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.

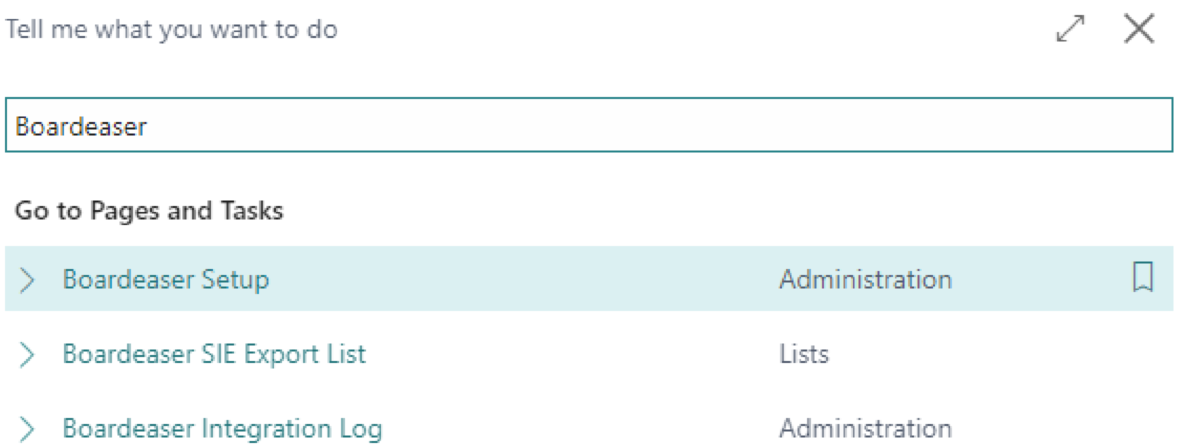
Sherpas contact information: boardeaser_bc@sherpas.se

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.

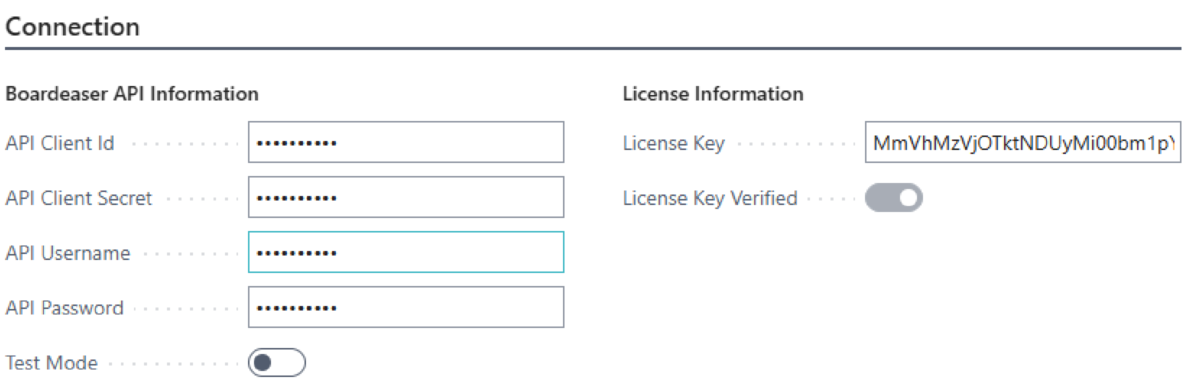
Under 3.1.1 Boardeaser Connection Information you will find more information on how to retrieve API information from Boardeaser and license key from Sherpas.

3.1. Boardeaser Setup



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



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.

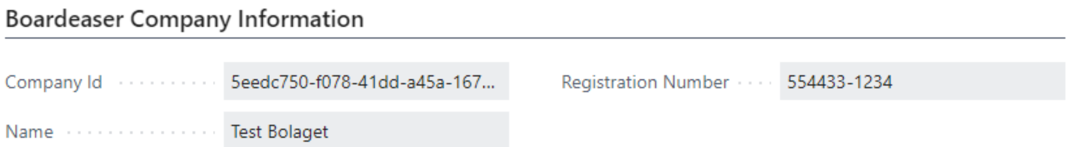
If you have an account in Boardeaser's test environment, you can use that for testing purposes.
By activating "Test Mode" you can connect to the test environment.

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

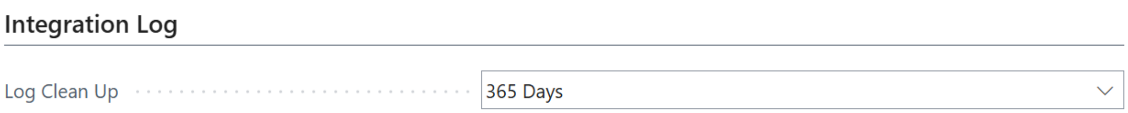
3.1.3. Boardeaser Company Information



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”.

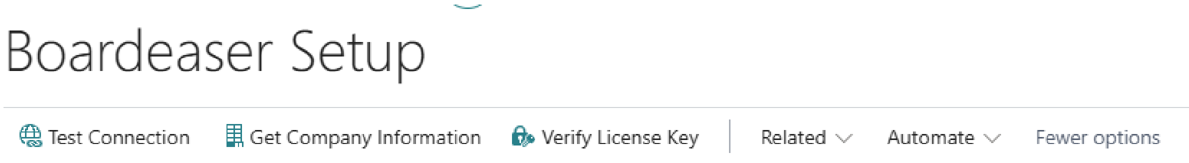
3.1.4. Integration Log

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



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

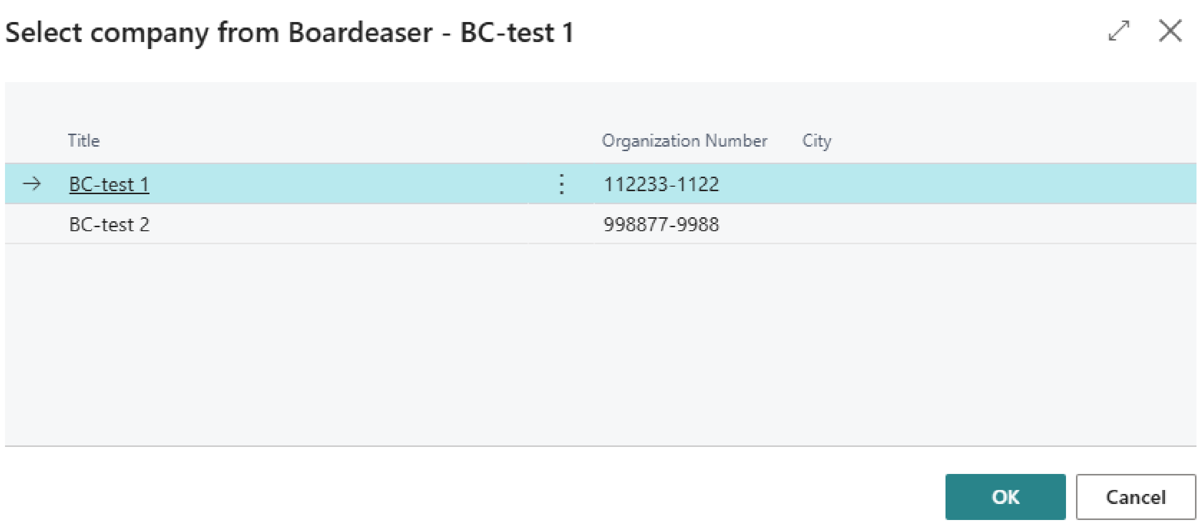


3.1.5.1. Test Connection

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

3.1.5.2. Get Company Information

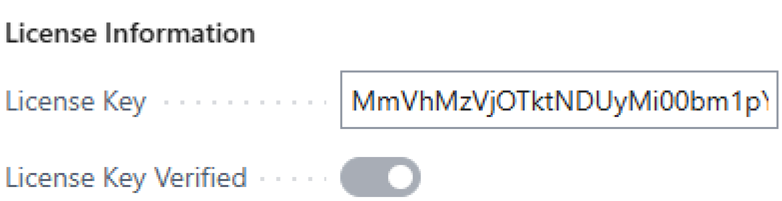
For the integration to work between Business Central and Boardeaser you must retrieve your company information from Boardeaser. When you click on “Get Company Information” a dialog will open with a list of all your registered companies in Boardeaser. Select company to use and click on “OK”. Make sure 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.



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

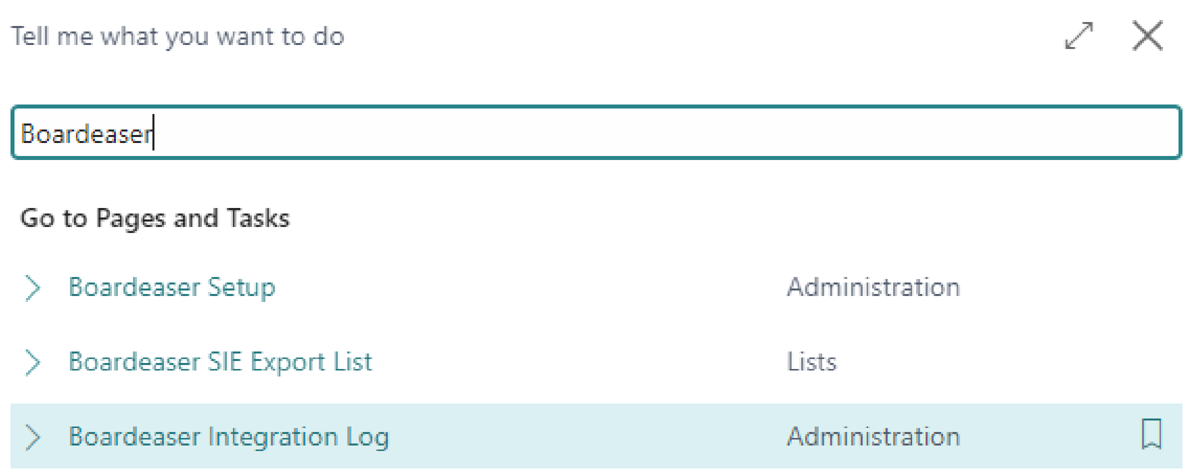
3.1.6. Verify License Key

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”.



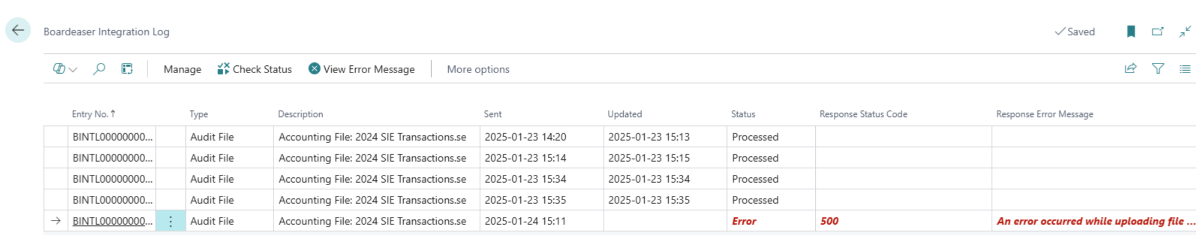
3.2. Boardeaser Integration Log

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.



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



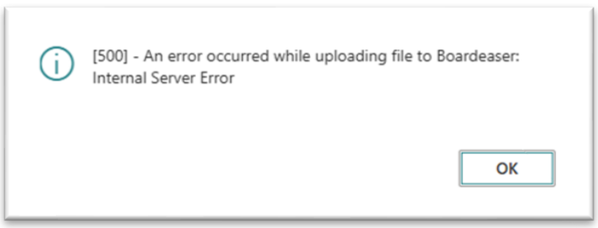
3.2.1. Actions

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.

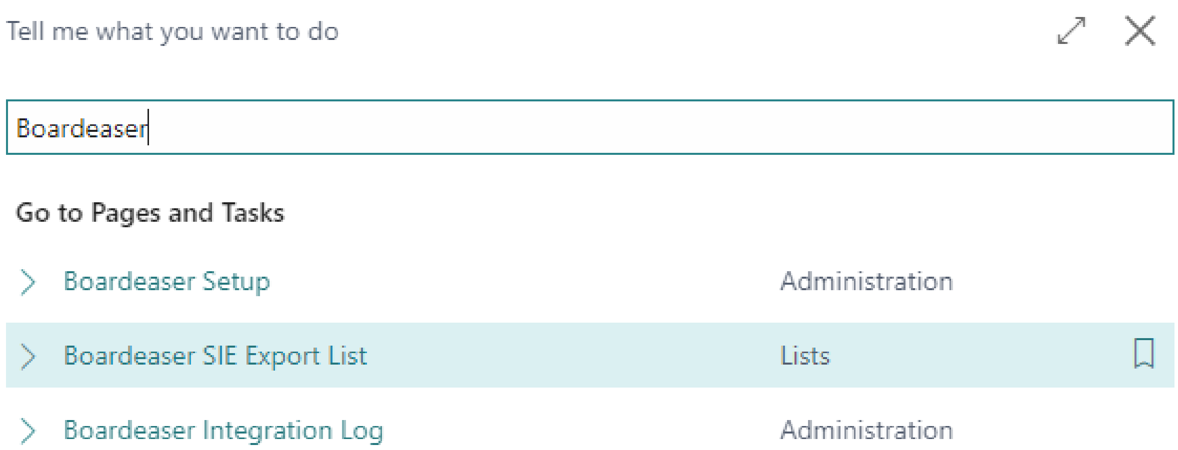


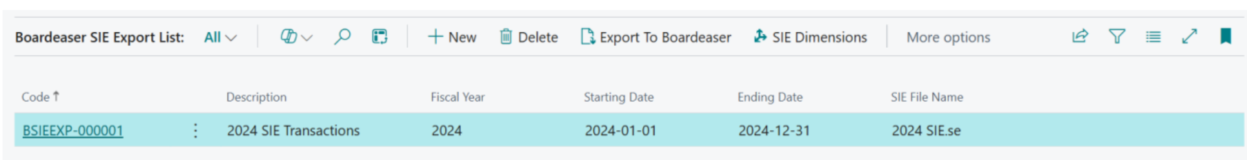
3.3. Boardeaser – Export

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”.





3.4.1. Actions

3.4.1.1. Export to Boardeaser

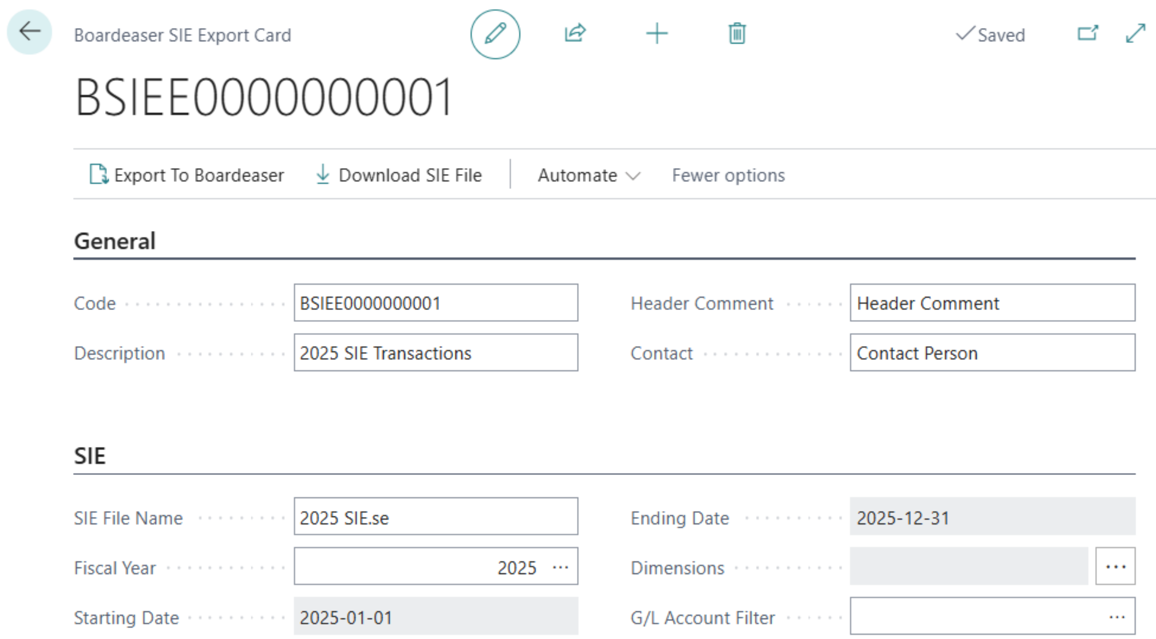
Generates a SIE export and sends it to Boardeaser. The integration log page will contain information about the export. When you open the integration log page it will send status requests to Boardeaser and update any files that hasn’t been updated.

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.



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 filed.

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.

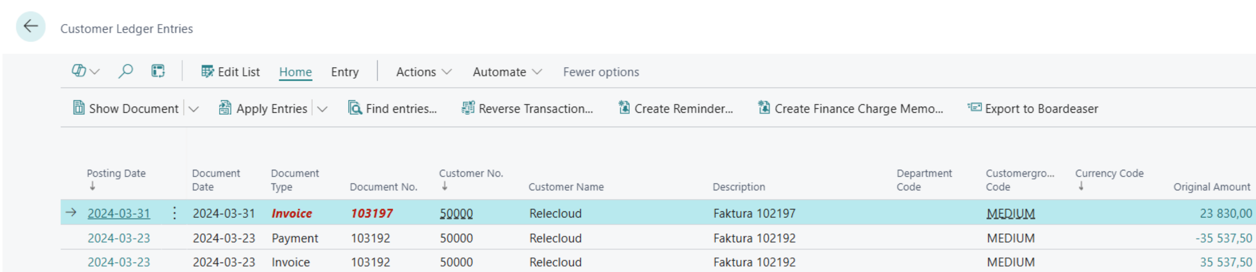
3.6. Customer Ledger Transactions

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

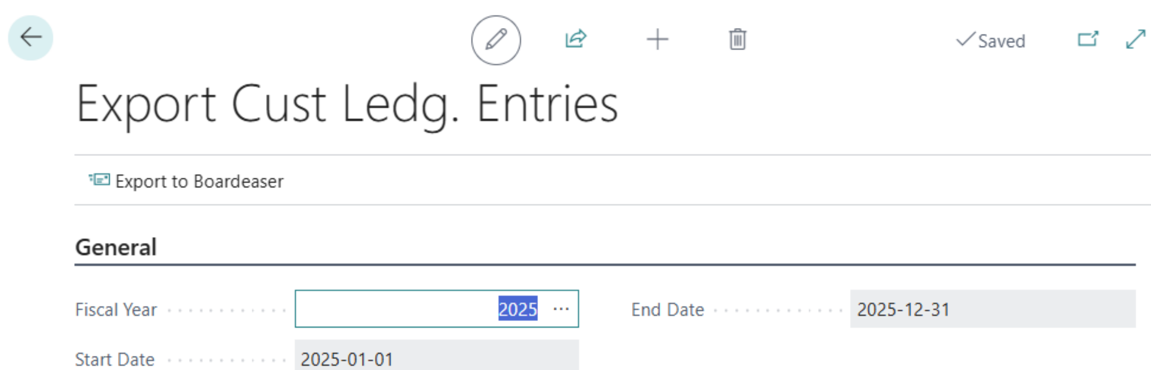
3.6.1. Actions

3.6.1.1. Export to Boardeaser

Chose “Export to Boardeaser” from the meny.



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.



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.)

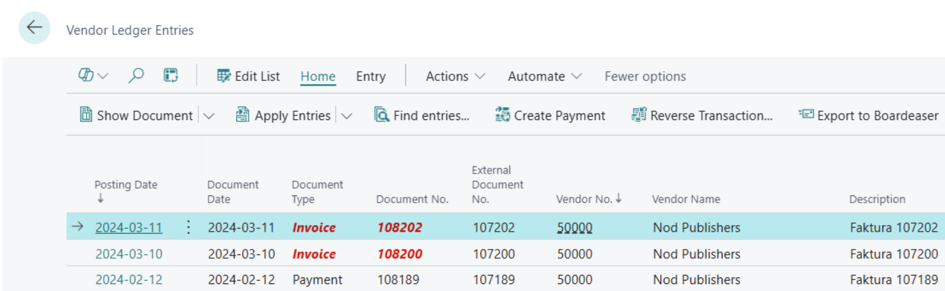
3.7. Vendor Ledger Transactions

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

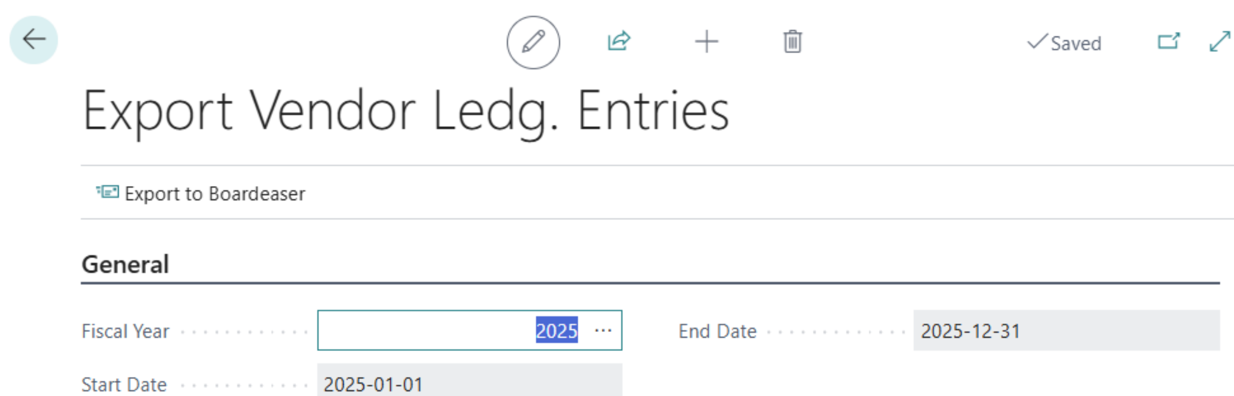
3.7.1. Actions

3.7.1.1. Export to Boardeaser

Chose “Export to Boardeaser” from the meny.



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.



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