Setup and Getting Started with Golden EDI Freemium

This document will guide you how to initialize, setup and use Golden EDIs free functionality that will support you to automatize your PDF management.

If there is something in this document that you don't understand or if there are any problems during setup or usage you can contact our support and we'll help you.

We recommend you send us an email to <u>contact@goldenedi.com</u> with your contact information and you will get free support, news and other valuable information about Golden EDI.

Our Guide will take you through 5 steps to finalize the set-up:

- 1. Step 1, Prerequisites
- 2. Step 2, Install Golden EDI from AppSource
- 3. Step 3, Configuration E-mail/SMTP. (SMTP is your function for handling mail)
- 4. Step 4, Initialization and setup of Golden EDI
- 5. Step 5, Create a test sending of a PDF Invoice.
- 6. Step 6, Make the process automatic with the Job Queue entries

Step 1, Prerequisites

First you need to make sure that following prerequisites are fulfilled:

- 1. License type for your user is a Full User.
- 2. Your permissions are set to SUPER or equal.
- 3. Make sure you have permission to install Apps to your Business Central.
- 4. Set your Role Center to 'Business Manager'. So that you get the correct privileges to run the initialization of Golden EDI.

Step 2, Install Golden EDI from AppSource

1. On AppSource click the button with the text, "FREE TRIAL", to install the app.



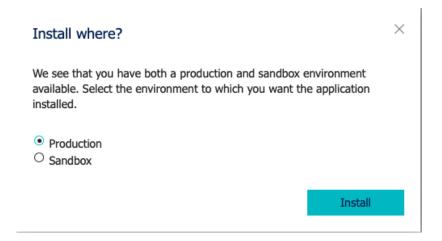
- 2. You may be prompted to login to your Microsoft Office 365 account, do so if that option comes up.
- 3. Fill out contact information and accept terms and click continue.

One more thing													
Golden EDI By Golden EDI AB													
This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.													
Name *	Firstname	Lastname											
Work email \star	firstname.lastname@example.com												
Job title													
Company	CRONUS AB												
Country / region	Sweden												
Phone number *	9999999999999												
 Phone number * I give Microsoft permission to use or share my account information so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's terms of use and privacy policy and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate terms and privacy. 													

You're signed in as Alexander Persson (alexander@goldenedi.com).



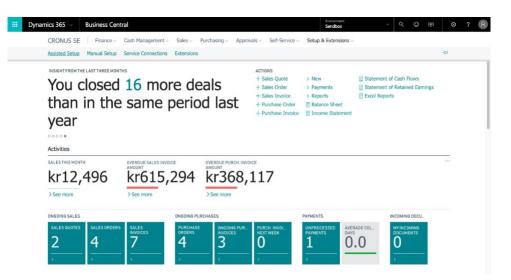
4. Choose the environment where the app should be installed, most likely your production environment.



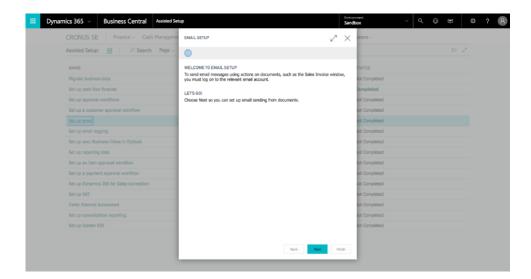
- 5. Now it will install automatically in the background.
- 6. When it is installed you will be able to continue with the below step, should not take more than a few minutes at most.

Step 3, Configuration E-mail/SMTP

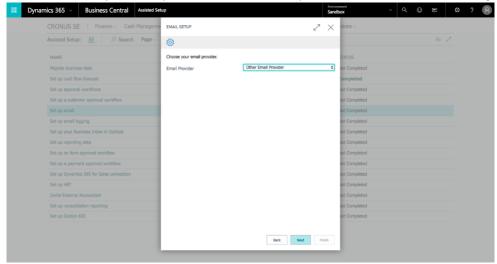
1. Under the 'Setup & Extensions' menu click the 'Assisted Setup' option.



2. Click on 'Set up email' if its status is 'Not Completed', if this is already done you can continue on step 6.



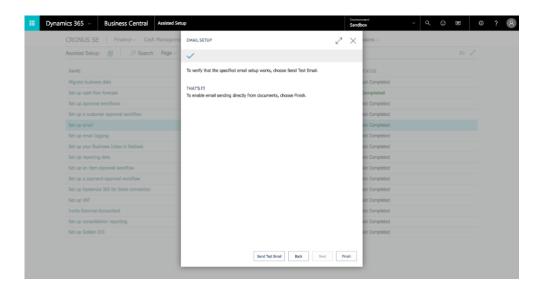
3. Select the email provider, pictured will be a set-up of 'Other Email Provider' using SMTP.



4. Fill in the email account details and then click next when you are done.

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Set up your Business Inbox in Outlook				lot Completed				
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Set up an item approval workflow				lot Completed				
Set up a payment approval workflow				lot Completed				
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Set up VAT				lot Completed				
Invite External Accountant				lot Completed				
Set up consolidation reporting				lot Completed				
				lot Completed				

5. Click finish to complete the set-up of E-mail communication. If you need to verify your settings, you can click 'Send Test Email' and check if it works. If not, you can go back and check the entered details.

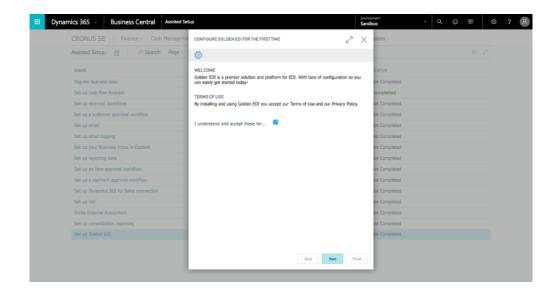


Step 4, Initialization and setup of Golden EDI

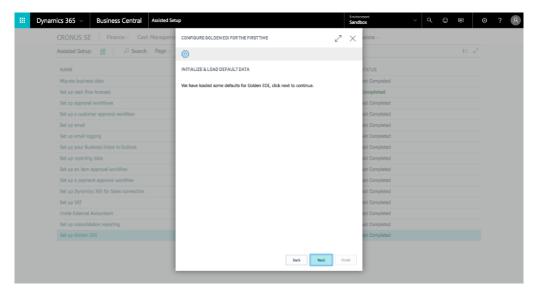
1. Now you can click on 'Set up Golden EDI' to begin setting up Golden EDI for a basic outgoing invoicing flow.

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Set up cash flow forecast	Completed
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Set up a customer approval workflow	Not Completed
Set up email	Not Completed
Set up email logging	Not Completed
Set up your Business Inbox in Outlook	Not Completed
Set up reporting data	Not Completed
Set up an item approval workflow	Not Completed
Set up a payment approval workflow	Not Completed
Set up Dynamics 365 for Sales connection	Not Completed
Set up VAT	Not Completed
Invite External Accountant	Not Completed
Set up consolidation reporting	Not Completed
Set up Golden EDI	··· Not Completed

2. Accept the Term of Use and the Privacy Policy by clicking the check-box and clicking the next button. You can find both the privacy policy and the terms of use on AppSource.



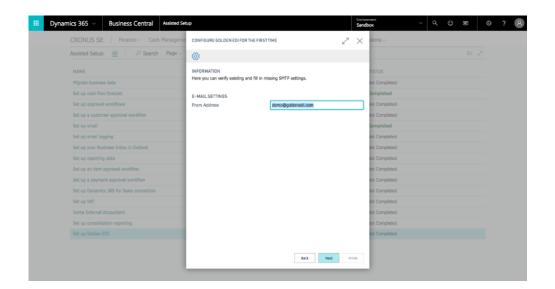
3. Wait for the application to load and build some default data. It will not take very long and when finished you can press 'next' to continue.



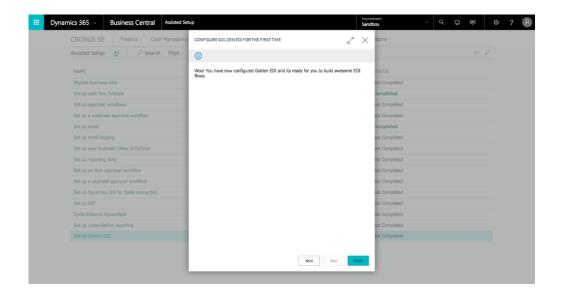
4. On this page you can optionally setup of outgoing invoicing for wanted customers by filling in the customer number and the e-mail they want to receive their invoices. For test purposes I suggest filling in one customer here so you can use it further down this document. When done click 'next' to continue.

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		Back Next Fit	nish		

5. Fill in the e-mail address that should be used as the 'From Address' in sent e-mails.



6. Setup is now done so you can click 'Finish'. We can now begin testing a small part of Golden EDI using the customers you entered in previous steps.



Step 5, Create a test sending of a PDF Invoice

Now when the system is setup correctly and configured for outgoing invoices, we can run some tests.

1. Go back to the main page and click 'Customers' below the company name.

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2. Click one of the customers you used during the setup. For us this was Trey Research so we click on that.

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3. Scroll down and expand the 'Invoicing' section and check that 'PDFCUST' is filled in under 'GEDI Profile'. If you forgot to add a customer in the setup or if you want to add additional customers, you can do that by filling in 'PDFCUST' as the 'GEDI Profile' for the customer.

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4. Now that we have verified that the customer has the necessary information we can go back to the main menu and create a new 'Sales Invoice'.

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5. Fill in the invoice with the data you want for the customer chosen in previous steps.

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Contact		Kelly Hells	trom	Due Date 4/23/2018							
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Invoice Discount %			0	Total 1	Incl. VAT (SEK)				9,760.00		
Invoice Details									Show more		
				1 -							
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6. Release the invoice when you are done. Click yes on any dialogue that comes up.

Dyn	namics 365 🗸	В	usiness Cer	102222 · Trey Research							ironment Idbox		> < C < C < E	☺ ?
HOME	ACTIONS NAVIGATE	ма	Lines NAGE LINE											
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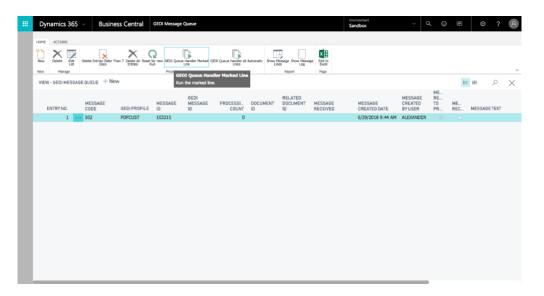
7. Search for the 'GEDI Message Queue' page and open it.

 Dynamics 365 v Busine	iss Central	Environment Sandbox		~	0 © È	٥	? 8
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8. There should be a line there with 'Message Code' 502 (means outgoing PDF-invoice). With the invoice number as 'Message ID'. Click on that line so it is highlighted.

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1	502	PDFCUST	103215		0				6/29/2018 9:44 AM	ALEXANDER					

9. Click on 'GEDI Queue Handler Marked Line' to run the marked line and process it.



10. There should now be two lines in the queue and both of the should be marked as 'Message Received'.

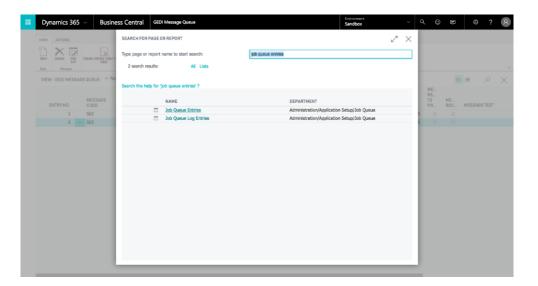
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2 5	503 PDFCU	JST 103215		0		71634		6/29/2018 9:45 AM	ALEXANDER				

11. Now you should have gotten an email with the invoice in the email address you setup for the customer. We will now show how to automate most of these steps by adding entries to the job queue.

Step 6, Make the process automatic with the Job Queue entries

During these steps we will setup automatic processing of the 'GEDI Message Queue' by using the Job Queue. This means that invoices will be automatically sent out during a set interval, so you don't have to do anything.

1. Search for the 'Job Queue Entries' page and open it.



2. Add the following job queue and set it to active. Change to Codeunit in field Object Type to Run. Fill in 70019001 in field Object Id to Run.

Click show more. Choose Gediqueue in field Job Queue Category Code. Click Recurrence and fill in the days and time you want the queue to be active. And the minutes between the runs.

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User ID	ALEXANDER		Run Heartbeat w. GEDI Pro	file					
Recurrence									
Recurring Job	2		Run on Saturdays		2				
Run on Mondays	0		Run on Sundays						
Run on Tuesdays			Starting Time		8:00:00 AM				
Run on Wednesdays			Ending Time		8:00:00 PM				
									5
Run on Thursdays	2		No. of Minutes between Ru	ns					

 It should look like this after you close the card. This means that the Job Queue is now active, and it will process the 'GEDI Message Queue' every five minutes between 8AM and 8PM.
 If STATUS is stopped then stand on the line and click restart.

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Ready	EUROPEINAVSNAP	Codeunit	6700	O365 Sync. Management				6/16/2018 7:32 PM	Ye
Ready	EUROPEINAVSNAP	Codeunit	2161	Calendar Event Execution				6/16/2018 12:00 AM	
Ready	EUROPEINAVSNAP	Codeunit	842	Cash Flow Forecast Update	Cash Flow Forecast Update			6/22/2018 7:38 PM	Ye
Ready	ALEXANDER	Codeunit	2161 70019001	Calendar Event Execution GEDI Queue Handler	GEDI Queue Handler	GEDIQUEUE		6/30/2018 12:00 AM 6/29/2018 10:17 AM	

Now you can go ahead and create more invoices that will be automatically sent out to the respective customer. Just remember to add 'PDFCUST' as the 'GEDI Profile' for any customer you want to activate this for.

This guide will help setup a small and simple flow using Golden EDI. It only touches a small part of what is possible and more advanced topics such as incoming orders, invoices, standard formats, custom formats, validation and more is not covered here. If you would like to discuss a more advanced setup you are welcome to contact us at <u>contact@goldenedi.com</u> and we will gladly help you solve your EDI needs.

NOW YOU HAVE A COMPLETE AND FULLY WORKING GOLDEN EDI SETUP!