Setup

Last updated: March 24, 2022

Creating a Nolan Cloud Services Account

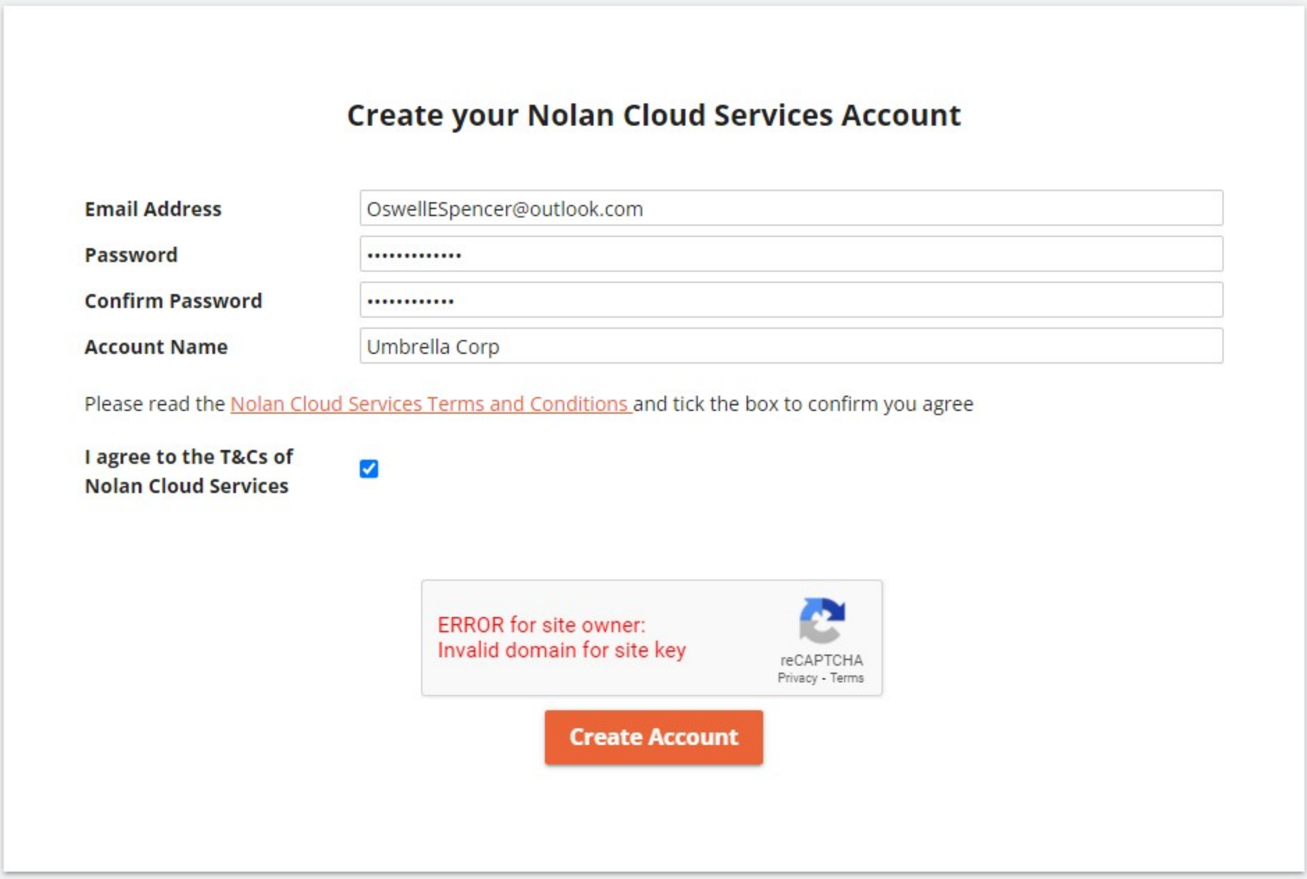
Once you have successfully installed the package following the previous installation chapter, it will need to be configured.

Locate the **Nolan Bank Feeds Setup** window by using the **Search Option** within **Dynamics 365 Business Central**.

Now, select the link, and click on **Sign Up.**

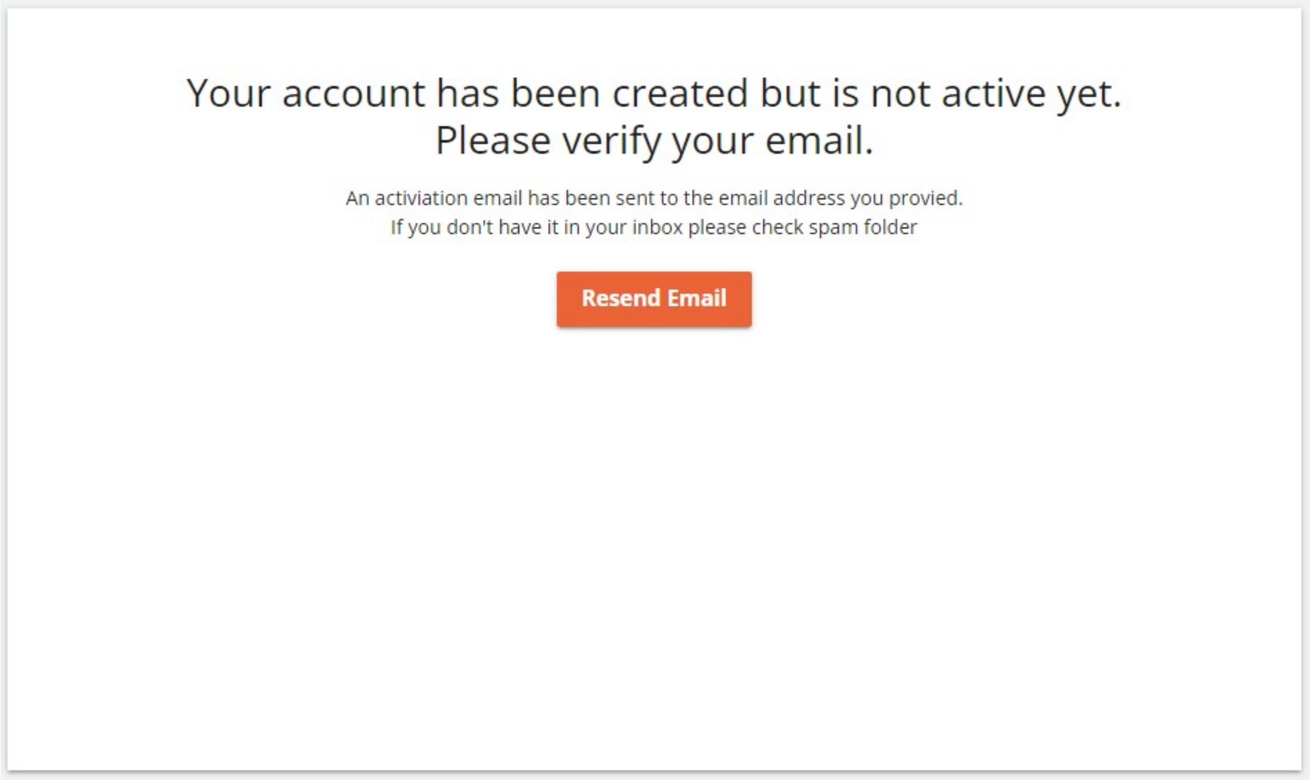
You will then be redirected to the Nolan Cloud Services page where you can create a new account as seen below.

Please make sure to use your own details when filling in the fields and selecting **Create Account**.

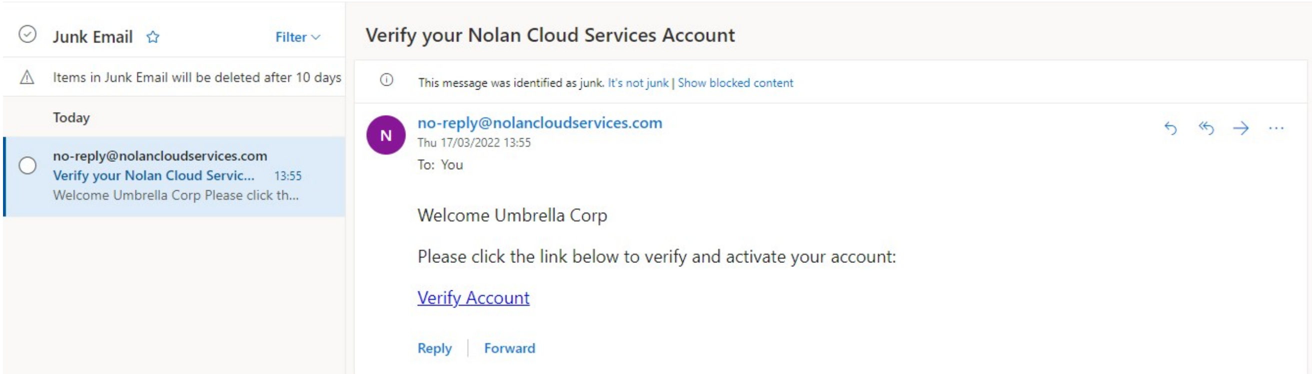


It is **<u>IMPERATIVE</u>** that the **CUSTOMER** ticks the **Terms and Conditions** tick box. This **MUST NOT** be done by a consultant or third party.

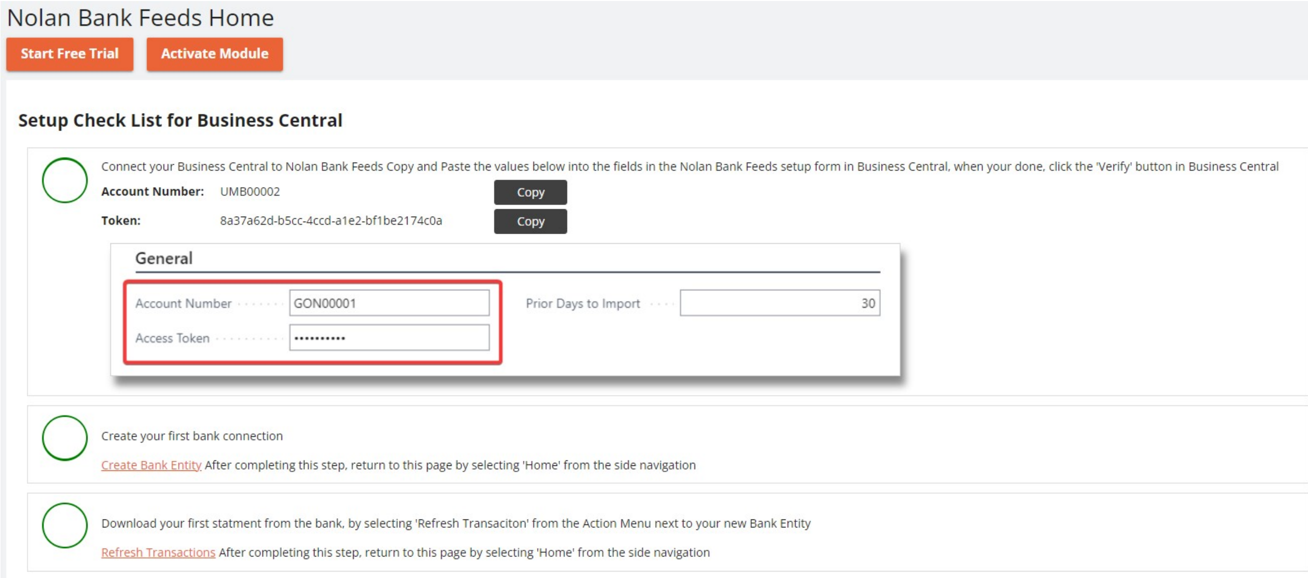
You will then be faced with a screen stating that a verification email has been sent to the email address you entered during the account creation.



Please see an example of the verification email below.

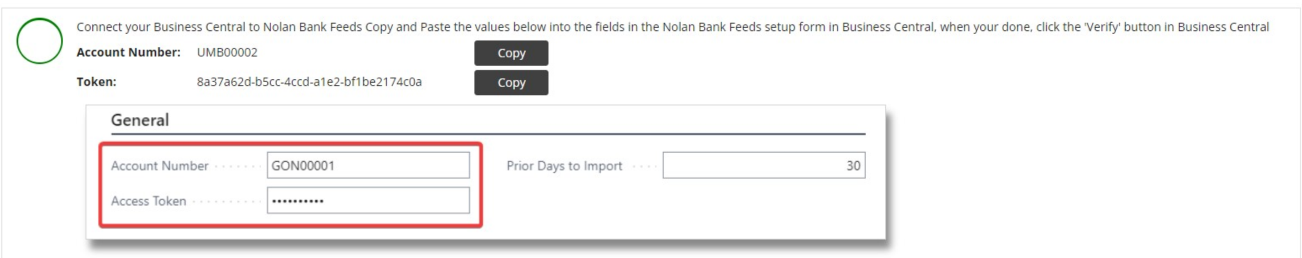


Once you have located this email (bear in mind it may have been sent to your junk folder) select the **Verify Account** link in the email and you will be taken to a page presenting you with a checklist for linking your Dynamics 365 Business Central and Nolan Cloud Services accounts.

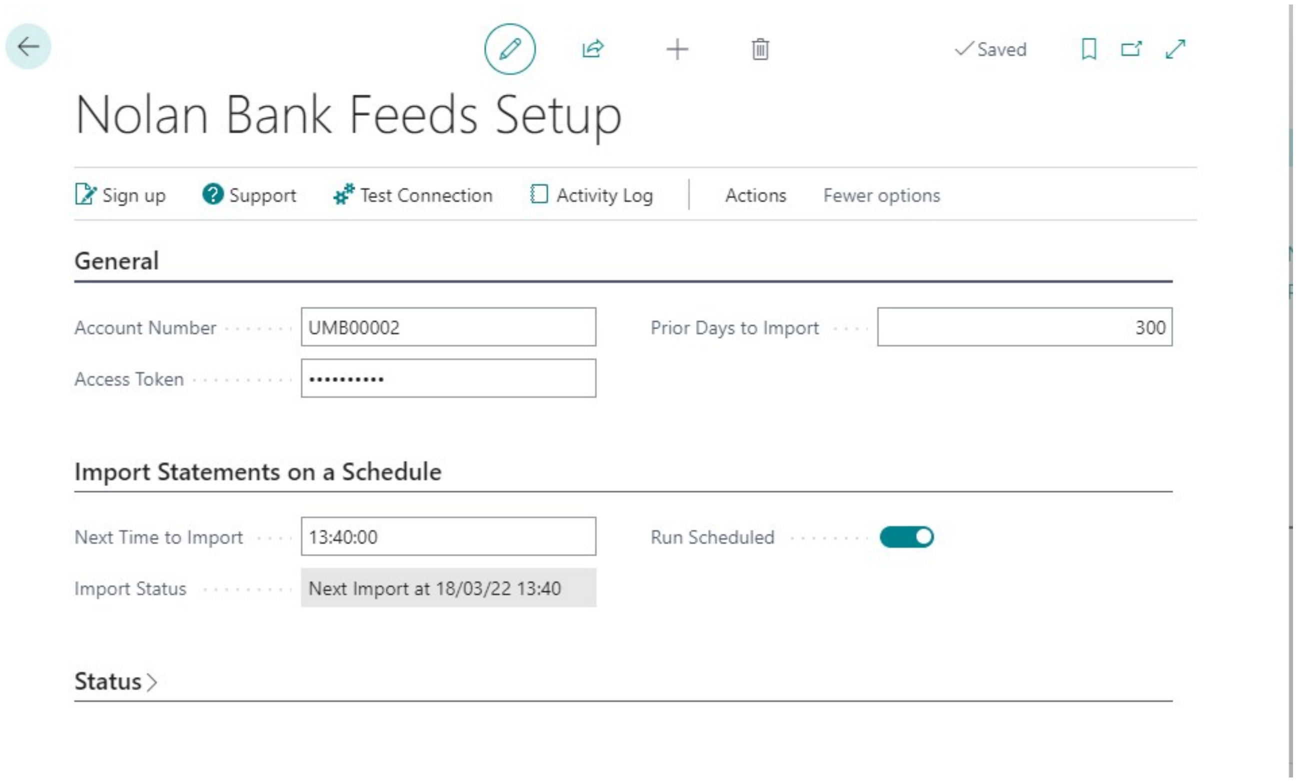


Your registration is now complete, and your Nolan Cloud Services account is active.

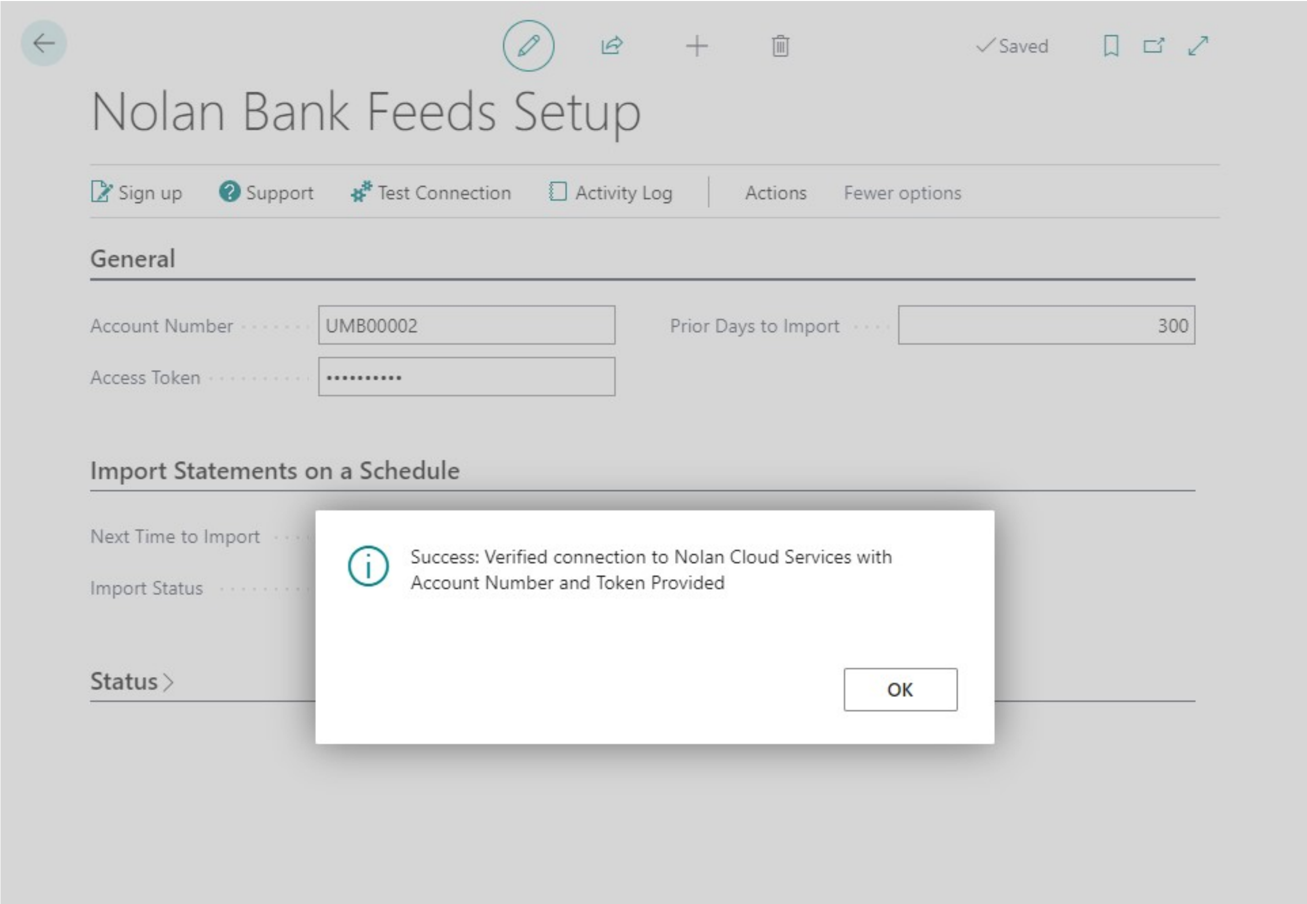
Connecting Business Central to Nolan Cloud Services



Use the **Copy** feature above to copy your **Account Number** and **Access Token** and input them into the relevant fields back in the **Nolan Bank Feeds Setup** window in Dynamics 365 Business Central as seen below.



Once you have done this, you can test Dynamics 365 Business Central's connection to Nolan Cloud Services using the **Test Connection** option as seen below.

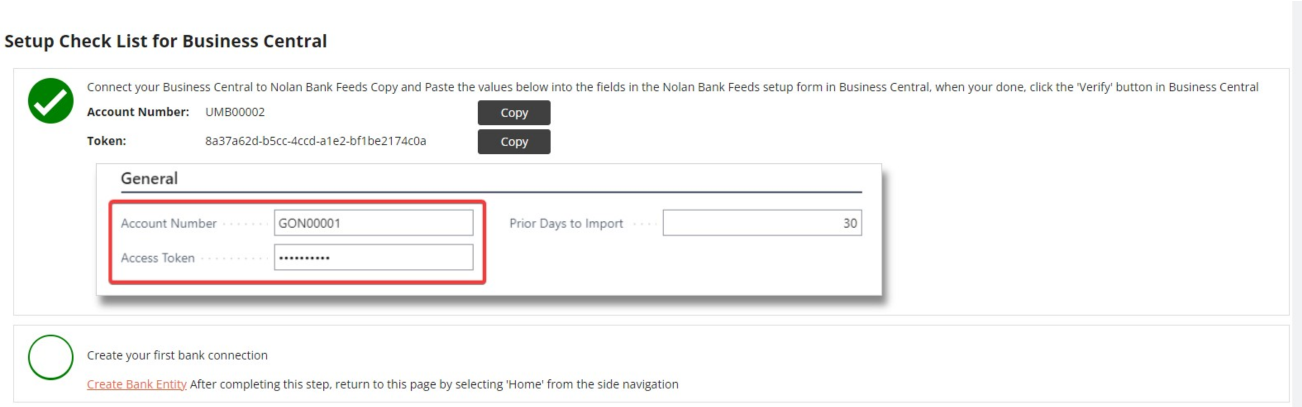


Your Dynamics 365 Business Central and Nolan Cloud Services accounts are now linked.

Creating a New Bank Entity in Nolan Cloud Services

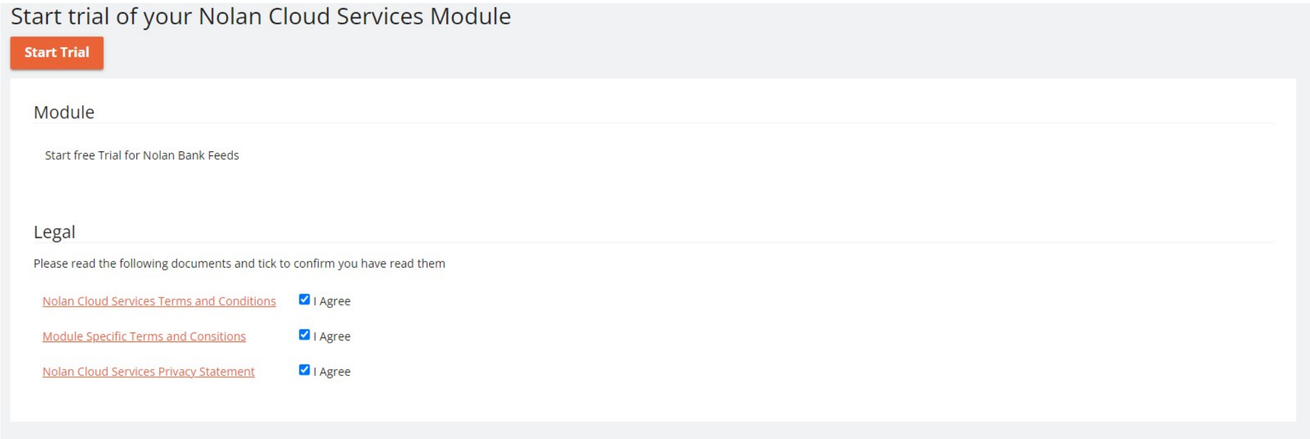
Before Bank Feeds can be used, it needs to be connected to a **Bank Entity** (the bank you wish to use) within Nolan Cloud Services.

From the **Setup Checklist for Dynamics 365 Business Central** page as found in the previous section, click the **Create Bank Entity** link as seen below.

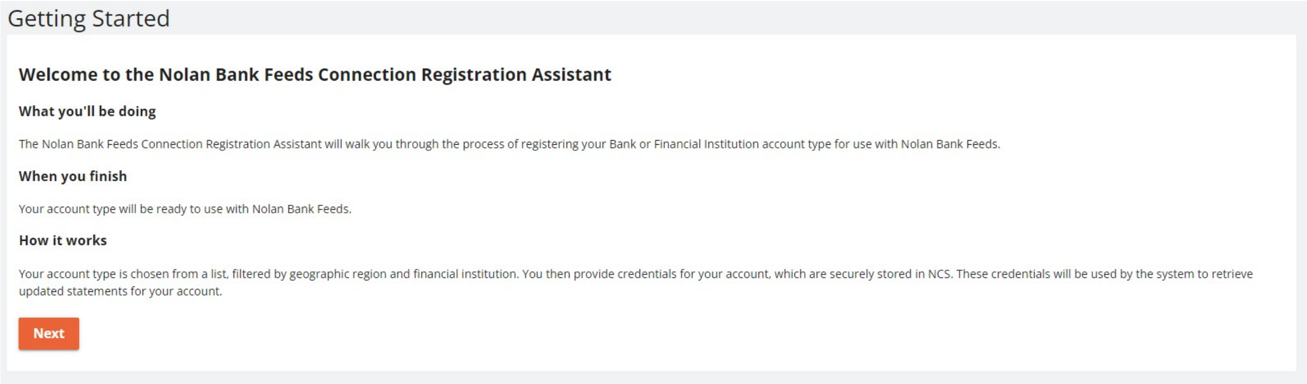


This will bring up the **Start trial of your Nolan Cloud Services Module** screen where you can read the Nolan Cloud Services legal documents.

Once you have read them, you will need to tick to agree you have done so and then click **start trial**.

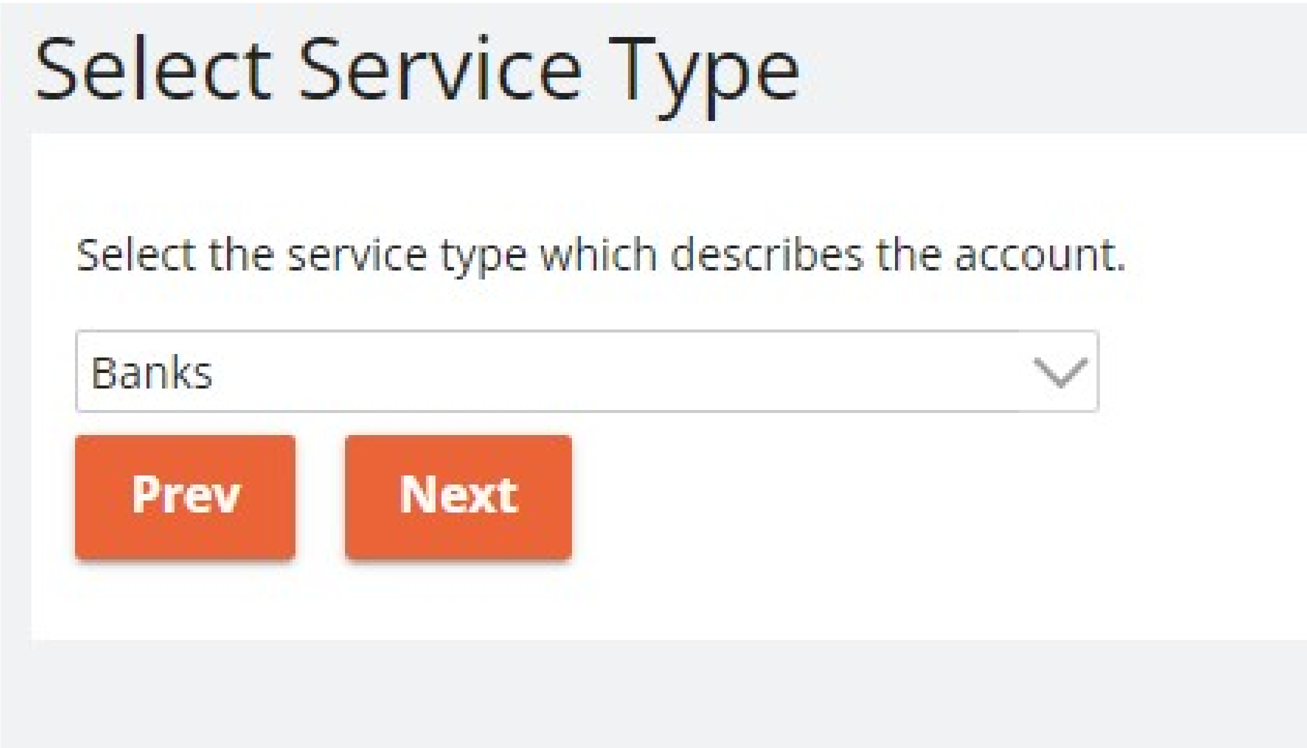


This will bring up a **Getting Started** screen with some basic information regarding the process of setting up a new **Bank Entity** and how it works as seen below.

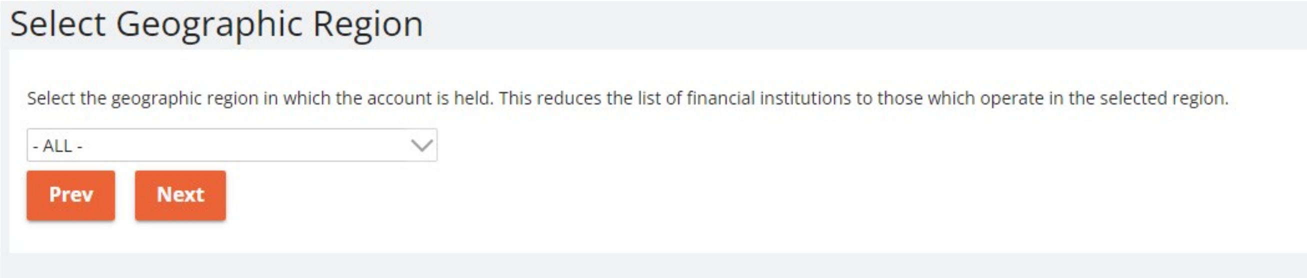


Clicking **Next** will bring you to the following screen where you will need to select which type of account you want to create.

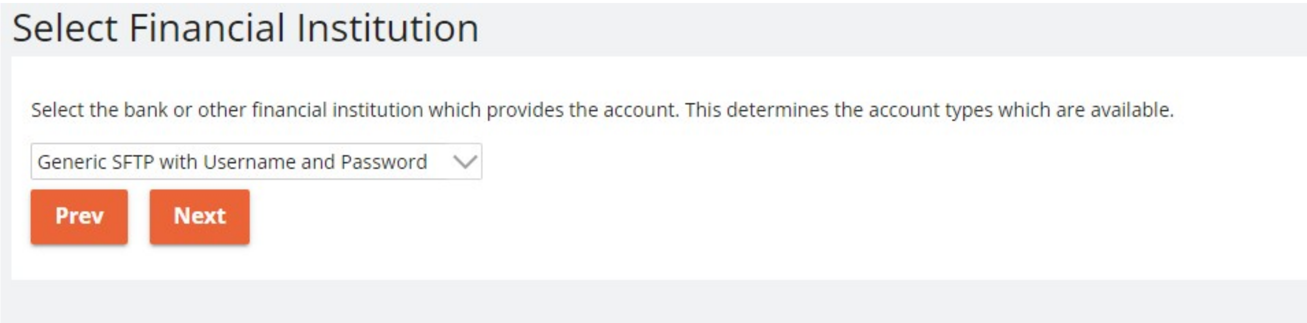
As we are setting up a new **Bank Entity**, select **Banks** from the drop-down list and click **Next**.



The next screen asks for your geographic region, select the option which applies to you and click **Next**.

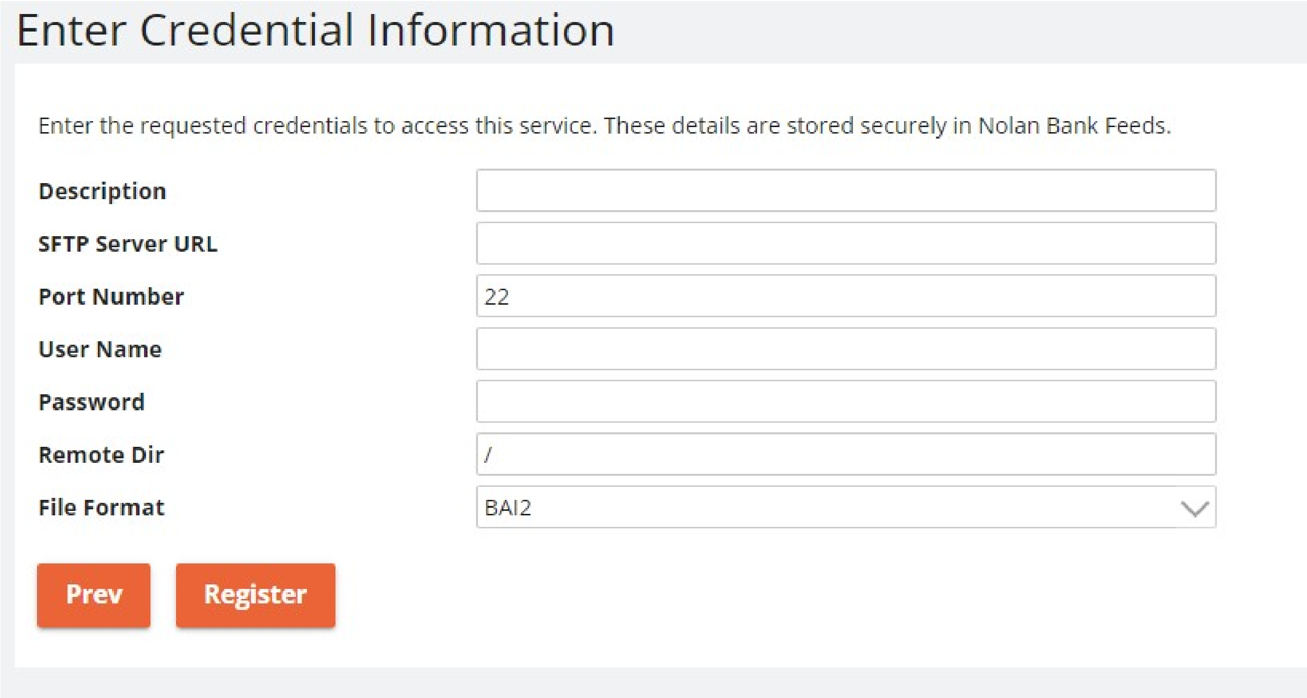


The following screen requires you to select the **Financial Institution** of which you would like to create a new **Entity**. Once your institution is selected, click **Next**.

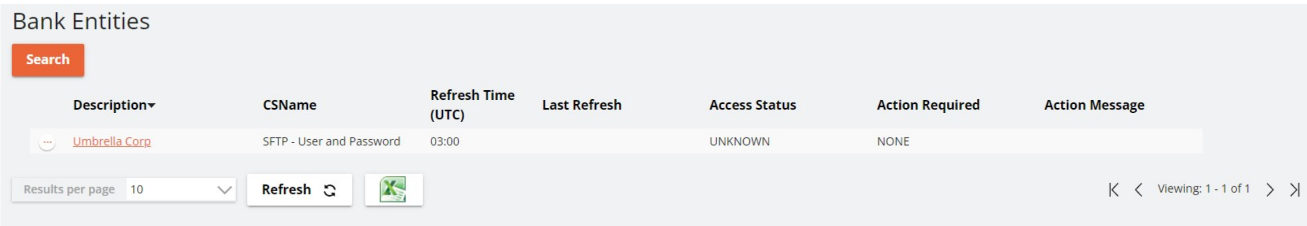


Now that you have selected the **Financial Institution**, you will be asked to choose an **Account Type**. Once you have chosen the relevant option, click **Next**.

This will bring you to the **Credentials** screen where you will need to input the required information into the required fields. Once you have done this and clicked **Register**, your new **Bank Entity** will be registered within **Nolan Cloud Services**.



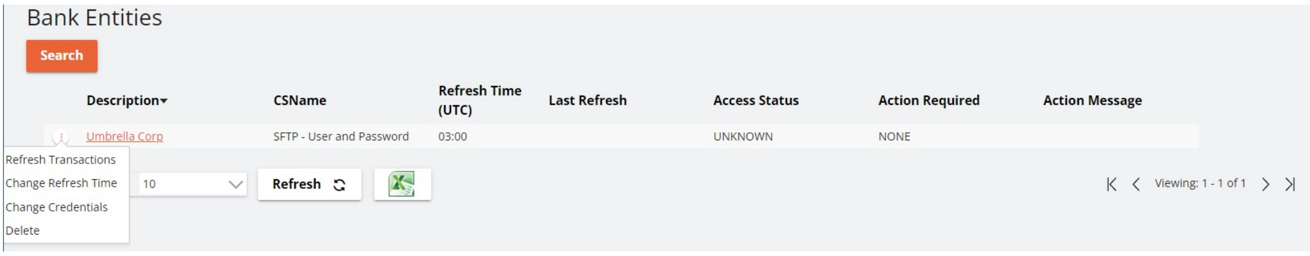
You should now have a screen like the one below, showing a new **Entity** registered within **Nolan Cloud Services**.



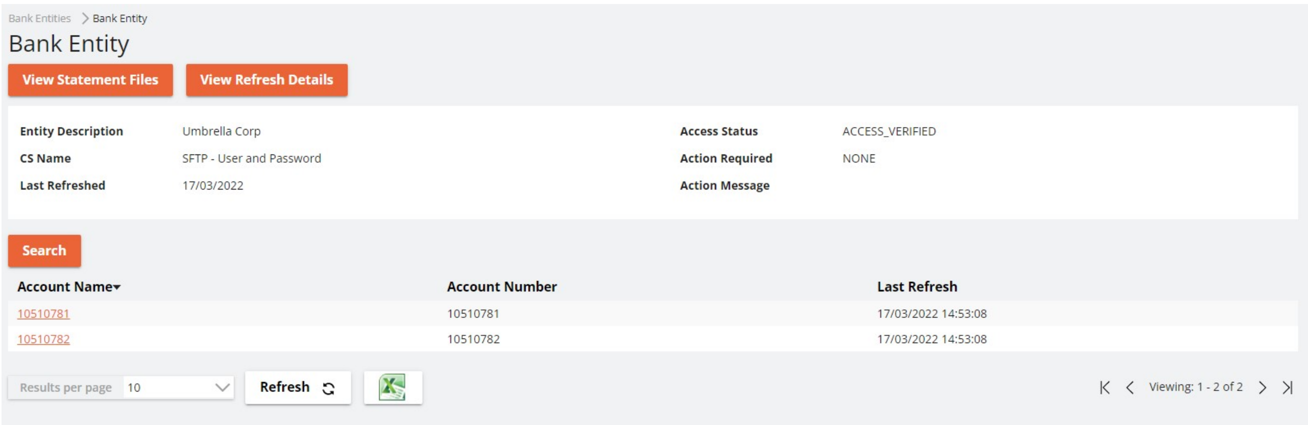
This concludes this section.

Downloading your first Statement from the Bank

Now that your **Entity** is set up, you will want to try downloading your first statement. From within the **Bank Entities** screen, select the **Refresh Transactions** option as seen below.

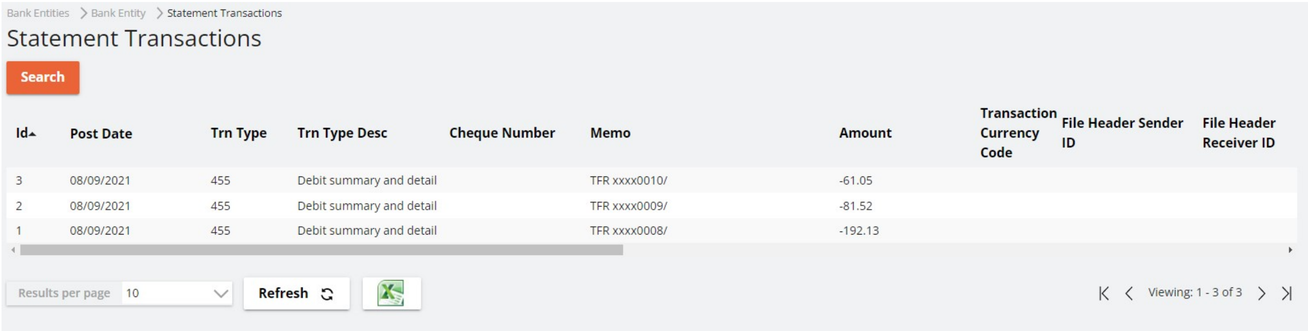


Once the access has been verified, indicated by the **Access Status** seen above, click on the name of your **Entity**. This will bring up the following screen which gives a more detailed description of your **Bank Entity** such as the **Accounts** against it.



Now, select the **Account** from which you want to download your **Statement**.

This will bring up the **Statement Transaction** screen which shows all the **Statements** against the **Account** which have been successfully downloaded.



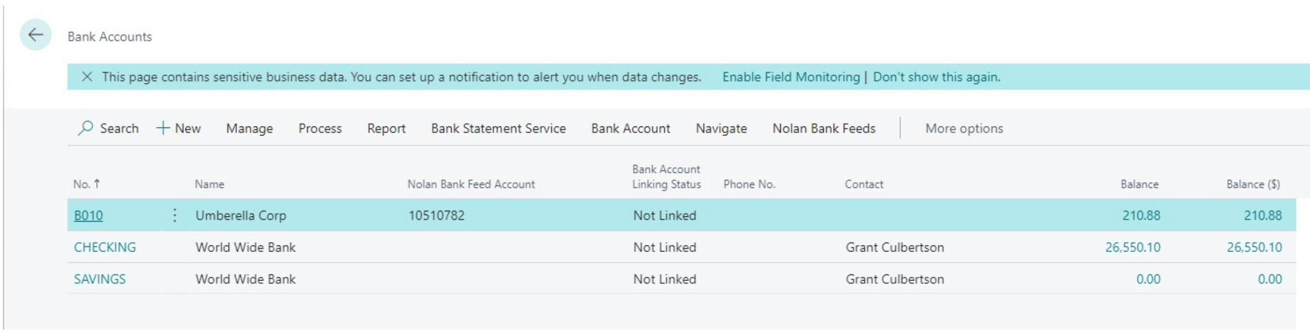
You have now successfully downloaded your statements into **Nolan Cloud Services** from the **Bank**.

This concludes the section **Downloading your first Statement from the Bank**.

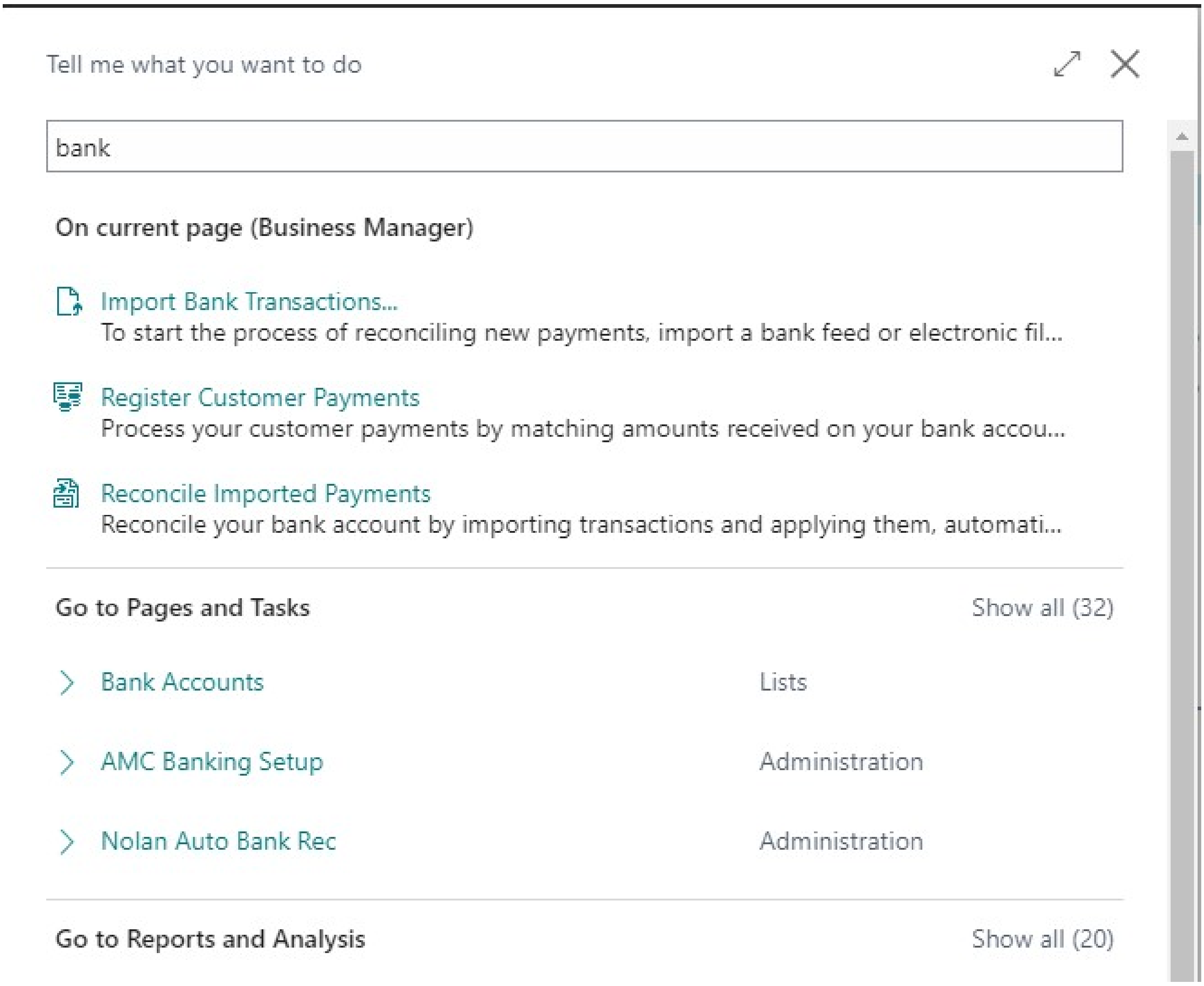
Linking the Dynamics 365 Business Central Bank to the Nolan Cloud Services Bank

To link your **Dynamics 365 Business Central** and **Nolan Cloud Services banks** , use the **Search** function in **Dynamics 365 Business Central** to search for **Bank** . Then select, **Bank Accounts**.

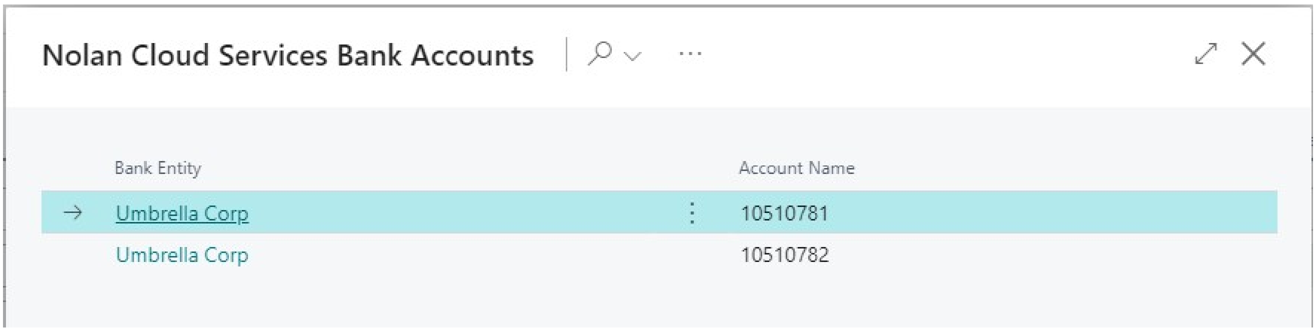
This will bring up a list of all the **Bank Entities** listed within **Dynamics 365 Business Central**. Select the **Entity** you created earlier.



Next, click **search** and type **bank** into the search box as seen below.



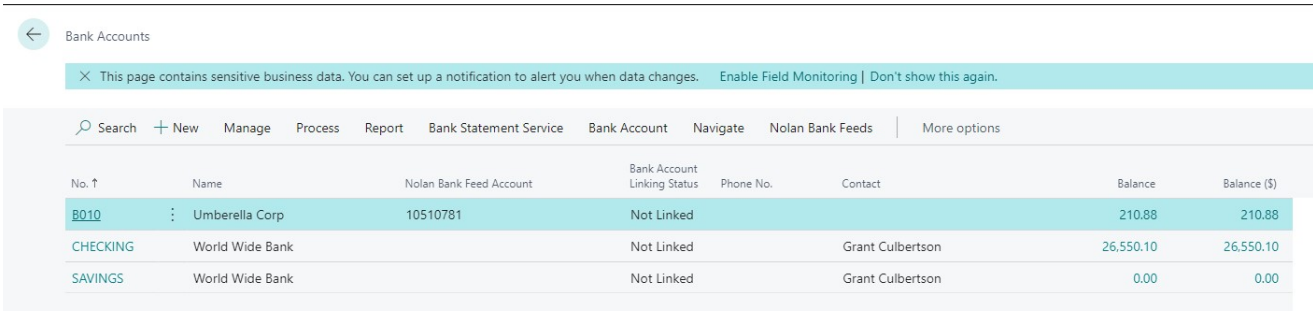
INSERT INSTRUCTIONS HERE



Select the relevant **Entity** and click **OK**.

Your **Dynamics 365 Business Central Bank** and **Nolan Cloud Services Bank** should now be successfully linked.

You can check, however, by going back to the **Bank Accounts** screen in **Dynamics 365 Business Central** and checking the **Linking Status** as seen below.

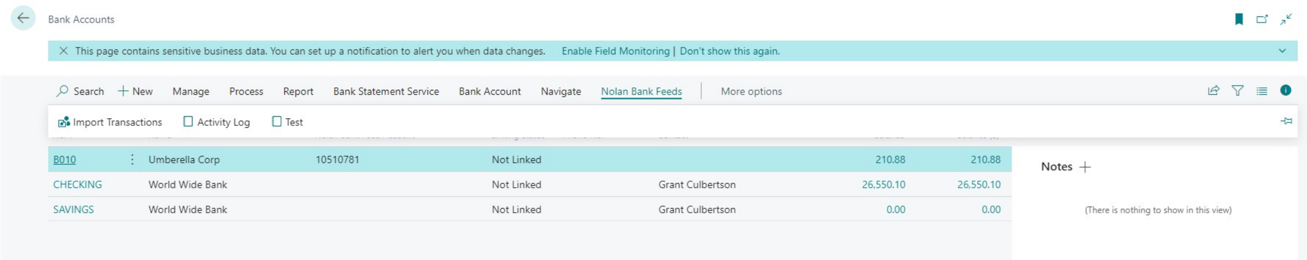


This concludes the section **Linking the Dynamics 365 Business Central Bank to the Nolan Cloud Services Bank**.

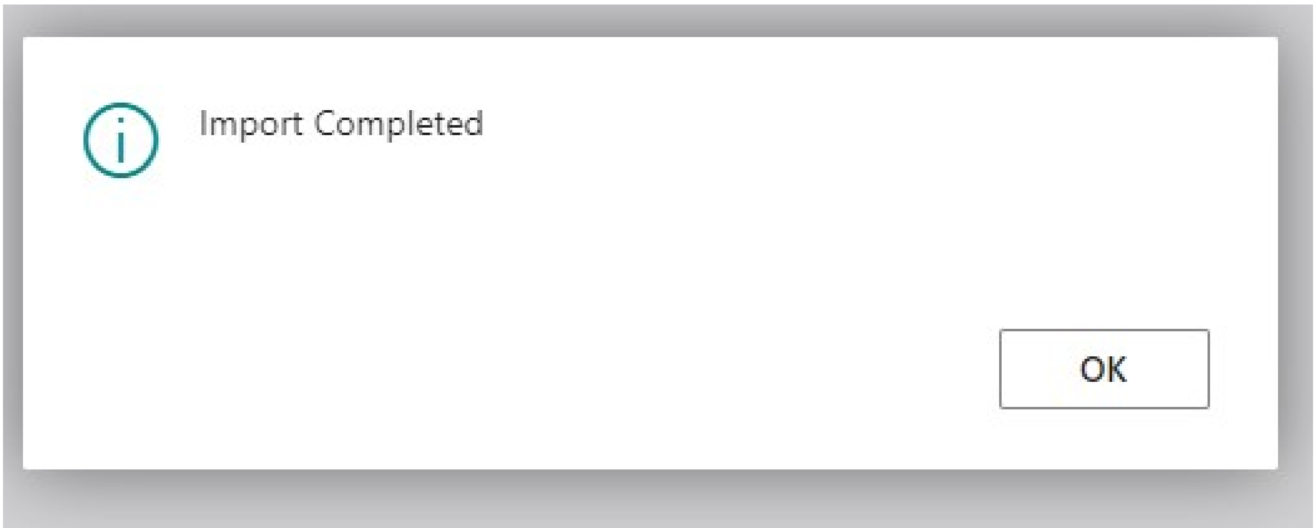
Downloading your bank statements into Dynamics 365 Business Central

This is the final stage of the **Nolan Bank Feeds** setup process, where you will be downloading **Bank Statements** from **Nolan Bank Feeds** into **Dynamics 365 Business Central**.

From the **Bank Accounts** screen in **Dynamics 365 Business Central**, select **Nolan Bank Feeds** and **Import Transactions** as seen below.



You will then be presented with a pop-up stating that the **Transactions** have been successfully **Imported**, such as the one below.



This will now have **Imported** all **Transactions** across all the listed **Bank Accounts** from **Nolan Bank Feeds** into **Dynamics 365 Business Central**.

This completes the set-up process for **Nolan Bank Feeds** within your **Dynamics 365 Business Central Account**.