

Setup and Getting Started with Golden EDI Freemium

This document will guide you how to initialize, setup and use Golden EDI's 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 contact@goldenedi.com 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.

Apps > **Golden EDI**



Golden EDI [save for later](#)

Golden EDI AB

★★★★★ 5.0 (2)

Free trial

Overview

Reviews

FREE TRIAL

Products

Electronic Data Interchange (EDI) solution for Microsoft Dynamics 365 Business Central

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.

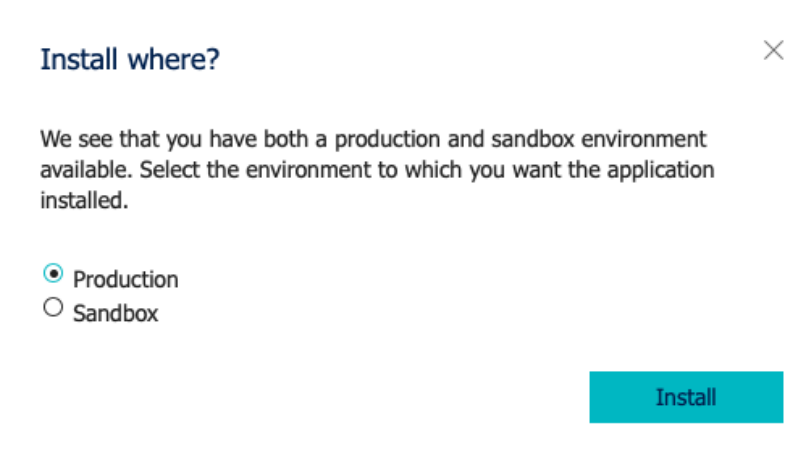
Name *	<input type="text" value="Firstname"/>	<input type="text" value="Lastname"/>
Work email *	<input type="text" value="firstname.lastname@example.com"/>	
Job title	<input type="text"/>	
Company	<input type="text" value="CRONUS AB"/>	
Country / region	<input type="text" value="Sweden"/>	
Phone number *	<input type="text" value="999999999999"/>	

☒ 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).

Continue

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

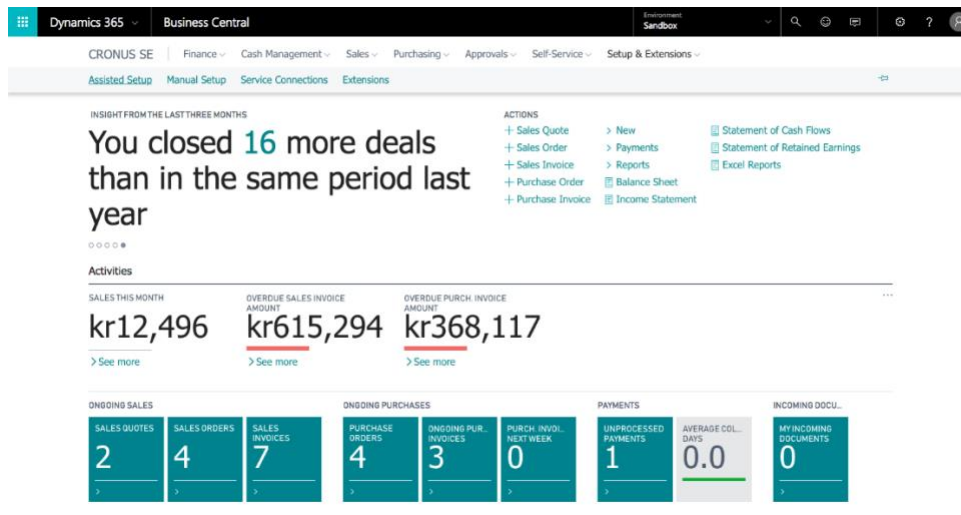


The screenshot shows a dialog box titled "Install where?" with a close button (X) in the top right corner. The text inside the dialog reads: "We see that you have both a production and sandbox environment available. Select the environment to which you want the application installed." Below this text are two radio button options: "Production" (which is selected) and "Sandbox". At the bottom right of the dialog is a blue button labeled "Install".

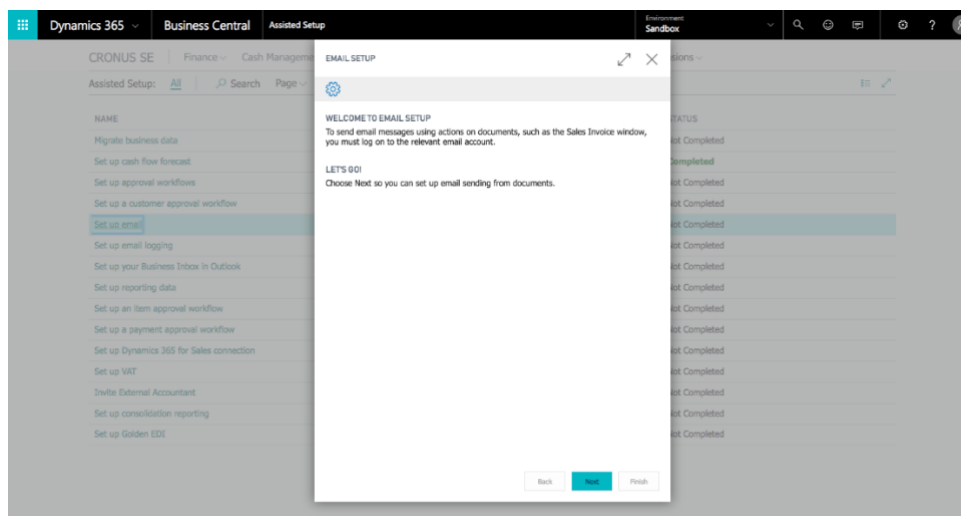
5. Now it will install automatically in the background.
6. When it is installed you will be able to continue with the below step, should not take more than a few minutes at most.

Step 3, Configuration E-mail/SMTP

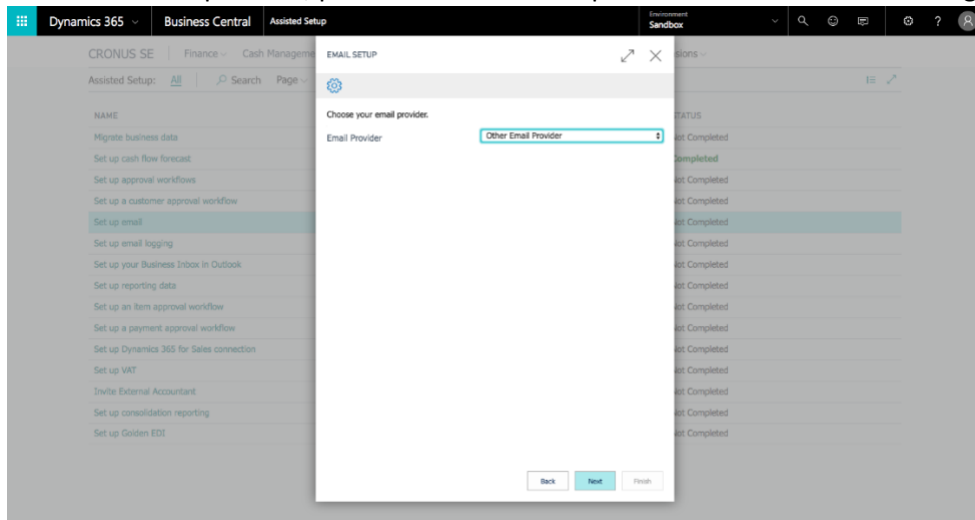
1. Under the 'Setup & Extensions' menu click the 'Assisted Setup' option.



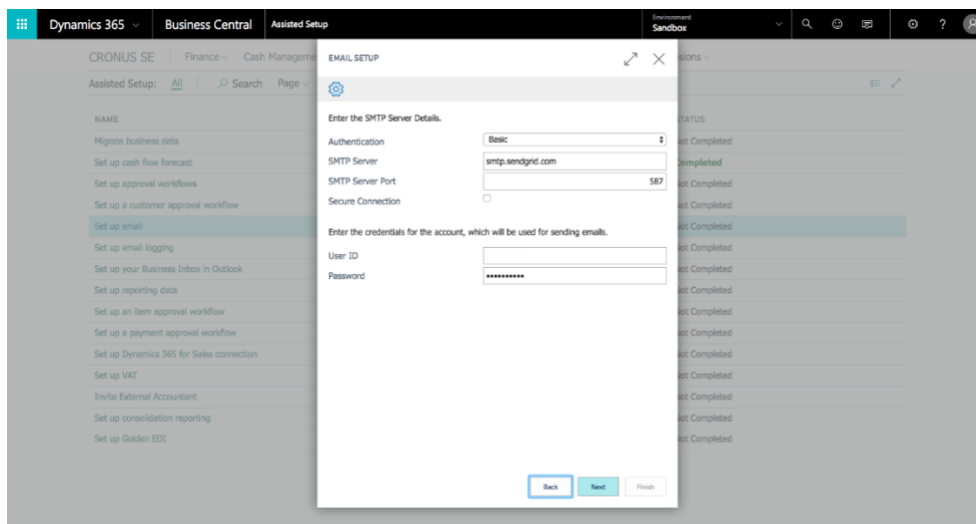
2. Click on 'Set up email' if its status is 'Not Completed', if this is already done you can continue on step 6.



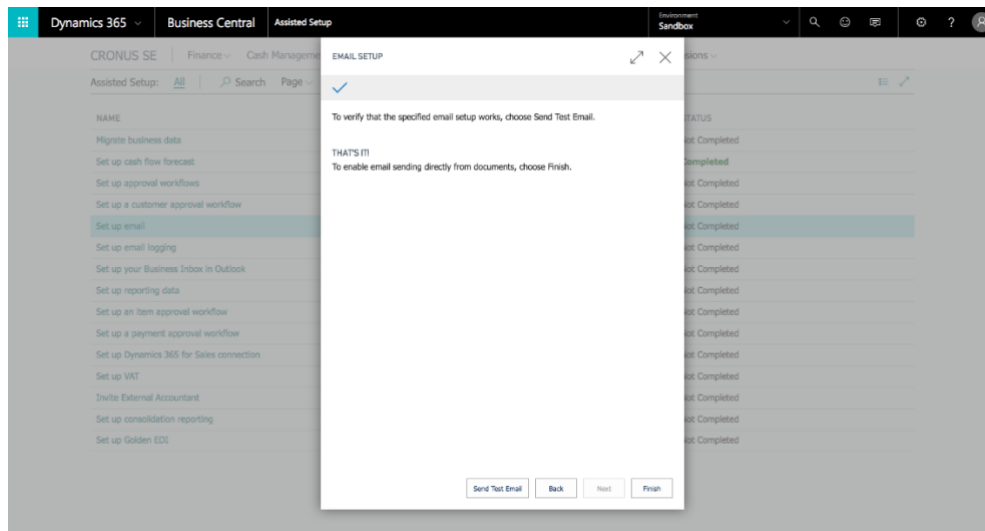
3. Select the email provider, pictured will be a set-up of 'Other Email Provider' using SMTP.



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

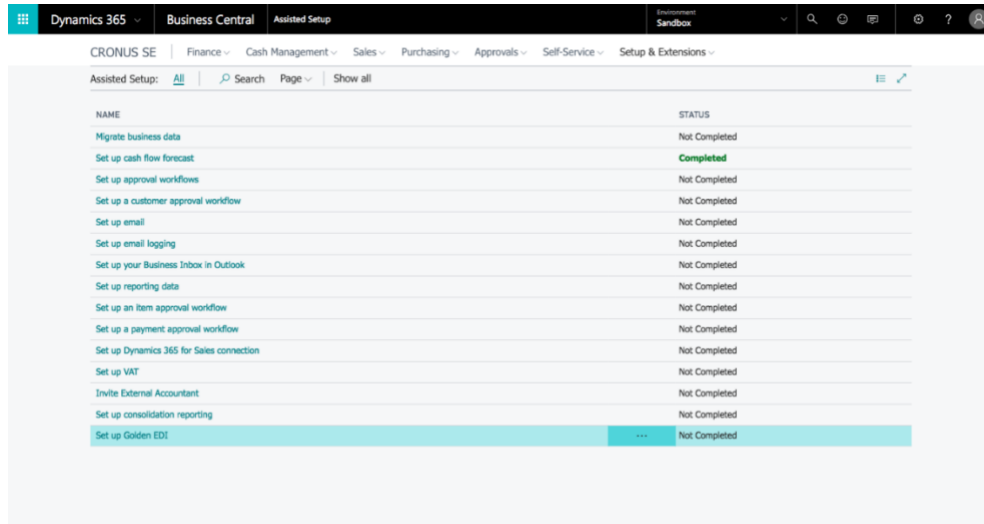


5. Click finish to complete the set-up of E-mail communication. If you need to verify your settings, you can click 'Send Test Email' and check if it works. If not, you can go back and check the entered details.

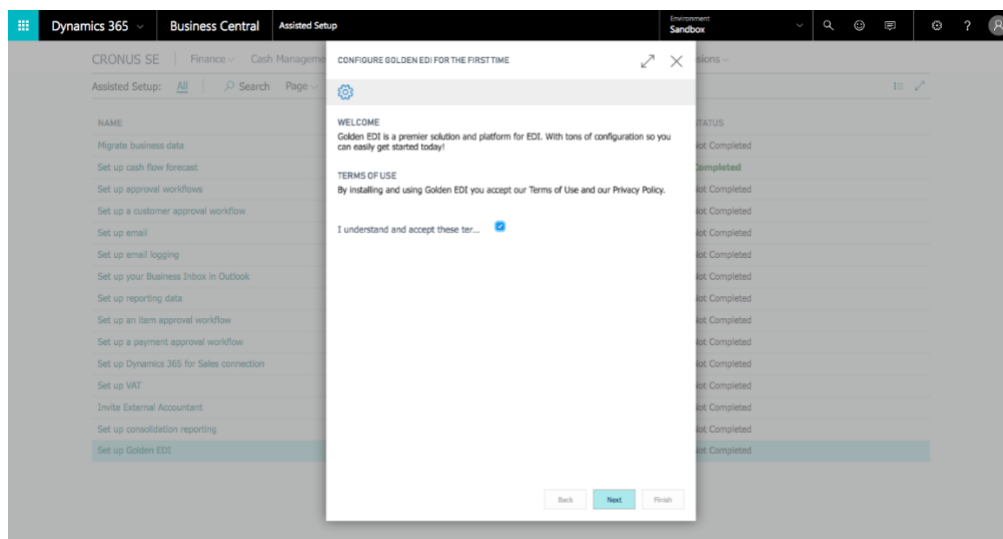


Step 4, Initialization and setup of Golden EDI

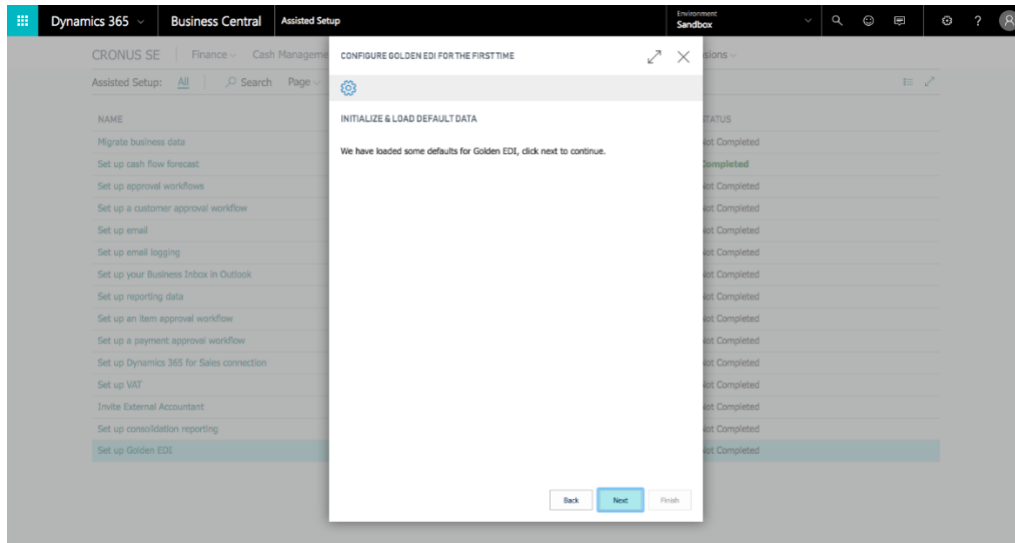
1. Now you can click on 'Set up Golden EDI' to begin setting up Golden EDI for a basic outgoing invoicing flow.



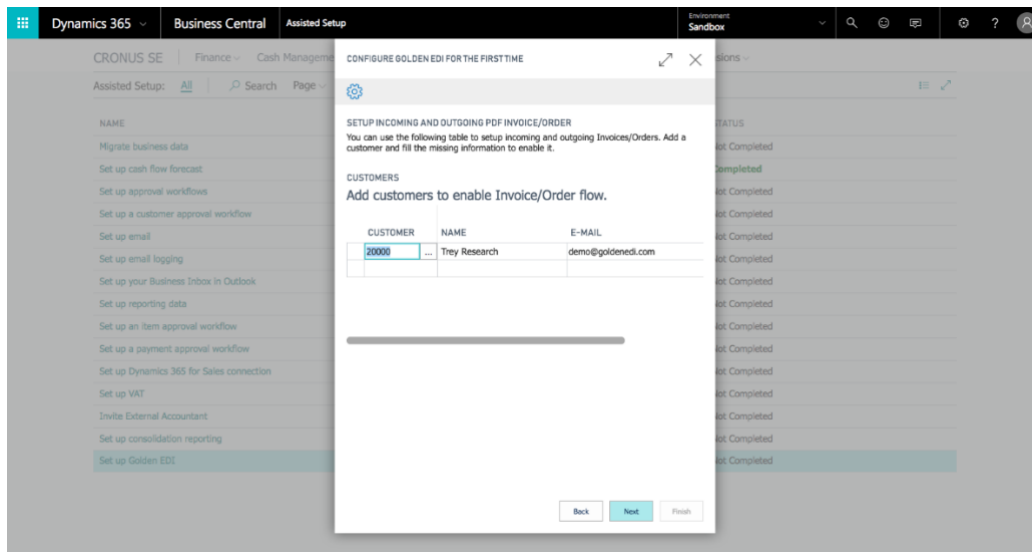
2. Accept the Term of Use and the Privacy Policy by clicking the check-box and clicking the next button. You can find both the privacy policy and the terms of use on AppSource.



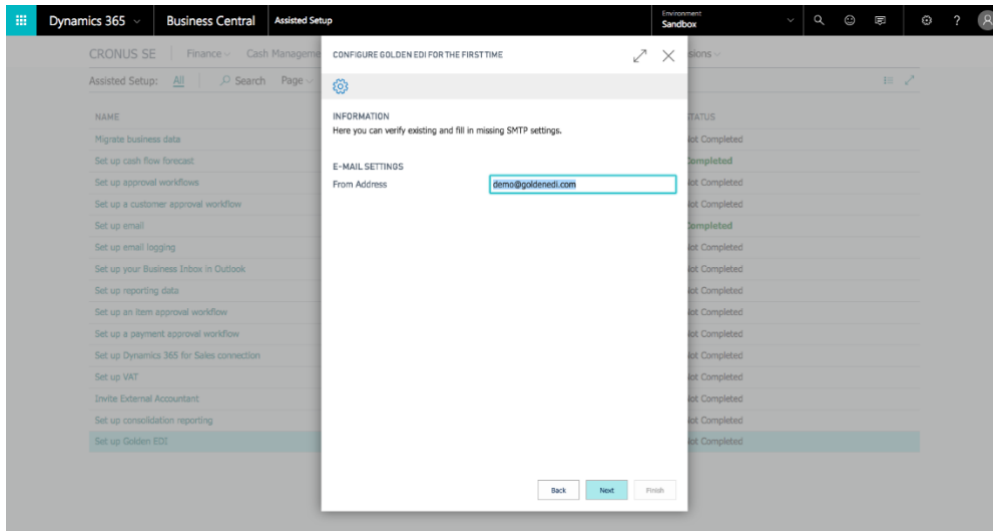
- Wait for the application to load and build some default data. It will not take very long and when finished you can press 'next' to continue.



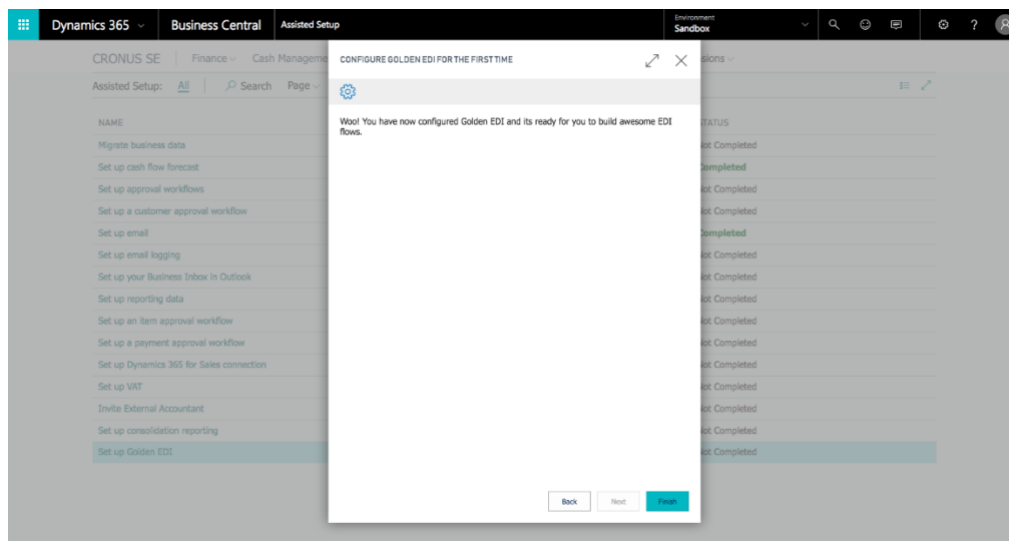
- On this page you can optionally setup of outgoing invoicing for wanted customers by filling in the customer number and the e-mail they want to receive their invoices. For test purposes I suggest filling in one customer here so you can use it further down this document. When done click 'next' to continue.



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



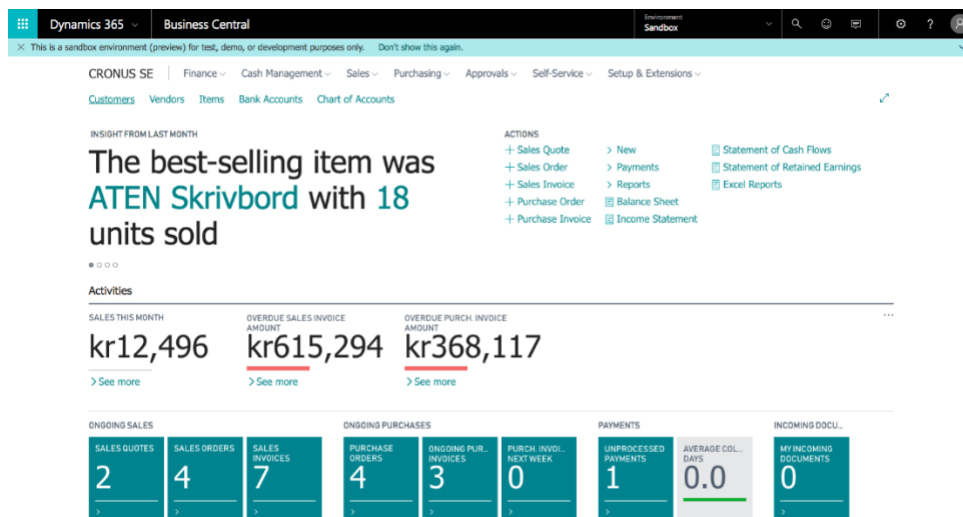
6. Setup is now done so you can click 'Finish'. We can now begin testing a small part of Golden EDI using the customers you entered in previous steps.



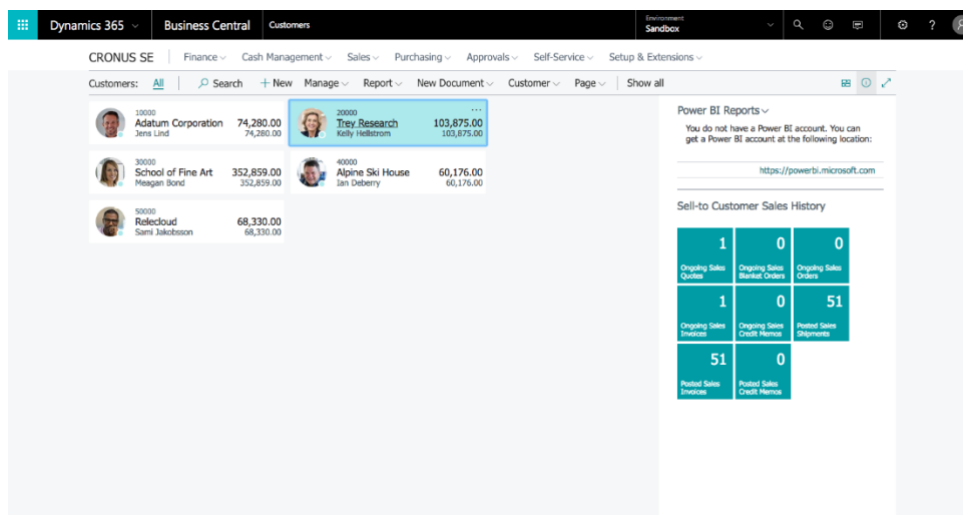
Step 5, Create a test sending of a PDF Invoice

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.



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



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.

Dynamics 365 Business Central Customers > 20000 - Trey Research

EDIT - CUSTOMER CARD

Address 2: [Field]
 Post Code: 114 32
 City: STOCKHOLM
 Country/Region Code: SE

Contact Name: Kelly Hellstrom
 Phone No.: [Field]
 Email: demo@goldmedit.com
 Home Page: [Field]

Invoicing

VAT Registration No.: SE254687456701
 POSTING DETAILS
 Gen. Bus. Posting Group: INVRKES
 Customer Posting Group: INVRKES
 GEDI Profile: PDFCUST
 GEDI Invoice Rounding: 0.00
 GEDI Doc. Exchange Type: [Field]
 GEDI Doc. Exchange ID: [Field]

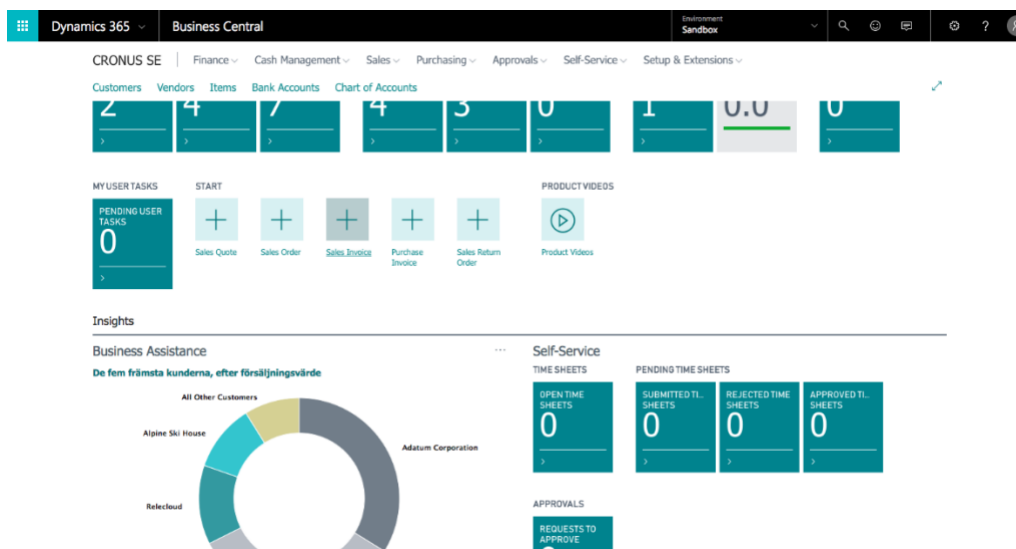
Payments > 14 DAGAR
Shipping >
Statistics >

Customer Picture

Attachments
 Documents: 0
 Sell-to Customer Sales History

1	0	0
Original Sales Quoties	Original Sales Blanket Orders	Original Sales Orders
1	0	51
Original Sales Invoices	Original Sales Credit Memos	Posted Sales Documents
51	0	
Posted Sales Invoices	Posted Sales Credit Memos	

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'.



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

The screenshot shows the 'NEW - SALES INVOICE - 102222 · TREY RESEARCH' form in Dynamics 365 Business Central. The form is divided into several sections: General, Lines, and Invoice Details. The General section contains fields for Customer Name (Trey Research), Contact (Kelly Hellstrom), Posting Date (4/9/2018), and Due Date (4/23/2018). The Lines section is a table with columns for TYPE, NO., DESCRIPTION, LOCATION CODE, QUANTITY, UNIT OF MEASURE CODE, UNIT PRICE EXCL. VAT, and LINE DISCOUNT %. It contains two lines: Line 1 with item 1896-S (ATEN Skrivbord) and Line 2 with item 1908-S (LONDON Kontorstol, blå). The Invoice Details section shows Subtotal Excl. VAT (SEK) as 7,808.00, Total Excl. VAT (SEK) as 7,808.00, Inv. Discount Amount Excl. VAT (SEK) as 0.00, Total VAT (SEK) as 1,952.00, Invoice Discount % as 0, and Total Incl. VAT (SEK) as 9,760.00. The form also includes an Attachments pane on the right.

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	LINE DISCOUNT %
Item	1896-S	ATEN Skrivbord		1	STYCK	6,562.00	
Item	1908-S	LONDON Kontorstol, blå		1	STYCK	1,246.00	

Subtotal Excl. VAT (SEK)		Total Excl. VAT (SEK)
7,808.00		7,808.00

Inv. Discount Amount Excl. VAT (SEK)		Total VAT (SEK)
0.00		1,952.00

Invoice Discount %		Total Incl. VAT (SEK)
0		9,760.00

Invoice Details

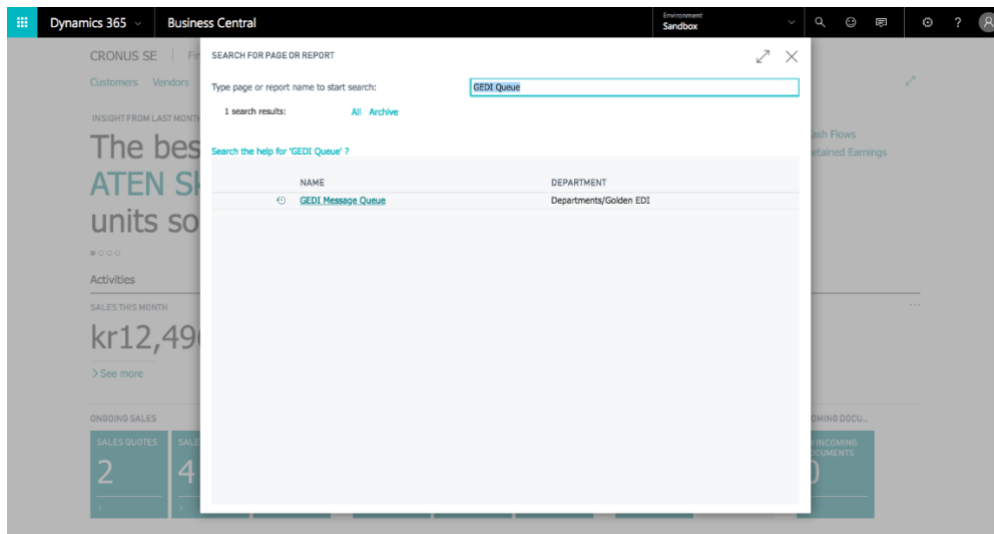
Currency Code	Transaction Type

Shipment Date: 4/9/2018

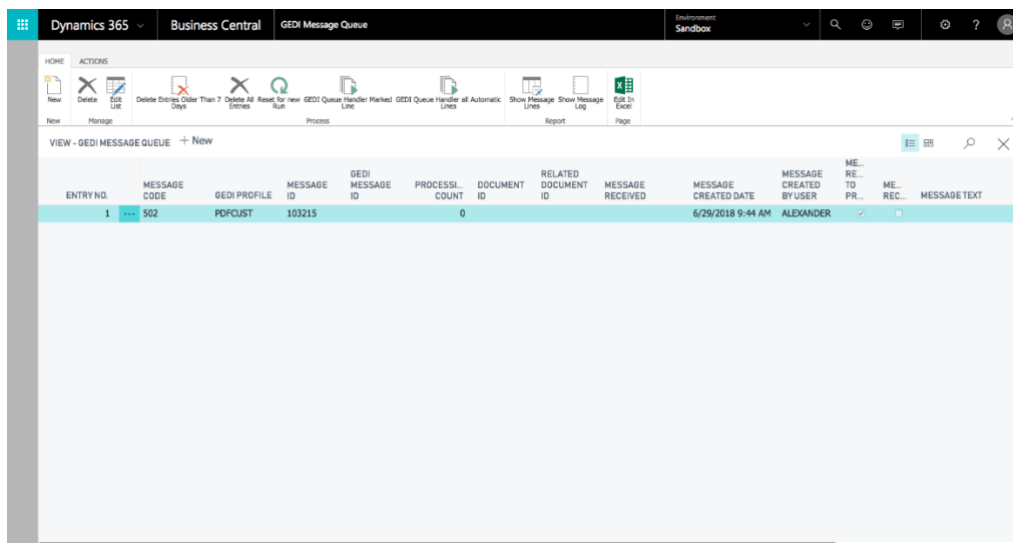
6. Release the invoice when you are done. Click yes on any dialogue that comes up.

This screenshot shows the same sales invoice form as before, but with the 'Release' button in the 'MANAGE' ribbon highlighted. A tooltip is visible over the 'Release' button, stating: 'Release the document to the next stage of processing. When a document is released, it will be included in all availability calculations from the expected receipt date of the items. You must reopen the document before you can make changes to it.' The rest of the form, including the General, Lines, and Invoice Details sections, remains the same as in the previous screenshot.

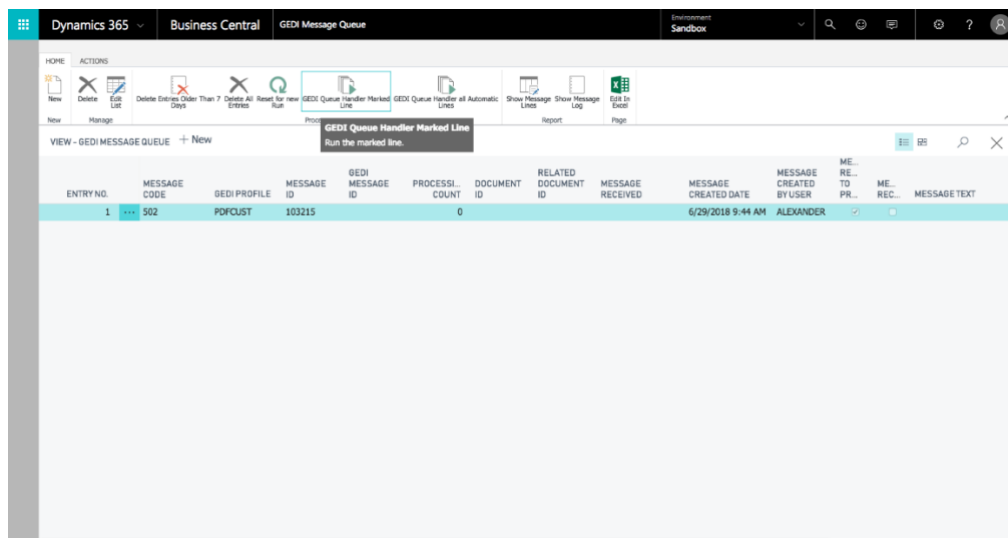
7. Search for the 'GEDI Message Queue' page and open it.



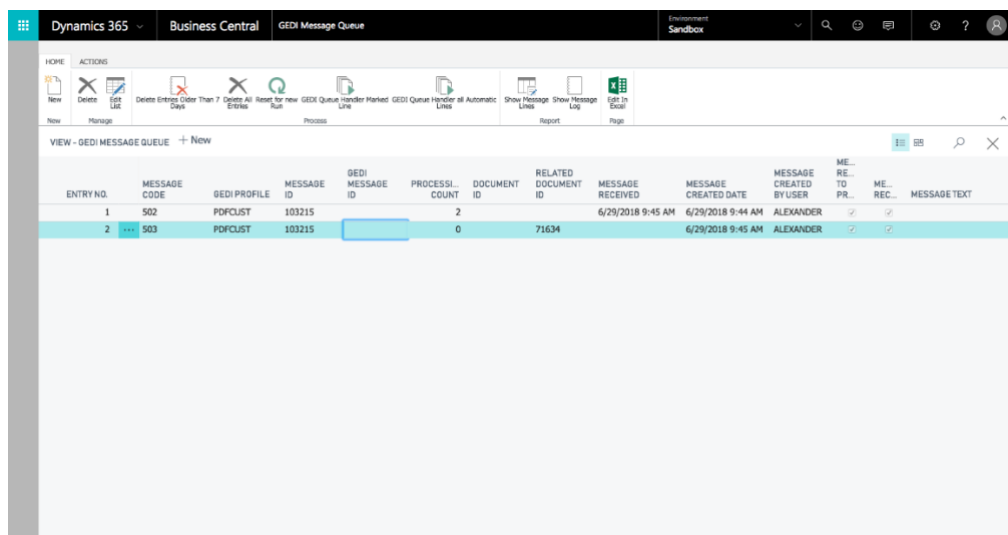
8. There should be a line there with 'Message Code' 502 (means outgoing PDF-invoice). With the invoice number as 'Message ID'. Click on that line so it is highlighted.



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'.

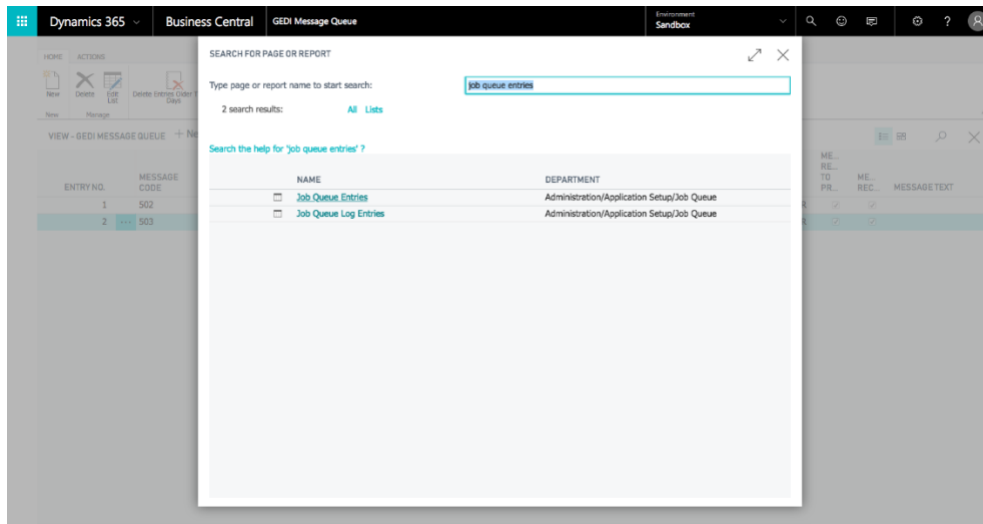


11. Now you should have gotten an email with the invoice in the email address you setup for the customer. We will now show how to automate most of these steps by adding entries to the job queue.

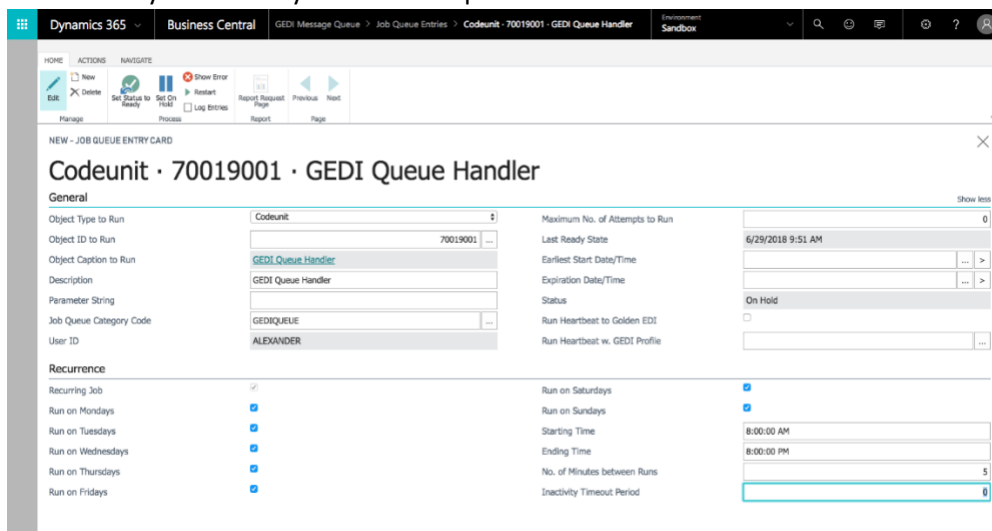
Step 6, Make the process automatic with the Job Queue entries

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.



- 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.

STATUS	USER ID	OBJECT TYPE TO RUN	OBJECT ID TO RUN	OBJECT CAPTION TO RUN	DESCRIPTION	JOB QUEUE CATEGORY CODE	USER SESSION STARTED	EARLIEST START DATE/TIME	SCH.
Ready	EUROPE\NAYSNAP	Report	1511	Delegate Approval Requests				6/16/2018 7:32 PM	Yes
Ready	EUROPE\NAYSNAP	Codeunit	6700	O365 Sync. Management				6/16/2018 7:32 PM	Yes
Ready	EUROPE\NAYSNAP	Codeunit	2151	Calendar Event Execution				6/16/2018 12:00 AM	Yes
Ready	EUROPE\NAYSNAP	Codeunit	842	Cash Flow Forecast Update	Cash Flow Forecast Update			6/22/2018 7:38 PM	Yes
Ready	ALEXANDER	Codeunit	2151	Calendar Event Execution				6/30/2018 12:00 AM	Yes
Ready	ALEXANDER	Codeunit	70019001	GEDI Queue Handler	GEDI Queue Handler	GEDIQUEUE		6/29/2018 10:17 AM	Yes

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 contact@goldenedi.com and we will gladly help you solve your EDI needs.

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