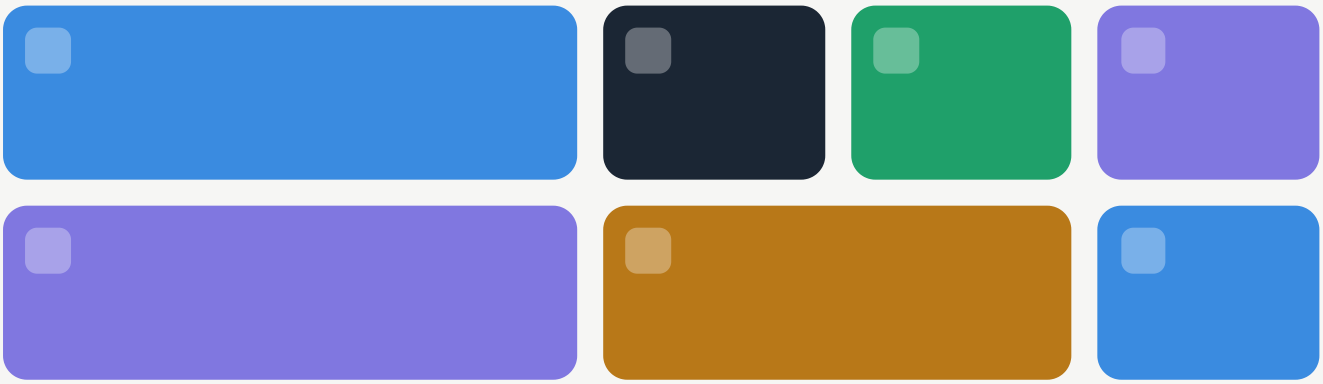
BPMSquare

CUSTOMER EDITION

Connectors and the Integration middleware

How to connect other systems to BPMSquare: the REST API, the change feed and webhooks, connectors, the integration middleware and Data Workbench.

New way of customer relationship



Connectors and the Integration middleware

Provided by **Snasquare**

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CHAPTER 5

Connectors and the Integration middleware

> Screen names and button words may be refined as the product improves. If a name here is slightly different on your screen, look for the same idea nearby.

About this chapter

This chapter is for the consultant or administrator who connects BPMSquare to other systems. You do not write code for anything in it. You fill in fields, press **Test**, and watch the results.

It covers two screens in **Settings > Integrations**:

- **Connectors**: one tile for each system you can connect. Slack, Google Calendar, Gmail, a mail server, Microsoft Dynamics 365, SAP S/4HANA and ePROMIS.
- **Integration middleware**: one page for everything about syncing with an ERP. The connection, the links between BPMSquare objects and ERP objects, field mapping, a message monitor, and resync.

It also covers the two settings that decide where email goes while you test: **Email output** and **Inbox channels**.

Only workspace administrators can open these screens. The Integration middleware page needs a module that your BPMSquare contact switches on for your workspace. Without it, the page does not appear. Ask your BPMSquare contact.

The examples use a made-up company, Example Trading LLC.

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1. How the pieces fit

You want to	Connector	Where it is managed
Send quotation emails from your own Gmail, as a reply in the customer's thread	Gmail	Connectors
Use your own business mailbox for supplier RFQs and for the shared Inbox	Mail server, or Gmail	Connectors, then Inbox channels or RFQ settings
Post to Slack	Slack	Connectors
Read a calendar	Google Calendar	Connectors
Bring customers, contacts, products, projects and orders in from Dynamics 365, and send awarded quotes out	Microsoft Dynamics 365	Connectors, then Integration middleware
Bring customers, suppliers, products and orders in from SAP S/4HANA, check and send sales orders	SAP S/4HANA	Integration middleware
Link tenders and budgets to ePROMIS	ePROMIS	Its own settings page

A password, secret or key you enter on any of these screens is stored encrypted. It is never shown again. When you edit a connection and leave a secret field blank, the stored secret is kept.

Sending to or reading from another system always goes out from BPMSquare's servers, never from your browser. Every address you type must be a public `https` address. An address on a private or internal network is refused.

2. The Connectors screen

Open **Settings** > **Integrations** > **Connectors**. The screen shows a tile for each connector, with a **Connected** or **Not connected** label.

Connect a simple connector

Slack, Google Calendar, Gmail and the mail server work the same way.

1. Click the tile. It opens.
2. Press **Connect**.
3. Fill in the fields.
4. Press **Save & connect**. If the details are wrong, the screen says so in red and nothing is saved.
5. Press **Test connection**.

Change or remove one

- These four connectors have no **Edit** button. To change a detail, press **Disconnect**, then connect again.
- **Disconnect** asks you to confirm. Anything that relies on the connector stops working straight away.
- Dynamics 365, SAP S/4HANA and ePROMIS are different. They have **Edit** and keep a stored secret when you leave its field blank.

Which tiles you see

- **Dynamics 365**: always. With the Integration middleware module, the tile opens that page (**Managed in Integration middleware**). Without it, the tile opens the older Dynamics 365 page (section 7).
- **SAP S/4HANA**: only with the Integration middleware module.
- **ePROMIS**: only with the GCC tender module.

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3. Slack

What it is. A link to a Slack channel through an Incoming Webhook.

What you need. An Incoming Webhook URL from Slack. It looks like `https://hooks.slack.com/services/…`. In Slack, make an app for your workspace, switch on Incoming Webhooks and add one for the channel.

Steps.

1. Open the **Slack** tile. Press **Connect**.
2. Paste the **Incoming Webhook URL**.
3. Press **Save & connect**.
4. Press **Test connection**. A message "BPMSquare is connected to this Slack channel." appears in the channel.

What it does today. The connection is stored and can be tested. At this snapshot no BPMSquare screen sends its notifications to Slack yet. Connect it now if you want it ready.

Disconnect. Press **Disconnect** and confirm.

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4. Google Calendar

What it is. Read-only access to a calendar through its private iCal address.

What you need. The secret address in iCal format. In Google Calendar, open the calendar's settings, go to **Integrate calendar**, and copy the **Secret address in iCal format**. Anyone who holds that address can read the calendar, so treat it like a password.

Steps.

1. Open the **Google Calendar** tile. Press **Connect**.
2. Paste the **Secret iCal URL**.
3. Press **Save & connect**, then **Test connection**.

The test reads the calendar and says how many upcoming events it found, and what the next one is. A calendar with no upcoming events still passes: "Connected, no upcoming events found on this calendar."

What it does today. The connection is stored and can be tested. At this snapshot no BPMSquare screen shows calendar events yet.

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5. Gmail

What it is. Quotation emails are sent from your own Gmail address instead of BPMSquare's sender. When the customer's original email is found in your inbox, with a matching subject, the quote goes out as a real reply in that thread.

What you need.

- A Gmail address.
- A 16-character **App Password**. Google issues these only when 2-Step Verification is on for the account. In your Google Account, go to Security, then 2-Step Verification, then App passwords.

Steps.

1. Open the **Gmail** tile. Press **Connect**.
2. Type the **Gmail address** and the **App password**.
3. Press **Save & connect**.
4. Press **Test connection**. A test email is sent from your address to your address.

Gmail can also be chosen as the **Mailbox** of an Inbox channel (section 13).

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6. Mail server (SMTP and IMAP)

What it is. Your own business mailbox on any mail server: Zoho, Microsoft 365 with IMAP switched on, cPanel, or your hosting provider. BPMSquare sends supplier RFQs from this address and reads the replies back. It can also be the mailbox for an Inbox channel.

What you need. The mailbox address, the user name (usually the address), the password or an app password, and the server details from your mail provider.

Fields.

Field	Example
Email address	`purchasing@example.com`
Username (usually the email address)	`purchasing@example.com`
Password or app password	
SMTP server	`smtp.example.com`

Field	Example
SMTP port	`587` (or `465`)
IMAP server	`imap.example.com`
IMAP port	`993`

Steps.

1. Open the **Mail server (SMTP / IMAP)** tile. Press **Connect**.
2. Fill in the fields and press **Save & connect**.
3. Press **Test connection**. BPMSquare logs in to both servers. The answer names them: "Logged in to smtp.example.com (send) and imap.example.com (receive) as …".

To send RFQs from this mailbox, choose it as the mail channel in the RFQ settings.

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7. Microsoft Dynamics 365

What it does. It brings records in from Dynamics 365 and sends awarded quotes out. It works with three products. The product you choose decides what an awarded quote becomes there.

Product	What an awarded quote becomes
Sales, Customer Service, Field Service, Project Operations (Dataverse)	A **Quote**
Finance & Operations / Supply Chain	A **Project**
Business Central	A **Project**

A **Sales Order** is also offered as the document. On Finance & Operations and Business Central that choice stays greyed out as "not ready" until its entity is set on the Mapping tab, and it has not yet been proven against live systems.

What you need before you start.

- An app registration in Microsoft Entra for BPMSquare. You will copy its **Directory (tenant) ID** and **Application (client) ID**.
- A **client secret** for that app, and the day it stops working.
- In Dynamics, an application user for that app with a security role. The role must be able to read customers, contacts and products, and to create quotes (or projects). A role that is too narrow shows up as a missing permission when you press **Test**.
- The address of your environment, for example `https://contoso.crm4.dynamics.com`. For Business Central online, the environment name, such as `Production`. For Business Central on-premises, the API base address of your server.
- For Finance & Operations, the legal entity. For Business Central, the company.

Login types. Choose one. Finance & Operations and Dataverse accept the first three. Business Central also accepts the fourth.

Login type	Use when
OAuth 2.0, app registration and client secret	The usual choice.
OAuth 2.0, app registration and certificate	Your company forbids client secrets. You paste the certificate and the private key. The private key is stored encrypted and not shown again.
OAuth 2.0, sign in as a user	Records must be read as a person. BPMSquare shows a **Redirect address**. Add it under **Web** in the app registration, then press **Connect with Microsoft**.
Basic, username and password or web service key	Business Central on-premises only.

Set up (Integration middleware page).

1. Open **Settings > Integrations > Connectors**, click **Dynamics 365**, and press **Managed in Integration middleware**. You can also go straight to **Settings > Integrations > Integration middleware**.
2. If nothing is connected yet, the page shows **Connect Dynamics 365**. Press it.
3. Choose the **Product**.
4. Choose the **Login type**.
5. Type the **Address**.
6. Type the **Directory ID** and **Client ID**.
7. Paste the **Secret** and set **Secret expires on**. The page warns you 30 days before that day.
8. For Finance & Operations or Business Central, type the **Legal entity** or **Company**.
9. Press **Connect**.
10. Press **Test**. The answer is one line, such as "The connection and the permissions are fine." If a permission is missing, the line says how many, and **Show details** lists them with what to do.

After that, the connector chip at the top of the page shows a green dot and the address. Click the chip to **Test**, **Edit** or **Disconnect**. A **Disconnect** keeps the records that were already brought in. Nothing new goes out until you connect again.

Without the Integration middleware module, the Dynamics 365 tile opens an older page named **Microsoft Dynamics 365**. It has the same connection fields and its own sync buttons. The rest of this chapter describes the middleware page.

What it reads. Customers become accounts. Contacts become contacts. Products become products. Projects become projects. With Dataverse, sales orders become sales orders, and their deliveries and invoices come in as read-only documents.

8. SAP S/4HANA

What it does. It brings records in from SAP S/4HANA and reads sales orders back. It works with S/4HANA Cloud (public edition) and with S/4HANA systems that expose the standard OData APIs. Sales orders can be checked with SAP, and sent to it, from the order page. Awarded quotes are not sent to SAP from the Links tab. The Links tab for SAP shows only what comes in.

SAP S/4HANA has no tile of its own until your workspace has the Integration middleware module. It is managed on that page only.

What you need before you start.

- The **API host** of your SAP system, for example `my426318-api.s4hana.cloud.sap`. Type it without `https://` and without a path.
- A **Communication User** of a **Communication Arrangement**. The arrangement needs scenario `SAP_COM_0008` (Business Partner, Customer and Supplier Integration), and `SAP_COM_0009` (Product Integration) for products.
- That user's password.

To try BPMSquare first without your own SAP system, choose the sandbox login. It needs an **API key** from the SAP Business Accelerator Hub (open an API and choose **Show API Key**). The sandbox gives sample data, read only. The panel shows it as "Sandbox (sample data)".

Set up.

1. Open **Settings > Integrations > Integration middleware** and click the **SAP S/4HANA** chip.
2. Press **Connect SAP S/4HANA**.
3. Choose the **Login type**: Communication user, or API key.
4. For a Communication user, type the **API host**, the **Communication user** and the **Password**. For the sandbox, paste the **API key**.
5. Press **Connect**, then **Test**.

What it reads.

From SAP	Into BPMSquare
Customers	Accounts
Suppliers	Suppliers
Products	Products
Sales orders	Sales orders (and their deliveries and invoices, as read-only documents)

Each record keeps SAP's own number, shown on the record (section 12).

Narrowing what is read. On the **Resync** tab, **Scope > Edit** limits a run to records of a given category, grouping or industry. Sales area and country are not offered as filters yet.

Sending an order to SAP. An order can be sent only when its order type, or the coverage it falls under, has a sales area chosen under **Mapping > Value mapping**. With no row there, **Send to ERP** on the order is not possible. The Sales and tenders chapter of the Solution Guide describes the order page.

9. ePROMIS

What it is for. ePROMIS is a project and cost system used with tenders. BPMSquare can read its lists (tenders, the Resource Master, cost codes and justifications) and send an awarded tender's project and budget to it.

Where it lives. Its own page: **Settings > Integrations > Connectors > ePROMIS**. It needs the GCC tender module. It is not on the Integration middleware page.

What you need. From your ePROMIS supplier: the API base address, how requests sign in (an API key in a header, a bearer token, or a user name and password), the credential, a company or database code if they ask for one, and the description of the API.

Fields.

Field	What it holds
Base URL	The ePROMIS API address, starting with `https`.
Sign-in	API key in a header, Bearer token, or User name and password.
Header name	For an API key: the header that carries it, spelled as the ePROMIS documentation spells it. The default is `X-API-Key`.
User name	For User name and password.
API key, Token or Password	The credential. Stored encrypted. Leave blank on a later save to keep it.
Company code and Sent as	A code some setups need on every request, and whether it travels in a header or in the address.
Endpoint map (JSON)	Where each ePROMIS operation lives. See below.

The endpoint map. ePROMIS does not publish a public description of its API. BPMSquare therefore does not guess one. The endpoint map says, for each operation, the path, the method and where in the answer to find the values. The operations are: Test address, Tenders list, Project read, Project create, Budget create, Budget replace, Resource Master list, Cost Code list and Justification list. Until you fill an operation in, it answers "Not configured". **Start from the empty template** loads the empty shape.

Steps.

1. Open the **ePROMIS** tile and press **Set up** (or **Open settings**).
2. Fill in the Base URL, Sign-in and the credential. Add the company code if ePROMIS asks for one.
3. Paste the endpoint map from the ePROMIS documentation. Start from the empty template.
4. Press **Connect**.
5. Press **Test**. With a Test address in the map, it calls that. Without one, it contacts the base address and says "Connected" only if that proves the credential.
6. **Edit** and **Disconnect** are on the connected line.

Limits at this snapshot. The connection, the endpoint map and the test are in place. ePROMIS is not yet on the Integration middleware page, so it has no Links, Monitor or Resync tabs. Fill in and test the endpoint map against your ePROMIS system before you rely on it.

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10. The Integration middleware page

Open **Settings > Integrations > Integration middleware**. This is where everything about syncing with an ERP lives. The page serves every connector that has the module: **Dynamics 365** and **SAP S/4HANA**. A chip for each is at the top. The chosen connector is kept in the address (`?connector=`), so a link or a reload comes back to the same one.

Where each part of the page is.

Part	What it is for
Connector chips	One chip for each connector, with a dot for its state. Click the open chip to see or change the connection.
Setup line	A slim line: "Set up 3 of 5 · Next: …". It opens the next step. It is hidden when every step is done.
Links tab	Which BPMSquare objects are linked to which ERP objects, and which links are on.
Mapping tab	Which BPMSquare field fills which ERP field, and the value lists.
Monitor tab	Every message in and out. Restart a failed one.
Resync tab	Read data from the ERP now or on a timetable.

The tab is kept in the address (`?tab=links` , `mapping` , `monitor` , `resync`).

The setup line

For Dynamics 365 there are five checks. For SAP S/4HANA, which only reads, there are two (the first and the third).

Check	Done when
Connect	The connection works.
Choose the links	You opened Links, checked the Standard Quote link and saved once. The defaults being on does not count as a choice.
Read customers	Customers have been read from the ERP at least once. A quote needs its customer to exist in the ERP.
Send a test quote	A test quote went through.
First real quote	A real Standard Quote was sent.

Links

One table, one row for each link. Columns: **BPMSquare**, an arrow, **ERP**, **Runs**, **On**.

For Dynamics 365:

BPMSquare	Arrow	ERP	Runs
Standard Quote	goes to	Quote, Project or Sales Order (what your product creates)	When awarded
Accounts	comes from	Customers	Off, Hourly or Daily
Contacts	comes from	Contacts	Off, Hourly or Daily
Products	comes from	Products	Off, Hourly or Daily
Projects	comes from	Projects	Off, Hourly or Daily
Sales orders	comes from	Sales orders (Dataverse only)	Off, Hourly or Daily

For SAP S/4HANA, the rows are Accounts from Customers, Suppliers from Suppliers, Products from Products, and Sales orders from Sales orders.

Switch a row on with its **On** switch. A row cannot be switched on if the ERP is not connected. A row that says **Database update needed** cannot be switched on yet. Ask your BPMSquare contact.

The Standard Quote row. Click it to open its panel.

- **Create as**: what the awarded quote becomes in the ERP. A greyed choice is not ready for your ERP yet and says why.
- **Which webhook**: appears when you choose **Webhook**. The quote is sent to a Call webhook from **Settings > Webhooks** instead of the ERP (Chapter 3). The webhook list is empty until you make one.
- **If the customer has none: price list**: for a Dynamics Quote or Sales Order. A quote uses the customer's own price list in Dynamics. This one is used only when the customer has none.
- **Include**: what travels with the quote. The items are Customer prices, Summary text, Drawing link, Notes and terms, Security profile, Materials list, Project tasks and Internal costs. An item that cannot be sent to the chosen target is greyed, with the reason. A quote or sales order carries prices only. The materials list, project tasks and internal costs go to Project targets.
- **Try it**: pick a Standard Quote, then **Preview** or **Send a quote now**. Preview shows in words what would be sent, and the exact body behind **Show the exact body**, and sends nothing. **Send a quote now** is safe to repeat. A quote never lands twice.
- **Save**. Save once even if you change nothing. That is what completes the "Choose the links" check.

The row's menu (**More**) has **Send a test quote**. It builds a clearly marked sample quote whose reference starts with `ZZ`, sends it, and shows its ERP number and an **Open** link. BPMSquare never deletes a test quote. You do.

When a quote is sent. A Standard Quote goes to the ERP only when it is **awarded**. In BPMSquare, awarded is the status Accepted. A rejected quote is never sent. The send happens after the person saves. It never slows or fails the save. If it fails, the message shows in the Monitor, and you can restart it.

Mapping

Works with no changes. Open it only if your ERP is customised.

- **Mapping for** (a choice at the top): the document to map. For Dynamics 365 these are Quote to the ERP, Customers, Contacts, Products and Projects from the ERP, and one entry for each Call webhook that takes a quote. For SAP S/4HANA: Customers, Suppliers and Products.
- **Fields** or **Value mapping** (a switch at the top).
- **Fields.** Each line sends one BPMSquare field to one ERP field. A line with no use shows **Not sent**. The ERP side is a pick-list read from the ERP's own description, with its display name, technical name, type and a required mark. **Fetch fields** reads that description again, or takes a pasted sample, or a list you type. Fields that are new or gone are flagged, never dropped.
- **Convert** on a line changes a value on its way: a code from a list, a date format, a join of fields or a fixed value. **If empty** gives a value to send when the BPMSquare field is empty.
- **Propose** fills the empty lines by matching names and types. **Propose by name** fills only empty lines. **Replace all by name** starts over. **Ask AI for the empty lines** is offered only if your workspace has it, and sends field names and types, never record data. You accept each suggestion. Nothing is saved until you press **Save mapping**.
- **Add a fixed value** adds a line that sends a constant. **Remove** deletes a line you added. **Show all** opens a long list.
- **Show sample data** (for fields that come in): five sample rows as the ERP returns them.
- **Try it** (for fields that go out): the exact body the saved mapping would send for a sample quote. Nothing is sent and nothing is recorded.
- **Reset to standard** puts the standard mapping back. The page says "Using the standard mapping" until someone edits it.
- **Value mapping.** Lists that turn BPMSquare values into the ERP's codes, such as `Mtr` into `M`. One list serves every document of this connection. The inbound side of a list says what BPMSquare value a returned code becomes. Exactly one row answers a code. If a code is unknown, a default can be set. If you leave the default empty, the code is kept as it arrived and counted.
- For SAP, the only list is the **sales area** (and, for the company, the ERP company) of an order type or a coverage. The order type's row wins.

Save with **Save mapping**. If you try to leave with unsaved changes, the page asks.

Monitor

Every message in and out, newest first. It lists connector messages, webhook calls, emails and WhatsApp messages. Calls made to your workspace's API are recorded too, with their method, path and status and never their body. In the connection panel, **Keep bodies of inbound pulls and API calls** keeps the request and answer of those for two days.

Filters.

- Status chips: **All**, **Failed**, **Waiting**, **OK**.
- **Direction**: In and out, Out, In.
- **Document or entity**: Everything, Quote, Customers, Contacts, Products, Projects.
- **From** and **To** dates, in UTC days.

- **Search**: a record reference or an ERP number.
- **Clear filters**.

Columns. Time, Direction, What, Record (a link to the BPMSquare record), ERP number, Status.

Status words.

Word	Meaning
Sent to Dynamics 365 (or SAP S/4HANA)	An outgoing message reached the ERP.
Received from Dynamics 365 (or SAP S/4HANA)	An incoming read worked.
Sent, Received	The same, for webhooks, email and other channels.
Failed	It did not work.
Waiting	It is queued.
Skipped	Nothing was sent, on purpose.
Redirected (demo)	A demo workspace recorded it and sent nothing.
Dry run	A preview.

A line with detail has a small arrow next to its status. Click it to read why. A failed line also has a **What to do** line in plain words. A restart result appears there too.

Actions. Tick lines. The action bar then offers:

- **Restart** sends the ticked failed lines again. With several ticked it reads **Restart (3)**. With no line ticked and the **Failed** chip on, it reads **Restart all failed (12)**. It asks you to confirm and handles up to 200 lines. Nothing lands twice in the ERP. A line that cannot be restarted says so. After a restart each line shows its answer: **Done**, **Still failing** with the reason, **Already fine**, or **Cannot be restarted**.
- **View request** and **View response** work on exactly one ticked line that has a recorded body. Otherwise they are greyed, and the hover says **Select one line** or **No payload recorded**. A panel shows the request or the answer, with **Copy**. Bodies are shown with personal data and tokens removed.
- **Refresh**.

How long things are kept. A message line is kept for 30 days. Its request and answer are kept for 2 days. Each time an administrator opens a body, the look is written to Change history.

Resync

Moves data from the ERP into BPMSquare on demand. Messages and failures are in the Monitor.

Two views: **Full resync** and **Specific records** (kept in the address as `?view=`).

Full resync. One row for each inbound entity.

Column	Meaning
Entity	Customers, Contacts, Vendors (Suppliers for SAP), Products, Projects, Sales orders. A row for an entity that is off in Links says **Switched off in Links**.
Scope	Which records of the ERP a run reads. **Edit** opens the scope panel.
Last run	When it ran and what it did.
Automatic	**Off**, **Hourly** or **Daily**. Daily runs at 02:00 UTC, as the screen says.
Run	**Sync now** reads what changed since the last run. **Full resync** reads everything within the scope.

A **Scope** is a set of conditions. A record is read if it matches every row. The values inside one row are alternatives. Records that fall outside the scope later stay as they are in BPMSquare. Nothing is ever deleted. After you change a scope, the row says a Full resync brings in the rest.

Automatic runs follow BPMSquare's own timetable, so use **Sync now** when you need the data at once. Only one run for an entity can be going at a time.

Specific records.

- **Get records from the ERP**: choose an **Entity**, type up to 100 **Ids or numbers** separated by commas, spaces or new lines, and press **Get N records**. An id is the long code of a record. A number is the one people see. The scope does not apply, and **Sync now** is not affected.
- **Send a record to the ERP** (Dynamics 365 only): choose **Kind of record**, either **Account** or **Standard Quote**, pick the record and press **Send**. An Account goes to the webhook or receiving URL you set up in Chapter 3, the same as the **Push to ERP** action on an account. A Standard Quote follows its awarded or rejected rule.

11. What is two-way and what is read-only

Object	Dynamics 365	SAP S/4HANA	Notes
Customers to Accounts	In	In	
Contacts	In	Not yet	
Suppliers (Vendors)	Not a link on the page	In	The older Dynamics 365 page also reads vendors into Suppliers.
Products	In	In	
Projects	In	Not available	
Sales orders	In (Dataverse), as read-only	In	An order that comes from the ERP is read-only in BPMSquare. Its deliveries and invoices are read-only documents.

Object	Dynamics 365	SAP S/4HANA	Notes
Sales orders out	Send from the order page, to the ERP	Send from the order page, to SAP	The ERP accepts it, then it locks in BPMSquare.
Awarded Standard Quote	Out, as Quote, Project or Sales Order	Not sent	A rejected quote is never sent.
Account	Out, one at a time, to your webhook or receiving URL	Not available	From Resync, Specific records, or Push to ERP on the account (Chapter 3).
Anything else	Not exchanged	Not exchanged	

BPMSquare reads in only what you switch on in **Links**.

A record that came in from the ERP is shown with the ERP's own number. A record BPMSquare sent is linked to its ERP record, so a second send updates or skips and never duplicates.

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12. The ERP id line on records

Where a record is linked to an ERP record, its page shows one extra line:

```
Dynamics 365 · QUO-01002 · Open in Dynamics
```

It names the system, the number people use in the ERP, and, for Dynamics Dataverse, a link to open the record there. The long technical code is shown only as a tooltip. The line is read-only. It is not BPMSquare's own reference.

It appears on accounts, contacts, products, suppliers, inventory items, Standard Quotes, quotations, deals, estimates, RFQs, purchase orders, invoices, work orders, cases, workforce projects and employees, when they are linked. A record with no link shows nothing.

Search by ERP number in the Monitor's search box to find the matching record.

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13. Email output and Inbox channels

These two settings are not connectors, but they decide where email goes while you build and test.

Email output

Settings > Integrations > Email output. Admin only. It controls where quotations, invoices, campaigns and workforce notifications are delivered.

Option	What it does
Send to business partners	Email goes to the real address on the account, contact or employee record. For a production workspace.
Send to a specified email address	Every business email, from any transaction, goes to the one inbox you type under **Redirect everything to**. The subject and body name the intended recipient.

While you build an integration, choose **Send to a specified email address** and type your own inbox. Switch to **Send to business partners** when you go live. A demo workspace is always in redirect mode and cannot be changed.

The **Outbound emails** log lists what was sent.

Inbox channels

Settings > Integrations > Inbox channels. Needs the Shared Inbox module. A channel is an address your customers write to.

- **Mailbox**: *None* (a forwarding address only), *Gmail*, or *Mail server (IMAP)*. If it says "Not connected yet", connect that mailbox on the Connectors screen first.
- **Reply name** and **Reply from**: who replies appear to come from.
- A connected mailbox works by itself. Receiving by a forwarding address needs an inbound mail domain on the platform. Ask your BPMSquare contact.

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14. A checklist for connecting an ERP

1. Set **Email output** to your own inbox.
2. In your ERP, prepare the app registration (Dynamics 365) or the Communication Arrangement (SAP S/4HANA) and write down the values the page asks for.
3. Open **Integration middleware**. Connect, then **Test**. Fix any missing permission.
4. On **Links**, switch on the links you need and save the Standard Quote panel once.
5. On **Resync**, press **Sync now** for **Customers**, then the others. Check **Last run**.
6. Open an account. The ERP id line shows.
7. On **Links**, **More > Send a test quote**. Check the ERP number.
8. Award a real Standard Quote. Watch it in **Monitor** until it reads **Sent to** your ERP.
9. Set **Automatic** to **Daily** or **Hourly** for the entities you rely on.
10. Switch **Email output** to **Send to business partners** when you go live.