

User Manual

Aptean Food and Beverage ERP

Deployment Instructions

Product Documentation



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Deployment Instructions

Article • 4/3/2023 • 2 min read

This document provides the deployment instructions to set up the Aptean Food and Beverage extensions on your Business Central environment.

Prerequisites

To set up the appropriate admin permissions for the following tools, click the corresponding links in the table.

Tool	Link
Azure tenant	Click here
Azure subscription	Click here
Office 365 tenant	Click here
Business Central Online environment	Click here
PowerApps Online environment	Click here
PowerBI	Click here
PowerBI Desktop	Click here

The following licenses are required to use the Aptean Food and Beverage extensions and all their functionalities.

- Business Central
- Office
- Teams
- PowerBI
- PowerApps

For more information, click [here](#).

Business Central extensions can be accessed and installed via [AppSource](#). For more information on installation, click [here](#). To uninstall any Business Central extension, click [here](#).

To activate the Http Client Request for any module, on the **Extension Settings** page, on the **Group** FastTab, turn on the **Allow HttpClient Requests** toggle. This activates the runtime and allows the extension to make HTTP requests through the HttpClient data type when running in a non-production environment.



You can activate licenses via the Apteau License and Subscription Management extension. Find the instructions [here](#).



Power Platform

Article • 4/3/2023 • 1 min read

Business Central can be integrated with Microsoft Power Platform and Dataverse to perform various create, read, update, and delete operations. This topic provides information regarding integrating the following tools with the Apteian extensions.

- Power Apps
- Power Automate
- Power BI
- Dataverse



Power Apps

Article • 4/3/2023 • 17 min read

1. Create a Power Apps environment, if not already done. For more information, click [here](#).
In the app, the user can choose the language to use during app runtime.
2. Create the Dataverse database and choose the currency that matches the company currency setup in Business Central.

For more information on the Business Central Dataverse integration, click [here](#).

3. Activate the languages to be used in the environment via the Power Apps Admin Center.
For more information on activating languages, click [here](#).
4. Import the Power Apps Solutions Foundation and Quality Control in the created Power Apps Online environment. Packages (.zip) can be requested by contacting Aptean.
For more information on importing packages, click [here](#).

Note

Foundation is used for all Aptean Power Apps Solutions and only contains the tables for all solutions.

During the import, the connection setup for the Azure Blob Storage Connection is shown.

5. Select the one used in the current environment.
6. Select the connection to Azure Blob Storage to be used to link and show Quality Control attachments. If there's no connection available, create a new one. To do that, select **New Connection** in the drop-down menu.
7. In the **Authentication type** field, select *Access Key* from the drop-down menu while creating a connection with the Azure Blob Storage.

After creating the connection, go back to this screen, refresh, and select the created connection in the drop-down.

8. Enter the **Azure Storage Account Name** and **Access Key** saved in the steps described above for the connection.

The above connection is now linked to the Connection Reference used in the solution. For more information about connection references, click [here](#).



Note

If the connection reference is already setup in the environment, the value will not be updated (so that it does not overwrite customer specific data) and can only be changed after importing manually by editing the connection reference.

- As instructed in the user documentation, the Azure Blob Storage container used to store files and photos in Quality Control is created with the name *attachments*.

This is also asked during import for a fresh install:

If you used another name, the environment variable **AzureBlobStorageAttachmentsPath** offers the ability to set your own value. In all other cases, use *attachments/* as should have been created when following the instructions.

If the environment variable is already setup in the environment, the value will not be asked or updated (so that it does not overwrite customer-specific data) and can only be changed after importing by manually editing the environment variable:

In the Default Solution, search **Environment Variables**, edit the **AzureBlobStorageAttachmentsPath** Environment variable and enter your Blob container name to be used as the **Current Value**. In the example below, the example *qualityphotos/* is used instead of *attachments/*.

Important

Always define the value with */* at the end as shown below.

To change an environment variable, go to the **Default Solution** in your environment, search for Environment variables and select the Environment variable you would like to edit.

- Save and publish the app.

Note

Since some values are stored in the cache, it's advised to reopen the browser after changing connection references or environment variable values. When the app is started, and the old value is still used, the cache refresh can be triggered by pressing CTRL+F5 just after the Canvas App is started.



11. Run the app to test it and allow all connections.
12. Repeat the steps described for the other canvas app in the solution. Finally share the Canvas and Model driven app with users that need access to it, otherwise they cannot use the app. For more information on sharing apps, click [here](#).

Note

If you are using the Aptean Quality Control extension, assign the Quality Check Role to those users.

13. Select Manage users in the Power Platform admin center to find the users.

14. Select the Power Apps environment.
A new window opens.

15. Under **Users**, select **See all**.

16. Select **Manage security roles** and check the required role.
For more information on how to setup users and their roles, click [here](#).

Note

If you are using the Aptean Quality Control extension, check the QualityCheckUser role.

17. Execute the data import.

The data package is imported by using the Data Migration Utility.

Note

If you are using the Aptean Quality Control extension, click [here](#) to download the Quality Control data package (.zip).

This is part of the XRM Toolkit that can be installed by running the script as described in the installation details in paragraph 3.

18. Start the data migration XRM toolkit.
19. Login and open the environment you want to import the data into.
20. Select **Import data**.

21. Select the data file to import.



*

22. Select Import Data to start the import.

*



PowerBI

Article • 5/23/2023 • 1 min read

As connection URL for the PowerBI packages, the connection to BC Online to use is default:

[https://api.businesscentral.dynamics.com/v2.0/<YourDomain>/<YourEnvironment>/ODataV4/Company\('<Your%20Company%20Name>'\)](https://api.businesscentral.dynamics.com/v2.0/<YourDomain>/<YourEnvironment>/ODataV4/Company('<Your%20Company%20Name>')) and authentication OAuth2.



Power Automate

Article • 5/23/2023 • 1 min read

- To create PowerApps environment, click [here](#). The same environment can be used for Power Automate and PowerApps.
- For more information on how to import a Power Automate solution, click [here](#).
- After import and configuration of the Power Automate, set up the Power Automate URL in Business Central. For details, see [here](#).

The Power Automate URL is available after the Power Automate is saved and turned on.



Dataverse

Article • 5/23/2023 • 4 min read

Before synchronizing the registrations from Dataverse to Dynamics 365 Business central, a connection must be made.

The Dataverse connection setup is standard functionality within Dynamics 365 Business Central and can be done via an assisted setup guide.

There are a few pieces of information that must be ready before creating the connection:

- The URL for the Dataverse environment to connect. If the Dataverse Connection Setup assisted setup guide is used to create the connection, the environments are automatically discovered, but it is also possible to enter the URL of another environment in your tenant.
- The username and password of an account that has administrator permissions in Business Central and Dataverse.

For general information, click [here](#). The configuration of both Business Central and Dataverse is described by Microsoft [here](#) and should be executed with an administrator account in both Business Central Online and Dataverse, if not already done. For more information about the User Setup, click [here](#).

1. Select the Search icon  , enter **Dataverse Connection Setup** and then choose the related link.
The **Dataverse Connection Setup** page opens.
2. Enter the **Environment URL** to which the Dataverse environment must connect.
3. Enter **Client Id**.
4. Enter **Client Secret**.
5. Enter **Redirect URL**.
This is the URL for the Dynamics 365 Business Central environment used for the connection.
6. Turn on the **Enabled** toggle.
7. Log in with an account that has administrator permissions in Dynamics 365 Business Central and Dataverse.

After creating the connection with Dataverse, the job queue entries must be created that manage the scheduled synchronization between Dataverse and Dynamics 365 Business Central.

If the Dataverse connection is already enabled, then it is only necessary to execute the function 'Use Default Synchronization Setup' to synchronize the jobs and table mappings for the Quality Control extension.

8. On the action bar, click **Actions > Use Default Synchronization Setup**. A dialog box opens displaying the following message: *This will restore the default integration table mappings and synchronization jobs for Dataverse. All customizations to mappings and jobs will be deleted. The default mappings and jobs will be used the next time data is synchronized. Do you want to continue?*
9. Click **Yes**.



10. Click **OK**.

When the synchronization is completed, the job queues are created for the synchronization between Dataverse and Dynamics 365 Business Central.

Show created job queue entries

On the action bar, click **Related** > **Synch. Job Queue Entries**.

The created job queue entries are shown. The created job queue entries are recurring jobs with default 5 minutes between the runs. This means that when a value is sent from Dataverse, the value is visible a maximum of 5 minutes later in Dynamics 365 Business Central.



Mobile App (MWR)

Article • 4/3/2023 • 4 min read

Setup Mobile App Defaults and Translations

In the Business Central **Mobile Setup** page, you can create the default setup which also adds the default ENU translations into the **Mobile translations** table.

.

Translations can be viewed via:

.

.

In addition to the ENU language, a rapid start package is available with an additional 12 languages to import into this table. To download the package, [click here](#).

Languages can be deleted from the file or before applying the rapid start package data in Business Central. But this applies only to specific languages.

For more information about rapid start packages, [click here](#).

 Important

When the **Create Default Setup** action is run again, all translations will be reset to ENU records and additional languages need to be imported again via the rapid start package.



XRM Toolkit

Article • 4/3/2023 • 7 min read

Prerequisites

- User should have permissions and licenses for PowerApps
- Knowledge about the solution, schema and data packages should be created and applied in correct manner, not as a whole. For example, first create a schema and data package for master data that could be imported to a new solution and then, demo data making use of this master data.
- The order data that is imported cannot be influenced. As an alternative, the data package could be imported multiple times until all related data is available for all entities to successfully import.

Import order (worst case):

1. Entity Slave 2 > will fail
2. Entity Slave 1 > will fail
3. Entity Master > will succeed (create)

Second import run:

1. Entity Slave 2 > will fail
2. Entity Slave 1 > will succeed (create)
3. Entity Master > will succeed (update / no duplicate data)

Second import run:

1. Entity Slave 2 > will succeed (create)
2. Entity Slave 1 > will succeed (update / no duplicate data)
3. Entity Master > will succeed (update / no duplicate data)



 Important

This will only work if compare-on-update is setup correctly. If you do not compare any fields during update, data will be duplicated on a second import run instead of only updating changed values. For details, see the following steps.

Install XRM Toolkit

1. Make sure NuGet.Config in `C:\Users\<yourusername>\AppData\Roaming\NuGet` only holds reference to:

```
<add key="nuget.org" value="https://api.nuget.org/v3/index.json" protocolVersion="3" />
```

 Note

Select **View** and tick the checkbox against **Hidden Items** to show the AppData folder. 

2. Create folder `C:\devtools`
3. Start PowerShell ISE (**Run as administrator**).
.
4. Enter command: `cd c:\devtools` in the command console and press enter.
.
5. Open this [link](#) and select the Copy button to copy the latest Windows PowerShell script.
.
6. Paste the script code in the top screen in Power Shell ISE and enter F5 to run the code.
7. To start using the Data Migration tool, open the folder `C:\devtools\ConfigurationMigration` and run `DataMigrationUtility.exe`.



Customer Item Catalog

Article • 5/23/2023 • 1 min read

In order to perform deployment of the Aptean [Customer Item Catalog](#) extension, the following tools must be installed and the instructions must first be followed:

Tool	Instructions
Prerequisites	Click here
Power Apps	Click here
Exchange/Outlook	Click here

Power Automate

- To create the Power Automate environment, click [here](#). The same environment can be used for Power Automate and Power Apps.
- To download the Customer Item Catalog Power Automate zip file, click [here](#).
- To import the download solution on the Power Automate, see [here](#).
- To upgrade the solution on the Power Automate, see [here](#).

Exchange/Outlook

You must import and configure Power Automate for each user because it is specifically linked to their email account. For details, see the [Customer Item Catalog](#) document.



Upgrade to the Latest Version

Article • 5/23/2023 • 2 min read

To upgrade to the *Customer Item Catalog Power Automate Solution v1.0.0.0* version, you have to delete the existing *Import Item Catalog Excel Attachment from email to Business Central Flow v1.3.0.0* version as follows:

1. Sign in to Power Automate, and then select **My flows**.
2. Navigate to the flow you want to delete.
3. Click the context menu  and select **Delete**.

Note

The above steps are required only in case if you are currently using the *Import Item Catalog Excel Attachment from email to Business Central Flow v1.3.0.0* and wish to upgrade to the new *Customer Item Catalog Power Automate Solution v1.0.0.0*.



Import the Solution

Article • 5/23/2023 • 5 min read

To import the new *Customer Item Catalog Power Automate Solution v1.0.0.0*, follow the below steps:

Note

Before using the new version of *Customer Item Catalog Power Automate Solution v1.0.0.0*, it is necessary to delete the old flow *Import Item Catalog Excel Attachment from email to BusinessCentral Flow v1.3.0.0*, as described in the [Upgrade to the Latest Version section](#).

1. Sign in to Power Automate and on the navigation bar, select **Solutions**.
2. On the action bar, select **Import solution**.
The **Import a solution** page opens.
3. Select **Browse**.
4. Upload the file you want to import.
5. Select **Next**.
6. On the **Advanced Settings** FastTab, select the **Enable Plugin steps and flows included in the solution** checkbox.
7. Select **Next**.
8. On the **Connections** FastTab, Select **Business Central Online and Office 365 Outlook Connection**.
If connections do not exist, select [New connection](#) to create a record. You should also refresh the **Import a solution** page to view the created connection.

Note

The specified connection can be changed later by modifying the connection reference through the Default solution in the environment, which holds the environment-specific values used during runtime. After changing the values, turn the Power Automate *Off* and *On* again to use the new values.

9. Select **Next**.
10. Configure the values in the required fields.



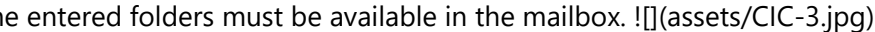
 Note

If you import a new version of the solution, there is no need to reconfigure the values as they will remain unchanged. 

11. Enter the folder name for Office365 Outlook Processed Folder.

12. Enter the folder name for Office365 Outlook Error Folder.

 Note

The entered folders must be available in the mailbox. 

13. Enter the environment name for Business Central Online Environment Name. The characters should be in uppercase.

14. In the Business Central Online Company GUID field, enter the Company GUID.

To copy the GUID

- a. Login to your Business Central Online company.
- b. Navigate to the Companies page.
- c. Select the desired company.
- d. Press CTRL+ALT+F1 to open the Page Inspection.
- e. Copy the GUID value from the **Id (8000,GUID)** field.

15. Click **Import**.

This will import the Solution with the configured values and turn *On* the Power Automate.

 Note

To view the details, click the created cloud flow by navigating into the solution.  



Compliance Documents

Article • 5/23/2023 • 3 min read

In order to perform deployment of the Aptean [Compliance Documents](#) extension, the following tools must be installed and the instructions must first be followed:

Tool	Instructions
Prerequisites	Click here

Power Automate

- To create the Power Automate environment, click [here](#). The same environment can be used for Power Automate and Power Apps.
- To download the Compliance Documents Power Automate zip file, click [here](#).
- To import the downloadsolution on the Power Automate, see [here](#).
- To upgrade the solution on the Power Automate, see [here](#).
- After importing and configuring Power Automate, set up the Power Automate URL in Business Central. For more information, click [here](#).

The Power Automate URL is available after the Power Automate is saved and turned on.

The URL to call the Power Automate should be set in the Compliance Documents Setup.



Upgrade to the Latest Version

Article • 4/3/2023 • 2 min read

To upgrade to the *Aptean for Food and Beverage Compliance Documents Notifications Power Automate Solution v1.2.0.0* version, you have to delete the existing *Compliance Documents Notification Flow v1.1.0.0* version as follows:

1. Sign in to Power Automate, and then select **My flows**.
2. Navigate to the flow you want to delete.
3. Click the context menu  and select **Delete**.

Note

The above steps are required only in case if you are currently using the *Compliance Documents Notification Flow v1.1.0.0* and wish to upgrade to the new *Aptean for Food and Beverage Compliance Documents Notifications Power Automate Solution v1.2.0.0*.



Import the Solution

Article • 4/3/2023 • 3 min read

To import the new *Aptean for Food and Beverage Compliance Documents Notifications Power Automate Solution v1.2.0.0*, follow the below steps:

Note

Before using the new version of the *Aptean for Food and Beverage Compliance Documents Notifications Power Automate Solution v1.2.0.0*, it is necessary to delete the old flow *Compliance Documents Notification Flow v1.1.0.0*, as described in the [Upgrade to the Latest Version](#) section.

1. Sign in to Power Automate and on the navigation bar, select **Solutions**.
2. On the action bar, select **Import solution**.
The **Import a solution** page opens.
3. Select **Browse**.
4. Upload the file you want to import.
5. Select **Next**.
6. On the **Advanced Settings** FastTab, select the **Enable Plugin steps and flows included in the solution** checkbox.
7. Select **Next**.
8. On the **Connections** FastTab, Select **Office 365 Outlook Connection**.
If connections do not exist, select [New connection](#) to create a record. You should also refresh the **Import a solution** page to view the created connection.

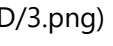
Note

The specified connection can be changed later by modifying the connection reference through the Default solution in the environment, which holds the environment-specific values used during runtime. After changing the values, turn the Power Automate *Off* and *On* again to use the new values.

9. Select **Next**.
10. Click **Import**.
This will import the Solution with the configured values and turn *On* the Power Automate.



 Note

To view the details, click the created cloud flow by navigating into the solution.  



Document Link

Article • 4/3/2023 • 5 min read

In order to perform deployment of the Aptean [Document Link](#) extension, the following tools must be installed and the instructions must first be followed:

Tool	Instructions
Prerequisites	Click here

Azure Storage

1. Create the Storage Account for Document Link and Blob storage container 'attachments'.
For more information on how to create the Azure storage account, click [here](#).
For more information on how to create Azure Blob storage containers, click [here](#).
.
2. Select the storage account and select **Access keys** to retrieve the Storage Account name and Key for accessing the Storage account.
.

Business Central

1. Create the Blob Storage Connection for the Blob Storage Accountcreated in the previous topic.
.

This setup is part of the [Aptean Azure Connector](#), which offers the ability to connect your Blob storage accounts to be used in Business Central extensions.
2. Select the Document Link Setup as shown below. This will be used to store all attachments saved via the Document Link extension.
.

For more details, [click here](#).

 **Important**

If there is a need to keep attachments unique per company, you can create the storage and set it up per company.



Aptean Mesh

Article • 4/24/2026 • 13 min read

In order to perform deployment of the Aptean [Mesh](#) extension, the following instructions must first be followed:

Tool	Instructions
Prerequisites	Click here

Azure Active Directory prerequisites

Aptean Mesh uses OAuth 2.0 for mobile authentication. The following Azure AD configuration is required:

- An active Microsoft Azure subscription linked to the Microsoft 365/BC tenant.
- Permission to register an Azure AD Application (Application Administrator or Global Administrator role).
- Azure AD App Registration with:
 - A Client ID (Application ID)
 - A Tenant ID (Directory ID)
 - Mobile and desktop redirect URI configured `apteanmesh://auth`
 - API permission: Dynamics 365 Business Central > user_impersonation

Create an App Registration

1. In the [Azure Portal](#), navigate to **Microsoft Entra ID > App registrations**.
2. On the action bar, select + **New registration**.
3. Enter a name for the App Registration (for example, Aptean Mesh).
4. In the **Supported account types** field, select the appropriate option for the organization.
5. Select **Register**.
6. Save the **Application (client) ID** and **Directory (tenant) ID** for later use on the **Mobile Setup** (BC) page.

Configure the Redirect URI

1. In the App Registration, on the navigation menu, select **Authentication**.
2. Select + **Add a platform** and choose **Mobile and desktop applications**.



3. In the **Redirect URI** field, enter: `apteanmesh://auth`
4. Select **Configure**.

Configure API permissions

1. In the App Registration, on the navigation menu, select **API permissions**.
2. On the action bar, select + **Add a permission**.
3. Select **Dynamics 365 Business Central** from the API list.
4. Select **Delegated permissions** and add the following permissions:

API	Permission	Type
Dynamics 365 Business Central	Financials.ReadWrite.All	Delegated
Dynamics 365 Business Central	user_impersonation	Delegated
Microsoft Graph	User.Read	Delegated

5. Select **Grant admin consent** for the tenant (administrator rights are required for this step). For more information, see [Grant admin consent](#).

Register the application in Business Central

1. In Business Central, search for **Microsoft Entra Applications** and open the page.
2. Select + **New** to create a new entry.
3. In the **Client ID** field, enter the Application (client) ID from the Azure AD App Registration.
4. In the **Description** field, enter a name (for example, Apteian Mesh).
5. Set the **State** field to *Enabled*.
6. On the **User Permission Sets** FastTab, add the following permission sets:

Permission Set	Description
Mesh220FDW	Mesh (full access)



MeshBasic220FDW

Mesh Basic

7. On the action bar, select **Grant Consent** and sign in with an administrator account to authorize the application.

Install the Mesh mobile app

The Aptean Mesh Android app can be downloaded from the [Google Play Store](#) and installed on mobile scanning devices.

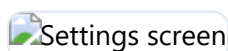
Mobile app prerequisites

- Android 7.0 (Nougat) or later.

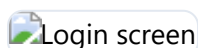
Configure the mobile app

On starting the Mesh app for the first time, the Setup screen appears where the connection details can be configured.

1. In Business Central, search for **Mobile Setup** and open the page.
2. In the **Client ID** field, enter the Application (client) ID from the Azure AD App Registration created earlier.
3. The **Mobile Setup** page displays a QR code FactBox containing the tenant ID, client ID, API endpoint, and telemetry connection string.
4. On the mobile device, scan the QR code from the [Mobile Setup](#) page using a barcode scanner, or enter the configuration details manually.
5. The app reads the QR code and populates the Settings screen with the tenant ID, client ID, and telemetry connection string.
6. On the **Login** screen, enter the company URL and select the **Connect to Warehouse** button to authenticate with a valid Business Central user account.



Settings screen



Login screen



Mobile Warehouse Registration

Article • 11/4/2025 • 10 min read

In order to perform deployment of the Aptean [Mobile Warehouse Registration](#) extension, the following instructions must first be followed:

Tool	Instructions
Prerequisites	Click here
Mobile App	Click here

OAuth

Because the Android Mobile app uses OAuth to access Business Central, an app registration has to be created that allows the connection to Business Central using OAuth.

1. Create an App registration.
For more information on creating an app registration, [click here](#).
For more information on the setup of the app registration, [click here](#).
Add the name for the new App Registration and select Public client/native (mobile & desktop) in the Redirect URI (optional) section and fill the URI: <https://api.businesscentral.dynamics.com/>
When finished select **Register**.
.
2. Save Application (client) ID and Directory (tenant) ID for later use in the Android Mobile App configuration.
.
3. Select **Authentication** tab in the app registration.
4. Select **Add a platform** and add **Mobile and desktop applications**. In the platform configuration created, add the Redirect URI: <https://api.businesscentral.dynamics.com>
.
5. On the navigation menu, select **API permissions**.
6. On the action bar, select + **Add a permission**.
It is possible to quickly search for the permissions when adding them.
.
7. Select **Grant admin consent** (you should have admin rights for this Azure tenant to be able to do this). For more information, [click here](#).
.



Install Mobile App

You can download the [Aptean Mobile Warehouse](#) android app from the Google Play store and install it on mobile scanning devices.

Prerequisites

- Android Operating System
- The Mobile App is tested on: Pie (version 9) API level 28, other versions are not tested.
- The Mobile App can't be installed on versions older than KitKat (version 7) API level 24.

In addition, the Zebra Datawedge is required. On Zebra Android devices, this software will be pre-installed in most of them. For more information about Zebra Datawedge, [click here](#).

To download the Datawedge toolkit, [click here](#). Please choose default configuration during setup.

On starting the Android Mobile app for the first time, enter the following information:

Tenant ID should be filled with the Directory (tenant) ID from the App Registration created for the Mobile OAuth connection.

Client ID should be filled with the Application (client) ID from the App Registration created for the Mobile OAuth connection.

URL should be the URL to connect to the MWR WebService in the specific environment to be used:

<https://api.businesscentral.dynamics.com/v2.0/<Tenant>/<Environment>/WS/<Company>>

Tenant: Depending on the setup in Azure Active Directory, your domain name or tenant ID should be used.

Environment: The environment name to be used, for example Sandbox or Production.

Company: This should be the Company to be used to login to. For example, both CRONUS USA, Inc. and CRONUS%20USA%2C%20Inc. is a valid configuration.

License guidelines

To operate in the warehouse environment, ensure that each user is assigned either a Dynamics 365 Business Central Device license or a Dynamics 365 Business Central Premium license, but not both.



The Business Central device licenses provide limited access to a subset of Business Central capabilities which grant access via certain devices, using either assigned or shared logins while the Business Central Premium licenses have access to all functionalities.

Assigning device licenses

To assign device licenses in Entra ID, follow these steps:

1. In Microsoft Entra ID, create a security group named *Dynamics 365 Business Central Device Users*, ensure that all Business Central licenses are assigned to this security group from the [Microsoft 365 Admin Center](#).
2. Then, add users to the group to grant them access to handheld devices.

To know more, see [To create the Dynamic 365 Business Central Device Users group](#).

Note

Users with handheld scanners in the warehouse must have at least a Device license. If multiple users only require limited access rights and work on shared devices, it is generally more cost-effective to license the devices rather than the individual users.

The total number of device licenses is visible in Entra ID, not in Business Central. Therefore, you'll need to manually match the number of users in the group with the available licenses.

Note

The Azure Active Directory is renamed as Microsoft Entra ID. To know more, see [New name for Azure Active Directory](#).

With the Business Central device licenses, you can perform all the functionalities available in mobile warehouse.



Non Conformances

Article • 4/3/2023 • 9 min read

In order to perform deployment of the Apteau [Non Conformances](#) extension, the following tools must be installed and the instructions must first be followed:

Tool	Instructions
Prerequisites	Click here
Power BI	Click here
Teams	Click here
Planner	Click here

Teams

For the Non-Conformance Teams integration, you can set up a Teams channel per type in Business Central.

The group ID of the Teams channel can be found by right-clicking the channel in Teams.

The link will show: <https://your-channel-Url?groupId=xxxxxx&tenantId=xxxxxx>.

To allow Business Central to connect to Teams, it uses Microsoft Graph and needs permissions to use Graph via an app registration that is referenced to in the Business Central Non-Conformance setup.

For more information on creating an app registration, click [here](#).

For more information on the setup of the app registration, click [here](#).

The app registration for Non-Conformance should be set up as multi-tenant. Use authorization tokens and the Business Central OAuthlanding redirect URL for the specific environment(s).

The redirect URL should hold the environment name of the Business Central environment that needs to be linked to the Non-Conformances extension.



1. Select + **Add a permission**. You can quickly search for the permissions when adding them.
2. Select **Grant admin consent**. (You should have admin rights for this Azure tenant to be able to perform this step). For more information, click [here](#).
3. Create a client secret key via certificate and secrets.
4. Copy the value of the secret key that is generated.

Note

The secret key is shown only one time.

5. Add all the app registration information in the Non-Conformance setup.

The Tenant ID and Client ID can be found on the App Registration Overview tab.



Quality Control

Article • 4/3/2023 • 2 min read

In order to deploy the Aptean [Quality Control](#) for Food and Beverage extension, the following tools must be installed and the instructions must first be followed:

Please ensure that you have installed the corresponding Aptean **Quality Control** extension on your Business Central environment before proceeding with the update of the latest version of Quality Control Power Apps. To ensure this, check [Release Notes](#) for more information. 1. Install or update latest version of the Power Apps **Foundation Solution**. 2. Install or update the Power Apps **Quality Control Solution**. 3. Publish all customizations. 4. Import Quality Control translations using **XRM Toolkit**.

You can find the required instructions for the corresponding tools here:

Tool	Instructions
Prerequisites	Click here
Power Apps	Click here
Power Automate	Click here
Power BI	Click here
Dataverse	Click here
Teams	Click here
SharePoint	Click here
XRM Toolkit	Click here

Important attention point

For both Connection References and Environment Variable values, its necessary to:

- Turn off Power Automates and turn them on again using the values.
- For Canvas apps, you must reopen the browser, and in some cases, you must press CTRL+F5 while starting or running the Canvas app to refresh the values in your browser cookies.

In addition to installing and setting up the above mentioned tools, perform the following steps to be enable smooth functioning of the extension.



Azure Storage

1. Create the storage account and Blob storage attachments for Quality Control.

Note

If a different name is used for the Blob storage, change the Azure Blob Storage Attachments Path as described in the PowerApps paragraph below. And add the name used as Current value in the Environment Variable created for this purpose.

For more information on creating the Azure storage account, click [here](#).

For more information on creating Azure Blob storage containers, click [here](#).

2. Copy the **Storage account name** and **Key** from the **Storage Account Access keys** page to use when configuring the Quality Control PowerApps.

Power BI

The Power BI packages have been created for Aptean Quality Control extension. For instructions on configuration, click [here](#).

You can also download the Quality Control package [here](#).



Shop Floor Production

Article • 10/10/2024 • 41 min read

In order to deploy the Aptean [Shop Floor Production](#) extension, the following instructions must first be followed:

Please ensure that you have installed the corresponding **Aptean Shop Floor Production** extension on your Business Central environment before proceeding with the update of the latest version of Shop Floor Production Power Apps. To ensure this, check [Release Notes](#) for more information.

1. Install or update latest version of the Power Apps **Foundation Solution**.
2. Install or update the Power Apps **Shop Floor Production Power Automate Solution**.
3. Install or update the Power Apps **Shop Floor Production Custom Connector Solution**. Verify and test the functionality of the Custom Connector action.
4. Install or update the Power Apps **Shop Floor Production Solution**.
5. Publish all customizations.
6. Check if the Power Automate feature is enabled in the Power App Shop Floor Production Power Automate Solution. If not, start the Power Automate.
7. Import Shop Floor Production translations using **XRM Toolkit**. You can download the Shop Floor Production package [here](#).

You can find the required instructions for the corresponding tools here:

Tool	Instructions
Prerequisites	Click here
Power Apps	Click here
Sharepoint	Click here
XRM Toolkit	Click here

 **Note**

The following notification will display when the latest version of Aptean Shop Floor Production is installed. To stop receiving this notification, select **Don't show this again**.

For the following extensions, another notification is shown if the correct version isn't installed



Deployment Instructions

- Aptean Packaging for Food and Beverage
- Aptean Labeling for Food and Beverage
- Aptean Process Manufacturing for Food and Beverage
- Aptean Lot Management for Food and Beverage
- Aptean Advanced Comments for Food and Beverage

These notifications display because the Shop Floor Production extension extracts crucial information, which is displayed to the users, from these other extensions.

Note

Before installing any new versions of Power Apps Solutions, ensure that you have installed the latest versions of the Business Central extensions in your Business Central Environment. Use the Business Central Admin Centre to confirm the availability of new versions for installation.

Here is an example:

Deployment Instructions

The Apteian Shop Floor Production in your Power Apps environment incorporates real-time synchronization through a Custom Connector (API). This ensures that any updates or changes in the Shop Floor Production system are instantly reflected in your Business Central environment. To set up this functionality, import and configure the Shop Floor Production Custom Connector Solution in your Power Apps environment. This process establishes a seamless connection and configures the API for efficient system functionality. For more information about custom connectors, click [here](#).

Before doing so first an app registration needs to be created and a Key-Vault setup in Azure which are both requirements for the Custom Connector. This is because the Custom Connector is using OAuth to access Business Central.

For information on how to create an app registration, click [here](#). For information on the setup of the app registration, click [here](#).

Attention points

For both Connection References and Environment Variable values its necessary to:

- Turn off Power Automate and then turn it on again to update the new values.



- Go to the Custom Connector and select **Edit**. To apply the new values, click the **Update** button in the window and select **Close** to leave the edit mode.
- For Canvas apps, the browser must be reopened, and in some cases, you must press CTRL+F5 to refresh again while starting or running the Canvas app to refresh the values in your browser cookies.

Create the App Registration

1. Go to <https://entra.microsoft.com/#home>.
2. Select **Go to Azure Active Directory**.
3. In the navigation menu, click **Applications > App registrations**.
4. On the **App registrations** page, on the action bar, click **New registration**.
5. On the **Register an application** page, in the **Name** field, fill in the name of the app.
6. Click the **Register** button on the bottom of the screen.
7. After creating the App registration, save the **Application (client) ID** for later use in the custom connector setup.
8. To create a client secret, on the navigation menu, select **Certificates & secrets**.
9. Click **New client secret**. Enter 'secret' in the **Description** field and the required value in the **Expires** field.
10. Click **Add**.
11. Copy the secret **Value**. This value is generated and shown *only once*. This secret will be required for later setup in the Key Vault Secret setup.
12. On the navigation menu, select **Authentication**.
13. Select **Add a platform**.
14. On the **Configure platforms** pane, select **Web**.
15. In the Redirect URLs field, enter <https://global.consent.azure-apim.net/redirect>. This is a general URL for all custom connectors.
16. Click **Configure**.
17. On the navigation menu, select **API permissions**.
18. On the action bar, click **Add a permission**.
19. On the **Request API permissions** pane, select **Dynamics 365 Business Central > Delegated permissions > user_impersonation**.
20. Click **Add permissions**.
21. After the permissions have been added, on the action bar, select **Grant admin consent for <company_name>**. You should have admin rights for this Azure tenant to be able to do this. For more information, click [here](#).



Create the Key-Vault and Key-Vault Secret

1. To ensure secure storage of the secret value used by the Custom Connector Solution for the OAuth flow login and the app registration Client Secret Key, you must initiate both a Key-Vault and Key-Vault secret. For example,

Note

You can also use an existing Key-Vault, taking into account that PowerApps will need access to this Key-Vault. For more information on how to set up a Key-Vault, see [Create Key-Vault | Microsoft Docs](#). For more information on creating a Key-Vault Secret, see [Create Key-Vault Secret | Microsoft Docs](#).

2. Save the app registration Client Secret Key as created based on the earlier instruction as the actual value for the Key-Vault secret value for Client Secret.
3. Before integrating the PowerApps environment with KeyVault, it is essential to set up the connection to enable PowerApps to retrieve the secret key from KeyVault and utilize it in the OAuth flow for signing in.
 - a. The Power Platform should be added as Resource Provider in your Azure Subscription.
 - b. Dataverse must get read permission on the Key-Vault Secrets. To enable this, add principal 00000007-0000-0000-c000-000000000000 (Dataverse) in the Key-Vault Access policies and enable *Get* permission for **Secret Permissions**.

The end result is that PowerApps can now read secrets that enable the use of Secret Data Type for Environment Variable Values with the actual secret values stored and read from the Key-Vault.

Important

The user that will set up the Custom Connector Solution and its Environment Variable Values also needs permission to access the Key-Vault and read the secrets to initiate the connection. This is not required for all users that will create new connections based on the new custom connector.



Import Shop Floor Production Custom Connector Solution (Managed)

Note

The Custom Connector Solution version represents the highest Shop Floor Production Business Central API version currently supported by the Custom Connector Solution.

Important

The user that will import and set up the Custom Connector Solution and its Environment Variable Values also needs permission to access the Key-Vault and read the secrets to initiate the connection. This is not required for users that will create new connections based on the new custom connector.

During import, the Environment Variable Values will be asked. Enter the values needed for the Custom Connector to connect and log in users to Business Central Online.

Base URL

Base URL for Business Central Connection.

For Business Central Online environments this needs to be set up with v2.0// or the specific server Base URL in case of on prem environments.

Note

Depending on the setup in Azure Active Directory, the domain name could be used as basePath: `v2.0/<your-domain-name>/<your-business-central-environment-name>/`

Or tenant ID can be used (this one should always work, so advised is to use tenant id):

`v2.0/<your-tenant-id>/<your-business-central-environment-name>/`

For more information on how to find your tenant ID, click [here](#).

Important

Base URL of the Custom Connector already starts with '/', so don't start the given value with this character because it then will start with two slashes.



Host

Host for Business Central Connection.

For Business Central Online environments this needs to be setup with **api.businesscentral.dynamics.com** or the specific server URL in case of on prem environments.

ClientSecret_KeyVault

App registration Secret Key for AAD OAuth authentication with Business Central, safely stored in Key-Vault as set up in the above steps.

Important

The value needs to be entered as the full path to the secret key stored in the KeyVault.

For example,

```
/subscriptions/<your_subscription_id>/resourceGroups/<resource_group_name>/providers/Microsoft.KeyVault/vaults/<your_keyvault_name>/secrets/<your_secret_name>.
```

The above information can be found in the Key-Vault Properties; the secret name is the one created as instructed earlier as Key-Vault secret, for example clientSecret.

Client ID

App registration Application (client) ID for AAD OAuth authentication with Business Central.

App Registration Client ID can be found on the App Registration Overview tab for the app registration created earlier as instructed.

Enter the app registration Application (client) ID as the actual value for the Client ID.

Resource URL

Resource URL for Business Central Connection.

For Business Central Online environments this needs to be setup with <https://api.businesscentral.dynamics.com> as used in the app registration set up.

Now all fields have a value select Import. The Custom Connector Solution is created, and the Custom Connector is, in addition visible via *Dataverse > Custom Connectors*.

Important

When the above solution is imported again, the values will not be asked for and the Custom Connector will continue working with the values as saved in the Environment Variable Values (so that it does not overwrite customer specific data).



If a mistake has been made or one of the variable values needs to be changed, this is possible by manually editing the environment variable.

In the *Default Solution*, search Environment Variables, edit the Environment variable that needs a change and enter the new value as the Current Value.

Note

For the ClientSecret_KeyVault, the path to be entered as the current value, in this case, is shown as separate fields.

Important

The Custom Connector doesn't automatically pick up the new values. To apply the new values, go to the Custom Connector via *Dataverse* > Custom Connector and edit the connector.

Select Update Connector and then Close again. The Custom Connector is now using the new values.

Note

To test the connector, go to *Dataverse* > *Custom Connector*, select Edit and go to step 4. **Test**. Select your personal connection and try the Get Companies request.

The custom connector for Shop Floor Production is now ready to use.

Import Shop Floor Production Power Automate Solution (Managed)

This Solution is used by the Shop Floor Production Solution to view PDF files from SharePoint (Work Instructions). It contains a Power Automate and Connection Reference to be able to connect to SharePoint.

Select the SharePoint Connection to be used and/or create the connection during import.

The above connection is now linked to the Connection Reference used in the solution.



For more information about the connection references used, click [here](#).

After successfully importing all the above, publish all customizations.

Important

If an environment variable value needs to be changed this is possible by going to the Default Solution in your environment, search for Environment variables and select the Environment variable you would like to edit.

Power Apps

Create a Power Apps environment using Step 1 and 2 in [Power Apps](#). For more information, click [here](#).

Now, the environment is ready to import the Foundation and Shop Floor Production Solution Packages (.zip); the package files can be requested by contacting Aptean. Foundation is used for all Skye Power Apps Solutions and contains the tables for all solutions.

When you import the Shop Floor Production Solution zip file, you will be prompted to provide the SharePoint connection. This connection should be associated with the SharePoint site that holds the relevant Work Instructions, which will be linked and displayed in the Shop Floor Production apps.

Note

Only one SharePoint site is supported.

If there are no connection, you can create a new SharePoint connection using the *New Connection* option. Make sure to **Refresh** the page to select the newly created connection. Then, the connection will be linked to the Environment Variable SharePoint Connection used in the solution.

If the Environment Variable is already set up in the environment, its value will not be updated during the import process to prevent overwriting the customer-specific data. You can edit the environment variable manually to



change the value after importing. If the SharePoint connection is not established during import or modification later, it can be accomplished by editing the Environment Variable within the **Default Solution**. Search for the Environment Variables section and **Edit** the SharePoint value accordingly. In the SharePoint multiple Document Libraries can be created. In the below image upto ten Document Libraries are created for the site Workinstructions:

Logical naming can be applied to the Document Libraries to easily search for a Work instruction in the corresponding Document Libraries.

Important

The Aptean Shop Floor Production Work Instruction Setup app now offers support for up to ten SharePoint Document Libraries. Each library has a capacity to hold up to 2000 items. The Workinstructions in Power Apps can load and allow searching and selection from these 2000 items. Any additional items stored in the SharePoint Document Library will not appear in the list and cannot be found using the search function in the Workinstructions.

When changing the connection, also make sure the Document Environment Variable values are reset to start using the Document Libraries of the new SharePoint Site that has been configured as connection. The, select the SharePoint Site (site) to be used and the Document Folder (list) where Work Instructions are available. When importing the solution, both the SharePoint Connection (SharePoint Site) and the Document Library (SharePoint list) will be requested.

Select the **SharePoint Site > Documents Folder > Import**. If you have a limited number of work instructions, you can link all the Document Environment Variables to a single document library for setting up work instructions. As you add more instructions, you can later modify the values of the Document Environment Variables to start using additional Document Libraries. This allows you to switch to different libraries within the app and add instructions from another library. For more information, see [Environment Variables](#). To apply the updated values, the app must be restarted. This will enable the utilization of the new values. A notification will be displayed in the apps overview if certain environment variables have not been setup.

1. In the **Power Apps** admin center, select **Manage users** to access the users' section.
2. Select the Power Apps environment you want to work with. A new window opens.
3. On **Users**, select **See all** to view all the users associated with the selected environment. A new window opens.
4. Select **Manage users in Dynamics 365**.
5. Select **Manage Roles** and assign the **ShopFloorProduction** role to the users who need access to the Shop Floor Production Power Apps Solution. To create Recurring Quality Checks based on Shop Floor Production



processing, you need to initiate a Job Queue process. This is done via the Create and Schedule Job Queue Entry for Recurring Quality Checks action on the **Shop Floor Production Setup** page. For more information on setup of users and their roles, [click here](#). Set up the desired job queue category code and ensure that the Max recurring Quality Checks setting is defined to prevent the creation of Quality Checks without a limit.

Note

The category code will be automatically created and set up if it is not defined manually: SFPJQREC.

User Specific Instructions

The following instructions apply to all end users. Follow these instructions when you start using the PowerApps Solutions.

1. Select Sign in for the **ShopFloorControlProduction** connection.
2. A sign in window opens to sign in with your account.
3. When the sign in is successful and all connections are signed in, select **Allow** for all connections and the app starts and is ready to use.

When you delete a personal connection, for whatever reason, that is created as a result of the above action (via **Dataverse > Connections**) and start the app right away the following error message will appear.

This is the result of the personal connection stored in memory. To resolve this,

- a. Wait until it is refreshed by the platform (can take minutes or hours) and start the app again.
- b. Press CTRL+F5 to refresh and start the app again, sometimes refreshing multiple times is needed.
- c. Start the browser in Guest mode and start the app again in this session.

License guidelines

In shop floor operations, users must have both Power Platform Premium license and a Dynamics 365 Business Central Device license or Dynamics 365 Business Central Premium License.

A Power Platform Premium license provides access to features and services within Microsoft's Power Platform, which includes Power Apps, Power Automate, Power BI, and Power Virtual Agents.



Note

The Business Central Device licenses provide limited access to a subset of Business Central capabilities which grant access via certain devices, using either assigned or shared logins while the Business Central Premium licenses have access to all functionalities.

With the Business Central Device licenses, you can use all the functionalities available in the Shop Floor Production Power App.

