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 –
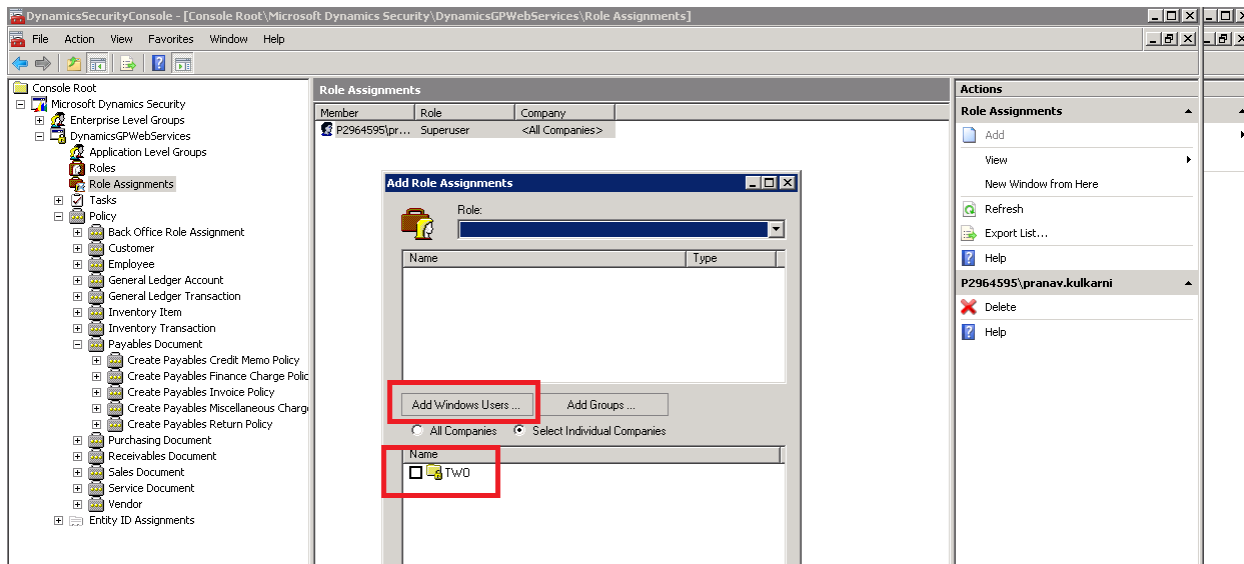
Configuring Security Roles

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.

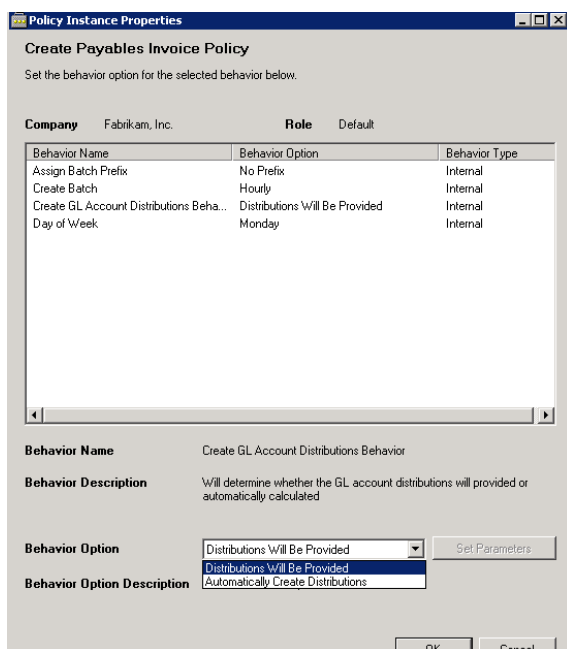Now, go ahead and select the Role as "Accounts Payable Coordinator" or "SuperUser"

Configuring "Create Payables Invoice Policy"

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

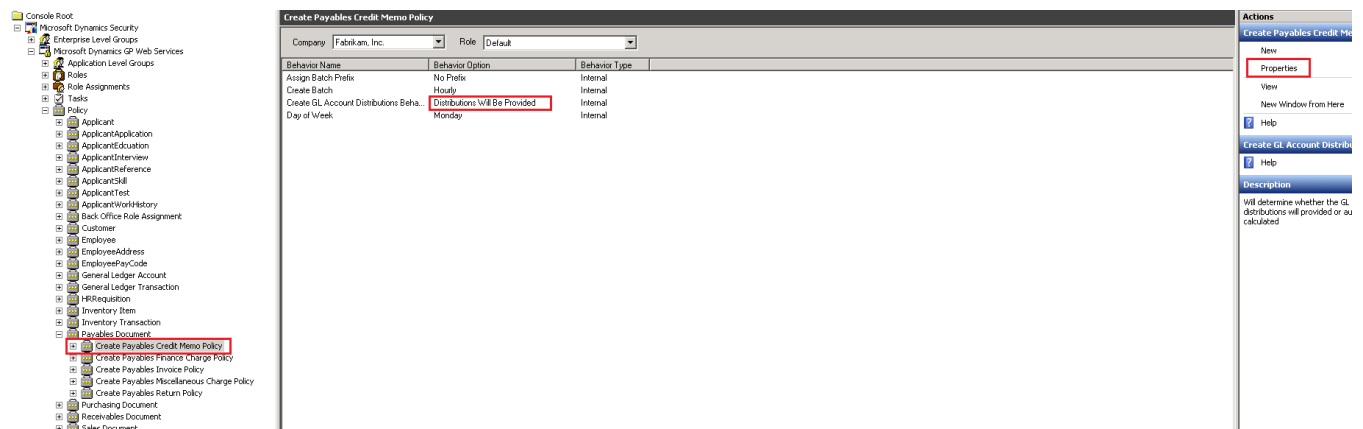Make sure Create GL Account Distribution Behavior is set to "Distribution Will be provided"
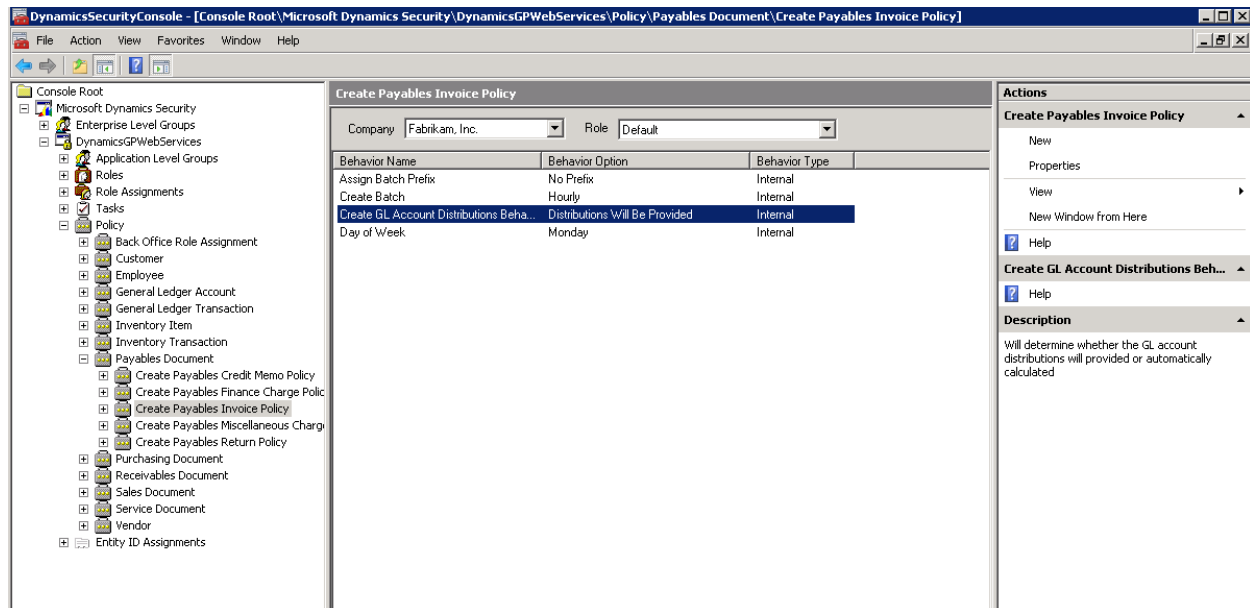
The default is "Automatically Create Distribution". Click on properties link on the right side of the above window. You will be then presented with the following window where you could change the distribution type.

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 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.
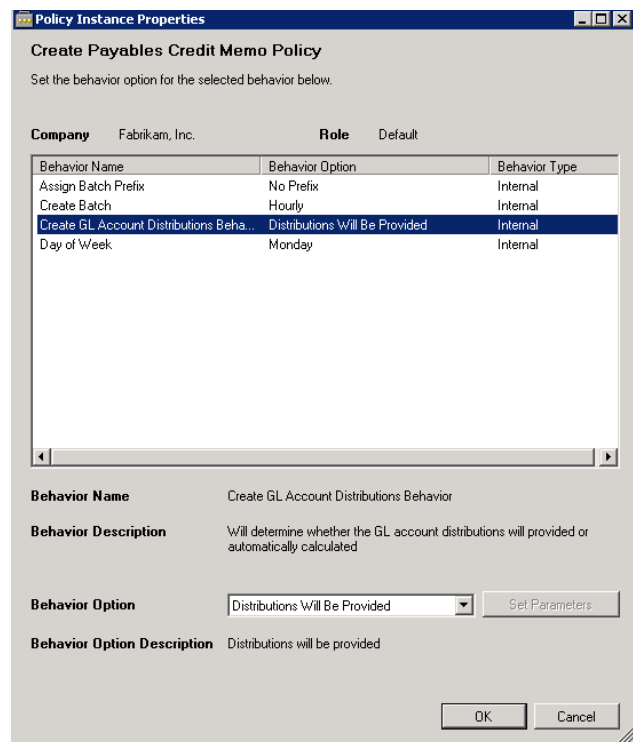
Configuring "Create Sales Invoice Policy"

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-
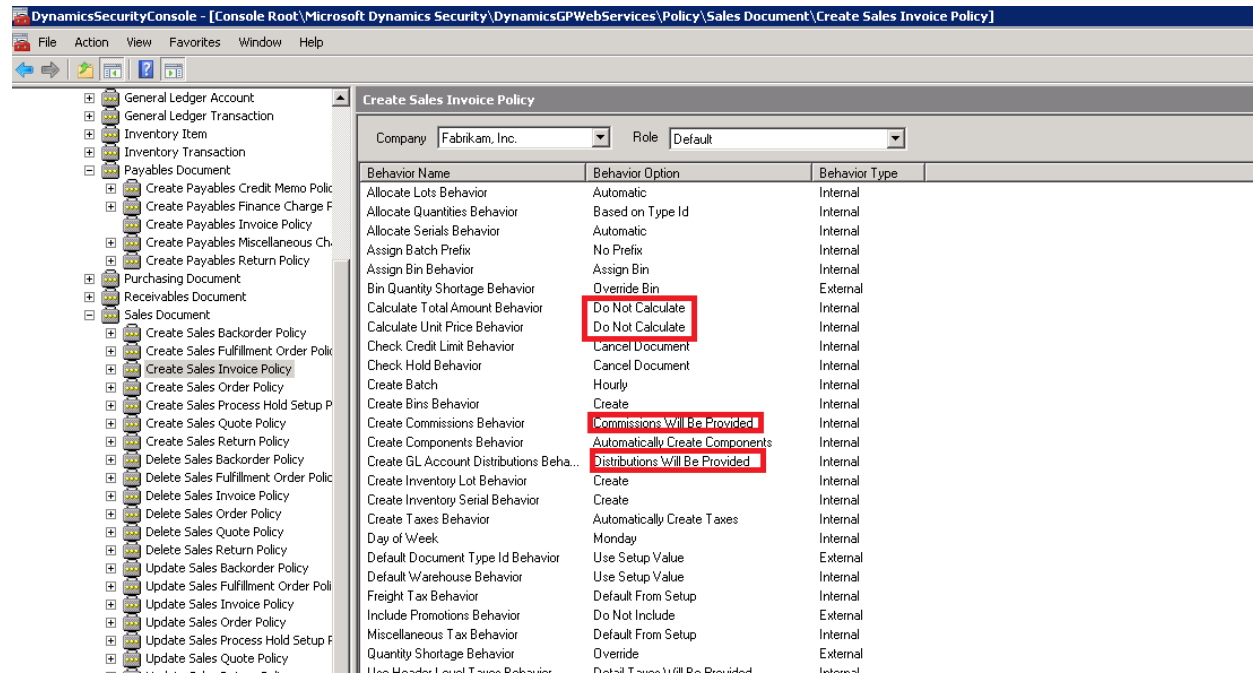
Configuring "Create Purchase Receipt Policy"

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