System Solutions LLC Store Account Management Tools for D365 Business Central User Guide

Extension

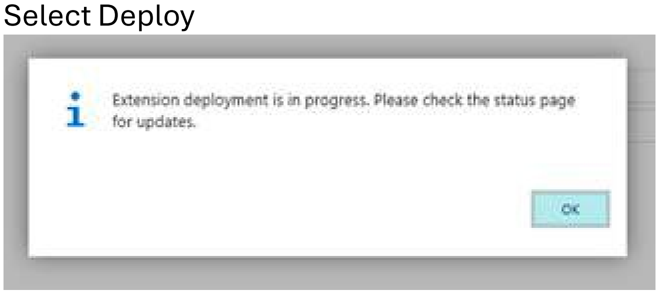
- **Extension Version Number: 6.2.0.4**
- **Extension Version Date: 05/13/2025**
- **Published by:** System Solutions LLC
- Find more extensions for Microsoft Dynamics 365 Business Central by System Solutions LLC

System Requirements

- Microsoft Dynamics 365 Business Central (Essential or Premium License)

How to Install / Uninstall SS Dynamics 365 Business Central SAMT

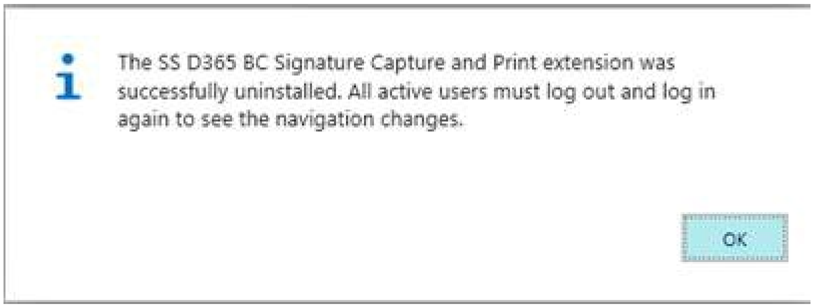
- **Note:** This App is not dependent on any other D365 Extension, it can be installed without the pre-existence of any Extension.
- In Dynamics 365 Business Central Production tenant: Extension Management > Upload Extension > Select the app file > Choose the above file (or latest version) > Select Deploy To = Current version > Language = English, check Accept box
- 

- Select Deploy
- 

- After installation is complete, Search Extension Management and Extension should be visible.

To Uninstall from Production Tenant:

- Extension Management > Highlight the Installed Extension > Select Uninstall (not Unpublish). Result will be:

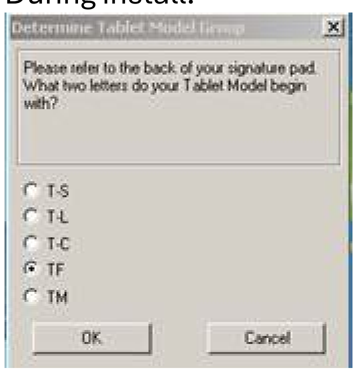
- 

To Remove Uninstalled Extensions from the List:

- Extension Management > Highlight the Installed Extension > Select the … and select Un-publish.

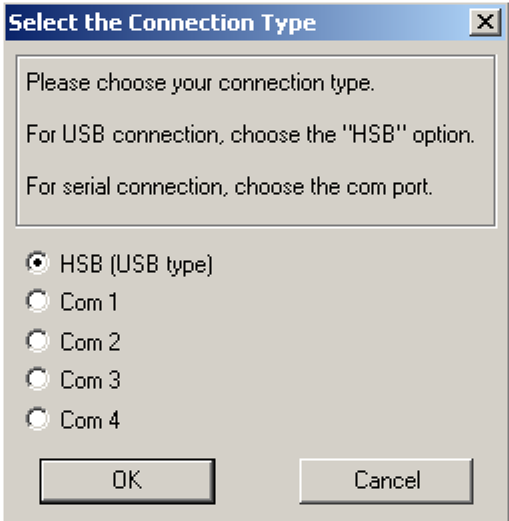
Install Topaz Drivers on the PC:

[Edit]

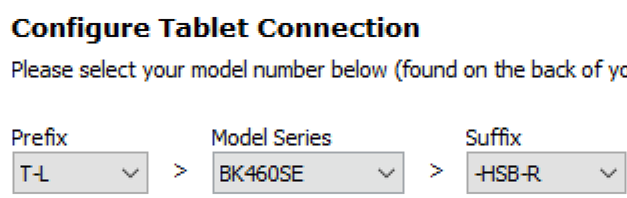
- Click here to [Install Sigplus Software]
- Follow the instructions at this link to install specific model: [SigPlus Pro Software for Topaz Signature Pads]
    - During install:
    - 

    - Then:
    - 

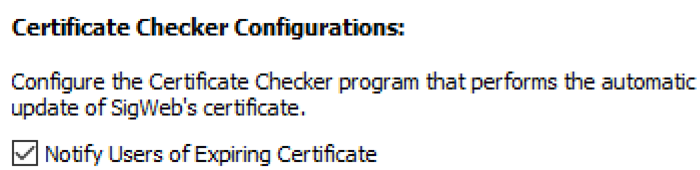
    - Then:



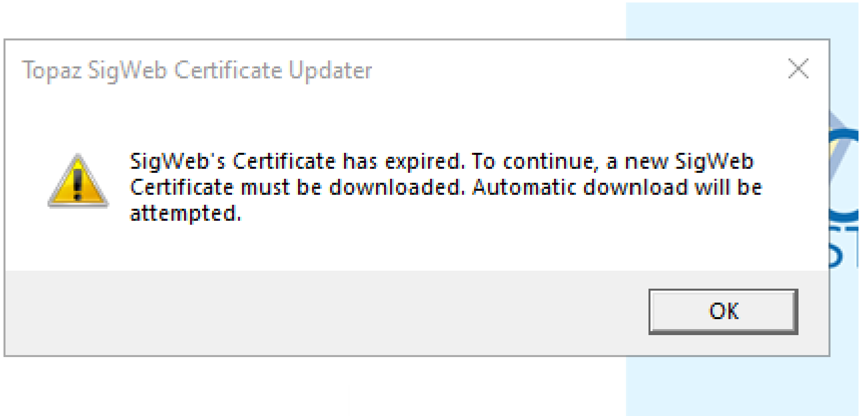
  - Then Agree to the Agreement.
- **Install SigWeb App** (This.is.installed.AFTER.above.driver.install)
- Install Z:\Install Files\Microsoft Dynamics D365\System Solutions 365 Business Central Extensions\SS D365 BC Store Account Management Tools\Topaz Driver
- During Installation > Select Appropriate Prefix, Model Series and Suffix



- When Prompt leave "Notify Users of Expiring Certificate" Checked,



Click OK to SigWeb's Certificate download.



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Installed is now completed.
If throwing an error, reinstall drivers. Its possible cashier did not click okay and exited out of window.

Testing Topaz

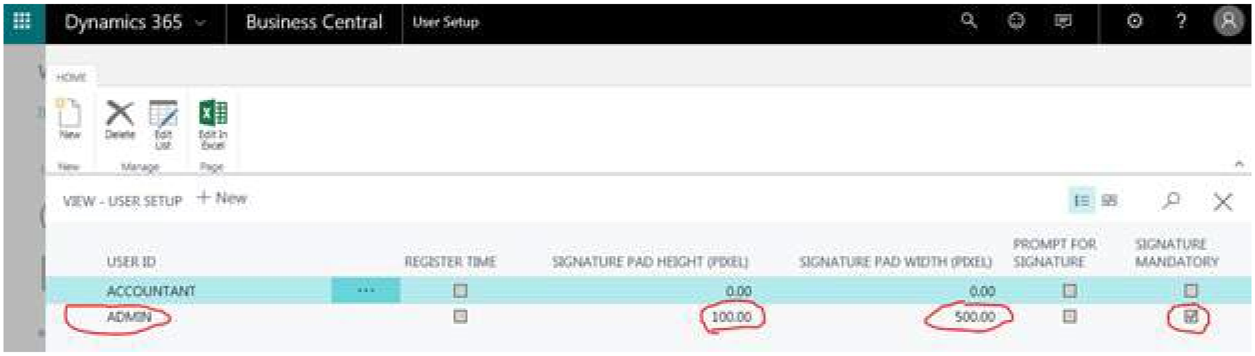
- Test Topaz Function By going to https://www.sigplusweb.com/sigwebtablet_demo.html
- Click "Sign" Action > Sign Topaz Pin Pad > Signature should be displayed on page

12-27-23 UPDATE - You may need to download the Certificate Updater if you're having issues taking signatures on this step: https://topazsystems.com/software/sigwebcertupdater.exe

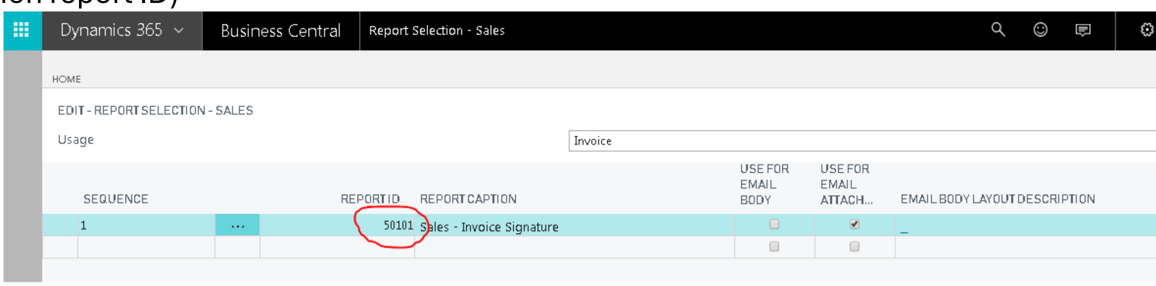
Setup Dynamics 365 Business Central Tenant Users:

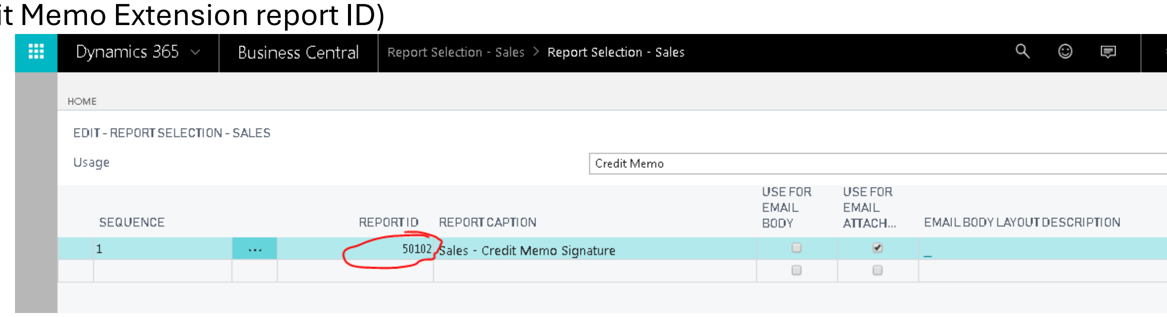
The setup has to be done for each Tenant User whether it be a POS user or Back Office user who may only be selling with Sales Orders.   If all PC's that could potentially be used for POS sales or Sales Order sales do not have a Pad, suggest setting the Signature to "Prompt" not "Mandatory".

- Search > User Setup
  - Select or Add a Tenant User ID
  - SAMT Prompt Form column = Check the box (if not checked, the Form will not prompt that is used to capture Signature, Contact, or External Document No.)
  - Fill the Signature Pad Height and Width columns
    - Dimensions in Pixels, setup for a ; 1" x 5" Pad is 100 x 500
    - Under SAMT Signature Device Drop Down > Select Topaz or SS Credit Card Processing (If using Ingenico Lane 7000 to Capture Signatures)
  - Check Prompt or Mandatory
    - If Mandatory user will not be allowed to Exit the Sign screen until something is captured as a signature

- 

Setup Dynamics 365 Business Central Invoice and Credit Memo:

- Set up new report ID's for Credit Memo and Sales Invoice like in the picture below.
    - Search > Report Selections Sales > Select Invoice > Type over default report ID 1306 replace with 71836 (50101 or 70371836 in other versions) (Invoice Extension report ID)
        - 

    - Search > Report Selections Sales > Select Credit Memo > Type over default report ID 1307 replace it with 71837 (50102 or 70371837 in other versions) (Credit Memo Extension report ID)
        - 

    - These Report ID's and Layouts can be customized using the default D365 Business Central report customization process.

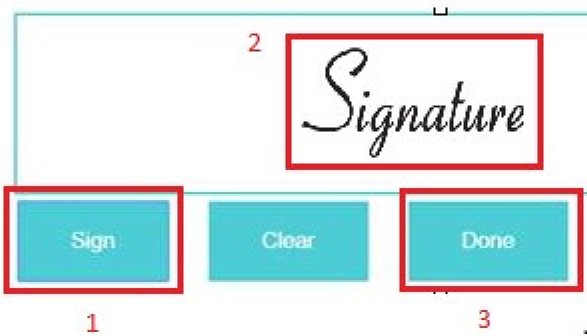
Usage - How to post Invoice to Customer Account and get the signature:

Edit

- Log Into POS
- Select Customer and the items
- Go to Pay -> Select the "Post to Customer" icon 

- It will prompt: "Do you want to post the Invoice?" -> YES
- It will open the Invoice details - do the following ->

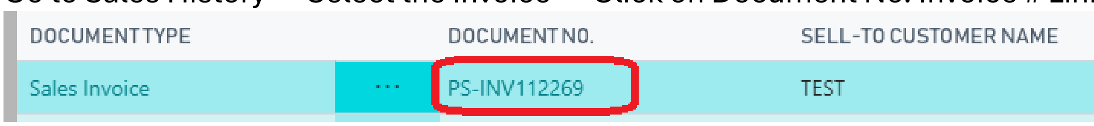
1. Click on SIGN
2. Ask customer to do their signature on your Topaz
3. Click "Done" once completed



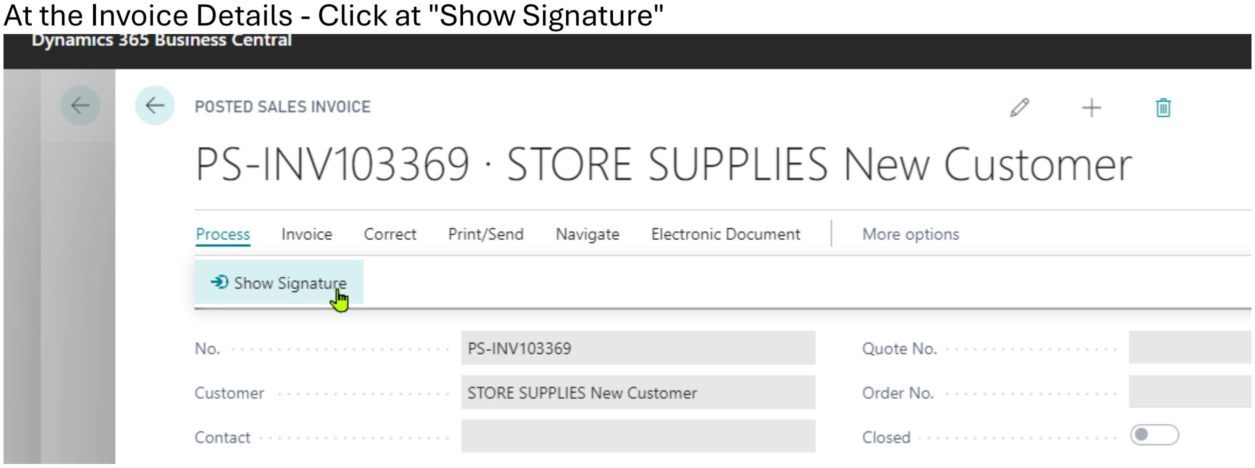
- It will display "Signature successfully added" -> Click OK.

How to view invoice with the signature details:

- Go to Sales History -> Select the Invoice -> Click on Document No. Invoice # Link

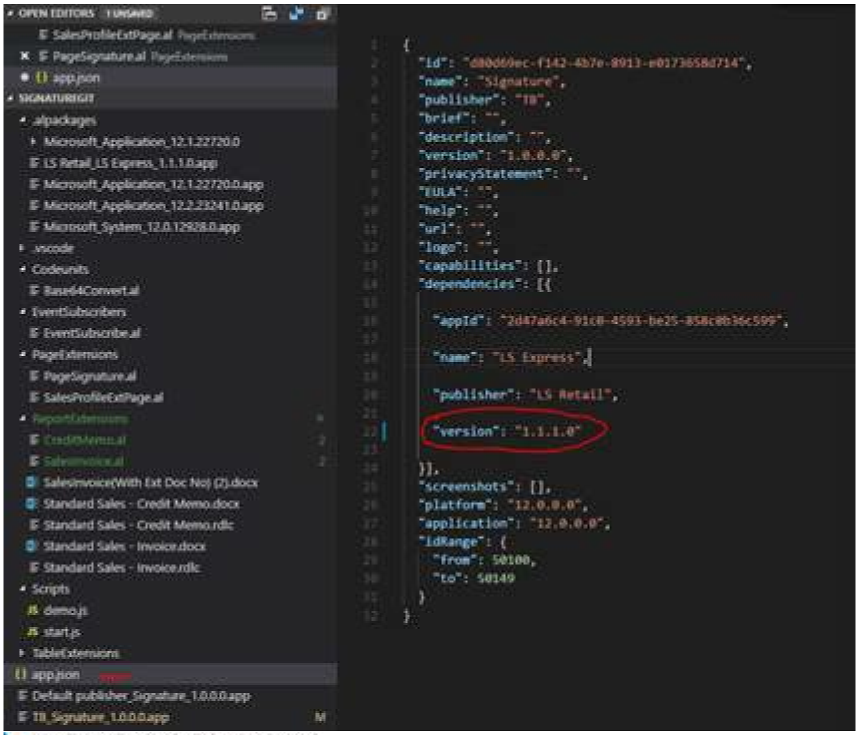


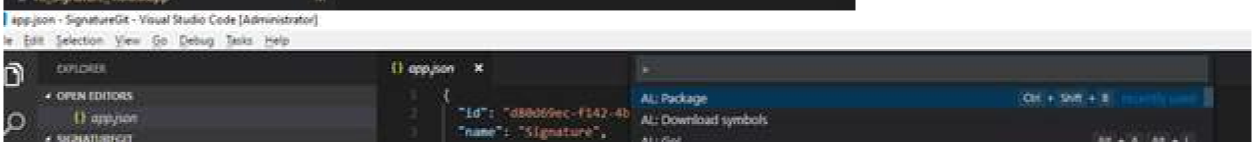
- At the Invoice Details - Click at "Show Signature"



Upgrades:

- Business Central updates shouldn't affect the extension.
- If an newer version is programmed, to repackage the product you have to press CTRL+SHIFT+P and then choose package or directly CTRL+SHIFT+B

- 



Topaz Wifi Pad Installation Guide for Model #T-LBK750SE-WFB1-R
Complete below on first POS.
Model T-LBK750SE-WFB1-R "Wireless Sled, Siglite 4x3"
Reference: www.topazsystems.com/wifiguide
1. Wi-Fi is setup and functioning on your network before continuing.
2. COM 7,8 and COM 9 are available to ensure proper operation.
3. Download and run “TopazWiFiConfig” from: www.sigpluspro.com/wifi. When prompted by the installer, look on the back of the signature pad to find the signature pad model number, and select the appropriate option. Do not plug the reader in via USB until installer states to do so.
4. The Wi-Fi pad can be configured to work in two modes:
a. Computer Mode (factory default): The Wi-Fi pad connects to an integrated Wi-Fi card or USB Wi-Fi adapter on the PC
b. Router Mode: The Wi-Fi pad connects to a router. The PC connects to the same router to gain access to pad (which will be used in below steps). Below steps are for Router Mode, which will be most commonly used.
5. Connect the micro-USB cable from the pad to your PC.
6. Leave the Topaz turned off (there is a manual switch on the backside).
7. Open the "Topaz Wifi Config" App by selecting the desktop shortcut placed during installation, or find the app located C:\Program Files (x86)\Topaz Systems\Tools\WiFi\TopazWifiConfig.exe

8. Check the box located in the Wi-Fi Mode" section labeled "Connect to router"
9. Update sensitive SSID and Password within the "WLAN" section
10. Select network interface card you want to use from the dropdown menu
   a. Wi-fi adapters will be listed in blue text
   b. Ethernet cards will be listed in green text
   c. The Wi-Fi config utility with automatically chose an available network address based on the network card selected.
   d. If there is only one card listed, then there is nothing to do in this step.
Note.there.is.also.an.option.for.Manual.Network.Set‗Up.for.Advanced.Users¡.This.is.enabled. by.checking.ƒManualƒ.checkbox.below.the.network.interface.list¡.Note.setting.ƒManual.IPƒ. is.used.when.setting.up.multiple.PCs̸.to.share.a.Wi‗Fi.Topaz.reader¡
11. Put the signature pad into "Blacklight Mode" by following these steps
   a. Power ON the pad while pressing the pen tip in the upper-right hand corner of the display.
   b. Leave the pad in this mode until the programming is complete. If you do not see a image on your display, unplug the pad and try again.
   c. Select the "Program" button on the WiFi config utility.
Note¿SSID.and.password.are.the.only.settings.that.should.be.changed.at.this.point¡
   d. Make sure“ Connect to Router” remains un-checked.
   e. Wait for programming to complete (this may take up to a minute).Note: To conserve battery, the pad will automatically shut off after 5 minutes of use unless an application is connected. This can be changed later in optional step.
   f. A window will display “All Updates Completed”. Select “OK”. Exit “Backlight Mode” by selecting OK. Note¿Backlight.levels.do.not.need.to.be.adjusted.(using.the.>.and.‗.on.the. screen)
   g. Unplug the USB cable from the Topaz.
   h. Ping test your manually assigned IP address. If pinging fails, check SSID and password.
12. Test with the Topaz DemoOCX Utility
  a. Open "DemoOCX" by selecting shortcut on your desktop.
  b. Click Properties > Tablet > Com Port > Port 8 (this is the network port).
  b. Click the "Start" button and then sign on the pad. The signature will appear on the pad in the DemoOCX window.
13. Install newest version of Sigweb: https://www.topazsystems.com/sdks/sigweb.html
   a. During install the Topaz Model # is preselected, set COM 8 (as this is the network port).
14. If the Topaz pad will be used for multiple BC users. Repeat all above steps (using same manual IP set above).

Setup Dynamics 365 Business Central Verifone MX915:

Follow wiki here: Verifone REST WebService - Installation Guide and Troubleshooting / How to compile and generate the Setup.exe and VerifoneSignatureCapture.msi installer files

Getting Signature to Work in Business Central App (Microsoft Store) with Workaround

Follow wiki here: Workaround to get Store Account Management Tools signatures to work with Business Central App (Microsoft Store)

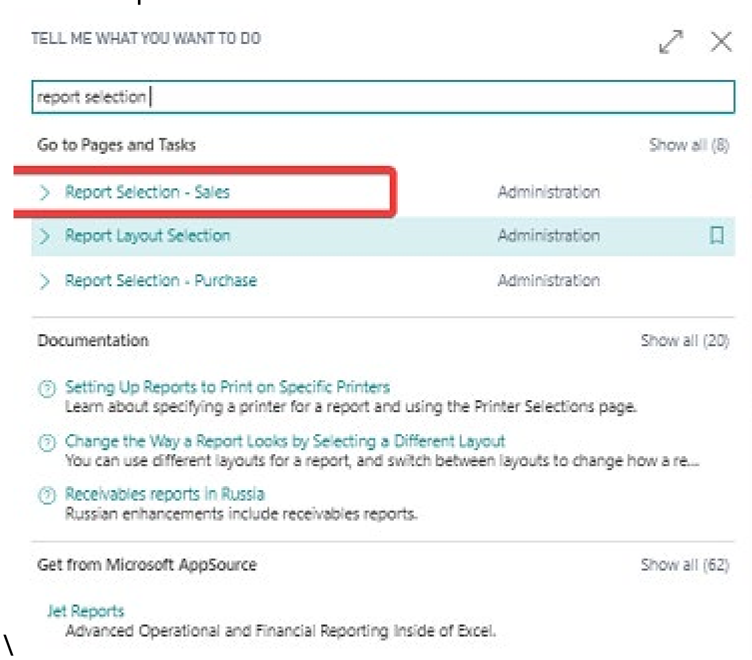
SS Dynamics 365 Business Central SAMT Customer Statements Setup and Use

Edit

Desktop version (obsolete see Wiki Link)- [SS Dynamics 365 Business Central Customer Statements- Desktop Version]

Initial Configuration of Customer Statements (Cloud version-installed directly into customers tenant).

- Install most current version directly into customer tenant through extension management. "Z:\Install Files\Microsoft Dynamics 365\System Solutions 365 Business Central Add Ons\SS D365 BC Store Account Management Tools"
- Search for "Report Selection - Sales" after installation is completed.
- Report Selection - Sales



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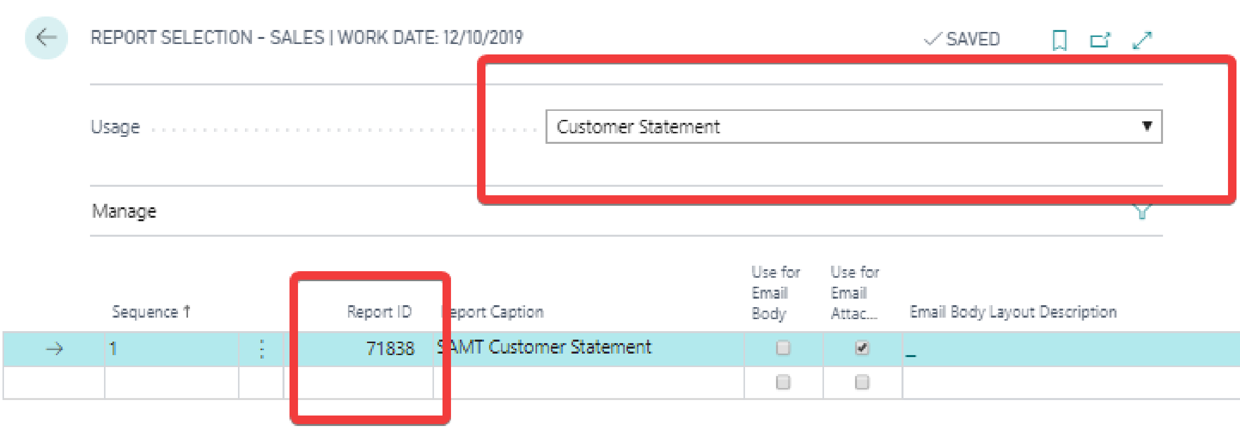
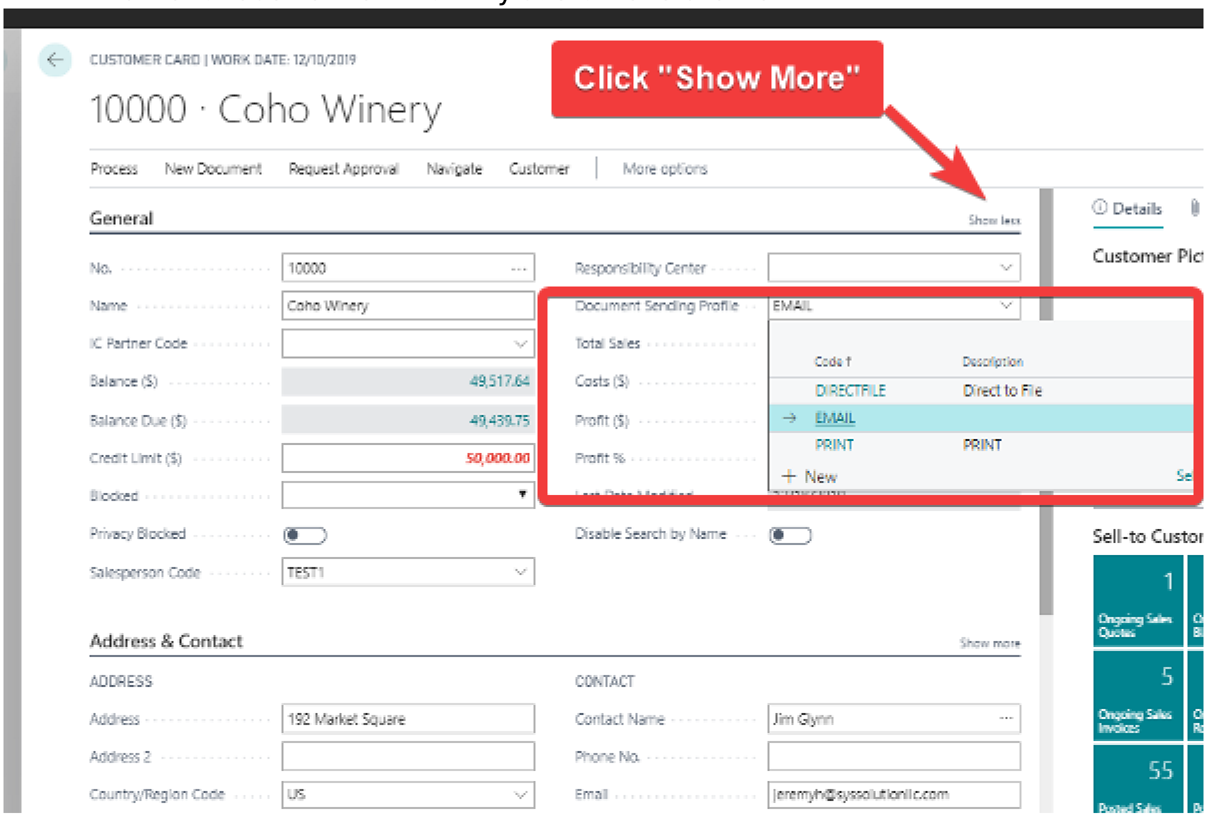
- Usage = Customer Statement
- Report ID = 71838
- Report Caption = This will update after Report ID is entered.
- "Use for Email Attachment" - Checked off

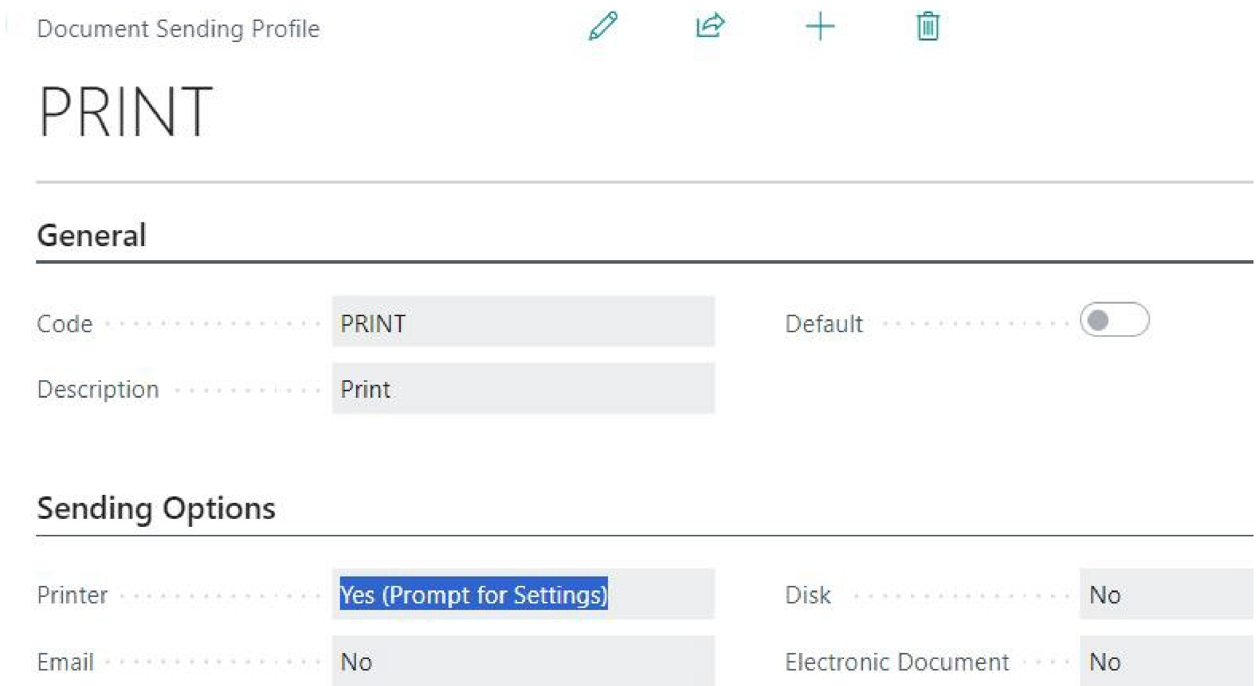


Customer Card Setup:

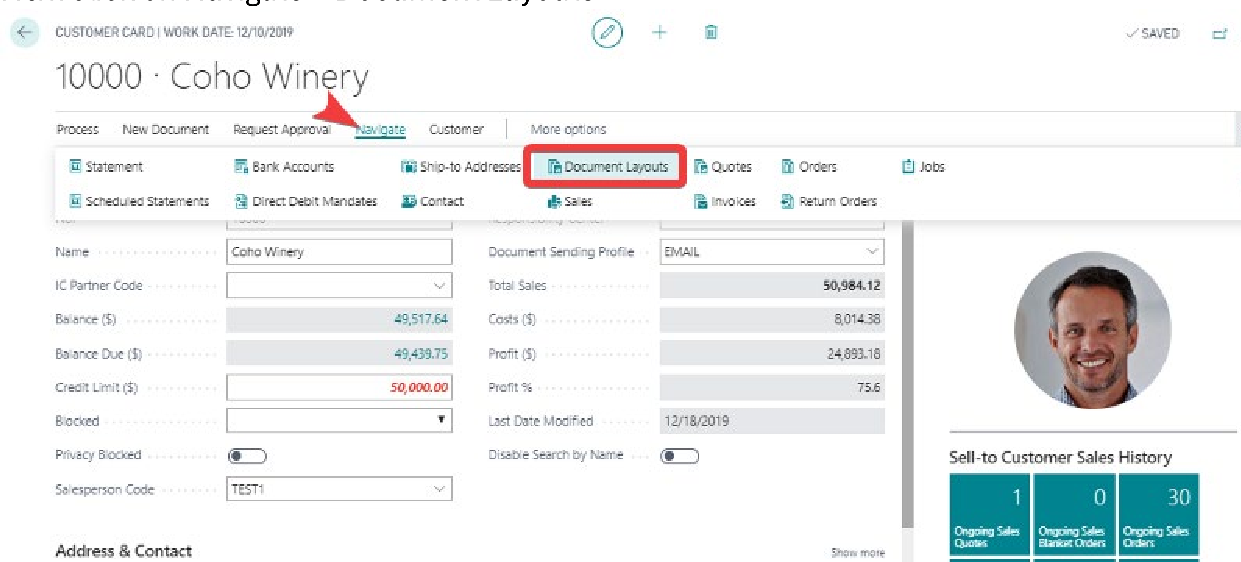
- This needs to be set on each customer card (Check with development if this can be imported during data migration)(Example new store).
- Click "Show More" under General on customer card > Go to "Document sending Profile" This will be set to either EMAIL or PRINT depending on how the customer wants to receive their monthly customer statement.



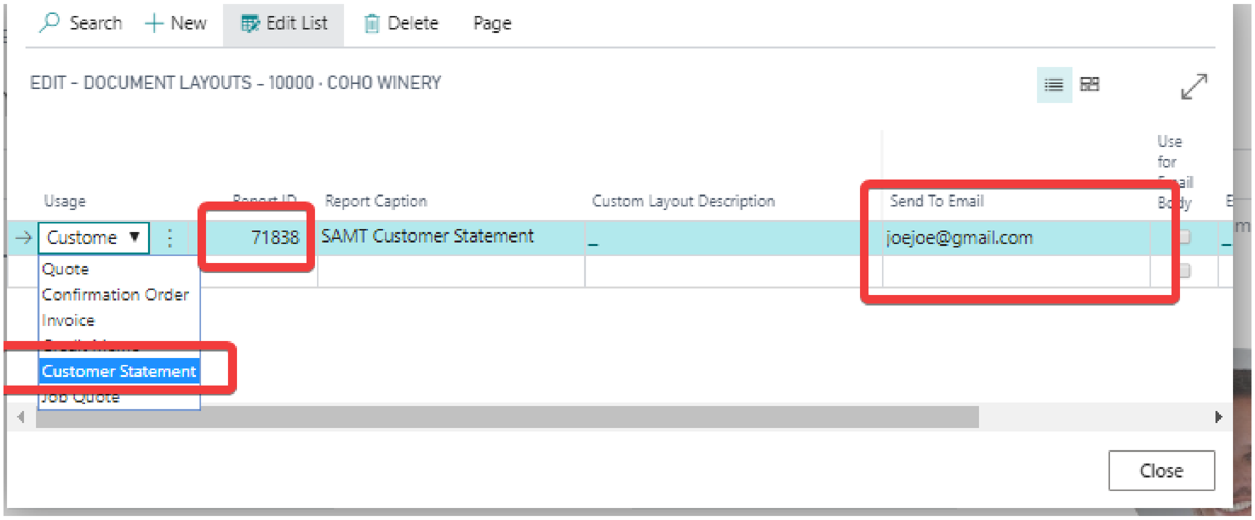
- If Email and Print options do not exist in the Document Sending Profile field they must be added.
- Search Document Sending Profiles > Click + Add.
- Under General Tab > Code = PRINT > Description = Print > Uncheck Default.
- Under Sending Options Tab > Printer = Yes (Prompt for Settings) >Email, Disk and Electronic Document = No.
- Set up Email option similarly.



Next click on Navigate > Document Layouts

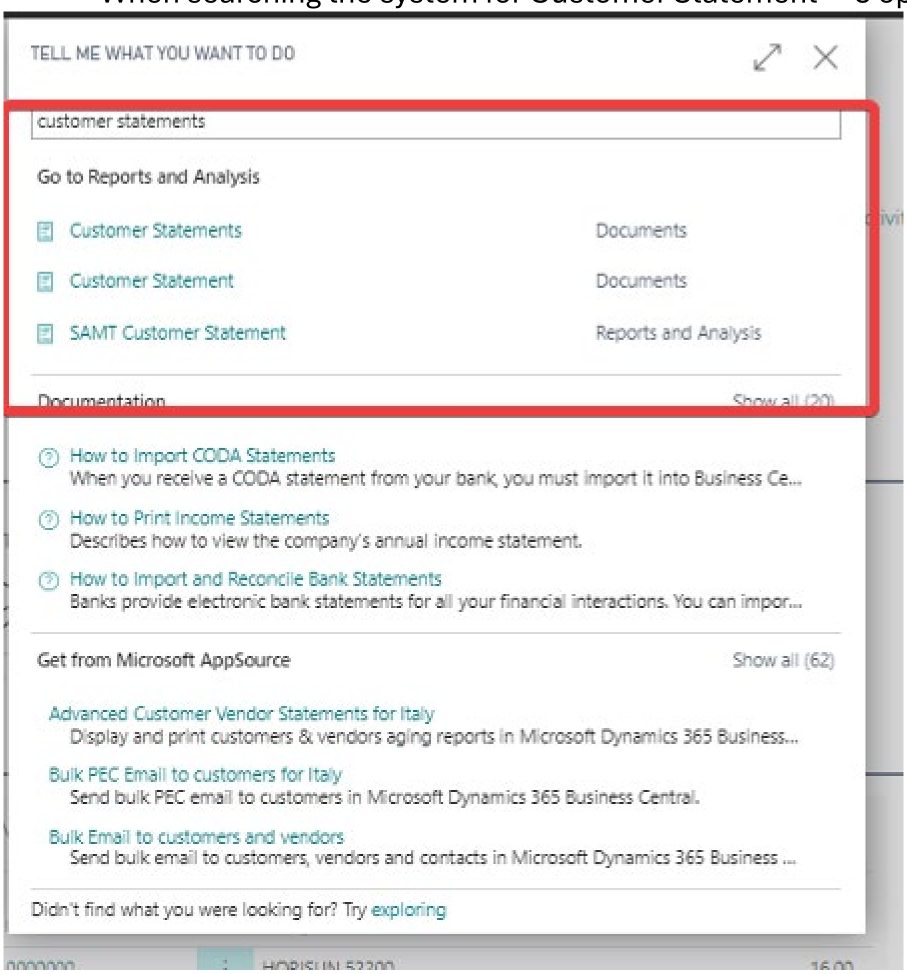


- Usage Drop Down= Select "Customer Statement"
  - Report ID = 71838
- Report Caption = this will auto fill once Report ID is entered
- Send To Email = Enter email address of customer that will be receiving emailed statement



Running Customer SAMT Customer Statements (After above steps completed)

- When searching the system for Customer Statement > 3 options will appear.



Customer.Statement.(note.this.is.singular.spelling)

- Use this to print / e-mail SS D365 BC Customer Statements - Once above steps are completed "SAMT customer statements" will open - As this is an overlay.

- **Note: as of 8/24/203, this page can't be searched for** (possibly a bug) and Microsoft has still not said when it will be fixed. In the meantime, the following workaround can open the same page (remove this section when Microsoft fixes it).
    - Open any customer card.
    - Report > Statement.
    - Remove the auto-filled Customer No. filter.
    - Proceed as normal (this is the same page).

Customer.Statements.(plural.spelling)

- This will run native 365 statement (If a specific customer does not want SS SAMT statement)

SAMT.Customer.Statement

- **Do not use** (Unable.to.email.statements.through.this)

Email Customers SAMT Statements: On.Each.customer.card.must.have.navigate.~. Document.Layouts.~.SAMT.Statement.ID.~.Email.assigned.for.this.to.email¡.The.email.set. on.customer.card.field.is.ignored.here¡.If.coming.is.customer.from.RMS?these.will.be. imported.during.migration.(we.apply.any.current.customer.that.is.setup.in.current.RMS. Customer.Preferences)

- Usage = Customer Statement
- Report ID = 71838
- Send to Email = Email address of customer

Print Customer Statements (remaining customer who's are not receiving emailed statement)

Use Report Output: Print

How to Exclude Customers with 0.00 Balance

1) Click + Filter to add additional filter
2) Search for Balance ($) = Enter <.01

How to Exclude Specific invoices or Credit memo's from Statement Print out.

- Under Filter: Cust Ledger Entry: > Select Document No.
- In below example the report will exclude.
- S-INV+000755 (Invoice)
- PS-CR104007 (credit memo)