

# System Solutions John Deere Financial Dealer Integration

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USER GUIDE

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## **1. App Configuration: Main Setup Page**

Navigate to the John Deere Financial Setup Page within Microsoft Dynamics 365 Business Central to configure the app settings. Follow these steps:

- Open Dynamics 365 Business Central and access the John Deere Financial app Setup Page.
- Input your merchant number in the designated field.
- Specify the default descriptive billing code and credit plan numbers for transactions.

*Note: The descriptive billing code and credit plan numbers are essential for JDF (John Deere Financial) integration, though specific details about their purpose may be obtained from your JDF documentation.*

- In the "JDF Payment Method" field, select the relevant payment method set up in LS Express that will open the John Deere Financial payment page.

## **2. User Setup: Adding JDF Terminal Numbers**

Proceed to the User Setup page to assign JDF Terminal Numbers to users. This step ensures that each user can utilize the app for making payments. Follow these instructions:

- Access the User Setup Page within Dynamics 365 Business Central.
- Add JDF Terminal Numbers for each user who will be using the app for payments.

## **3. Customer Configuration: Adding John Deere Financial Account Number**

Configure customer settings to facilitate JDF payments by adding the John Deere Financial account number to each customer. Follow these steps:

- Open the customer card for the relevant customer.
- Locate and set the John Deere Financial account number in the designated field.

*Note: It is mandatory to have the John Deere Financial account number set for customers to make payments using JDF.*

## **4. Point of Sale (POS) Transaction: Making JDF Payments**

In the Point of Sale (POS) module, follow these steps to make JDF payments:

- Launch the POS module within Dynamics 365 Business Central.

- Create a sale with a JDF customer and pay.
- Select the configured JDF payment method, as set up on the Main Setup Page.
- The John Deere Financial payment page will be prompted.
- Click "Pay" to initiate the payment process.
- If John Deere Financial approves the amount, the payment will be successfully added to the sale.

*Note: Ensure that the JDF payment method selected aligns with the configuration on the Main Setup Page.*