

Datagate Innovation - Custom Invoice Image

Last Modified on 02/02/2024 12:03 pm CST

Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>



Leverage ConnectBooster to display or send Datagate (PDF) invoices.

Invoices created in Datagate can be viewed in the ConnectBooster portal, once the same invoice number resides in your accounting system. This serves as a single pane of glass viewing for all your customers billing needs. This includes notification of past due invoices, and email delivery for new invoices (if enabled in your portal).

This document explains how to set up ConnectBooster to look in Datagate for the invoice PDF first. If it doesn't find it, fall-back logic will let the system continue to look at other invoice images. I.e., the copy from ConnectWise Manage or QuickBooksOnline.

Before you begin:

- 1st: Contact ConnectBooster – support@connectbooster.com - and request to have the "Custom" Integration option added.
- 2nd: Contact Datagate – support@datagate-i.com - and request an API key

After the above two items have been performed, log into ConnectBooster with any administrator account to proceed.

Setup:

Navigate to Integrations. Select the "Custom" option".

+ New Integration
IP Address List

| | |
|---|---|
| <div style="background-color: #0056b3; color: white; padding: 5px;"> xero Xero ⋮ </div> <div style="padding: 5px;"> <p style="text-align: center;">Organization BNG Development</p> <p style="text-align: center;">Last Sync 06-04-2022</p> </div> | <div style="background-color: #0056b3; color: white; padding: 5px;"> 🔑 BNG Gateway ⋮ </div> <div style="padding: 5px;"> <p style="text-align: center;">Api Key gckQ...taJ9</p> <p style="text-align: center;">Last Sync 08-17-2023</p> </div> |
| <div style="background-color: #0056b3; color: white; padding: 5px;"> 🏢 Microsoft Business Central ⋮ </div> <div style="padding: 5px;"> <p style="text-align: center;">User 627ae078952b88c16e088936</p> <p style="text-align: center;">Last Sync Never</p> </div> | <div style="background-color: #0056b3; color: white; padding: 5px;"> 🔗 Custom ⋮ </div> <div style="padding: 5px;"> <p style="text-align: center;">Name Custom Integration</p> <p style="text-align: center;">Last Sync 08-17-2023</p> </div> |

Enter the Integration name:

Datagate Invoices

Custom
6451371d3f1c9000725a3679

[Help ?](#)

Integration Name

Datagate Invoices

Click on the down arrow to enable the configuration, and choose **GetInvoiceImage**

Change method to **“GET”** and copy in the following text:

`https://api.dataportal.nz/v1/connectbooster/getinvoiceimage/{{InvoiceNumber}}`



Custom

6451371d3f1c9000725a3679

Help ?

Integration Name

Datagate Invoices

GetInvoiceImage

Description:

Tokens: Use tokens to build your request using the following format: **TokenName**

Available tokens: **InvoiceNumber authToken ipAddress InvoiceNumber**

Method



POST

GET

Body, For Example Form Data Or JSON Content (Tokens Allowed)

2

URL (Tokens Allowed)

https://mycustominteg

1

Header Key

Header Value

cache-control

no-cache

Add Header

Delete Command


Close

Disable Sync

Save

Create three header keys as below. Copy the values from this text:

1. Cache-control: no-cache
2. X-API-Key: (supplied by Datagate in step two at the start of this document)
3. X-Client-Id: dcd04876-c33d-41dc-bf4d-df8861db6147






Custom
6451371d3f1c9000725a3679

[Help ?](#)

tokens: use tokens to build your request using the following format: `{tokenName}`
Available tokens: `InvoiceNumber authToken ipAddress InvoiceNumber`

Method URL (Tokens Allowed)

Raw Request Body, For Example Form Data Or JSON Content (Tokens Allowed)

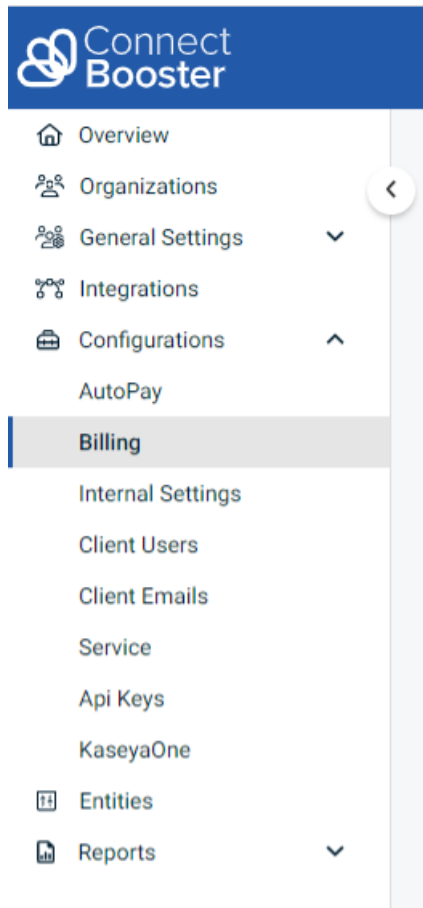
| Header Key | Header Value | |
|--|---|--|
| 1 <input type="text" value="cache-control"/> | <input type="text" value="no-cache"/> |  |
| 2 <input type="text" value="X-API-Key"/> | <input type="text" value="944984D9-60A6-4E53 8918 ECD47F664878"/> |  |
| 3 <input type="text" value="X-Client-Id"/> | <input type="text" value="dcd04876-c33d-41dc-bf4d-df8861db6147"/> |  |

Select **SAVE**

Enabling the Invoice Image option:

From the 3 bar menu in the top left, navigate to:

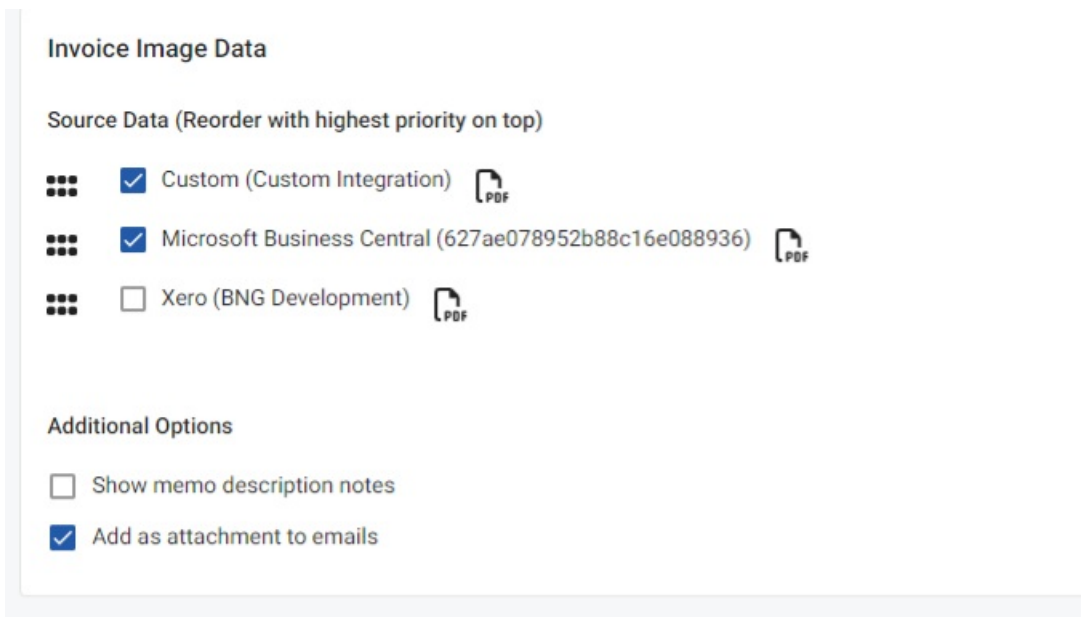
Configurations + Billing



Scroll down to "Invoice Image Data".

Enable the Custom option labeled (Datagate Invoices).

Note: Click and drag "Custom (Datagate Invoices)" to sit in the 1st position of priority. This hierarchy determines the system fallback logic in which we will try and fetch invoices for viewing and email delivery.



Testing

You can test by viewing a customer invoice that is in **both** your *accounting system* AND in *Datagate*.

Navigate to a given customer, and go to the Open Invoices section.

Note: Find an invoice number that is also in Datagate.

Select "More".

The screenshot shows the 'Demo Company' interface. On the left is a navigation menu with options: Organization Details, Balance, Open Invoices (4), Organization Credits, Pending Payments, Scheduled Payments, Payments Calendar, Payment Methods (6), AutoPay (4), Invoice History, and Transaction History. The main area is titled 'Open Invoices' and contains a table with the following data:

| Invoice Number | Company | Balance | Total | Due Date | More | Icons |
|----------------|--------------|------------|------------|------------|------|-------|
| A1034 | Demo Company | \$2,547.50 | \$2,562.50 | 03-24-2017 | More | 🔍 🗑️ |
| CB6604 | Demo Company | \$99.00 | \$99.00 | 05-01-2021 | More | 🔍 |
| 751 | Demo Company | \$257.50 | \$257.50 | 05-14-2021 | More | 🔍 |
| CB6606 | Demo Company | \$99.00 | \$99.00 | 06-01-2021 | More | 🔍 |

Below the table is an 'Organization Credits' section with the text 'No Organization Credits'.

Select "View".

The screenshot shows the 'View' page for invoice CB6606. The header displays 'CB6606' and 'COMPANY Demo Company'. Below this is a table with the following data:

| DUE DATE | TOTAL | BALANCE |
|------------|---------|---------|
| 06-01-2021 | \$99.00 | \$99.00 |

Below the table is another table with the following data:

| TRAN. DATE | PO# |
|------------|-----|
| 06-01-2021 | - |

At the bottom of the page are three buttons: 'Cancel', 'View' (highlighted with a red box), and 'Pay'.

Expect to see the Datagate PDF open in a new tab. If not, check to see if you have pop-ups blocked on your browser.

Datagate

Tax Invoice

Tax Invoice: DG-01312
 Invoice Date: 29 Apr 2020
 GST Number: 13-678-4283

Tax Invoice For
 betri Solutions
 Attn: Lee Dubber

Datagate Demo
 NoReply@datagate-l.com
 12 Demo Way
 Demo Street
 Auckland 0632
 09 477 9573

Summary for: 1 Feb 2020 - 29 Feb 2020

| | |
|----------------------|-------------------|
| Product and Services | \$1,195.00 |
| Sub Total | \$1,195.00 |
| GST | \$179.25 |
| Invoice Total | \$1,374.25 |

Payment Instructions

WARNING: The invoice number **MUST** be an identical match between Datagate, and your accounting system.

In the event your customer views an invoice that is not in Datagate, our system will fallback to the priority you set earlier.

I.e., the copy from ConnectWise Manage.

Your Company
 Enter your address
 Enter the City, Fl. Enter Zip
 (999) 999-9999

| | | |
|---|-----------------------------------|-----------------------|
| Bill To: betri Solutions United States | Date 09/30/2019 | Invoice 386 |
| | Account betri Solutions | |

| Terms | Due Date | PO Number | Reference |
|--------|------------|-----------|--------------------------|
| Net 10 | 10/10/2019 | | Monthly Billing for July |

| Other Charges | Quantity | Price | Amount |
|------------------------|----------|-------|--------|
| Agreement Telecoms | | | |
| 10ft Patch Cat5E Cable | 1.00 | 9.82 | 9.82 |

Full process flow:

1. Generate an invoice in Datagate
2. Export it - use your usual procedures so that the invoice data is showing in your accounting system.
3. Ensure your accounting integration sync has run, and that the new invoice is in your ConnectBooster portal.