

# Certify for Business Central

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 [efoqus.ca/certify/](https://efoqus.ca/certify/)

**Certify for Microsoft Dynamics 365 Business Central** is an integration app that will allow users to post expense reports from **Certify** directly in Business Central. No reason for manual operations, simply let the app create posting-ready general journals directly from Certify expense reports. Reimbursable expenses are posted to the employee module so the standard **suggest employee payments** functionality can use utilized.

## Setup

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First the App must be registered and connected to your Certify account.

Select **About Certify** from the Search Bar:

TELL ME WHAT YOU WANT TO DO



certify

### Go to Pages and Tasks

> Certify Setup

Administration

> About Certify

Administration

> Certify Expense Exports

Lists



EXPENSE MANAGEMENT  
MADE EASY.

*Happiness included.*

[Click here to register and to sign up for Certify.](#)

Please register this extension to activate the functionality. You'll get a registration code to unlock this extension.

Enter Registration Code .....

Registered To .....

Click the **Click here to register and to sign up for Certify** link. Complete the process and fill out the **Registration Code** field.

Now open **Certify Setup**

# Certify Setup

[Show Attached](#)

Navigate

Fewer options

Notes

Links



## Certify Connection Setup

Base URL .....

API Key .....

API Secret .....

## G/L Integration Setup

General Journal Templ...

General Journal Batch ...

Department Dimension ...

Expense Balance Acco...

Expense Balance Acco...

Reimburse Balance Ac...

Reimburse Balance Ac...

Default Tax Area Code ...

The **Base URL** is automatically filled out and you should never need to change that. The **API Secret** and **API Key** field comes from your Certify Setup. Go to Certify API Credentials and generate an API secret. (*codes shown here are fake*)



## Certify API Configuration

Certify API Key

[Redacted API Key]

Certify API Secret

[Redacted API Secret]

[Generate New Secret](#)

Next, you'll need to select a general journal to use and specify balance accounts for expenses and reimbursements. To handle sales tax correctly, you must also select a Tax Area Code.

## Employee Setup in Certify

Make sure that the **Employee ID** field in Certify is filled out with the Employee Code from Business Central

[Edit User](#) [Return to User Search Results](#) [New Search](#)

### User Details

First Name

Peter

Last Name

Testing

Email Address

pt@efoqus.ca

Email Status

Good - send email ▼

Employee ID

PT

EMPLOYEE CARD



PT · Peter · Testing

[Process](#)

Employee

Navigate

Show Attached

Navigate

Fewer options



Pay Employee

### General

[Show more](#)

No. .... PT ...

Initials .....

First Name ..... Peter

Search Name .....

Middle Name .....

Gender ..... ▼

Last Name ..... Testing

Company Phone ...

Job Title .....

Company Email .... pt@efoqus.ca

And make sure the Employee in Business Central has an **Employee Posting Group** attached.

## Expense Categories

Your expense categories must be mapped to G/L accounts before users start submitting expense reports. Start by creating the Expense Categories in Certify and then open the expense categories from Business Central (from the Certify Setup page) to map G/L accounts to each category.

### EXPENSE CATEGORIES

✓ SAVED



Search



Edit List

Show Attached



Open in Excel



NAME	EXPENSE TYPE	G/L ACCOUNT
Lodging	Lodging	61300
Miscellaneous	Cash Expense	61300
Mileage	Per-Diem	61200
Airfare	Travel	61300
Hourly Labor	Hourly	62200
Meals	Meals	61200
Rental Car	Rentals	61300

## Credit Cards

If you're using the Credit Card module of Certify, you must also create the credit cards inside Business Central. Select **Credit Cards** from the Certify Setup page and add the cards.

### CERTIFY CREDIT CARDS

✓ SAVED



Search



New



Edit List



Delete

Show Attached



Open in Excel



CARD NAME ↑	LAST DIGITS ↑	DESCRIPTION	EXPENSE BALANCE ACCOUNT TYPE	EXPENSE BALANCE ACCOUNT NO.
Erik	1234	Company card issued to Erik	G/L Account	11200

Make sure, that the **Card Name** and **Last Digits** matches the card stored in Certify.

## Expense Reports

When the setup is completed, you can start processing expense reports directly from Certify. Select **Certify Expense Reports** from the search bar.

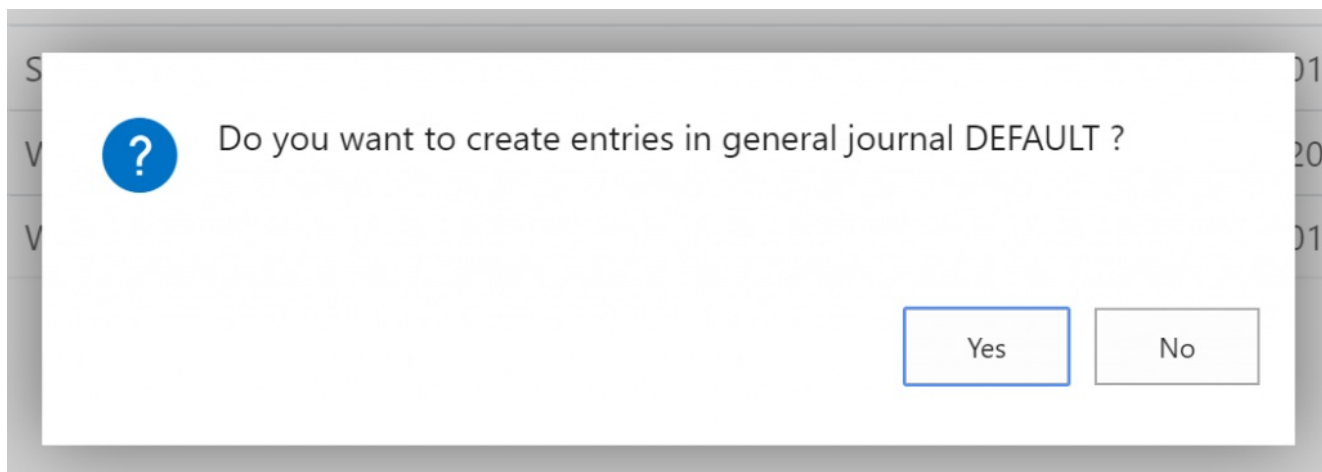
REPORT NAME	REPORT STATUS	DEPARTMENT	NAME	START DATE	END DATE	TOTAL
number 4	Waiting	General & Admin	Kim Mackintosh	9/13/2019	9/13/2019	19.10
number 5	Waiting	General & Admin	Kim Mackintosh	9/1/2019	9/6/2019	25.00
Number 3	Waiting	General & Admin	Kim Mackintosh	9/6/2019	9/12/2019	15.00
Sept2	Waiting	General & Admin	Kim Mackintosh	9/6/2019	9/18/2019	30.00
September 2019	Waiting	General & Admin	Kim Mackintosh	9/2/2019	9/13/2019	25.00
Expenses - 9/9/2019	Settled	General & Admin	Erik Hougaard	9/9/2019	9/9/2019	0.00
Test	Waiting	General & Admin	Erik Hougaard	5/13/2019	5/13/2019	25.00
Erik Expense Report	Waiting	General & Admin	Erik Hougaard	8/1/2019	8/31/2019	74.46

Under Actions, select **Get Expense Reports** to update the list from Certify.

From an expense return, you can go to **Navigate / Show Lines** to view the expenses on the selected report:

EXPENSEDATE	CATEGORY	VENDOR	AMOUNT
9/11/2019	Meals	Cactus	12.10
9/11/2019	Meals	Cactus	9.90

When ready, use **Actions / Generate Journal** to create General Journal lines in the journal selected in the Certify Setup.



From this point, it's just a regular general journal. You can proceed with posting, approvals or any other operation that can be done on a normal journal.