

## Ascora Integration functionality:

Ascora is now integrated with EzzyBills via an api key on the apps page below:

Go to Ascora settings in Ascora

Click on api settings on the settings panel under administration

The screenshot shows a web browser window with the URL [ascora.com.au/Portal/ApiSettings](https://www.ascora.com.au/Portal/ApiSettings). The page title is "API Settings". The main content area displays the "API Key" section, which includes a text input field containing the key `6e2H7acca91452eac4338398081f0e`, a "Generate New API Key" button, and a "Copy to Clipboard" button. Below the key, it states "2/08/2022 8:52:08 AM Enabled by Simon Lai" and "This API Key can be used to push/pull data from/to Ascora".

The right-hand navigation menu is expanded to show the "Settings" section, which includes the following items:

- Defaults
- System Settings
- Scheduling
- Quotes
- Jobs
- Supplies
- Inventory
- Statement
- Customers
- Custom Fields
- Stages
- Enquiries
- Sales
- External Calendar
- Translations
- API Settings (highlighted)

The top navigation bar includes the Ascora logo, a "Tour" button, and a notification that "Your trial expires in 20 days." with a "Book a Demo" button. The main navigation menu includes: Dashboard, Scheduler, Map, Tracking, Customers, Enquiries, Quotes, Jobs, Invoices, Inventory, Equipment, Advanced, Reports, Import, and Administration.

Click on generate api key and copy the api key

The screenshot shows a web browser window with the URL `ascora.com.au/Portal/APISettings`. The page header includes the Ascora logo and a navigation menu with items: Dashboard, Scheduler, Map, Tracking, Customers, Enquiries, Quotes, Jobs, Invoices, Inventory, Equipment, Advanced, Reports, Import, and Administration. The main content area is titled "API Settings" and contains the following information:

**API Key**

API Key: `6e2f7acca91452eac4338398081f0e` [Generate New API Key](#) [Copy to Clipboard](#) [Disable API](#)

2/08/2022 8:52:08 AM Enabled by Simon Lai

This API Key can be used to push/pull data from/to Ascora

At the bottom of the page, there is a "Show all" button.

Click on Ascora

The screenshot shows the EzzyBills dashboard with a sidebar on the left containing navigation options: Dashboard, Search/Approve, Settings, Email, Analysis, Workflow, Apps, Buy, and Help. The main area displays a grid of application integrations. The 'Ascora' integration is highlighted with a blue border. Below the grid, there is a 'Description' section for the selected app, which reads: 'Generate an Excel file of your recent Invoice History.' At the bottom of the dashboard, there is a file preview for 'TimeZoneRelease...pdf' and a 'Show all' button.

Enter api key and save

The screenshot shows the configuration page for the Ascora integration. The sidebar on the left is the same as in the previous screenshot. The main area is titled 'Ascora' and contains the following text: 'Job Management Software for Tradies.' and 'How To? Connect EzzyBills to Ascora, then upload Bills to EzzyBills and they will get imported into your Ascora account.' Below this, there is a field for 'Ascora API Key:' with the value '6e2ff7acca91452eac4338398081f081' entered. A blue 'Save' button is located below the API key field. At the bottom of the page, there is a section titled 'Become an App Partner' with the text: 'If you would like to become an EzzyBills App partner so that EzzyBills users can benefit from your Apps then contact [Support@ezzydoc.com](mailto:Support@ezzydoc.com)'. The footer of the page reads '© 2022 - EzzyBills'. At the bottom of the dashboard, there is a file preview for 'TimeZoneRelease...pdf' and a 'Show all' button.

Go to Workflow in EzzyBills and select Ascora and save it as part of workflow

The screenshot displays the EzzyBills application interface for configuring workflows. The browser address bar shows the URL `https://app.master.app/EzzyX/Workflow`. The left sidebar contains navigation options: Dashboard, Search/Approve, Settings, Email, Analysis, Workflow, Apps, Buy, and Help. The main content area is titled "Workflows" and shows a list of workflow items. The selected workflow is "copy of quickbooks approve" with details: `ezzyqa.workflow.copyofquickbooksapprove@ezzybills1.com`, `workflow.copyofquickbooksapprove`, and status "active".

Below the workflow list, a task selection menu is open, showing "Ascora Export" selected. A "New Task" button is visible. The workflow diagram in the center shows a sequence of steps: a red circle labeled "Start(101)", followed by three blue rectangular boxes labeled "Pre-extract[3]", "Extract[4]", and "Ascora Export[262]", and finally a green circle labeled "Finish[26]".

Below the diagram, a "Task Details" section is partially visible, showing tabs for "Ascora Export", "Review Results", "Review Approved", and "Copy Data From".

Now select an invoice and upload it to EzzyBills

The screenshot shows the EzzyBills web application interface. The browser's address bar displays the URL <https://app.master.app/EzzyX/Default>. The user is logged in as 'ezzyqa' and has a 'Log Out' button in the top right corner. A sidebar on the left contains navigation links: Dashboard, Search/Approve, Settings, Email, Analysis, Workflow, Apps, Buy, and Help. At the bottom of the sidebar is the email address 'support@ezzydoc.com'. The main content area features a large grey box with the text 'Drop bills here or e-mail [ezzyqa@ezzybills1.com](mailto:ezzyqa@ezzybills1.com) or sync' and a 'Select' button. Below this, the text '6 more to Process' is displayed above a grid of six invoice cards. The top row contains three cards: two green cards labeled '1153 Uploaded -7 hours ago' and '1159 Uploaded -6 hours ago', and one red card labeled '1155 Uploaded 10 hours ago'. The bottom row contains three cards: a green card with a document icon, a green card with a preview of an invoice, and a red card. At the bottom right of the main content area is a 'Show all' button. The browser's taskbar at the bottom shows a PDF file named 'TimeZoneRelease...pdf'.

After uploaded it should be in Ascora Supplier Invoice now:

The screenshot displays the Ascora Supplier Invoices web application. The browser address bar shows the URL `ascora.com.au/Purchasing/SupplierInvoice/Index`. The navigation menu includes: Dashboard, Scheduler, Map, Tracking, Customers, Enquiries, Quotes, Jobs, Invoices, Inventory, Equipment, Advanced, Reports, Import, and Administration.

The main header for 'Supplier Invoices' includes an 'Import/Export' button and a '+ New' button. Below the header, there are several filter and action buttons:

- When allocating items to a Job:
  - Maintain Item Markup (checked)
  - Maintain Item Sell Price
  - Use Highest
- Supplier Price shall be marked up based on the markup on the Job (highlighted in blue)
- Buttons for 'Sent To Accounts', 'Accepted', 'Expenses', 'Not Sent To Accounts', 'Not Accepted', 'Non-Expenses', 'All', 'All Types', 'Invoices', and 'Create'.
- Dropdowns for 'Origin' and 'Supplier', both currently set to 'Please Select'.
- A 'Bulk Actions' dropdown and a 'Search' button.

The main data table contains the following information:

	Invoice Date ↓	Due Date	Supplier	Referen...	Purchase Orders	Jobs	Receipt	Total Ex Tax	Total Inc Tax	Origin	Type	Accepted	Sent To Accounts	Accoun... Package Errors	Item #
<input type="checkbox"/>	29/8/20...	29/8/20...	COMPL... IRRIGA... (NSW) PTY. LIMITED	137677				\$188.00	\$188.00	Unknown origin	Invoice	N	N		1 item
<input type="checkbox"/>	29/8/20...	29/8/20...	ELDERS LIMITED	C3 06597				\$960.00	\$1,056...	Unknown origin	Invoice	N	N		1 item

At the bottom of the browser window, a PDF file named 'TimeZoneRelease...pdf' is visible in the taskbar, and a 'Show all' button is present in the bottom right corner.

Beware of duplicates as it will be red on the dashboard and reported as a duplicate

The screenshot shows the EzzyBills dashboard interface. At the top, there is a navigation bar with the EzzyBills logo on the left and a user profile dropdown labeled 'ezzyqa' with a 'Log Out' button on the right. Below the navigation bar is a large grey box with the text 'Drop bills here or e-mail ezzyqa@ezzybills1.com or sync' and a 'Select' button. The main content area is titled '6 more to Process' and displays a grid of bill cards. The first two cards are green and show '1163 Uploaded - 7 hours ago' and '1159 Uploaded - 6 hours ago' respectively. The third card is red and contains an error message: 'View Document Failed to export invoice to ascora. 0 Tracking Token specified (6032157) already exists for the specified Supplier'. Below this, there are three more cards: a green one with an 'APP' icon, a green one with a document preview, and a red one. At the bottom right, there is a 'Show all' button. The browser's address bar shows 'https://app.master.app/EzzyX/Default' and the page is marked as 'Not secure'.