

INSTALLATION – OPEN ENTITY CONFIGURATION (BASIC AND ADVANCED)

After downloading and installing the application from the Marketplace (Microsoft AppSource), the Open Entity application must be configured.

Open Entity can be configured with just the four basic functionalities of Copy-Paste, Execute Processes, Archive Data, or Export to Excel by running the Basic setup wizard. Alternatively, you can add utilities that allow interaction (data export and import) between companies, environments, and tenants of Business Central, including external connections (third-party applications) with the Advanced configuration. The choice between one or both configuration processes depends exclusively on the company's needs, and these two 'versions or modules' have been created to simplify the visual interface for Administrators and the required installations (Application Registration in Azure and Azure function creation if webhooks are going to be used) for the 'Advanced' version.

The user configuring the application and managing its functionality must have 'NOW OE Managers' permissions, while other users should have 'NOW OE Users' permissions. If a user does not have one of these permissions, they will not have access to Open Entity. The application's main page will reflect the user's configuration and the application's installation level (basic or advanced).

It can be launched from various locations: on the 'Extension Management' page, 'Assisted Setup,' or directly from the application's main Administrator page.

The user running the setup wizards must have 'NOW OE Managers' permission; it is NOT necessary to have the 'SUPER' permission.

← User Card

Effective Permissions

Send Email

Sent Emails

More options

General

Show more

User Name

Contact Email

Full Name

Microsoft 365

Status

Active

Authentication Email

Authentication Status

Active

User Permission Sets

New Line

Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
LOCAL	Country/region-specific ...	CRONUS ES	Base Application	System
LOCAL	Country/region-specific ...	Nomadaware Manufacturing	Base Application	System
LOGIN	Login access	CRONUS ES	System Application	System
LOGIN	Login access	Nomadaware Manufacturing	System Application	System
→ NOW OE MANAGERS ...	NOW OE MANAGERS		Open Entity	System
SECURITY	Assign permissions to us...	CRONUS ES		System

Extensions Management

← Installed Extensions

Manage

More options

Name ↑	Publisher	Version	Is Inst...	Published As
Email - Microsoft 365 Connector	Microsoft	v. 24.2.20227.20579	✓	Global
Email - Outlook REST API	Microsoft	v. 24.2.20227.20808	✓	Global
Email - SMTP API	Microsoft	v. 24.2.20227.20579	✓	Global
Email - SMTP Connector	Microsoft	v. 24.2.20227.20579	✓	Global
Enforced Digital Vouchers	Microsoft	v. 24.2.20227.21722	✓	Global
Error Messages with Recomme...	Microsoft	v. 24.2.20227.20579	✓	Global
Essential Business Headlines	Microsoft	v. 24.2.20227.20579	✓	Global
Intelligent Cloud Base	Microsoft	v. 24.2.20227.20579	✓	Global
Intrastat Core	Microsoft	v. 24.2.20227.20579	✓	Global
Intrastat ES	Microsoft	v. 24.2.20227.20579	✓	Global
Late Payment Prediction	Microsoft	v. 24.2.20227.20579	✓	Global
Open Entity	Nomadaware, S.L.	v. 1.0.0.0	✓	Dev
Payment Lin	Microsoft	v. 24.2.20227.20579	✓	Global
Payment Pra	Microsoft	v. 24.2.20227.20579	✓	Global
Recommend	Microsoft	v. 24.2.20227.20579	✓	Global
Review Gen	Microsoft	v. 24.2.20227.20579	✓	Global
Sales and In	Microsoft	v. 24.2.20227.20579	✓	Global
Sales Lines S	Microsoft	v. 24.2.20227.20579	✓	Global
Send To Em	Microsoft	v. 24.2.20227.20579	✓	Global
Shopify Con	Microsoft	v. 24.2.20227.21722	✓	Global

Manage

Install

Uninstall

Unpublish

Set up

Download Source

Learn More

Select More

← Setups for Open Entity

Actions

Start Setup

Open Entity Advanced

Open Entity Advanced

Setup Open Entity

Setup Open Entity

Assisted Setup & Actions (Inspect & Wizards) en Dashboard Manager.

Assisted Setup

Start Setup

General Videos

Title	Completed	Learn more	Description
Connect your files to the cloud	☐	Read	Configure which features can work with O...
Do more with Business Central			
Excel Add-in Centralized Deployment	☐	Read	Deploy the Excel add-in for specific users, ...
Configure the Cash Flow Forecast chart	☐	Read	Specify the accounts to use for the Cash FI...
Outlook Add-in Centralized Deployment	☐	Read	Deploy Outlook add-in for specific users, ...
Teams App Centralized Deployment	☐	Read	Deploy the Business Central app for Team...
Power Automate Environment	☐	Read	Override the default setting and choose a ...
Access data with Microsoft 365 licenses	☐	Read	Unlock data across your organization by s...
Card Settings	☐	Read	Configure security settings that determine...
Set Up Time Sheets	☐	Read	Track the time used on projects, register a...
Set up approval workflows			
Permite configurar el registro de correo ele...	☐	Read	Realice un seguimiento de los intercambio...
Set up approval workflows	☐	Read	Create approval workflows that automatic...
Set up an approval workflow to manage in...	☐	—	Create approval workflows that automatic...
Set up a customer approval workflow	☐	—	Create approval workflows that automatic...
Set up an approval workflow to manage pa...	☐	—	Create approval workflows that automatic...
Set Up Extended Security			
Set up field monitoring	☐	Read	You can monitor important fields when so...
NOW Open Entity			
Open Entity Advanced	☐	—	Open Entity Advanced
Setup Open Entity	☐	—	Setup Open Entity

Dashboard Manager

Manage

Actions

Fewer options

Open Entity - C

Base and Cust

Templates

Notifications a

Business Centra

Webhooks

Receptions

Setup

Templates

Custom Templates

Folders

WebHooks

Archive

Equivalences

Registered Operations

Permissions

Inspect & Wizards

Inspect Data App & Standard

Open Entity Basic Setup Wizard

Open Entity Advanced Setup Wizard

Check formulas

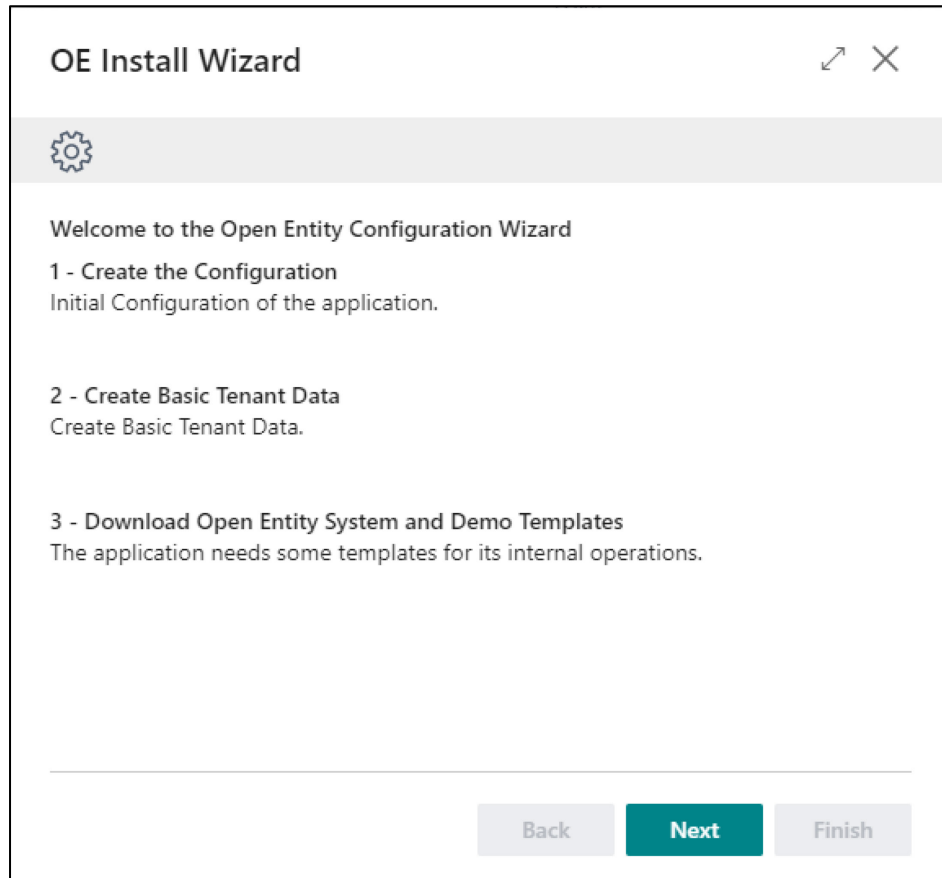
Utilities

Main Utilities

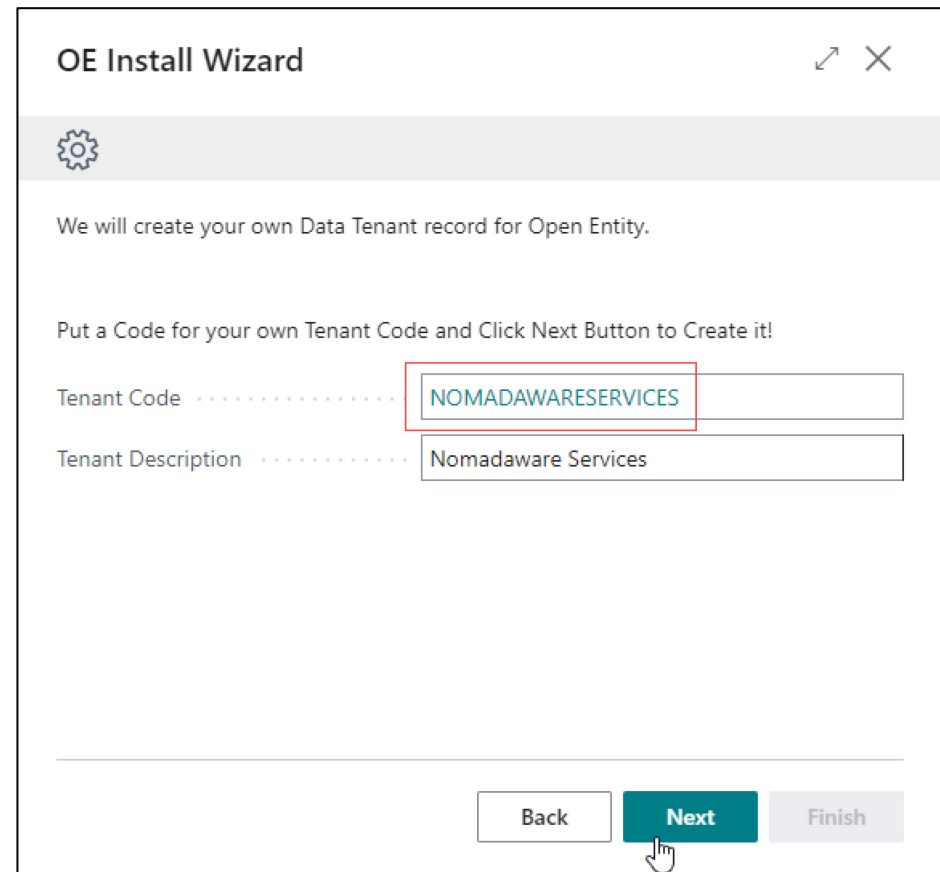
Description	Folder	Action	Run Type
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Basic Installation

After choosing one of the previous actions to configure the Open Entity application, the following wizard will be displayed, guiding us through the actions that will be carried out.



The screenshot shows the 'OE Install Wizard' window. At the top, there's a title bar with 'OE Install Wizard' and window controls. Below the title bar is a grey header with a gear icon. The main content area has the text 'Welcome to the Open Entity Configuration Wizard' followed by three steps: '1 - Create the Configuration' (Initial Configuration of the application), '2 - Create Basic Tenant Data' (Create Basic Tenant Data), and '3 - Download Open Entity System and Demo Templates' (The application needs some templates for its internal operations). At the bottom, there are three buttons: 'Back', 'Next' (highlighted in teal), and 'Finish'.



The screenshot shows the 'OE Install Wizard' window at the tenant configuration step. The title bar and header are the same. The main content area says 'We will create your own Data Tenant record for Open Entity.' followed by 'Put a Code for your own Tenant Code and Click Next Button to Create it!'. There are two input fields: 'Tenant Code' with the value 'NOMADAWARESOURCES' (highlighted with a red box) and 'Tenant Description' with the value 'Nomadaware Services'. At the bottom, there are three buttons: 'Back', 'Next' (highlighted in teal with a hand cursor), and 'Finish'.

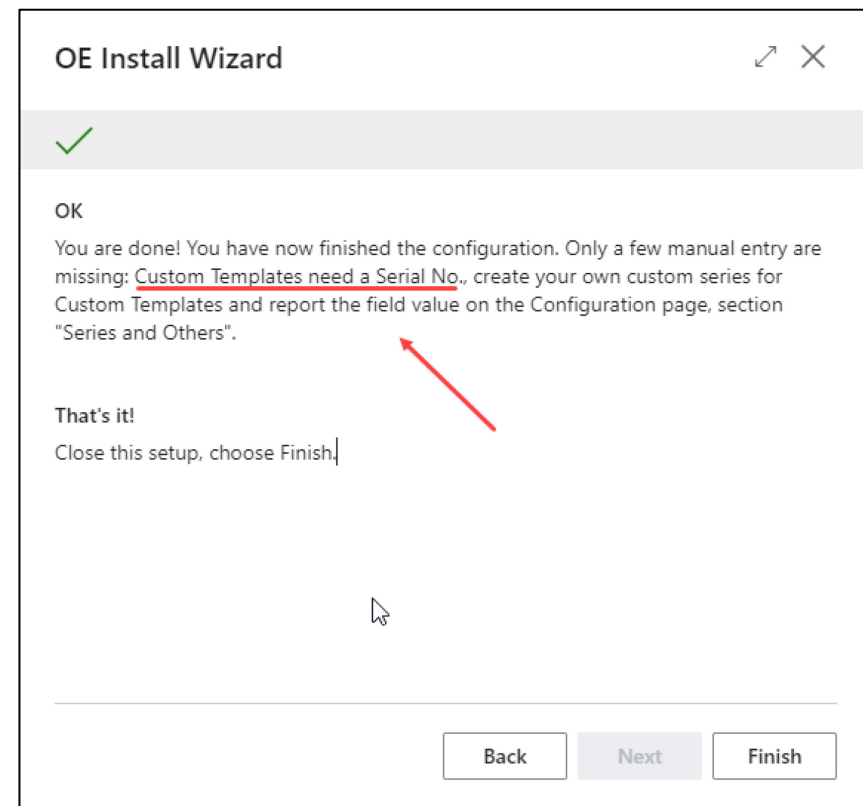
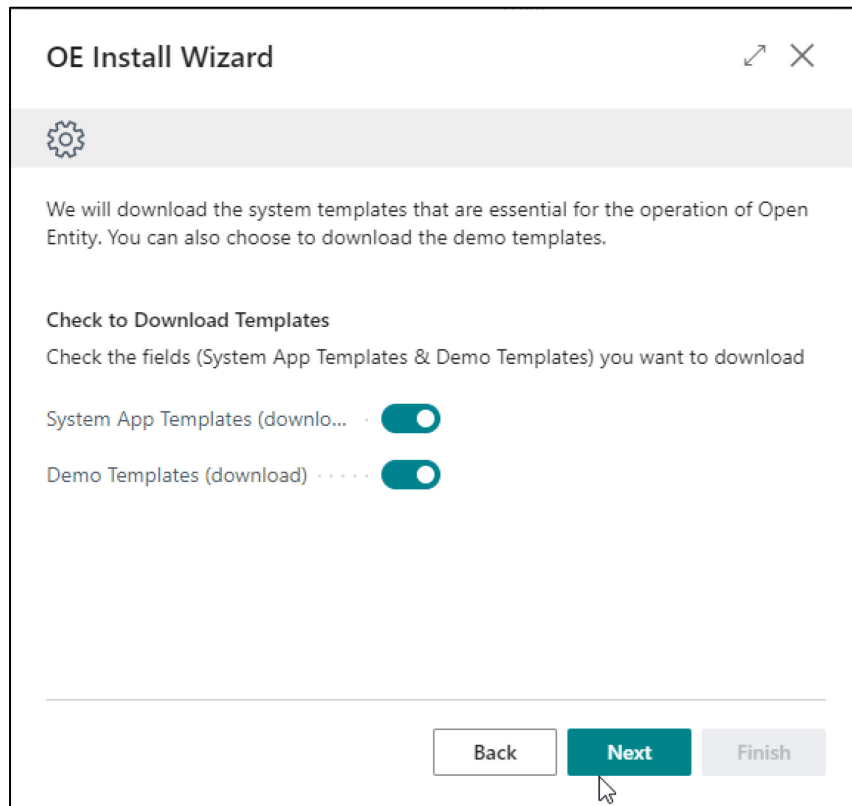
We enter a tenant code by which all our companies will be recognized. It is crucial that this code matches the code of other environments or tenants if we are going to interact with them. The reason is that this code will travel and be received at a destination, and if there is no match between the source and destination codes, the latter will fail to return a response regarding the operations performed.

Therefore, this 'Tenant Code' should be considered like an ID or Passport within Open Entity, or the sender of an email. It uniquely identifies a tenant and its environment or database.

We click Next, and the page to download the templates used by the system for its internal processes will appear. We select the options we want to download and click Next again.

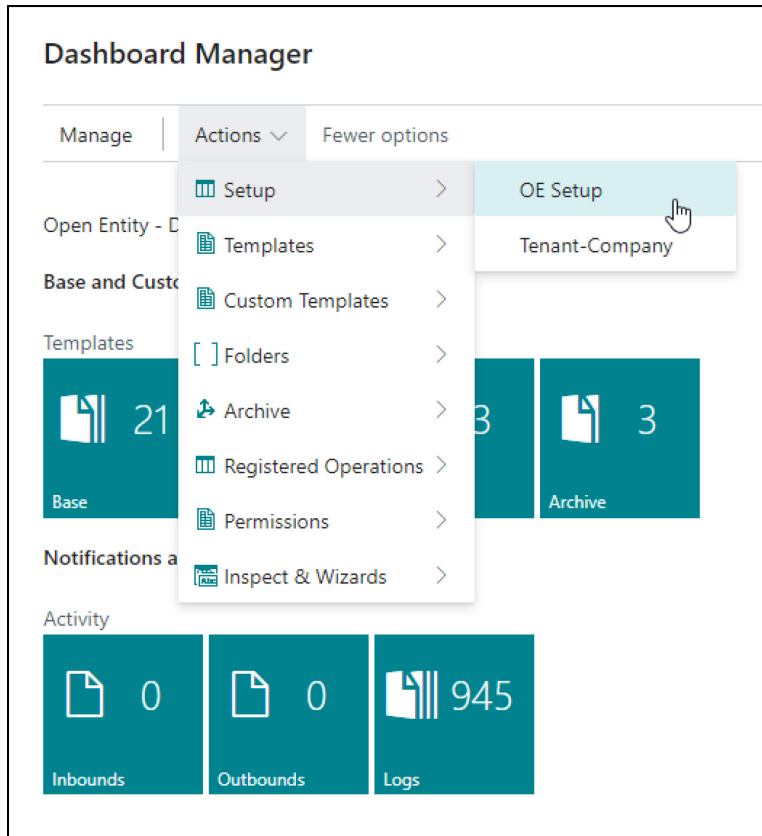
By clicking this button, the system templates and a Demo template (export templates) will begin downloading from the Nomadaware Azure server.

If this action cannot be completed for any reason, we can upload these templates later from the Setup page.



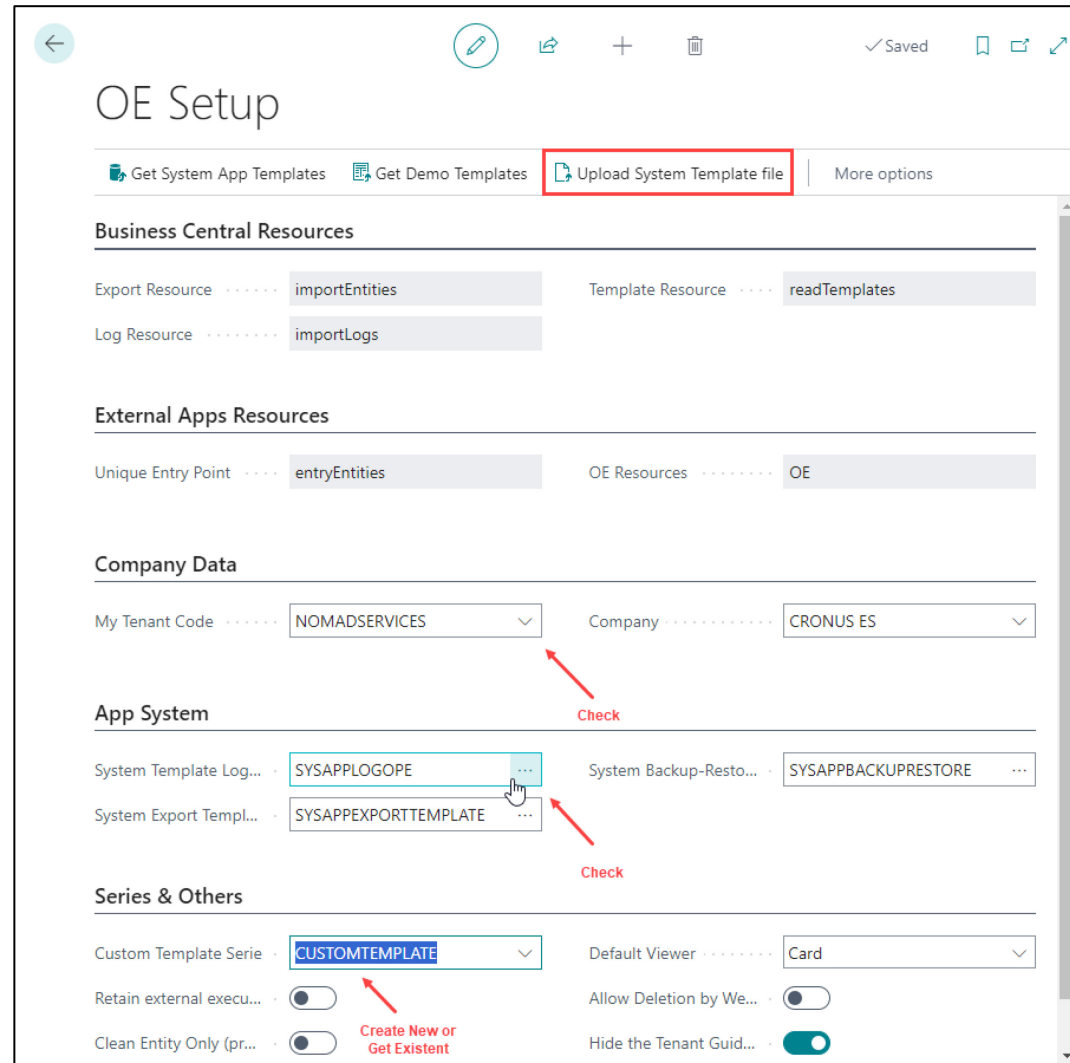
At the end of the wizard, we will proceed to configure a serial number for the custom templates, as indicated on the final page of the wizard.

We click the Finish button and navigate to the application's Setup page.



The two action buttons at the top will connect to the Nomadware Azure server to download the system and demo templates. The third action will allow us to manually upload the files we have downloaded from the Nomadware website (Downloads).

Note: The application will not function correctly without the system templates.

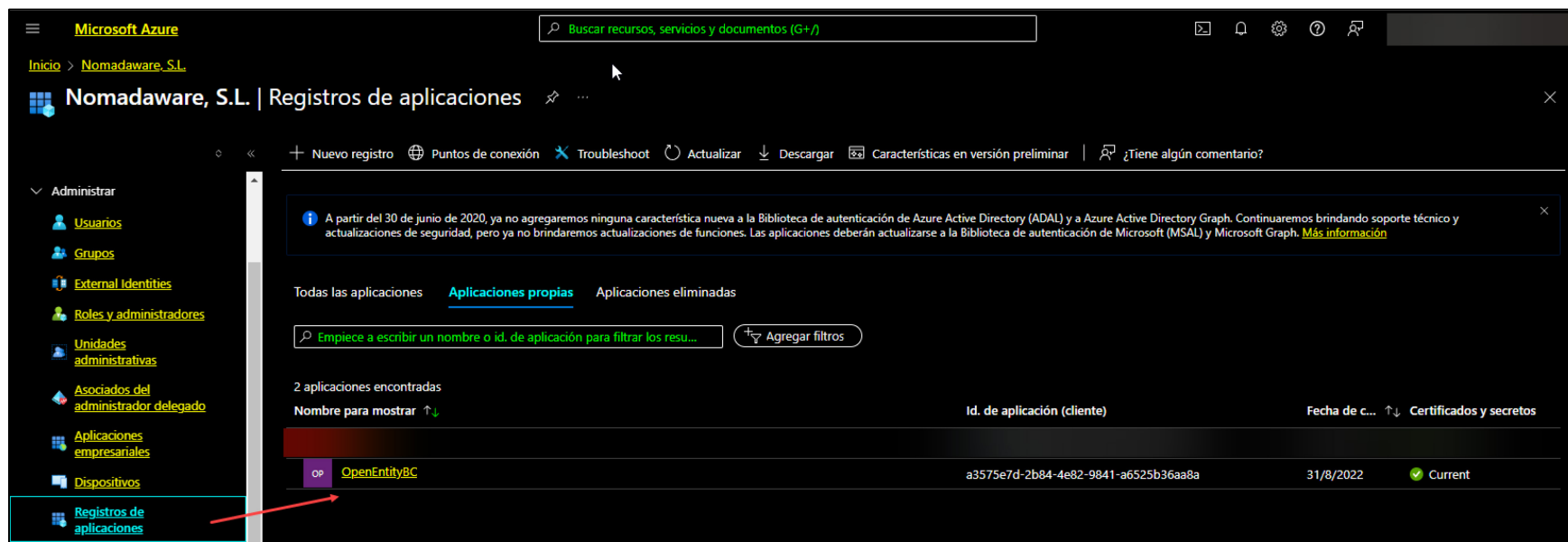


We check that the **Company Data** and **App System** sections are properly populated and that the system templates actually exist (click the three-dot button—if a blank screen appears, the templates have not been downloaded). Then, we create a new series for the **Custom Template Series** field.

You can watch a tutorial on the basic configuration on our YouTube channel: <https://youtu.be/bzU4y75k7II?si=HWKIMxIMJNK2oN3i>.

Advanced Installation

In the advanced configuration, we must have registered the Open Entity application in our Azure account under Microsoft Entra ID, specifically in the **App Registrations** section (New Registration), before starting the Advanced setup wizard.



The screenshot shows the Microsoft Azure portal interface. The top navigation bar includes the 'Microsoft Azure' logo and a search bar. The left sidebar contains a list of navigation links, with 'Registros de aplicaciones' (App Registrations) highlighted by a red arrow. The main content area displays the 'Registros de aplicaciones' page for 'Nomadaware, S.L.'. The page shows a list of applications, with 'OpenEntity8C' listed as one of the applications. The application details include the client ID 'a3575e7d-2b84-4e82-9841-a6525b36aa8a', the creation date '31/8/2022', and the status 'Current'.

Nombre para mostrar	Id. de aplicación (cliente)	Fecha de c...	Certificados y secretos
OpenEntity8C	a3575e7d-2b84-4e82-9841-a6525b36aa8a	31/8/2022	Current

When creating the application, it is important to retain the application code or client application ID and the secret value generated for OAuth2 authentication. This information is essential to continue with the configuration and to ensure that the application can communicate properly with other companies, Business Central tenants, or external applications.

The image displays two screenshots of the Microsoft Azure portal interface. The left screenshot shows the 'OpenEntityBC' application page under 'Registros de aplicaciones'. The right screenshot shows the 'Certificados y secretos' (Certificates and secrets) page for the same application.

Left Screenshot: OpenEntityBC Application Page

- Header: Microsoft Azure
- Breadcrumb: Inicio > Nomadaware, S.L. | Registros de aplicaciones > OpenEntityBC
- Search bar: Buscar recursos, servicios y documentos (G+/)
- Left sidebar: Información general, Inicio rápido, Asistente para integración, Administrar, Personalización de marca y propiedades, Autenticación.
- Right sidebar: Información esencial
 - Nombre para mostrar: OpenEntityBC
 - Id. de aplicación (cliente): a357...
 - Identificador de objeto: ...
 - Id. de directorio (inquilino): ...
 - Tipos de cuenta compati...: Varias organizaciones

Right Screenshot: OpenEntityBC | Certificados y secretos

- Header: Microsoft Azure
- Breadcrumb: Inicio > Nomadaware, S.L. | Registros de aplicaciones > OpenEntityBC
- Search bar: Buscar recursos, servicios y documentos (G+/)
- Left sidebar: Información general, Inicio rápido, Asistente para integración, Administrar, Personalización de marca y propiedades, Autenticación, Certificados y secretos (selected), Configuración de token, Permisos de API, Exponer una API, Roles de aplicación.
- Right sidebar: ¿Tiene algún comentario? (comment icon)
 - Text: Las credenciales permiten a las aplicaciones confidenciales identificarse con el servicio de autenticación al recibir tokens y una ubicación web direccionable (con un esquema HTTPS). Para obtener un mayor nivel de garantía, le recomendamos que use un certificado como credencial, en lugar de un secreto de cliente.
 - Notification: Los certificados de registro de aplicación, los secretos y las credenciales federadas se encuentran en las siguientes pestañas.
 - Tabs: Certificados (0) | Secretos de los cliente (1) | Credenciales federadas (0)
 - Text: Se trata de una cadena de secreto que la aplicación usa para probar su identidad al solicitar un token. También se conoce como contraseña de aplicación.
 - + Nuevo secreto de cliente
 - Table:

Descripción	Expira	Valor	Id. de secreto
Open Entity BC	2/4/2026	*****	*****

To complete this process, you can refer to the numerous help pages and tutorials available on the internet. Below are a few related links:

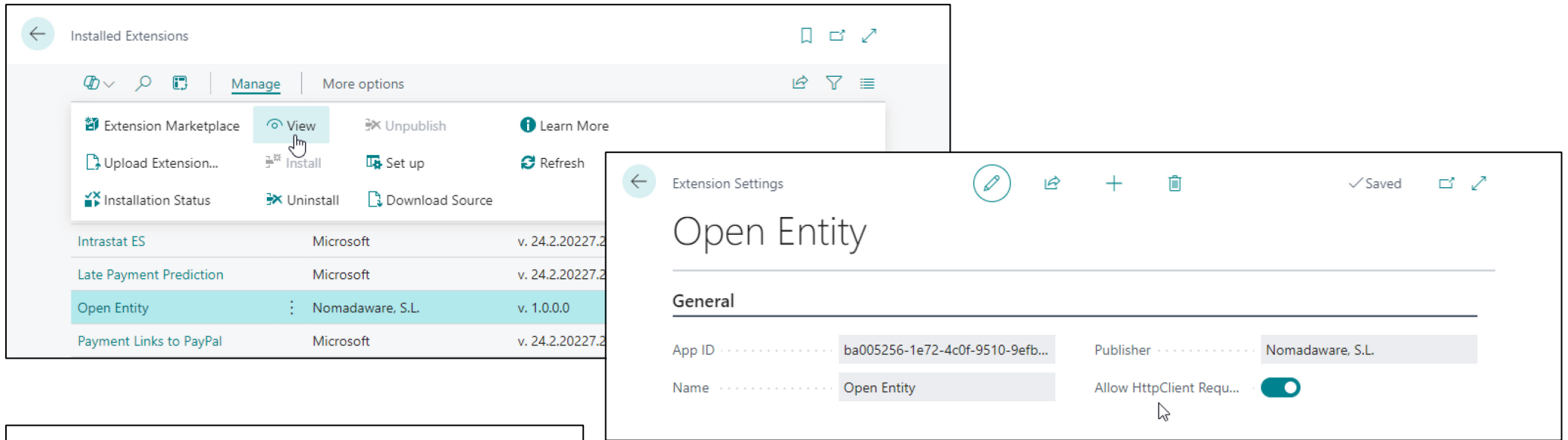
<https://www.navuser.com/how-to-register-business-central-app-with-api-permissions-in-azure-portal/>

<https://www.kauffmann.nl/2022/02/23/configuring-business-central-for-azure-active-directory-authentication-and-oauth-2/>

<https://community.dynamics.com/blogs/post/?postid=cd15ee4a-e750-4d16-81cc-6e344a801805>

Advanced Setup Assistant.

To begin with a quick check, on the installed extensions page (Extension Management), look for the Open Entity application and ensure that the 'Allow HttpClient Request' field is enabled by using the View action.



The screenshot displays the 'Installed Extensions' page in the Open Entity application. The 'Open Entity' extension is highlighted, and the 'View' action is being performed. The 'Open Entity' extension settings page is shown, indicating that the 'Allow HttpClient Request' toggle is enabled.

Installed Extensions

Extension Name	Publisher	Version
Intrastat ES	Microsoft	v. 24.2.20227.2
Late Payment Prediction	Microsoft	v. 24.2.20227.2
Open Entity	Nomadaware, S.L.	v. 1.0.0.0
Payment Links to PayPal	Microsoft	v. 24.2.20227.2

Open Entity Extension Settings

General

App ID: ba005256-1e72-4c0f-9510-9efb... Publisher: Nomadaware, S.L.

Name: Open Entity Allow HttpClient Request: ☒

OE Advanced Install Wizard

Welcome to the Open Entity Advanced Configuration Wizard

1 - Create the Azure Active Directory App in Business Central

Before proceeding with the installation of the advanced version, you must have registered the application in Microsoft Entra Id of your Microsoft Azure account and have saved or know the value of the client application id and the secret value. When finished you should go to the Business Central Microsoft Entra page and click on the 'Grant Consent' action and change the Status field to Enabled.

Back Next Finish

We run the Advanced Setup Assistant from any of the previously mentioned locations.

Upon running , a welcome message will be displayed along with a notice that, to proceed with the assistant, you must have registered the application in your business or personal Azure account and have securely saved or know the client application ID and its secret value, which will be requested in the next step.

OE Advanced Install Wizard

⚙️

We will create a new record in your Microsoft Entra Configuration in to Business Central with the Application Client ID and the Secret Application Value that you will be prompted for.

Enter the Client Application ID and the Secret Value

Application Client Id a3575e7d-2b84-4e82-9841-a6525b36aa8a

OAuth Client Secret

Back Next Finish

OE Advanced Install Wizard

⚙️

We will upgrade your own Tenant Record for advanced use of Open Entity. To export data to other tenants or Business Central databases you will have to create new entries in the Tenant page.

Click Next for Upgrade Tenant Record!

Back Next Finish

We enter the requested data and click "Next" until the assistant is completed.

On the final screen, we are warned that the newly created entry in Business Central for Open Entity must be validated by giving our consent and activating the State field.

OE Advanced Install Wizard

⚙️

✕ The action was executed correctly! ✓

✓

OK

You are done! You have now finished the Advanced Configuration. To make the advanced installation operational, you must access the Microsoft Business Central page Microsoft Entra Applications and execute the Grant Consent action. After that change the State field to enabled.

That's it!

Close this setup, choose Finish.

The installation will have created a new entry in the Microsoft Entra Applications page in Business Central with the Client ID that we filled in. We verify the data, and as the last installation page informed us, we grant consent (Grant Consent) and change the State field to "Enabled" if necessary.

Tell me what you want to do

entra

Go to Pages and Tasks

Show all (12)

> Microsoft Entra Applications

Administration

> Teams App Centralized Deployment

Administration

> INSPECT Business Central Objects

Lists

Go to Reports and Analysis

Day Book VAT Entry

Reports and Analysis

Day Book Vendor Ledger Entry

Reports and Analysis

Day Book Customer Ledger Entry

Reports and Analysis

Search for 'entra'

Search company data

Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Microsoft Entra Applications

+ New

Manage

Client ID	Description	State
{af30e371-ad4a-4097-88c1-5555e7ada96f}	Dynamics 365 Business Central para tablas vir...	Disabled
{ea76fed3-daf0-4865-a0c5-8d40c168791a}	Usuarios externos anónimos de Power Pages	Disabled
{a3575e7d-2b84-4e82-9841-a6525b36aa8a}	OE Management	Enabled
{bf9c07cb-3385-4de3-a63a-b630340b14b}	Usuarios ext. autenticados Power Pages	Disabled

View

Edit

Delete

Select More

When clicking on the Grant Consent button, we will be prompted to authenticate, followed by the acceptance of the requested permissions for the application's operation.

←

Microsoft Entra Application Card

✓ Saved

OE Management

⚙️ Grant Consent

More options

General

Client ID

{a3575e7d-2b84-4e82-9841-a652}

User information

User ID

{e9130b98-7ba9-46ad-958a-4f3...

Description

OE Management

User Name

OE MANAGEMENT

State

Disabled

User Telemetry ID

{1c106d1c-07a8-434a-b3d8-20...

Contact Information

Nomadaware, S.L.

Extension

App ID

{9c52f27a-cb70-4707-81e7-7...

App Name

Open Entity

User Permission Sets

New Line

Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ D365 BUS FULL ACCESS	Dyn. 365 Full Bu...		Base Application	System
→ NOW OE MANAGERS	NOW OE MANA...		Open Entity	System

Microsoft

Permisos solicitados

Revisar para su organización

OpenEntityBC

Nomadaware, S.L.

Esta aplicación quiere:

✓ Access as the signed-in user

✓ Access Dynamics 365 Business Central as the signed-in user

✓ Full access to Admin Center API

✓ Full access to web services API

✓ Access according to the application's permissions in Dynamics 365 Business Central

✓ Full access to automation

✓ Iniciar sesión y leer el perfil del usuario

Si acepta, esta aplicación tendrá acceso a los recursos especificados para todos los usuarios de la organización. No se le pedirá confirmación a nadie más para que revise estos permisos.

La aceptación de estos permisos implica que permite a esta aplicación usar sus datos, tal y como se especifica en las [condiciones de servicio](#) y la [declaración de privacidad](#). Puede cambiar dichos permisos en <https://myapps.microsoft.com>. [Mostrar detalles](#)

¿Le parece sospechosa esta aplicación? [Haga clic aquí para informar de ella.](#)

Cancelar

Aceptar

← Microsoft Entra Application Card

+

✓ Saved

OE Management

⚙ Grant Consent

More options

General

Client ID {a3575e7d-2b84-4e82-9841-a652}

Description OE Management

State Disabled

Contact Information Nomadaware, S.L.

User information

User ID {e9130b98-7ba9-46ad-958a-4f3...}

User Name OE MANAGEMENT

User Telemetry ID {1c106d1c-07a8-434a-b3d8-20...}

Extension

App ID

App Name

Consent was given successfully.

OK

User Permission Sets

New Line

Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name
→ D365 BUS FULL ACCESS	Dyn. 365 Full Bu...		Base Application
NOW OE MANAGERS	NOW OE MANA...		Open Entity

← Microsoft Entra Application Card

+

✓ Saved

OE Management

⚙ Grant Consent

More options

General

Client ID {a3575e7d-2b84-4e82-9841-a652}

Description OE Management

State Disabled

Contact Information

User information

User ID {e9130b98-7ba9-46ad-958a-4f3...}

User Name OE MANAGEMENT

User Telemetry ID {1c106d1c-07a8-434a-b3d8-20...}

Extension

App ID {9c52f27a-cb70-4707-81e7-71 ...}

App Name Open Entity

User Permission Sets

New Line

Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ D365 BUS FULL ACCESS	Dyn. 365 Full Bu...		Base Application	System
NOW OE MANAGERS	NOW OE MANA...		Open Entity	System

To finish, we will access the page of our Tenant, and the first thing we will notice is that three additional sections have been added, and the data has been filled in automatically. We click on the "Check Access Token" action, and if we receive a positive response, we have completed the advanced setup. Otherwise, the data on the form will need to be reviewed to ensure accuracy.

OE Tenant Card

NOMADSERVICES

Obtains Current Tenant information | **Check Access Token** | More options

General

Code NOMADSERVICES Environment-Instance .. OpenEntity_Demo

Description Nomadaware Services Additional Info Optional...

Tenant-Server Companies 2

Authentication

Use Authentication T... : OAuth v2.0

OAuth V2.0

OAuth Client ID a3575e7d-2b84-4e82-9841-a652

OAuth Client Secret

OAuth Scope https://api.businesscentral.dynan

OAuth Redirect URL https://businesscentral.dynamics.

Companies | New Line | Delete Line | Get Companies

Company Name ↑	Company ID	Additional Info
→ CRONUS ES	3967b449-5ae6-ee11-a201-6045bdacc8c3	
Nomadaware Manufacturing	1154d256-b9fa-ee11-a1fd-000d3a665f44	

Templates >

