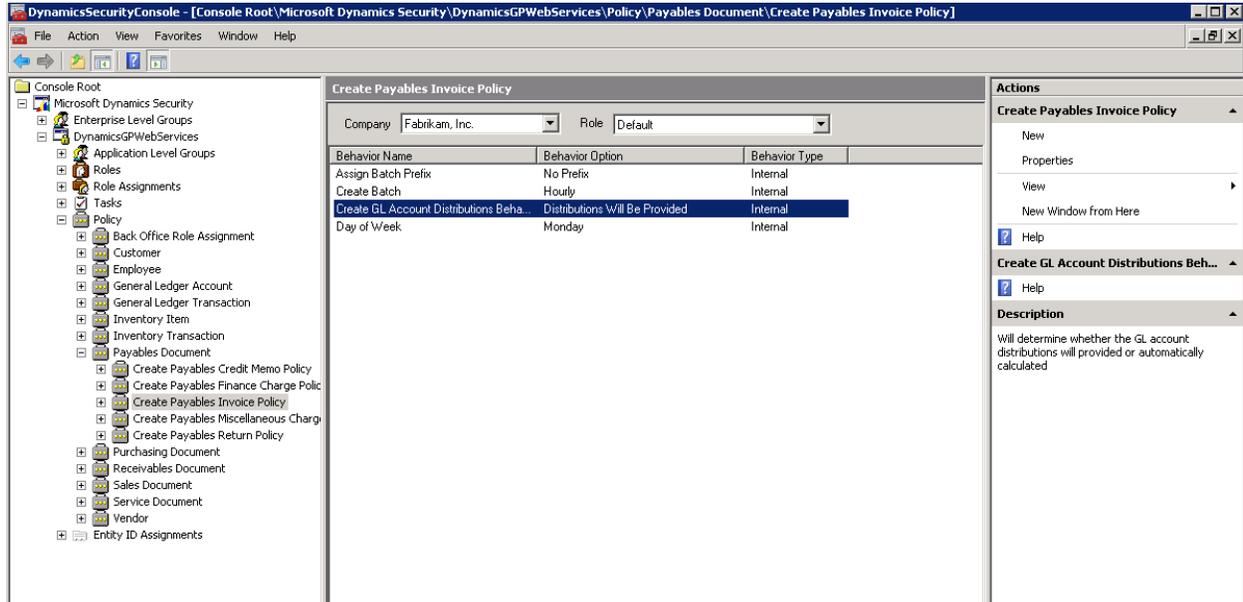


Now, go ahead and select the Role as "Accounts Payable Coordinator" or "SuperUser"

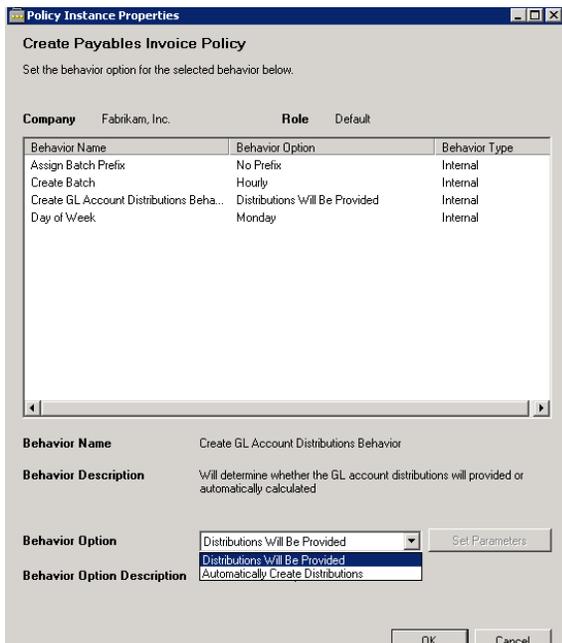
Configuring “Create Payables Invoice Policy”

Go to Administrative Tools -> Dynamics Security Console -> MicrosoftDynamicsSecurity -> DynamicsGPWebServices-> Policy ->Payables Document -> Create Payables Invoice Policy

Make sure Create GL Account Distribution Behavior is set to “Distribution Will be provided”



The default is “Automatically Create Distribution”. Click on properties link on the right side of the above window. You will be then presented with the following window where you could change the distribution type.



Configuring “Create Payables Credit Memo Policy”

If you plan to create Credit Memos (for processing refunds), follow this step. Repeat the above for “Configuring Create Payables Invoice Policy” by going to Administrative Tools -> Dynamics Security Console -> MicrosoftDynamicsSecurity -> DynamicsGPWebServices-> Policy ->Payables Document -> Create Payables Credit Memo Policy

Make sure Create GL Account Distribution Behavior is set to “Distribution Will be provided”

The screenshot shows the Dynamics Security Console interface. On the left, a tree view displays the navigation path: Console Root > Microsoft Dynamics Security > Enterprise Level Groups > Microsoft Dynamics GP Web Services > Application Level Groups > Roles > Role Assignments > Policy > Payables Document > Create Payables Credit Memo Policy. The main window displays the configuration for this policy. At the top, the Company is set to 'Fabrikam, Inc.' and the Role is 'Default'. Below this is a table of behavior options:

Behavior Name	Behavior Option	Behavior Type
Assign Batch Prefix	No Prefix	Internal
Create Batch	Hourly	Internal
Create GL Account Distributions Beha...	Distributions Will Be Provided	Internal
Day of Week	Monday	Internal

On the right side of the window, there is an 'Actions' pane with a 'Properties' link highlighted in red.

The default is “Automatically Create Distribution”. Click on properties link on the right side of the above window. You will be then presented with the following window where you could change the distribution type.

The screenshot shows the 'Policy Instance Properties' dialog box. The title bar reads 'Policy Instance Properties'. The main content area is titled 'Create Payables Credit Memo Policy' and contains the instruction: 'Set the behavior option for the selected behavior below.' Below this, the Company is 'Fabrikam, Inc.' and the Role is 'Default'. A table of behavior options is displayed:

Behavior Name	Behavior Option	Behavior Type
Assign Batch Prefix	No Prefix	Internal
Create Batch	Hourly	Internal
Create GL Account Distributions Beha...	Distributions Will Be Provided	Internal
Day of Week	Monday	Internal

Below the table, the 'Behavior Name' is 'Create GL Account Distributions Behavior'. The 'Behavior Description' is 'Will determine whether the GL account distributions will provided or automatically calculated'. The 'Behavior Option' is set to 'Distributions Will Be Provided' in a dropdown menu, with a 'Set Parameters' button next to it. The 'Behavior Option Description' is 'Distributions will be provided'. At the bottom, there are 'OK' and 'Cancel' buttons.

Configuring “Create Sales Invoice Policy”

If you plan to create sales invoice, follow this step (not common). Go to Administrative Tools - > Dynamics Security Console -> MicrosoftDynamicsSecurity - > DynamicsGPWebServices-> Policy ->Sales Document -> Create Sales Invoice Policy

Make sure the following 4 items are set as shown-

The screenshot shows the Dynamics Security Console interface. The left pane displays a tree view of policies, with 'Create Sales Invoice Policy' selected under the 'Sales Document' folder. The main pane shows the configuration for this policy, with the following table of behaviors and options:

Behavior Name	Behavior Option	Behavior Type
Allocate Lots Behavior	Automatic	Internal
Allocate Quantities Behavior	Based on Type Id	Internal
Allocate Serials Behavior	Automatic	Internal
Assign Batch Prefix	No Prefix	Internal
Assign Bin Behavior	Assign Bin	Internal
Bin Quantity Shortage Behavior	Override Bin	External
Calculate Total Amount Behavior	Do Not Calculate	Internal
Calculate Unit Price Behavior	Do Not Calculate	Internal
Check Credit Limit Behavior	Cancel Document	Internal
Check Hold Behavior	Cancel Document	Internal
Create Batch	Hourly	Internal
Create Bins Behavior	Create	Internal
Create Commissions Behavior	Commissions Will Be Provided	Internal
Create Components Behavior	Automatically Create Components	Internal
Create GL Account Distributions Beha...	Distributions Will Be Provided	Internal
Create Inventory Lot Behavior	Create	Internal
Create Inventory Serial Behavior	Create	Internal
Create Taxes Behavior	Automatically Create Taxes	Internal
Day of Week	Monday	Internal
Default Document Type Id Behavior	Use Setup Value	External
Default Warehouse Behavior	Use Setup Value	Internal
Freight Tax Behavior	Default From Setup	Internal
Include Promotions Behavior	Do Not Include	External
Miscellaneous Tax Behavior	Default From Setup	Internal
Quantity Shortage Behavior	Override	External
Use Header Level Taxes Behavior	Detail Taxes Will Be Provided	Internal

Configuring “Create Purchase Receipt Policy”

If you plan to create purchase receipts, follow this step (not common). Repeat the above for “Create Purchase Receipt Policy” by going to Administrative Tools - > Dynamics Security Console -> MicrosoftDynamicsSecurity - > DynamicsGPWebServices-> Policy ->Purchasing Document