

SmartUBL

Connecting to SmartUBL

'A step by step instruction manual on connecting to the SmartUBL API'

Version 1.0

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Powered by Smartbooqng

Submitting Files Through SFTP

To integrate your SFTP servers and applications (like FileZilla, WinSCP etc) with our services, we provide our users with the following options,

Connection options and requirements:

1. SFTP with File name and password.

- The IP address of the Server. For e.g., “192.123.4.56”.
- The port number of the Server. For e.g., Port – 22.
- The shared file. For e.g., example.OpenSSH.
- Username and password (if applicable) for the file.

2. SFTP with credentials

- The IP address of the Server. For e.g., “192.123.4.56”.
- The port number of the Server. For e.g., Port – 22.
- The credential to the Server – User Name and Password.

Note: For all the mentioned connections, the path of the SFTP folder must also be shared (for e.g., “[Download/Compact](#)”). This path would be configured on the nomenclature mentioned below.

Once these have been provided, the connection can be securely made.

Instructions for configurations:

The SFTP application database and its folders would need to be configured according to the following rules for the exchange of documents to happen correctly. Clients will have to follow a naming nomenclature for the “Download” and “Upload” folders.

- Users can use the “Download” folder to send the files to Smartbooqing so that our system can download it from there.
- Users can use the “Upload” folder to access the processed UBLs after Smartbooqing uploads it.

A. Configuration for sending files.

A folder – “Download” needs to be created – where the documents would be submitted. This folder must mandatorily have two sub-folders named “**Extensive**” (Article Lines) and “**Compact**” (VAT Lines) where the respective documents would be uploaded according to how they need to be processed.

B. Configuration for Receiving files.

Similarly, for receiving the processed UBLs, there should be a folder named “Upload”. The processed UBLs will be sent to this folder. Here the user will have two option on how they wish to receive the UBLs. They are:

1. The UBLs will be collectively made available in the “Upload” folder (no sub-folders required).
2. The UBLs will be made available in two separate sub-folders. If the user wishes to differentiate between the UBLs on the basis of comments, they will necessarily have to have folders with the name of “**UBLWithComments**” and “**UBLWithoutComments**”. The processed UBLs will be made available in the respective folders depending on the relevant comments generated while processing.

You can contact us at support@smartboozing.com with the option you would like to set and we will set it for you.

PDF Attachment Export.

Users can choose from these 3 option on how they would like to receive the PDF of the document.

- a. Invoice PDF in binary code within the UBL (Default)
- b. Invoice PDF as separate attachment and also a binary code within UBL
- c. Only UBL and no invoice PDF
- d. Only UBL with separate invoice pdf

You can contact us at support@smartboozing.com with the option you would like to set and we will set it for you.