

Boardeaser Connector

User Guide

Table of Contents

1. ABOUT THE APPLICATION.....	3
2. SUPPORTED LANGUAGES	3
3. BUSINESS CENTRAL INSTALLATION AND CONFIGURATION.....	4
3.1. Boardeaser Setup	5
3.1.1. Boardeaser Connection Information	5
3.1.2. Number series	6
3.1.3. Boardeaser Company Information	6
3.1.4. Integration Log	6
3.1.5. Actions.....	7
3.1.5.1. Test Connection.....	7
3.1.5.2. Get Company Information.....	7
3.1.6. Verify License Key.....	7
3.2. Boardeaser Integration Log.....	8
3.2.1. Actions.....	9
3.2.1.1. Check Status	9
3.2.1.2. View Error Message.....	9
3.3. Boardeaser – Export	10
3.4. SIE Export List	10
3.4.1. Actions.....	10
3.4.1.1. Export to Boardeaser.....	10
3.4.1.2. SIE Dimensions	10
3.5. SIE Export Card	11
3.5.1. Fields	11
3.5.1.1. General	11
3.5.1.2. SIE	11
3.5.2. Actions.....	12
3.5.2.1. Export To Boardeaser	12
3.5.2.2. Download SIE file.....	12
3.6. Customer Ledger Transactions.....	13
3.6.1. Actions.....	13
3.6.1.1. Batch Export to Boardeaser	13
3.6.1.2. Export to Boardeaser.....	13
3.7. Vendor Ledger Transactions.....	14
3.7.1. Actions.....	14
3.7.1.1. Batch Export to Boardeaser	14
3.7.1.2. Export to Boardeaser.....	14
4. SUPPORT	15

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

For Boardeaser API information, log in to your Boardeaser account and get connection the connection information.

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.

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, fill in the values that you get from Boardeaser.

License information, contact Sherpas to receive your 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 and list all your registered companies in Boardeaser. Select company to use and click on “OK”.

Select company from Boardeaser - BC-test 1



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

OK **Cancel**

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 have to 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

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	Description
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 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 ...

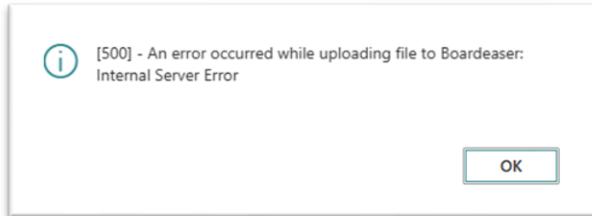
3.2.1. Actions

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					
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.

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

BSIEEXP-000001

Export To Boardeaser Download SIE File More options

General

Code	BSIEEXP-000001	Header Comment	Rubrik Kommentar
Description	2024 SIE Transactions	Contact	Kontakt Person

SIE

SIE File Name	2024 SIE.se	Fiscal Year	2024
Starting Date	2024-01-01	Dimensions
Ending Date	2024-12-31	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)

Starting Date – Start date for transactions included (select start date for Fiscal Year)

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

Fiscal Year – Automatically set from “Starting Date”

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
 -  Detailed Customer Ledger Entries Archive

3.6.1. Actions

3.6.1.1. Batch Export to Boardeaser

Enter “Start Date” and “End Date” 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 Boarder

General

Start Date	<input type="text"/>		End Date	<input type="text"/>	
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3.6.1.2. Export to Boardeaser

If you want to send only one customer ledger entry, then mark the line that you want to send and click on “Export to Boardersear”. 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.

Customer Ledger Entries										
		Edit List		Home	Entry	Actions		Automate		
		Show Document		Apply Entries	Find entries...	Reverse Transaction...	Create Reminder...	Create Finance Charge Memo...	Batch Export to Boardearer	Export to Boardearer
Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Avdelning Kod	Kundgrupp Kod	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

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 |
| Detailed Vendor Ledger Entries | Archive |
| Detailed Vendor Ledger Entries | Reports and Analysis |

3.7.1. Actions

3.7.1.1. Batch Export to Boardeaser

Enter “Start Date” and “End Date” 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.

Export Vendor Ledg. Entries

Export to Boardeaser

General

Start Date End Date

3.7.1.2. Export to Boardeaser

If you want to send only one vendor ledger entry then mark the line that you want to send and 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.

Posting Date	Document Date	Document Type	Document No.	External Document No.	Vendor No.	Vendor Name	Description	Avdelning Kod	Kundgrupp Kod
→ 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		

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/hc/en-gb>