

System Solutions LLC Vendor EDI for D365 Business Central User Guide

Extension

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System Requirements

- Microsoft Dynamics 365 Business Central version 25 or newer.
- A desktop computer with Windows 10 or newer.
- An active EDI account set up by your vendor.
 - The vendor must be supported by the Vendor EDI application. Contact System Solutions LLC for more details or to inquire about adding functionality for more vendors.

Description

The Vendor EDI application allows items, purchase orders, and other data in Business Central to be created and maintained by vendors. It also allows purchase orders in Business Central to be sent directly to vendors. Sync your inventory with a vendor's catalog, download purchase orders, place new orders, manage suggested prices, and more. Operations can be performed manually or set up to run on their own.

Installation

Vendor EDI sends data between vendors and Business Central by using two applications that communicate with each other.

- **Vendor EDI app for Business Central:** install from AppSource using [this link](#). This app receives vendor data and processes it into Business Central records. Once the app is installed, System Solutions must assign a license for the Business Central tenant in order for it to process data.
- **Vendor EDI Connector desktop application:** install by running "Vendor EDI Connector setup.exe" on a desktop computer that will stay powered on and connected to the internet. This application automatically downloads data from vendors and sends it to the Vendor EDI app in Business Central. Contact System Solutions for more details.

Setup

- **Vendor EDI Connector Connection Setup**
 - Open the Vendor EDI Connector desktop application > Configuration > **Connection**.
 - Input the Business Central tenant ID. This is shown in Business Central on the Help & Support page under "Microsoft Entra tenant ID."
 - Select the environment. If you're connecting to a sandbox, you may enter its name into this field.
 - Click Load Companies and select the company. If you have yet to login through the application using your Business Central user credentials, it will prompt you to do so at this step.

- If this setup is meant for a specific location in the company, click Load Locations and select the location. Otherwise leave this field blank.
 - Save the connection settings and go to Configuration > **Vendors**. Select the vendors that should be enabled with the application.
 - If you're interested in using a vendor with the app that's not currently listed, contact System Solutions.
- **Business Central Setup**
 - Open the **Vendor EDI Setup** page in Business Central. Set the general settings at the top. Additional settings for the Price Change Queue can be found at the bottom of the page.
 - New Item Template: Specifies the item template to use when a new item is created from vendor data.
 - Create New Items From: Specifies if the application is permitted to create new items from item data, invoice data, both, or none.
 - Update Existing Items From: Specifies if the application is permitted to update existing items from item data, invoice data, both, or none.
 - Automatically Calculate Profit Percent: Specifies whether the price change queue's profit percent fields should be automatically calculated when the page opens. These fields are hidden by default.
 - In the **Vendor Settings** list, add a new line for the vendor you're setting up.
 - If applicable, add a location code. This should match the location specified in the desktop application.
 - Click the vendor name in the list to open the full Vendor Settings card. Some settings will be listed for every vendor, while others only apply to specific vendors.
 - **Business Central tab:** Set the vendor, location code, and vendor number from Business Central.
 - **Vendor tab:** Details that allow the application to connect to the vendor in order to transfer data with it. This information is provided by the vendor.
 - **Item & Categories tab:**
 - Do Not Update Descriptions: Specifies that an item's description should not be changed when updating the item.
 - Set Category of New Items: Specifies that a category should be set for a new item based on the data provided by the vendor.
 - Set Category of Updated Items: Specifies that a category should be set when updating an existing item based on the data provided by the vendor.
 - Do Not Create New Categories: Specifies that only existing categories should be used. If the category can't be found, a category will not be set for the item.
 - Category Type: Specifies how the vendor's categories are created into Business Central item categories. An arrow

signifies multiple levels of categories. The available options will change depending on the vendor.

- **Costs tab:**
 - Cost Type: Specifies the type of cost to use from the vendor. Not applicable to all vendor settings.
 - Purchase Price List Code: Determines the purchase price list to use when adding or updating the vendor's item costs.
- **Prices tab:**
 - Price Updates fields: Specifies what to do with retail price changes when received by the vendor from different data types. "None" will not update the prices of items. "Queue" will add the price change to the Price Change Queue page, so it can be manually approved or declined at a later date. "Auto" will automatically update the unit price of the item.
 - Price Type: Specifies the type of price to use from the vendor. Not applicable to all vendor settings.
- **Purchase Orders tab:**
 - Receiving Invoices
 - Use Invoice No. as PO No.: Specifies that purchase orders should be created using the vendor's assigned invoice number instead of the provided purchase order number.
 - Receiving Direct Invoices
 - Process Direct Invoices: Specifies that direct invoices and dropship orders billed through the vendor should be added as purchase orders.
 - Find Items by Mfg. No. in Vendor No.: Specifies that the vendor's manufacturer numbers or their own vendor numbers match the vendor numbers in Business Central. This allows existing items to be found by searching for the manufacturer part no. under another vendor's vendor item no. or item reference in Business Central.
 - Do Not Create Items From Mfg. Part No.: Specifies that, when an item cannot be found by its manufacturer part number in Business Central, a new item should not be created.
 - Unknown Item Placeholder: Specifies that, when an item from a direct invoice cannot be found or created, a placeholder item should be added to the purchase order instead.
 - Sending Purchase Orders

- New PO Prefix: Specifies that new purchase orders should be prefixed with this text. This setting is typically left blank.
 - Send Prices With POs: Specifies that the items' retail prices should be sent to the vendor when an order is placed through the Vendor EDI application. This is often used for tracking or labeling. Not applicable to all vendor settings.
 - **Data Information tab:** These fields specify information about when data was downloaded from the vendor. It will not normally need to be changed. Not applicable to all vendor settings.
 - Vendor EDI Setup actions:
 - Actions > Process Imported Vendor Data: Manually processes all vendor data that is waiting with the "ready" status. The job queue will do this automatically.
 - Actions > Import Data From Excel: Allows data to be imported from Excel and processed by the application. For more information, see the Operation section below.
 - Related > View Imported Data: Opens the list of the raw data added by the Vendor EDI Connector desktop application. The status field shows whether the record has been processed or not.
 - Related > Price Change Queue: Opens the Price Change Queue page, which shows queued prices waiting to be approved (if price updates are set to the queue option in the settings).
 - Related > Vendor Inventory: Shows a list of all recorded quantities on hand as reported by vendors. If no applicable vendor is set up with the application, this page will be hidden.
 - Related > Job Queue Entries: Opens Business Central's Job Queue Entries page, to set up or modify jobs used with the Vendor EDI application.
- **Vendor EDI Connector Task Scheduling**
 - The Vendor EDI Connector desktop application can be set up to download and upload data on a regular basis without any user interaction using Task Scheduler, which is a part of Windows. Multiple tasks can be set up, depending on the needed data and schedule.
 - Open **Task Scheduler** and click Create Task.
 - General tab
 - Name example: "[Vendor Name] - [Task Name] - EDI for Business Central"
 - Under Security Options, enable "Run whether the user is logged in or not"
 - Under Security Options, enable "Run with highest privileges"
 - At the bottom, set "Configure for" to the computer's OS.
 - Triggers tab

- Click New to add a new trigger.
- **Set the desired schedule.**
 - For example, it is often set to run daily every morning a couple of hours before the company opens for business. However, with the latest version of Vendor EDI, it may be permissible to run during business hours and even multiple times per day. Vendors may have specific times of day that they make data available, which can affect this decision.
 - It may be useful to create a standalone task for SendPurchaseOrders that runs often throughout the day.
 - Set "Stop task if it runs longer than" to 2 hours.
 - Verify "Enabled" is checked and click OK.
- Actions tab
 - Click New to add a new action.
 - Action should be set to "Start a new program."
 - Program/script: click Browse and navigate to "**Vendor EDI Connector.exe.**"
 - It is often located in this folder: C:\Program Files (x86)\System Solutions\Vendor EDI Connector
 - Add arguments: The arguments are an important setting that tells the application which data to download or upload. Each task should contain two arguments:
 - **Argument 1: The vendor.** Available options: BlishMize, DoltBest, EmeryJensen, HouseHasson, Orgill, and more may be added in the future.
 - **Argument 2: The type of data.** Available options:
 - **UpdateItems:** Downloads item data from the vendor so items can be created or updated in Business Central. If the vendor has separate price data, it is typically included.
 - **UpdatePricesOnly:** If the vendor has separate price data, downloads it without other item updates. This is not typically used.
 - **ReceiveInvoices:** Downloads invoices from the vendor so they can be created or updated as purchase orders in Business Central. This also includes direct invoices and dropship orders if applicable.
 - **SendPurchaseOrders:** Looks for any purchase orders in Business Central with the "pending" sent status and uploads the orders to the vendor.

- **AllUpdates:** The equivalent of running UpdateItems, ReceiveInvoice, and SendPurchaseOrders one after the other.
 - **UpdateQuantitiesOnHand:** Downloads the quantities on hand for the vendors' items, which can be viewed from the item card or purchase order. Only applicable for certain vendors. This task should be timed to run based on when the vendor updates their file, which is usually multiple times per day.
 - As of 2026, Do it Best says that they update their quantity files at 4:30 AM, 12:00 PM, 3:00 PM, and 9:00 PM EST, so the task could run slightly after these times.
 - More arguments may be added in the future.
 - Example: The arguments "Orgill UpdateItems" will download item updates from Orgill.
 - If you'd like to test a task without making any changes, you can use arguments "Orgill Test" which runs the application for 5 seconds and closes.
 - Start in: This should be the folder where the exe is location. For example: C:\Program Files (x86)\System Solutions\Vendor EDI Connector
- **Business Central Job Queue Entry**
 - Once raw data has been sent to Business Central using the tasks set up above, it must be processed by the Vendor EDI app in Business Central. This can be done manually by going to Vendor EDI Setup > Actions > Process Vendor Data, but it can also be set up to process automatically using the job queue in Business Central.
 - Open the **Job Queue Entries** page in Business Central and open the entry called 70372194 "**Vendor Data Process Job SySo.**"
 - Set the desired schedule and then click "Set Status to Ready."
 - When this job runs, it will check to see if any data has been uploaded to Business Central and then process it. You can set it to run at a specific time or have it continuously check for new data on a regular basis. By default, the task will run every 30 minutes.
- **Integration With LS Express**
 - When using LS Express POS, the additional extension from System Solutions called **LSE Item Reference Barcode Sync** is required. It copies the UPCs created by Vendor EDI in the Item Reference table to the barcode table that's used by LS Express POS. If this extension is not installed, the items will not be found by their UPCs in POS.

- After installing, you can manually sync the barcodes by going to LS Expression Administration > Related > Inventory > Sync Item References to LS Express. From this page, click "Sync Item References to LS Express." The date on the page keeps track of when it last ran.
- Set up barcode syncing in the job queue by opening the **Job Queue Entries** page and find 64445 "**Barcode Sync SySo**." It defaults to run every three hours, but this can be changed as needed. Click "Set Status to Ready" to start the job.
- **Integration With Label Printer**
 - Some fields are available to the System Solutions extension Label Printer including Mfg. Part No., Order Multiple 2, and Order Multiple 3.

Modified Pages

- **Item References:**
 - Manufacturer No. and Manufacturer Part No.: Used for reference or, for some vendors, to search for items on direct invoices (billed through the vendor).
 - Credit Defective Merchandise: Specifies the vendor's policy if the item delivered is defective.
- **Item Card:**
 - Vendor Mfg. Part No.: Shows the Manufacturer Part No. from item references for the vendor that is selected in the item's Vendor No. field.
 - Web Item: Used for reference by some vendors.
 - Pricing Code: Can be used to label the item and view the code from the Price Change Queue page.
 - Order Multiples 2 and Order Multiple 3: Some vendors list more than one order multiple, which will be displayed in these fields for reference. An item with an EDI vendor selected will also enable the native Order Multiple field, no matter what its reordering policy is.
 - Action bar: Related > Purchase > Vendor Inventory: Shows the last reported quantity the vendor has on hand for the item. Only applicable for some vendors.
- **Purchase Order:**
 - Multiple fields and actions in the header are used to send purchase orders, as explained in the Operation section below.
 - Vendor Qty. on Hand: Shows the last reported quantity the vendor has on hand for the item. Only applicable for some vendors.
 - Order Multiple, Order Multiple 2, Order Multiple 3: Shows the order multiple fields from the item card.

Operation

- **Downloading Vendor Data**
 - Data is downloaded from vendors using the Vendor EDI Connector desktop application and uploaded to Business Central.
 - Data is represented as items, invoices, prices, or other forms.
 - You can open the **Imported Vendor Data** page if you'd like to review the data. Once it's processed, it will remain in this table with a "completed" status.

- To process the data into Business Central, go to the Vendor EDI Setup page > Actions > Process Vendor Data or let the job queue do it automatically.
- **Using the Price Change Queue**
 - If you've set any price settings to "queue," price changes will sit in the Price Change Queue until you've approved or deleted them.
 - Open the **Price Change Queue** page.
 - Use the (...) > Select More to Select the rows you want to approve and click **Approve** in the action bar. This will update the unit prices of the items.
 - If you'd like to remove price changes from the queue, simply select and delete the lines to permanently remove the rows from the queue.
 - Several fields can be added to the page with Personalize, which can be used to reference additional details about the items, or to filter which records are shown on the page.
 - If you'd like to see profit margins based on vendor costs, the vendor profit fields must be calculated on the page. This can be done manually with Actions > Calculate Profit Percent or as soon as the page is opened by enabling the Automatically Calculate Profit Percent setting on the Vendor EDI Setup page. These fields are hidden by default.
 - If you'd like to print labels for the newly approved prices, the additional System Solutions extension called Label Printer can bulk print labels with the "Price Changes Not Yet Printed" feature.
- **Placing Orders**
 - Purchase orders can be sent directly to the vendor using the Vendor EDI app.
 - Open a purchase order for the vendor you've set up with the EDI app and you'll see the fields list below, with some fields only being applicable for certain vendors. Click "show more" on the fast tab to see all available fields.
 - **EDI Status:** Specifies whether the order has been sent to the vendor or not. Pending: The user has flagged the order to send, but the application hasn't sent it yet. Submitted: The order has been sent to the vendor. Invoice Received: The vendor has returned an invoice for the order. Submission Unconfirmed: The order was sent to the vendor, but the application is unsure if it was received by the vendor, so check for another form of confirmation.
 - Orgill fields:
 - EDI Program No.: Specifies the promotional number for the order.
 - Do it Best fields:
 - EDI Transmit Code: Used for promotional or other informational details.
 - EDI Distribution Center: Specifies the distribution center or warehouse to order the items from if not shipping from the company's default distribution center.
 - EDI Shipping Service: Specifies the shipping service level requested for the order.

- **EDI Do it Best Preferred Carrier:** Specifies whether to use a preferred parcel carrier to ship this order instead (e.g. UPS). This is not normally used.
 - At the top of the purchase order, you'll also see buttons to **Send EDI Order** or **Cancel EDI Order**. Using these will change the EDI status of the order. The **Reset EDI Status** can also be added to this button, but it's hidden by default. This is a fail-safe that can be used to reset the status in case a correction needs to be made.
 - Once a purchase order has the pending EDI status, the Vendor EDI Connector desktop application will send the order to the vendor.
- **Transactions**
 - The following transactions can be ran manually through the **Vendor EDI Connector desktop application** or through their corresponding tasks (as described above). Some transactions may only be applicable to specific vendors.
 - **Update Catalog:** Downloads item data from the vendor so items can be created or updated in Business Central. If the vendor has separate price data, it is typically included in this transaction.
 - **Update Quantities on Hand:** Downloads the vendor's quantities on hand for their items, which can be viewed from the item card or purchase order in Business Central.
 - **Receive Invoices:** Downloads invoices from the vendor so they can be created or updated as purchase orders in Business Central. The items on the invoice are also typically created or updated by this transaction.
 - **Send Purchase Orders:** Looks for any purchase orders in Business Central with the "pending" sent status and uploads the orders to the vendor.
 - **Other > All Item Load:** Browse to or download a file provided by the vendor that contains the full list of their items. This data will be processed the same as items, but will not update existing item records.
- **Import Data From Excel**
 - The Vendor EDI application can also be useful to add data from vendors who can't communicate electronically, but can provide Excel files instead. Data can be imported from Excel, mapped to Vendor EDI's staging table, and then processed by the application's same methods and logic. For vendors that provide their own standard file layouts, it is also possible to save mapped fields for quicker use in the future.
 - Under the **Vendor Settings** of the **Vendor EDI Setup** page, add a new row with the EDI Vendor field set to "Data Import." This allows you to set the same settings used to process data as the predetermined EDI vendors. Open its Vendor Settings Card to adjust the settings before processing data that came from an Excel import.

- To start the import, on the **Vendor EDI Setup** page, go to Actions > **Import Data From Excel**. A page will open where you can upload the file and map its fields to the application's fields.
- General:
 - **File: Upload the Excel file.** Once you select the file, it will ask which Sheet to import the data from.
 - **Mapping Template:** If you have already saved a template of mapped fields, it can be selected here. Otherwise, this can be left blank.
 - **Data Type:** Select the type of data you are importing from the vendor (item, invoice, etc.). This affects how it will be processed.
 - **Batch No:** Label the import with a batch number. This is useful for organizational purposes, but it can be left blank.
 - **Location Code:** If applicable, specify the location of the data.
 - **Vendor No:** The vendor the data is being imported for.
- Mapping:
 - Select an **Excel field** on the left side and a **Business Central field** on the right side.
- Action bar:
 - **Import File:** Once you've finished mapping the fields, click Import File to proceed.
 - **Actions > Add All File Fields:** Automatically adds all columns from the Excel file to the mapping list.
 - **Actions > Add All Template Fields:** If a mapping template is selected, this automatically add all fields that were mapped and saved to the template.
 - **Actions > Save Mapping Template:** Save the fields in the mapping list to a new template. This is useful if you plan to import a file with the same layout in the future.
- After you successfully import the file, the data will be added to the **Imported Vendor Data** page with a status of "pending." This page will open automatically and show your imported data.
- If everything looks good, select all rows and go to Actions > **Set Status to Ready**. Otherwise, if there are any issues, you can select Set Status to Canceled instead and start the import over.
- Now that the data is set to a "ready" status, it will be processed automatically by the job queue, or manually by going to Vendor EDI Setup > Actions > Process Imported Vendor Data.

Troubleshooting

- **Missing Data**

- If data seems to be missing from Business Central, consider the following:
 - Are task(s) schedule to run the Vendor EDI Connector desktop application and have they been running?
 - Are the scheduled task(s) set up with the correct arguments?

- Is data waiting in the Imported Vendor Data page of Business Central with the "ready" status? If so, the job queue is stuck or on hold.
- Has the data actually been processed, but found under a different item or PO number? For example, an item may be found under an unexpected item number if the record for it already existed.
- Files downloaded from vendors are moved to FileBackup folders when they're done being processed. These files can help determine if there's a problem receiving data from the vendor or sending it to Business Central.
- Contact System Solutions for more help finding missing data.
- **Process Log**
 - A log of all transactions and actions made by Vendor EDI Connector can be found inside of its folder (typically C:\Program Files (x86)\System Solutions\Vendor EDI Connector).
 - Open **ProcessLog.txt** with Notepad and scroll to the bottom for the most recent logs.
 - This is useful to tell if the application is running and which transactions have been successful.
- **Error Log**
 - Whenever an error occurs in Vendor EDI Connector, it will be logged to an error log contained inside of its folder.
 - Open **ErrorLog.txt** with Notepad and scroll to the bottom for the most recent errors.
 - System Solutions can help further troubleshoot the errors logged here.