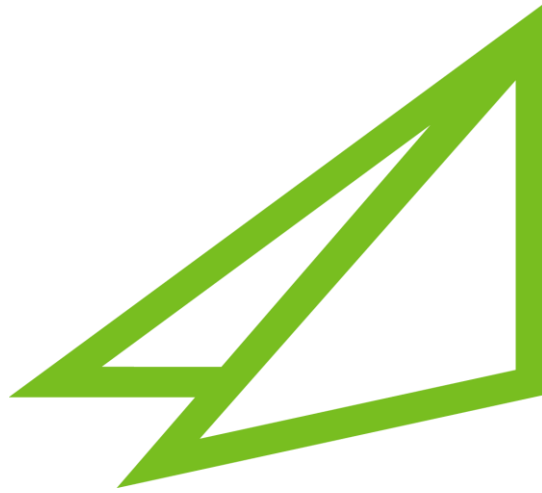




Boardeaser Connector

User Guide

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1. About the application

Boardeaser Connector is an application that provides a connection between Business Central and Boardeaser. You as a customer will be able to send financial information like SIE4, customer ledger transactions and vendor ledger transactions from Business Central to Boardeaser.

For more information, please visit the following websites.

<https://www.boardeaser.com>

<https://www.sherpas.se/boardeaser-for-bc>

2. Supported languages

The application supports the following languages: Swedish and English

3. Business Central Installation and configuration

To install the application, go to Microsoft AppSource. Once you have downloaded the app to Business Central you should contact Sherpas for license information.

Sherpas contact information: boardeaser_bc@sherpas.se

Boardeaser contact information: support@boardeaser.com

Once you have received the license information from Sherpas and updated the API information from Boardeaser, you should be able to connect to Boardeaser and start sending information from Business Central to Boardeaser.

Under 3.1.1 Boardeaser Connection Information you will find more information on how to retrieve API information from Boardeaser and license key from Sherpas.

3.1. Boardeaser Setup

Tell me what you want to do



Boardeaser

Go to Pages and Tasks

> Boardeaser Setup	Administration	🔖
> Boardeaser SIE Export List	Lists	
> Boardeaser Integration Log	Administration	

In Business Central go to the Boardeaser Setup for configuration of the connection to Boardeaser. First time you open the Boardeaser Setup page it will populate some settings for you.

3.1.1. Boardeaser Connection Information

Connection

Boardeaser API Information

API Client Id

API Client Secret

API Username

API Password

Test Mode ☒

License Information

License Key

License Key Verified ☐

Boardeaser API Information, go to Boardeaser and sign in. Navigate to the “Client Manager” via “My Organizations” and select: Administration > Settings > Advanced Settings. Here you will be able to generate the API credentials. Contact support@boardeaser.com if you have any questions.

If you have an account in Boardeaser’s test environment, you can use that for testing purposes. By activating “Test Mode” you can connect to the test environment.

License information, contact Sherpas at boardeaser_bc@sherpas.se to receive your license key. Once you have provided Sherpas with requested information you will receive a license key.

3.1.2. Number series

Number Series

Log No. Serie BE INT LOG ... SIE Export No. Serie BE SIE EXP ...

Number series used, you can create and use your own number series if you prefer that.

3.1.3. Boardeaser Company Information

Boardeaser Company Information

Company Id 5eedc750-f078-41dd-a45a-167... Registration Number 554433-1234
 Name Test Bolaget

For the integration to work you need to get company information from Boardeaser. To retrieve the information, click on the action "Get Company Information". For more information see chapter 3.1.5.2 "Get Company Information".

3.1.4. Integration Log

Cleanup of log entries can set in this section; default is 365 Days.

Integration Log

Log Clean Up 365 Days

Available options are Never, 7, 14, 30, 60, 90, 180 or 365 days. Each time a log entry is created a check for cleanup of old entries will be performed.

3.1.5. Actions

Boardeaser Setup

 Test Connection  Get Company Information  Verify License Key | Related  Automate  Fewer options

3.1.5.1. Test Connection

With this action you can test and verify that the connection to Boardeaser is up and running.

3.1.5.2. Get Company Information

For the integration to work between Business Central and Boardeaser you must retrieve your company information from Boardeaser. When you click on “Get Company Information” a dialog will open with a list of all your registered companies in Boardeaser. Select company to use and click on “OK”. Make sure that you select the same company from Boardeaser as the one you are currently active in BC. The app will preselect the company for you if a match can be made based on organization number. You still must click “OK” to confirm your choice.

Select company from Boardeaser - BC-test 1

Title	Organization Number	City
→ BC-test 1	112233-1122	
BC-test 2	998877-9988	

The “Boardeaser Company Information” section will be filled with information from Boardeaser.

3.1.6. Verify License Key

To be able to use the integration you must enter a license key and click on “Verify License Key”. This function will verify the key and set “License Key Verified” toggle to “true”.

License Information

License Key MmVhMzVjOTktNDUyMi00bm1p\

License Key Verified ☐

3.2. Boardeaser Integration Log

The integration log contains all requests that has been sent from BC to Boardeaser. If a request fails, you will find error information for that request in the log.

Tell me what you want to do



Boardeaser

Go to Pages and Tasks

> Boardeaser Setup

Administration

> Boardeaser SIE Export List

Lists

> Boardeaser Integration Log

Administration



Description of the statuses that a request can have:

Status	Descriptipon
Init	Default value before anything has happened
Error	Error occurred during export to Boardeaser
Sent	Sent to Boardeaser with no errors
Pending	Sent to Boardeaser with no errors but not yet processed by Boardeaser
Processed	File processed by Boardeaser

Boardeaser Integration Log

✓ Saved

Manage Check Status View Error Message More options

Entry No. ↑	Type	Description	Sent	Updated	Status	Response Status Code	Response Error Message
BINTL00000000...	Audit File	Accounting File: 2024 SIE Transactions.se	2025-01-23 14:20	2025-01-23 15:13	Processed		
BINTL00000000...	Audit File	Accounting File: 2024 SIE Transactions.se	2025-01-23 15:14	2025-01-23 15:15	Processed		
BINTL00000000...	Audit File	Accounting File: 2024 SIE Transactions.se	2025-01-23 15:34	2025-01-23 15:34	Processed		
BINTL00000000...	Audit File	Accounting File: 2024 SIE Transactions.se	2025-01-23 15:35	2025-01-23 15:35	Processed		
→ BINTL00000000...	Audit File	Accounting File: 2024 SIE Transactions.se	2025-01-24 15:11		Error	500	An error occurred while uploading file ...

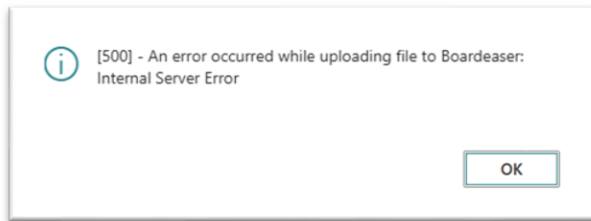
3.2.1. Actions

3.2.1.1. *Check Status*

Update status for sent file files. If there are any files uploaded to Boardeaser with status “Error” or “Pending” a status update will be performed.

3.2.1.2. *View Error Message*

This action will show the complete error in a message dialog.



3.3. Boardeaser – Export

This version of the application supports export of SIE4 files, customer ledger transactions and vendor ledger transactions to Boardeaser.

3.4. SIE Export List

To export a SIE file to Boardeaser search for Boardeaser and select “Boardeaser SIE Export List”.

Tell me what you want to do  

Boardeaser

Go to Pages and Tasks

- > Boardeaser Setup Administration
- > **Boardeaser SIE Export List** Lists 
- > Boardeaser Integration Log Administration

Boardeaser SIE Export List: All    							+ New	Delete	Export To Boardeaser	SIE Dimensions	More options							
Code ↑	Description	Fiscal Year	Starting Date	Ending Date	SIE File Name													
BSIEEXP-000001	2024 SIE Transactions	2024	2024-01-01	2024-12-31	2024 SIE.se													

3.4.1. Actions

3.4.1.1. Export to Boardeaser

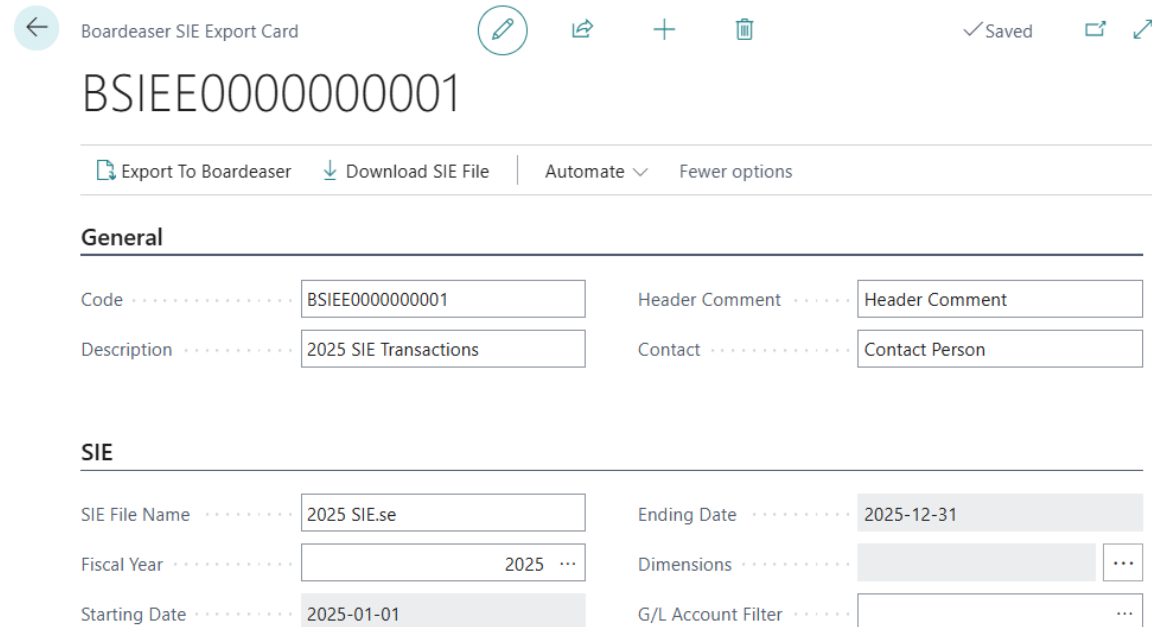
Generates a SIE export and sends it to Boardeaser. The integration log page will contain information about the export. When you open the integration log page it will send status requests to Boardeaser and update any files that hasn't been updated.

3.4.1.2. SIE Dimensions

If to use specific SIE dimensions in the export it is possible to do so by setting up a mapping of dimensions. This can then be used by the Business Units-functionality in Boardeaser.

3.5. SIE Export Card

When opening a SIE Export card, it is possible to create/edit/delete an export configuration. It is possible to create different configurations based on dates, dimensions and G/L Account filters. Exported file will be in SIE4 format.



Boardeaser SIE Export Card

BSIEE0000000001

Export To Boardeaser Download SIE File Automate Fewer options

General

Code BSIEE0000000001 Header Comment Header Comment

Description 2025 SIE Transactions Contact Contact Person

SIE

SIE File Name 2025 SIE.se Ending Date 2025-12-31

Fiscal Year 2025 Dimensions

Starting Date 2025-01-01 G/L Account Filter

3.5.1. Fields

Description of fields on export card.

3.5.1.1. General

Code – Automatically generated – press Enter and BC will generate a code based on the number series used for this file.

Description – Brief information about the export

Header Comment – Use in SIE file

Contact – Used in SIE file

3.5.1.2. SIE

SIE File Name – Name of the SIE file. File extension should be .se (if not it will be automatically added)

Fiscal Year – Enter Fiscal year for transactions included. Chose year from the list or enter manually.

Starting Date – Start date for transactions included (Automatically set from selected fiscal year.)

Ending Date – End date for transactions included (Automatically set from selected fiscal year.)

Dimensions – It is possible to setup a mapping of dimensions between the dimensions used in BC and what the SIE export should use.

G/L Account Filter – It is possible to filter which accounts should be exported.

3.5.2. Actions

3.5.2.1. *Export To Boardeaser*

Generates a SIE file of type 4 – transactions and exports it to Boardeaser.

3.5.2.2. *Download SIE file*

Generates a SIE file of type 4 – transactions and downloads it to your device. It is possible to upload SIE files manually to Boardeaser. If there is for example connection problems between your BC client and Boardeaser this could be helpful.

3.6. Customer Ledger Transactions

To export customer ledger entries to Boardeaser; search for Customer Ledger Entries and select “Customer Ledger Entries”.

Tell me what you want to do



Customer Ledger Entries

Go to Reports and Analysis

Customer Ledger Entries

Archive

3.6.1. Actions

3.6.1.1. Export to Boardeaser

Chose “Export to Boardeaser” from the meny.

Customer Ledger Entries

Edit List

Home

Entry

Actions

Automate

Fewer options

Show Document

Apply Entries

Find entries...

Reverse Transaction...

Create Reminder...

Create Finance Charge Memo...

Export to Boardeaser

Posting Date ↓	Document Date	Document Type	Document No.	Customer No. ↓	Customer Name	Description	Department Code	Customergro... Code	Currency Code ↓	Original Amount
→ 2024-03-31	2024-03-31	Invoice	103197	50000	Relecloud	Faktura 102197		MEDIUM		23 830,00
2024-03-23	2024-03-23	Payment	103192	50000	Relecloud	Faktura 102192		MEDIUM		-35 537,50
2024-03-23	2024-03-23	Invoice	103192	50000	Relecloud	Faktura 102192		MEDIUM		35 537,50

Enter “Fiscal Year” for the Customer Ledger Entries that you want to send to Boardeaser. Then click on “Export to Boardeaser”. Only entries with Document Type equal to Invoice will be exported. A message will appear after the export to say if the export went well or if there was an error. You can also check the integration log page that contains information about the export.

← + ✓ Saved

Export Cust Ledg. Entries

📄 Export to Boardeaser

General

Fiscal Year End Date 2025-12-31

Start Date 2025-01-01

Fiscal Year – Enter Fiscal year for transactions included. Chose year from the list or enter manually.

Starting Date – Start date for transactions included (Automatically set from selected fiscal year.)

Ending Date – End date for transactions included (Automatically set from selected fiscal year.)

3.7. Vendor Ledger Transactions

To export vendor ledger entries to Boardeaser search for Vendor Ledger Entries and select “Vendor Ledger Entries”.

Tell me what you want to do



Vendor Ledger Entries

Go to Reports and Analysis

Vendor Ledger Entries

Archive

3.7.1. Actions

3.7.1.1. Export to Boardeaser

Chose “Export to Boardeaser” from the meny.

Vendor Ledger Entries							
⌕ 🔍 📄 Edit List Home Entry Actions Automate Fewer options							
Show Document Apply Entries Find entries... Create Payment Reverse Transaction... Export to Boardsearch							
Posting Date ↓	Document Date	Document Type	Document No.	External Document No.	Vendor No. ↓	Vendor Name	Description
→ 2024-03-11	2024-03-11	Invoice	108202	107202	50000	Nod Publishers	Faktura 107202
2024-03-10	2024-03-10	Invoice	108200	107200	50000	Nod Publishers	Faktura 107200
2024-02-12	2024-02-12	Payment	108189	107189	50000	Nod Publishers	Faktura 107189

Enter "Fiscal Year" for the Vendor Ledger Entries that you want to send to Boardeaser. Then click on "Export to Boardeaser". Only entries with Document Type equal to Invoice will be exported. A message will appear after the export to say if the export went well or if there was an error. You can also check the integration log page that contains information about the export.

←

✓ Saved

Export Vendor Ledg. Entries

Export to Boardearer

General

Fiscal Year

2025

...

End Date

2025-12-31

Start Date

2025-01-01

Fiscal Year – Enter Fiscal year for transactions included. Chose year from the list or enter manually.

Starting Date – Start date for transactions included (Automatically set from selected fiscal year.)

Ending Date – End date for transactions included (Automatically set from selected fiscal year.)

4. Support

For support regarding this application please contact Sherpas at the following email address:

boardeaser_bc@sherpas.se

For support regarding Boardeaser:

<https://support.boardeaser.com>

support@boardeaser.com