System Solutions LLC ClickUp and Pick Ticket Manager for D365 Business Central User Guide

Extension

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Extension Setup

- Open the **Pick Ticket to ClickUp Setup** page to set up the app.
  - **API token**: allows the extension to connect to ClickUp.
    - Get this token from your ClickUp account by clicking your avatar in the upper right corner > Settings > Apps > under API token > Generate.
  - **Base URL**: allows the extension to connect to ClickUp.
    - Defaults to https://api.clickup.com/api/v2/.
  - **Folder Id**: the id of folder in ClickUp where the tasks should be created.
    - An easy easy to get this value is by clicking a task in your ClickUp account, then click its folder in the page navigation. The URL will contain the folder Id.
    - Example: https://app.clickup.com/9013485729/v/o/f/90133704296 = 90133704296.
  - **Automatically Create Task Default:** Sets the default for the Automatically Create Task" field when a new task is started in Business Central: No, After Posting, or After Payment.
  - **Upload Pick Instruction Automatically**: Specifies that a pick instruction PDF will be created and automatically attached to the task created in ClickUp.
  - **Disable Custom Fields**: Specifies that custom fields should not be created with the task. ClickUp's free plan limits the amount of custom fields that can be used, so this can be useful for testing.
- **Refresh List Data** action: This action will read lists, users, and custom fields from ClickUp, which are needed for creating tasks from Business Central. This needs to be done at least once when the app is set up for the first time and any other time the data needs to be refreshed.
- **ClickUp Tasks** page: Shows the list of all ClickUp tasks created in Business Central. Tasks can also be created from scratch from this page.
- **ClickUp Lists** page: Show the list data downloaded from ClickUp.
  - The Custom Fields value shows the amount of custom fields enabled for the list and opens a page displaying what they are.
- **ClickUp Custom Fields** page: Shows the custom fields from ClickUp available to each list. These fields can be mapped and ordered for use with Business Central.
  - To map a ClickUp custom field to a field from a Business Central sale, select the field from Business Central Field.

    - Multiple custom fields can use the "Item" field. For example, if you specify 4 item fields, it will be able to populate up to 4 lines from the sale into these fields in ClickUp.
    - The Order Index field can be changed to specify the order in which the fields should be listed in the task.
- **ClickUp Users**: Show the user data downloaded from ClickUp. Each user can be a member of any list.

Operation Instructions

Create a task from an Invoice, Order, or Posted Sales Invoice:

- Open the sale and go to the action group called either Invoice or Order.
- Click the **ClickUp Task** action.
- If a task doesn't exist yet, a new one will be created. If a task already exists, it will be opened.

Create a ClickUp task from scratch:

- Open the **ClickUp Tasks** page and click New.
- You can specify the document to use with the task. If it's not posted yet, select the sale under the Document No. field. If you'd like to use a posted sale instead, select the sale under the Posted Sales Invoice No. field.

Create a ClickUp task from LS Express:

- Pick Ticket to ClickUp can be integrated with LS Express POS using the **ClickUp and LSE Integration** app. Contact System Solutions for more details.
- Click the Sale action group in LS Express and then click the ClickUp Task action to create or view the task,

Using the ClickUp Task page:

- Input the fields for your new ClickUp task.
- The **Automatically Create Task** field option has three options:
    - No: Do not automatically create the task.
    - After Posting: Create the task when the sale is posted.
    - After Payment: Create the task when the posted sales invoice no longer has a balance.
- Under **Lines**, the lines for the selected sale will be displayed. The **To ClickUp** check box specifies that the item should be included on the pick ticket sent to ClickUp.
- When you're ready and if you don't want to wait until the sale is posted, use the **Create Task in Clickup** action to send the task to ClickUp.
- Once created in ClickUp, the **Open in ClickUp** action can be used to go to the task's page on your ClickUp account.
- The **Print** action prints a pick ticket based on the selected items.
- If you'd like to manually upload a PDF of the pick ticket, the **Upload Pick Instruction ClickUp** action will do this. However, this can be configured to occur automatically when the task is created.