The InvoiceBerry
integration

1. Goal of the integration

1.1 Simply manage your data

One of the many advantages of using the integration between Simple-Simon and InvoiceBerry is that you can control your data in one spot. Once the integration between Simple-Simon and InvoiceBerry is set, InvoiceBerry becomes the main ERP system. Customers and products and services should be added to InvoiceBerry. Simple-Simon automatically updates according to the mutations that are done in InvoiceBerry. Add your customers and products and services to InvoiceBerry. Simon will copy these and you can start creating and planning your work orders!

1.2 Less mistakes, quicker billing

Controlling your data in spot ensures you make less mistakes while billing to your customers. Create a work order in Simon, schedule the work order for yourself or your co-worker and register products and hours. Once the work order is reported finished and archived, it is sent to InvoiceBerry as an invoice within 5 minutes. Check, edit and confirm that the invoice is correct and send the bill to your customer. The integration between Simple-Simon and InvoiceBerry creates less mistakes and makes your billing quicker.

1.3 Advantages of the integration

The integration between InvoiceBerry and Simple-Simon comes with plenty of advantages, as you:

1. Can send your bill quicker and you make less mistakes.
2. Simon automatically acquires all your customers and products and services from InvoiceBerry and this is immediately available in Simon.
3. Your work order is finished in Simple-Simon, the archived work order is sent back to InvoiceBerry as an invoice.
4. Is your work order ready? Within 5 minutes the bill can be send to your customer.
5. It makes processing work order effortless, directly save time and money!
6. The integration can be easily created by yourself, ready within 5 minutes.

2. Principles of the integration

2.1 InvoiceBerry is the starting point for your customers, products and services

Once the integration between Simple-Simon and InvoiceBerry is set, InvoiceBerry becomes the main ERP system for your products and services and customers. Simple-Simon automatically updates once mutations are done in InvoiceBerry. Adding customers or products and services (products) and editing them, should be done in InvoiceBerry. Customers, products or PDF Documents added to Simon cannot be forwarded to InvoiceBerry. In order to prevent incorrect billing, customers, products and PDF Documents added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

2.2 Create and schedule a work order and register hours

You can start creating work orders once all your customer and products are transferred to Simple-Simon. Creating the work order is done in Simple-Simon. Create a work order, schedule the work order for yourself or your co-worker and register hours or products. You can also add own forms that ask specific questions about the job done.

2.3 Customer added to the work order should match the customer in InvoiceBerry

Every customer that is added to a work order, should be a customer that is transferred from InvoiceBerry to Simple-Simon. When you archive the work order in Simon, an invoice is created for that particular customer in InvoiceBerry. Your customer database is available for your office and in the field employees. They can select the correct customer. It is not possible to send the work order to InvoiceBerry if no customer is registered on the work order. The integration will send an error notification as it not possible to create an invoice in InvoiceBerry without selecting a customer.

2.4 Archiving the work order in Simon creates an invoice in InvoiceBerry

You can send your work order to InvoiceBerry by archiving the work order in Simon. In order to do so, the work order needs to be reported as finished. Check the finished work order, edit if necessary and archive the work order. Within a few minutes the work order becomes an invoice in InvoiceBerry. The invoice is added to the selected customer. That way it is easy to control your work orders and invoices. The integration logging allows you to precisely follow this process. For example, if no customer is added to the work order then no invoice can be created in InvoiceBerry. The integration logging shows you what might be wrong and how you can fix this.

2.5 Removing customer should be done in InvoiceBerry, Simon updates automatically

Removing or inactivating customers should be done in InvoiceBerry. InvoiceBerry is the main ERP system and Simon updates accordingly. A few times a week Simon checks and removes customers that are removed in InvoiceBerry as well. You do not need to remove these customers yourself; Simon does this automatically.

3. Exchanges in the integration

3.1 Retrieving products and services from InvoiceBerry

Once the integration between Simple-Simon and InvoiceBerry is set, InvoiceBerry becomes the main ERP system for your products and services (products in Simon). Every time you add an product to InvoiceBerry, the product is placed in Simon within minutes. Simple-Simon automatically updates once mutations are done in InvoiceBerry. Your product database is available for your office and in the field employees. They can select the correct product. Adding products and services (products) and editing them, should be done in InvoiceBerry. Products added to Simon cannot be forwarded to InvoiceBerry. In order to prevent incorrect billing, products added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

3.2 Retrieving customers from InvoiceBerry

Once the integration between Simple-Simon and InvoiceBerry is set, InvoiceBerry becomes the main ERP system for your customers. Every time you add a customer to InvoiceBerry, the customer is placed in Simon within minutes. Simple-Simon automatically updates once mutations are done in InvoiceBerry. Your customer database is available for your office and in the field employees. They can select the correct customer. Adding customers and editing them, should be done in InvoiceBerry. Customers added to Simon cannot be forwarded to InvoiceBerry. In order to prevent incorrect billing, customers added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

3.3 Work addresses are retrieved from InvoiceBerry, but may be added in Simon

The standard invoice address is automatically retrieved from InvoiceBerry and becomes the customer address in Simon. Additionally, a work address is created based on the invoice address. A work address is the location where the job should be done. You are also allowed to add work addresses in Simon. Just make sure you match the work address to the correct customer (which is retrieved from InvoiceBerry). You can create as many work addresses in Simon as you like, if they are matched to a customer.

3.4 Archived work orders are sent to InvoiceBerry

Sending work orders to InvoiceBerry is done by archiving them in Simple-Simon. Only a work order that is marked as finished can be archived. Once you archive the work order, it is placed in InvoiceBerry as an invoice within minutes. You can archive the work order by selecting ‘Archive’ in the work order overview. This button is only available if the work order is reported as finished. The work order is sent to InvoiceBerry as an invoice and placed at the correct customer. Your co-workers in the office can check the work order before sending it to InvoiceBerry. That is how you easily manage and control your work orders and bills.

3.4.1 How are the registered travel times in the work order sent to InvoiceBerry?

The registered travel times in the work order can be send to InvoiceBerry as an invoice line. You can determine which product should be used to book the times in InvoiceBerry. You can determine this by changing the settings of the integration. More information about the integration's setting travel time can be found in chapter 5.2 In InvoiceBerry you can edit the quantity, price or product before you send the bill to your customer. It is also possible to not register the travel time in InvoiceBerry. For more information about this, look at the settings in chapter 5.2.

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3.4.3 How are the registered products transferred to InvoiceBerry's invoice?

The registered products in the work order are transferred to InvoiceBerry as an invoice line. Here you can edit the price, quantity of product before you send the bill to your customer. Simon automatically selects the correct product in InvoiceBerry, as the product database is based upon InvoiceBerry's products and services.

4. Activating the integration

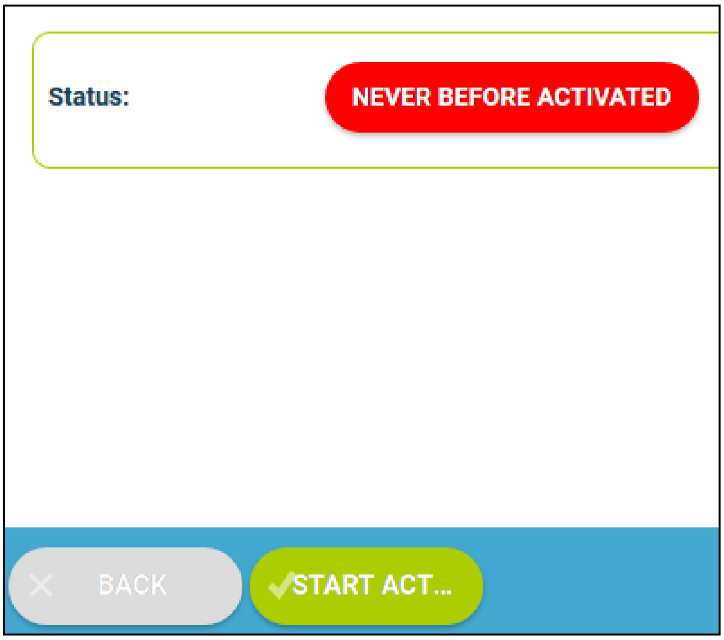
There are several options available to make sure the integration works as you wish. Change the settings so that the integration matches perfectly with your workflow. In order to activate the integration, InvoiceBerry and Simon should be connected. This chapter explains how creating the connection works.

4.1 Where should I start when creating the integration?

Make sure you are logged into Simple-Simon and head over to ‘Integrations’. Select ‘Activate integration’ and select ‘Usable’.

4.2 How do I activate the integration?

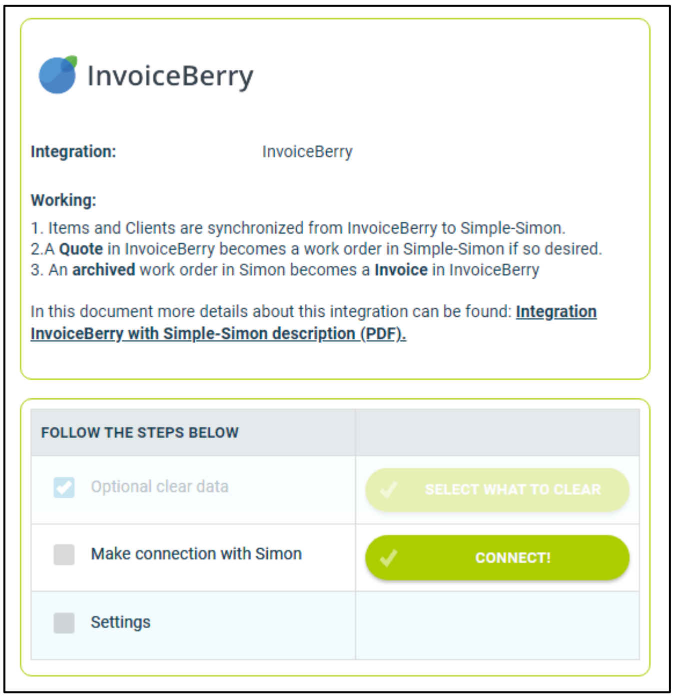
Select the green button ‘Start activation’. We then shortly explain how the integration works. Creating the integration starts by erasing existing Simon data. Chapter 4.3 “Why should I erase my database before I can activate the integration?” explains why and how this can be done.



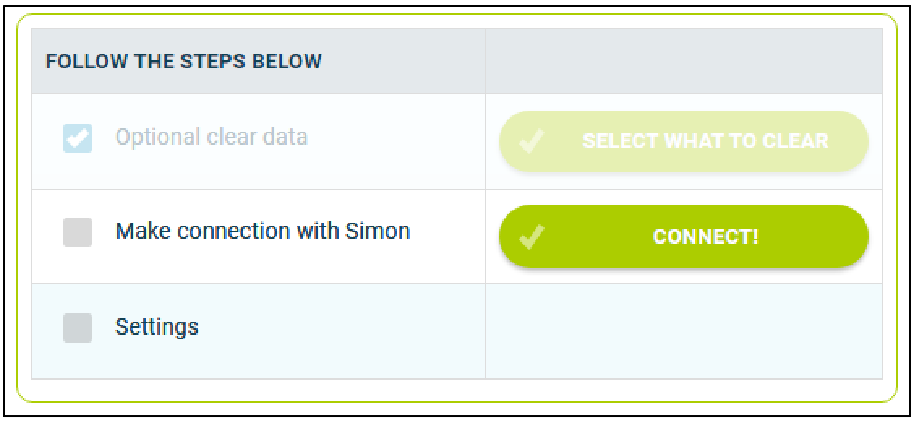
4.3 Why should I erase my database before I can activate the integration?

It is mandatory to erase your database in Simple-Simon if you want to start the integration with InvoiceBerry. Once the integration between Simple-Simon and InvoiceBerry is set, InvoiceBerry becomes the main ERP system. Customers and products and services should be added to InvoiceBerry. Simple-Simon automatically updates according to the mutations that are done in InvoiceBerry. Your database in Simon therefore should be emptied first, so that you can begin with a fresh start. Select 'Clear Simon data' to erase the data. Simon then shows you which parts should be erased.

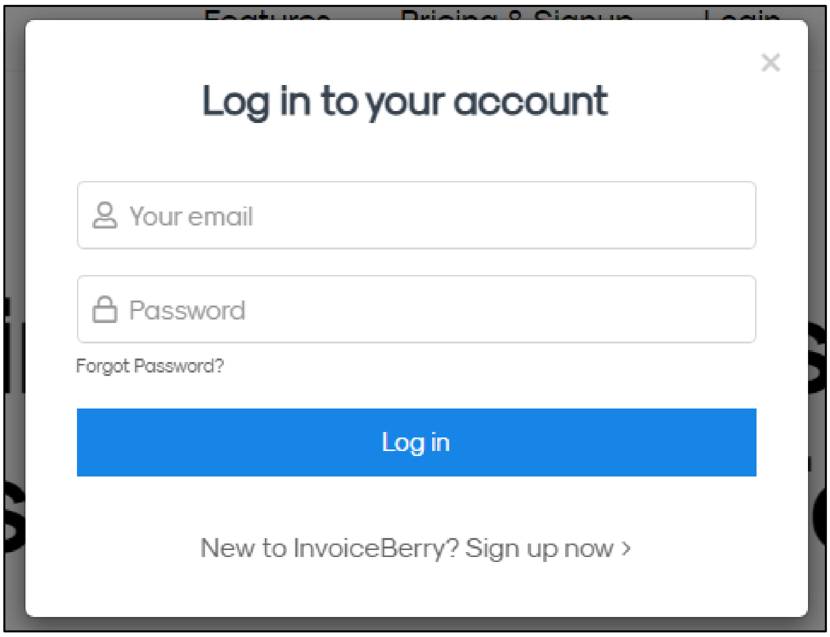
If you are restarting the integration (after de-activating it), you can choose which parts of the database should be erased. Select which parts of the database you want to remove and which should remain.



It is possible to start the integration as soon as you have erased the Simon database. You can do so by selecting 'Connect!'.



The next step is to go to the website of InvoiceBerry and login with your credentials . If the credentials are correct, you are sent back to the 'Settings' page in Simon.



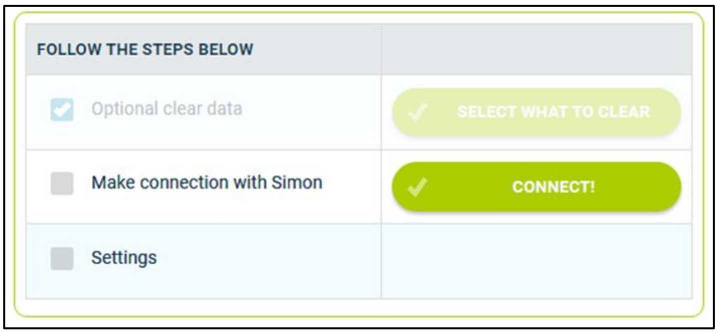
4.4 **Where can I deactivate my integration?**

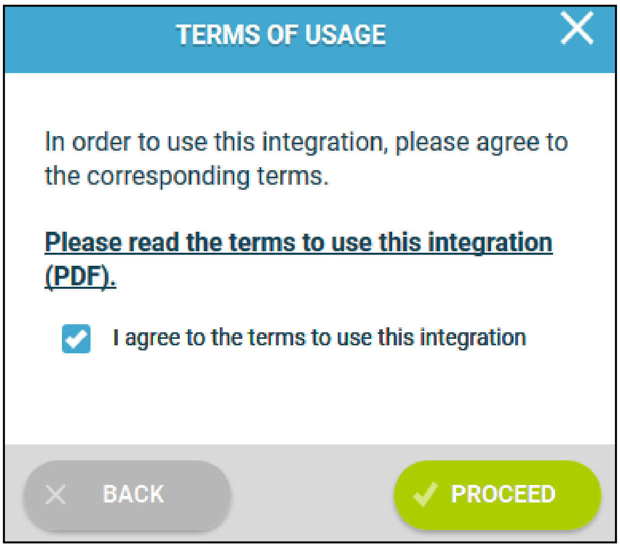
If wanted, you can immediately deactivate your integration. Once you deactivate the integration, it will stop automatically. You do not need to contact Simple-Simon to deactivate your integration. The moment you deactivate your integration, InvoiceBerry will no longer transfer customers and products to Simon and you cannot send work orders to InvoiceBerry either. Of course, you can restart the integration at any moment. The moment you restart the integration Simon will start updating the customer and products again and it is possible to send work orders to InvoiceBerry as well.

5. Settings integration

5.1 What should I do with the settings of the integration?

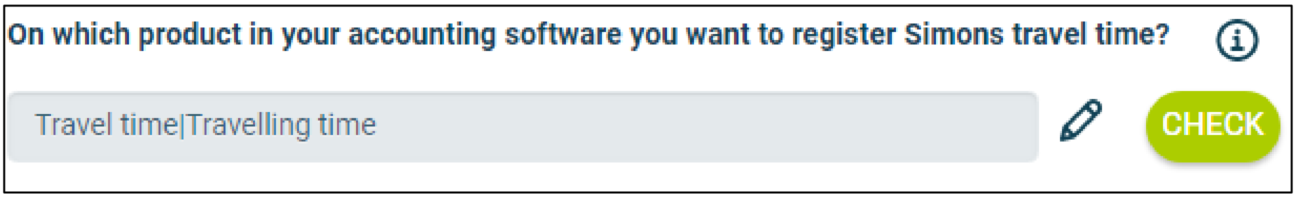
You can use the settings to determine how the integration should work. The settings can be selected after you have erased the Simon data and created a connection between Simon and InvoiceBerry. Select ‘Settings’ to manage the settings. When using the integration you agree with the terms and conditions of the integration.





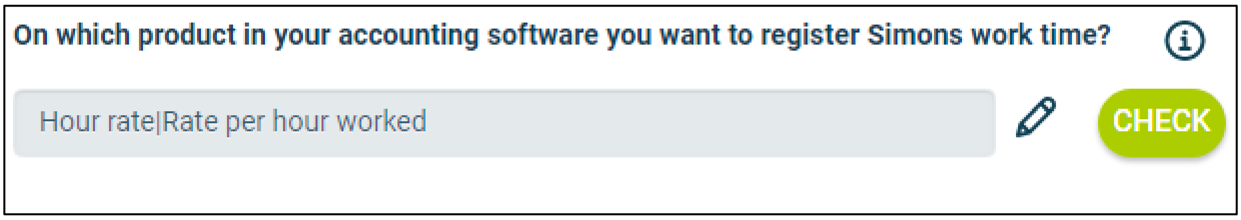
5.2 How do I send my registered travel time to InvoiceBerry?

If wanted, you can send the, in Simon registered, travel time to InvoiceBerry. The product you choose here is the product which is selected in InvoiceBerry when sending the travel time to InvoiceBerry. The travel time can be created in InvoiceBerry in the section called ‘Items’. Select ‘New Item’, fill in the information and click ‘Add Item’. Select ‘Check’ to validate the product in InvoiceBerry.



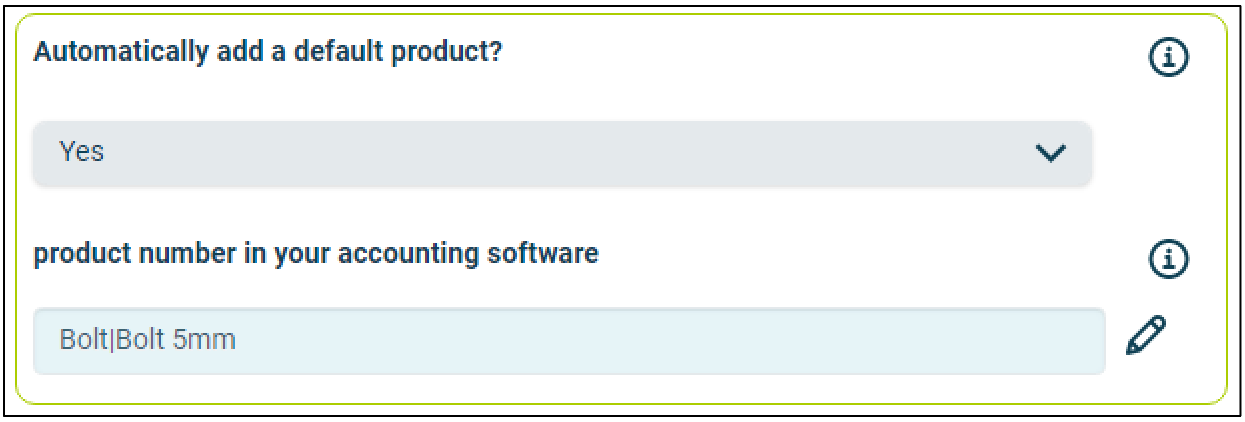
5.3 How do I send my registered work time to InvoiceBerry?

If wanted, you can send the, in Simon registered, work time to InvoiceBerry. The product you choose here is the product which is selected in InvoiceBerry when sending the work time to InvoiceBerry. The work time can be created in InvoiceBerry in the section called ‘Items’. Select ‘New Item’, fill in the information and click ‘Add Item’. Select ‘Check’ to validate the product in InvoiceBerry.



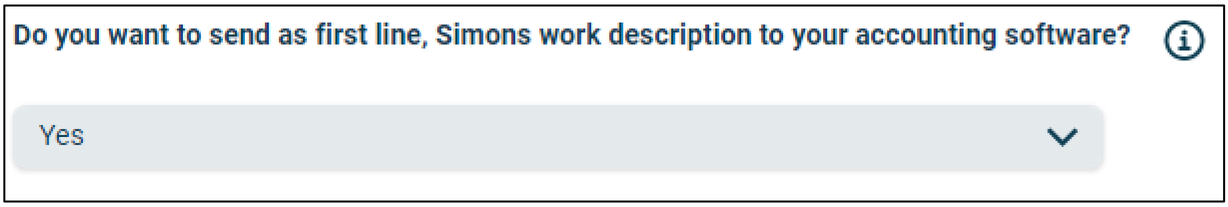
5.4 Can I add a default product to my invoice in InvoiceBerry?

If wanted, you can automatically add a default product to your invoice in InvoiceBerry. This product is automatically placed on your invoice once you send the work order from Simon to InvoiceBerry. An example of a default product is a ‘Bolt’. If you want the ‘Bolt’ to be automatically added to your invoice, set it as a default product here. Select ‘check’ to verify the product.



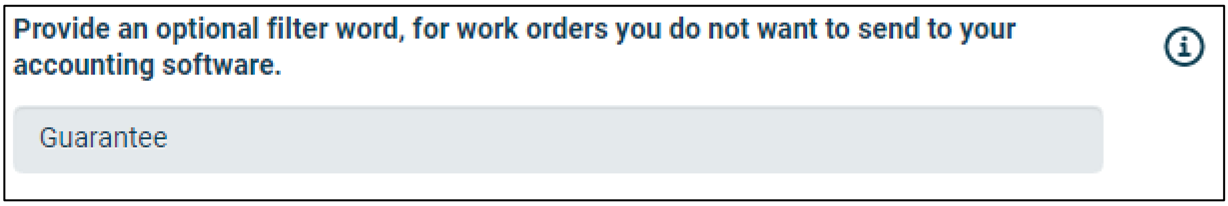
5.5 **How do I make sure that the description of the work done is placed in the invoice?**

If you want the description of the work done to be placed in the invoice, you can select to do so here. This might be convenient as the invoice then shows which work has specifically been done during the job. The description of the work done is then placed on the first line of the invoice.



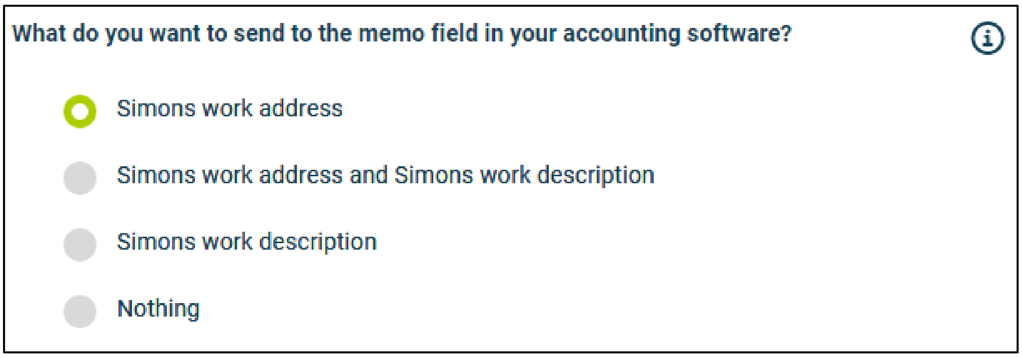
5.6 **Can I prevent work orders from being send to InvoiceBerry?**

When you archive the finished work order, it is sent to InvoiceBerry as an invoice. If you do not want all work orders to be send to InvoiceBerry, you can prevent this by entering a filter word. For example, if you do not want the guarantee jobs to be billed, you can add 'Guarantee' as a filter word. All work orders which have 'Guarantee' in the description of the work order, will not be send to InvoiceBerry. If you leave this setting empty, all work orders will be sent to InvoiceBerry.



5.7 **Can I add information from Simon to the notes in InvoiceBerry?**

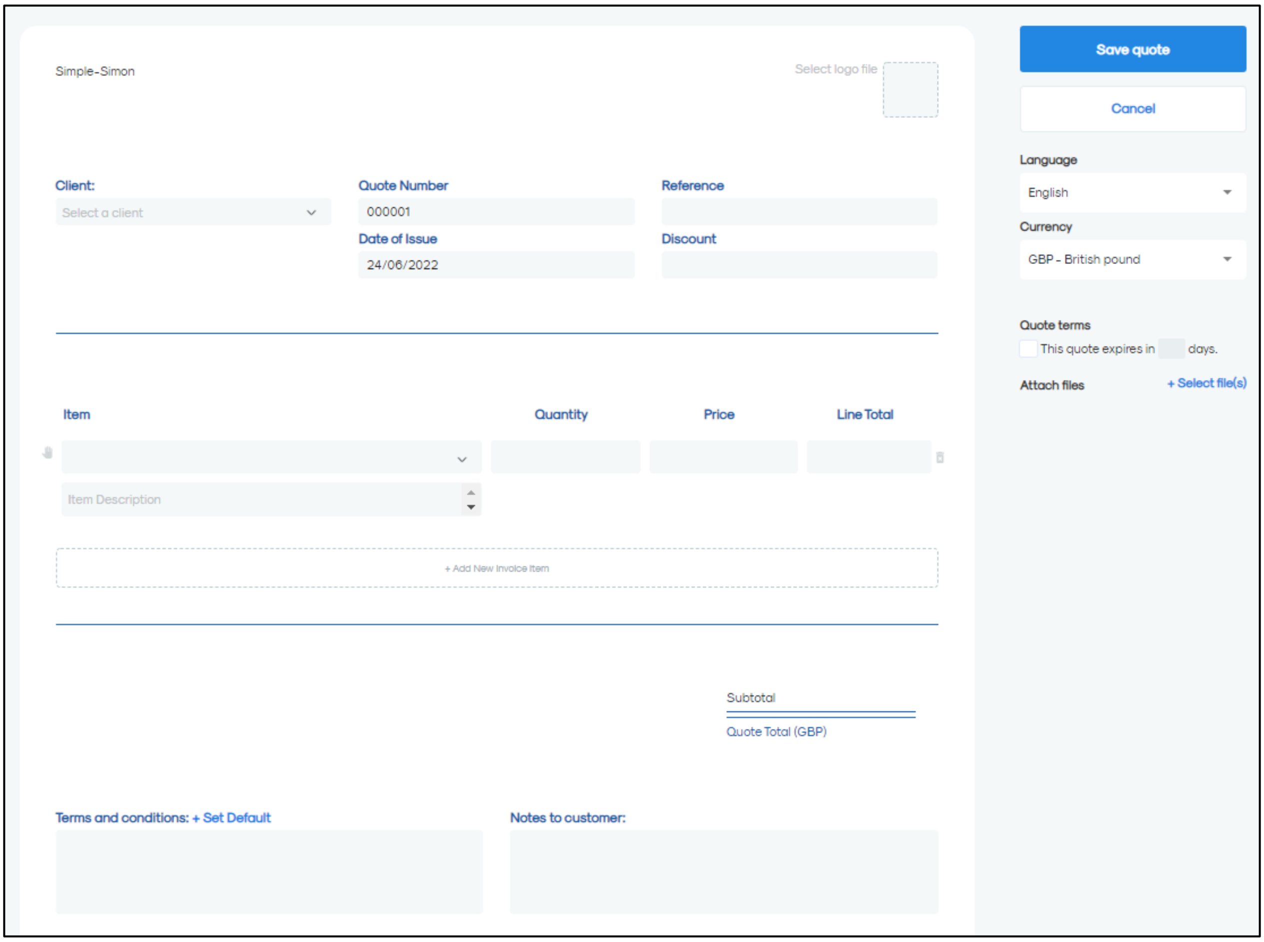
If wanted, you can send the work address, description of the work done or both to the invoice notes in InvoiceBerry. The work address is the location where the job is done. If you have multiple locations where work needs to be done, you can add them to the correct customer in Simon. Regardless of the choice made, the information is shown in the notes of the invoice. That way you can quickly see where the job was done or what kind of job it was.



5.8 **Sending Quotes from InvoiceBerry to Simon**

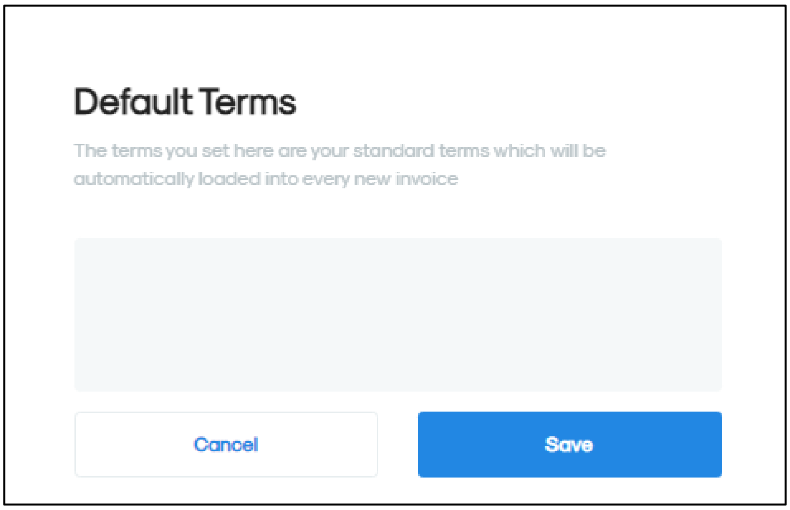
It is possible to send Quotes from InvoiceBerry to Simon. A Quote in InvoiceBerry becomes a work order in Simple-Simon if so desired. If you already have Quotes, you can select the Quotes you desire to be a workorder in Simon. If you don't have Quotes, you can make a Quote in InvoiceBerry by selecting 'Quotes'. Then press 'New Quote'.

When you press 'New Quote' a new screen will appear.



The first step is to select a client. InvoiceBerry will automatically produce a Quote Number. You can manually select the Date of Issue. You can also add a reference and discount if desired. Next you can select certain items and the quantity of the items which will produce a Quote Total. Once you selected the desired items, you can add terms and conditions of the Quote and add a note to the customer.

If you press ‘Set Default’ next to terms and conditions, you can add a standard term which will be automatically loaded into every new invoice.

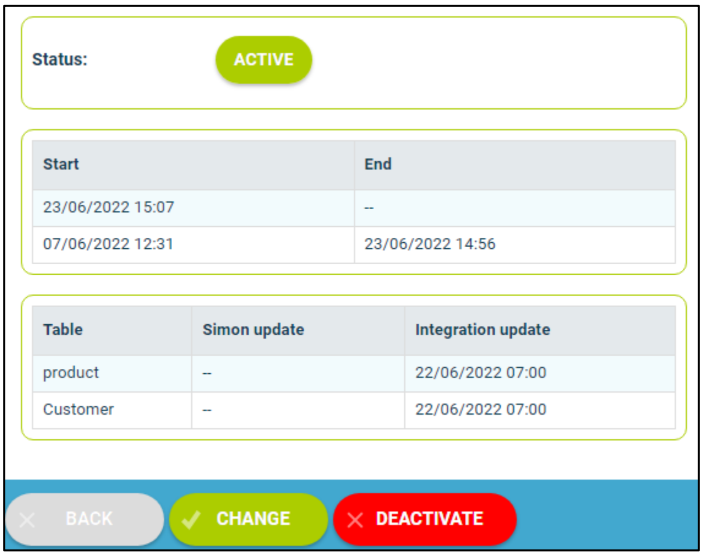


You can select a language and currency for the Quote and you can set a Quote term. When you select ‘Quote Terms’, you can chose if desired if you want the Quote to expire to a desired amount of days. You can also attach files to the Quote. This can be for example a word document about information of the customer, instructions or any other sort of information. Once you save the Quote, the Quote will be a work order in Simon if desired.

6. Edit settings integration

6.1 How can I edit the settings of my integration?

Once you have set the integration with InvoiceBerry, you can edit the settings of the integration. The status of the integration shows you whether it is active or not. By selecting ‘Change’ you can edit the settings of the integration. The next page will show you the settings button. Here you can edit the integration according to your own wishes. If you edit one setting, all other settings need to be checked as well. Press ‘Check’ to check each setting. Save the settings and the integration has been edited. The changes in the integration will be applicable from the moment you have edited the integration. This will not be done in retrospective.



6.2 Are there any consequences if I edit the interface?

The integration works according to the choices you make in the settings page. It is only possible to edit the integration’s settings if this is in line with information from InvoiceBerry. For example, if an product does not exist in InvoiceBerry, Simon will send an error notification stating this. It is your own responsibility that the integration information is correct.

6.3 When are changes to the integration activated?

The moment you alter the integration, the changes are saved and activated. This will not be done in retrospective.

6.4 Can I undo my settings?

You can edit the settings of the integration at any given moment. The moment you alter the integration, the changes are saved and activated. This will not be done in retrospective. If needed, you can also completely deactivate the integration. The moment you stop the integration, it will be deactivated completely. You do not need to contact Simple-Simon to do so. The moment you deactivate the integration, InvoiceBerry will no longer send customer and products to Simon and it also not possible to send a work order to InvoiceBerry. Of course, you can activate your integration again.

7. How does the integration work?

7.1 Why should I empty my database before starting the integration?

It is mandatory to erase your database in Simple-Simon if you want to start the integration with InvoiceBerry. Once the integration between Simple-Simon and InvoiceBerry is set, InvoiceBerry becomes the main ERP system. Customers and products and services should be added to InvoiceBerry. Simple-Simon automatically updates according to the mutations that are done in InvoiceBerry. Your database in Simon therefore should be emptied first, so that you can begin with a fresh start. Select 'Clear Simon data' to erase the data. Simon then shows you which parts should be erased.

If you are restarting the integration (after de-activating it), you can choose which parts of the database should be erased. Select which parts of the database you want to delete and which should remain.

7.2 How long does it take for InvoiceBerry and Simon to synchronize?

The synchronization between InvoiceBerry and Simon is done around every 5 minutes. This might be a bit more or a bit less, depending on how many people are using the integration. You can also view the highest mutation date. This shows the latest mutation you did in InvoiceBerry (or Simon), that influences Simon (or vice versa). If you want to view the mutation date, go to 'Integrations', 'Logging' and look at the green icon.

7.3 How often is a clean-up done in Simon?

Products or customers removed in InvoiceBerry, are automatically remove in Simon as well. Simon runs a clean-up, a few times a week, in which these customers and products are automatically removed. You do not need to remove customers or products yourself; Simon does this for you.

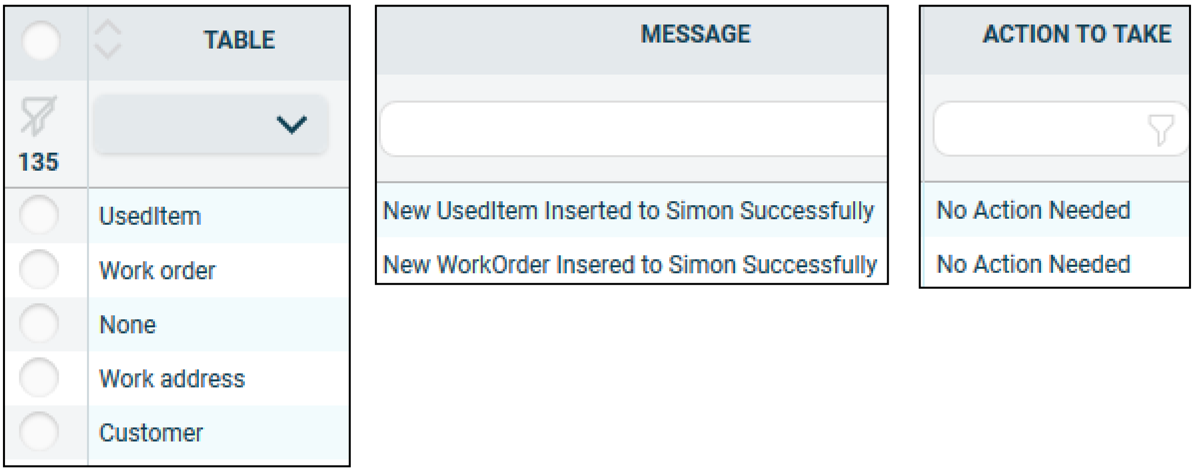
7.4 Why does it take a while (the first time) to retrieve the data from InvoiceBerry?

It might take a while to set the integration between Simple-Simon and InvoiceBerry. The first time Simon must import all customers and products from InvoiceBerry. How long this takes exactly is depended on the size of your database in InvoiceBerry.

8. Logging – notifications integration

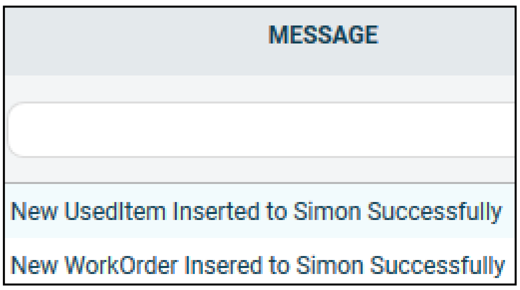
8.1 My integration with InvoiceBerry does not work, what should I do?

If (a part of) your integration does not work, a notification is created. You can view these notifications at ‘Integrations’ and then ‘Logging’. Here you can find all notifications regarding your integration. Each column tells you a bit about the notification. For example, the ‘Table’ column tells you whether the notification is about a work order, customer, work address or product. Furthermore, the column ‘Message’ shows you the exact notification. If something needs to be done about the notification, you can view what you should do in ‘Action to take’. An example of a notification is when no customer is attached to the customer. You cannot send a work order to InvoiceBerry without attaching a customer to the work order, as InvoiceBerry needs to know for which customer the invoice can be created.



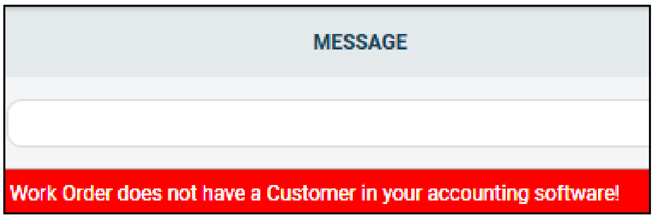
8.2 What is the meaning of the various notifications?

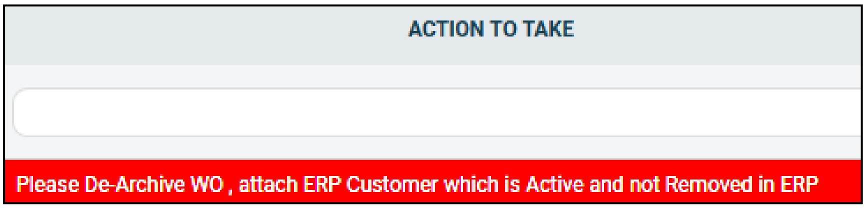
Depending on the type of notification, Simon will either show an info, warning or error message. Regardless of the type of notification, Simon will show the message in the ‘Message’ column. You can choose to only show warning or errors. If you want to view all notifications that require a solution, select errors. If a solution is required, this is shown in the column ‘Action to take’.



8.3 Notification is shown in my InvoiceBerry integration, what should I do?

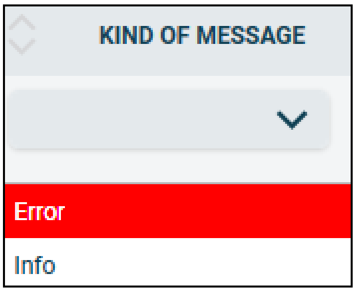
If you receive a notification that requires a solution, this will be shown in the column 'Action to take'. This column also explains what the solution should be.





8.4 What is the meaning of the various colours in the notifications?

The colour changes depending on the type of the mesInvoiceBerry. An 'info' notification is shown in white or blue. 'Warnings' are shown in yellow and 'errors' are shown in red. That way it is easy to view what is going on in the integration and if a solution is required.



9. Stop the integration

9.1 Where can I stop the integration with InvoiceBerry?

You can stop the integration with InvoiceBerry by going to 'Integrations' ➔ 'Activate integration' ➔ 'InvoiceBerry' ➔ 'Active' ➔ 'Deactivate'. Simon will then ask whether you really want to deactivate the integration. The integration can only be used later by reactivating it.

9.2 Are there any consequences if I stop my integration with InvoiceBerry?

No more customers and products will be transferred from InvoiceBerry and no work orders will be send to InvoiceBerry, from the moment you deactivate the integration. Of course, you can always reactivate the integration. The customers and products will be transferred to Simon and work orders will be send to InvoiceBerry from that moment on.

9.3 Should I contact Simon to stop my integration with InvoiceBerry?

You can deactivate the integration whenever you want. Once you deactivate the integration, it stops automatically. You do not need to contact Simon to do this.