

**Advania Verifone Cloud Connection**  
Setup and instructions

# Advania Verifone Cloud Connection

## 1. FIRST STEP

Before you can start using this app with Verifone Central, you will need to contact Verifone to get access and credentials for Verifone Central and get the android POI devices you need.

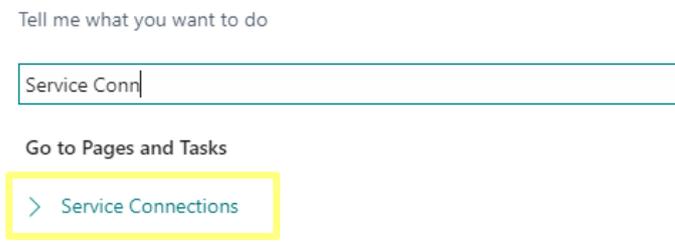
## 2. SETUP

To start using *Advania Verifone Cloud Connection* solution we need to add values to the setup and enable it. We can find the setup by typing Verifone in Tell me Search box.



*Verifone Cloud Setup*

Or it can be found in *Service Connections* page found via Tell Me search box.



Didn't find what you were looking for? Try [exploring](#)

*Service Connections*

Click on Advania – Verifone Cloud Setup line and run Setup action.



*Service Connections – Verifone Cloud Setup*

Verifone Cloud Setup page will open. All the setup value that you need to enter in the fields are value that you will get from Verifone after the Verifone Central has been setup for you.

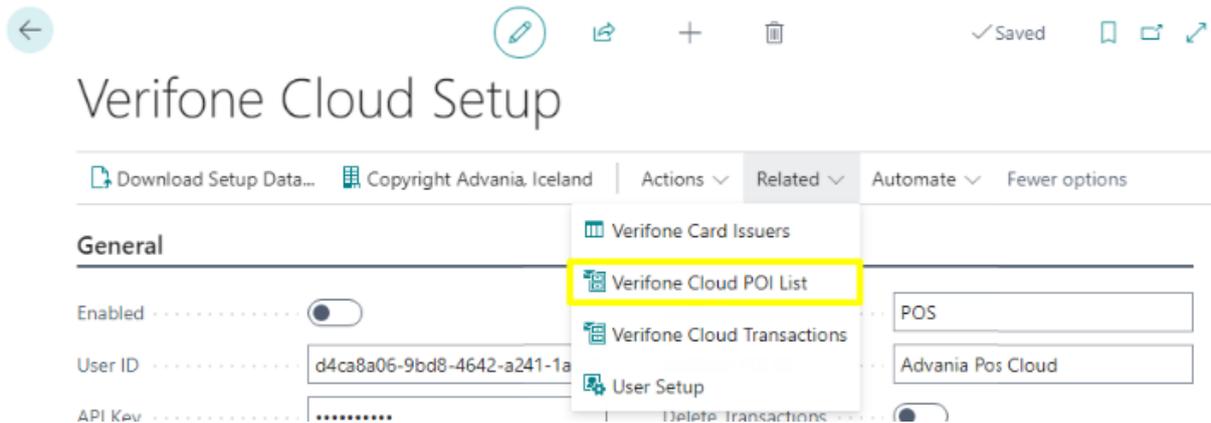
Verifone Cloud Setup page

If you are only using one POI device add its information in the setup page in the following fields “Verifone Service ID”, Verifone Sale ID and “Verifone POI ID”.

Verifone Cloud Setup page

If you are using more than one POI device you can leave the fields mentioned above in the *Verifone cloud Setup* page empty, as we will add the POI devices in the *Verifone Cloud POI list Page*.

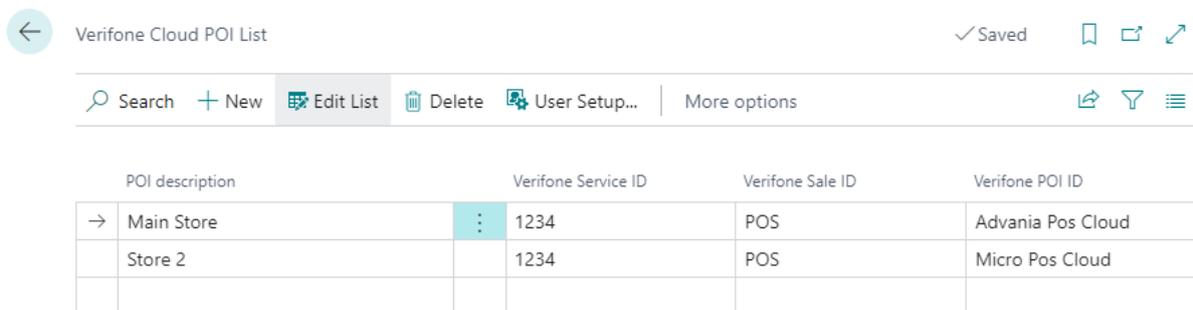
To open the *Verifone Cloud POI list Page* go to the *Related* action and select the *Verifone Cloud POI List* (or search for it via Tell me search box).



*Verifone Cloud Setup page*

On the *Verifone Cloud POI list Page* you then add all your POI devices and there required information.

The field *POI description* is used to identify each POI device and is decided by the users.



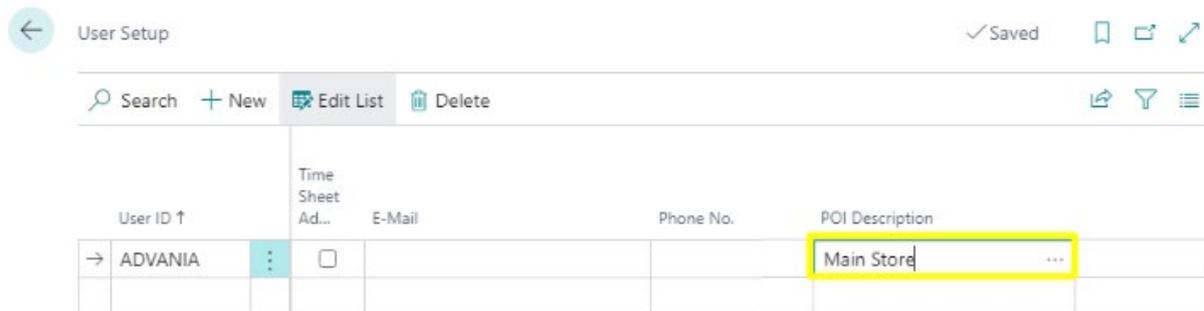
*Verifone Cloud POI List page*

After you have added the POI to *Verifone Cloud POI List page* you will need to add the POI to the user's setup, for the users. To do that click *User Setup* on the page (or via search box).



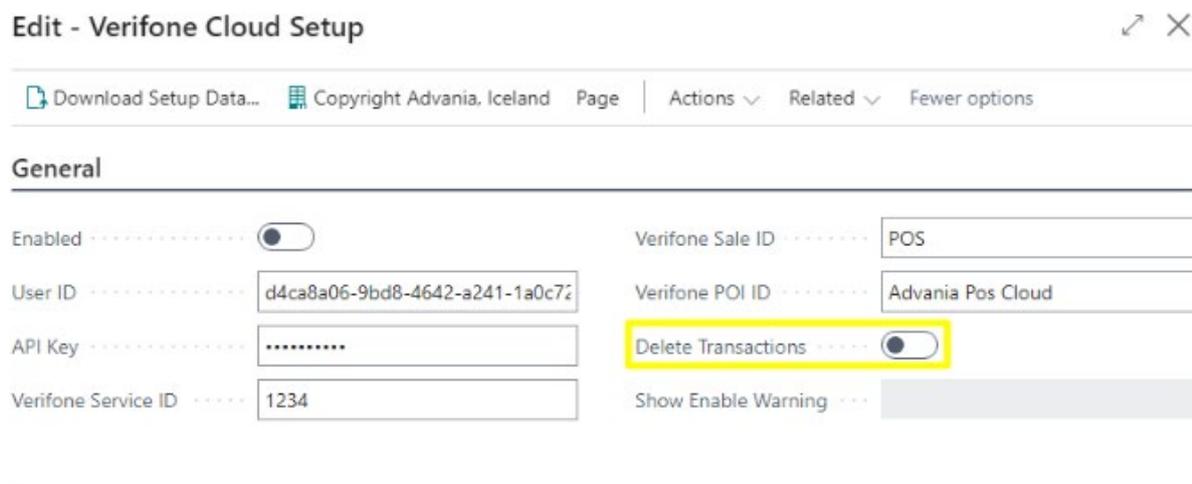
*Verifone Cloud POI List page*

On the *User setup* page go to the field *POI Description* and select the right PO device for each user (Same POI device can be selected for multiple users)



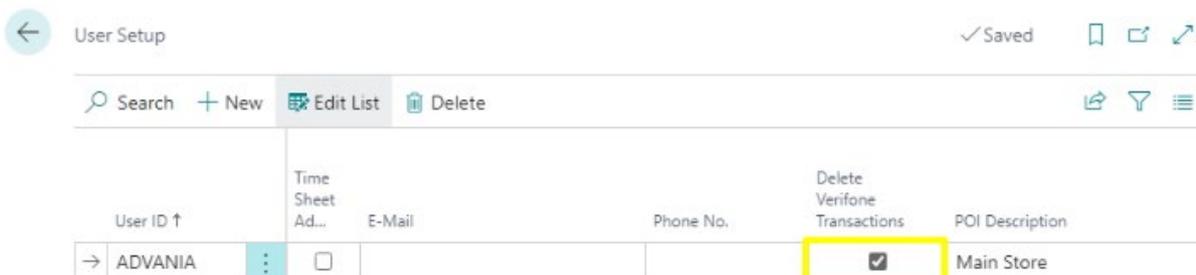
*User Setup page*

On the *Verifone Cloud Setup* page you have the field *Delete transaction*. This field is activated if you want to enable the option for selected users to be able to delete Authorized Verifone Transaction.



*Verifone Cloud Setup page*

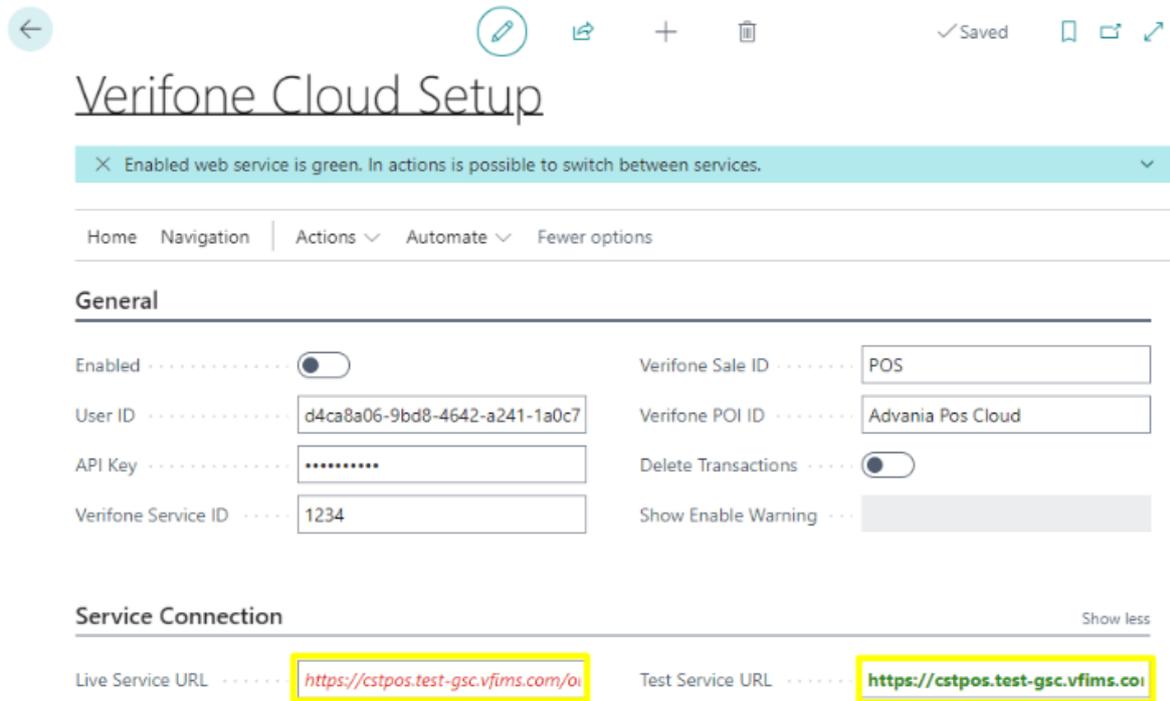
After you have activated the *Delete Transaction* field, you will need to go to the *User Setup* page and select the users that will be able to delete Authorized Verifone Transaction. You do that by activating the field *Delete Verifone Transaction* for selected users.



*User Setup page*

On the setup page you can choose to communicate with test environment or live environment by activating either Live or Test Service URL.

Active Service URL is marked as green while unactive is red



Verifone Cloud Setup

Enabled web service is green. In actions is possible to switch between services.

Home | Navigation | Actions | Automate | Fewer options

**General**

Enabled:  Verifone Sale ID: POS

User ID: d4ca8a06-9bd8-4642-a241-1a0c7 Verifone POI ID: Advania Pos Cloud

API Key: ..... Delete Transactions:

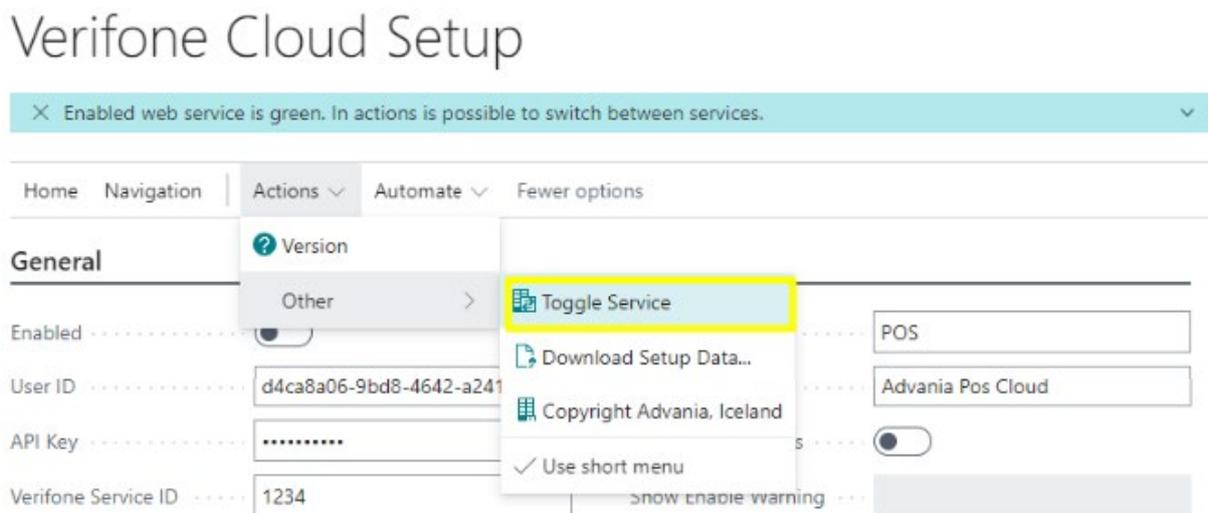
Verifone Service ID: 1234 Show Enable Warning:

**Service Connection** Show less

Live Service URL: <https://cstpos.test-gsc.vfims.com/oi> Test Service URL: <https://cstpos.test-gsc.vfims.com/oi>

User Setup page

To toggle between service, go to Action, Other and select Toggle service.



Verifone Cloud Setup

Enabled web service is green. In actions is possible to switch between services.

Home | Navigation | Actions | Automate | Fewer options

**General**

Enabled:  Verifone Sale ID: POS

User ID: d4ca8a06-9bd8-4642-a241-1a0c7 Verifone POI ID: Advania Pos Cloud

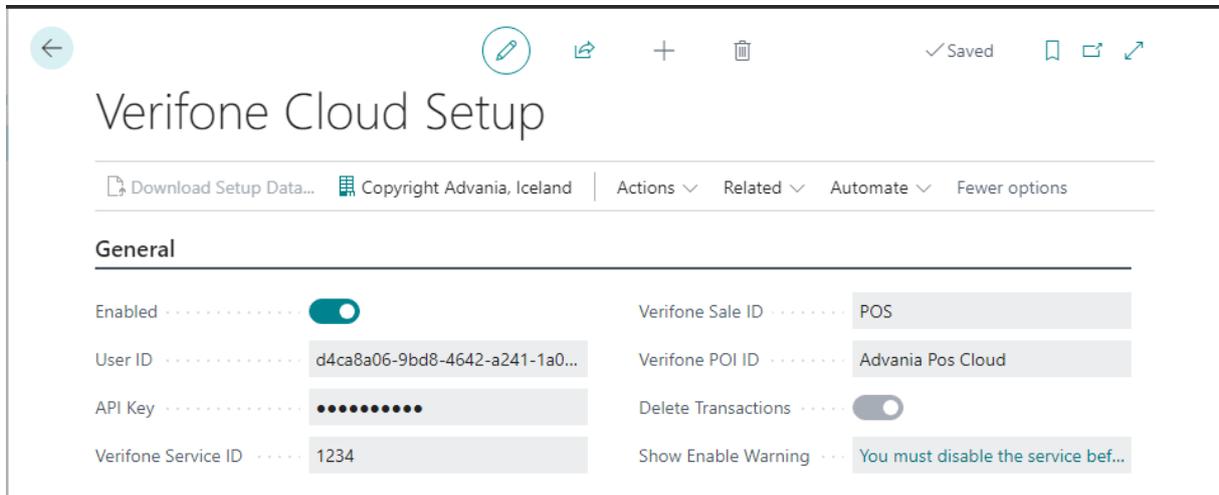
API Key: ..... Delete Transactions:

Verifone Service ID: 1234 Show Enable Warning:

Actions > Other > **Toggle Service**

User Setup page

After filling out all values, enable the solution and run Data Service action to download setup data.

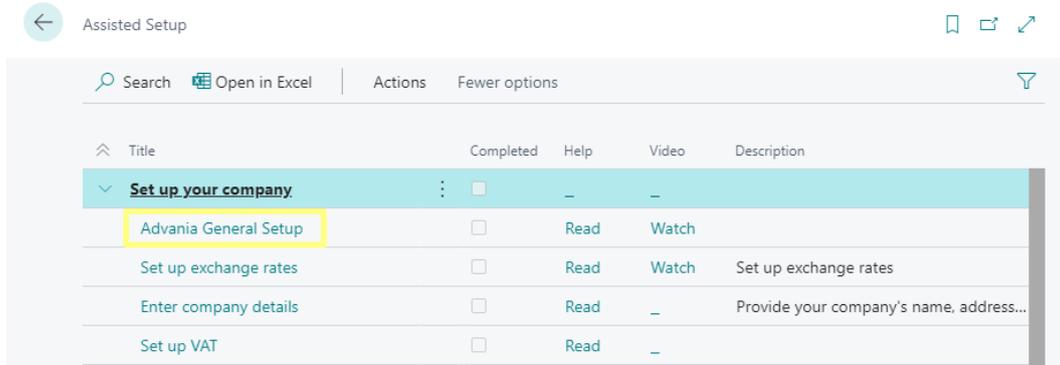


Verifone Cloud Setup page

**\*Note: If Verifone Cloud Setup is not enabled before running Data Service action, it will not appear in the list.**

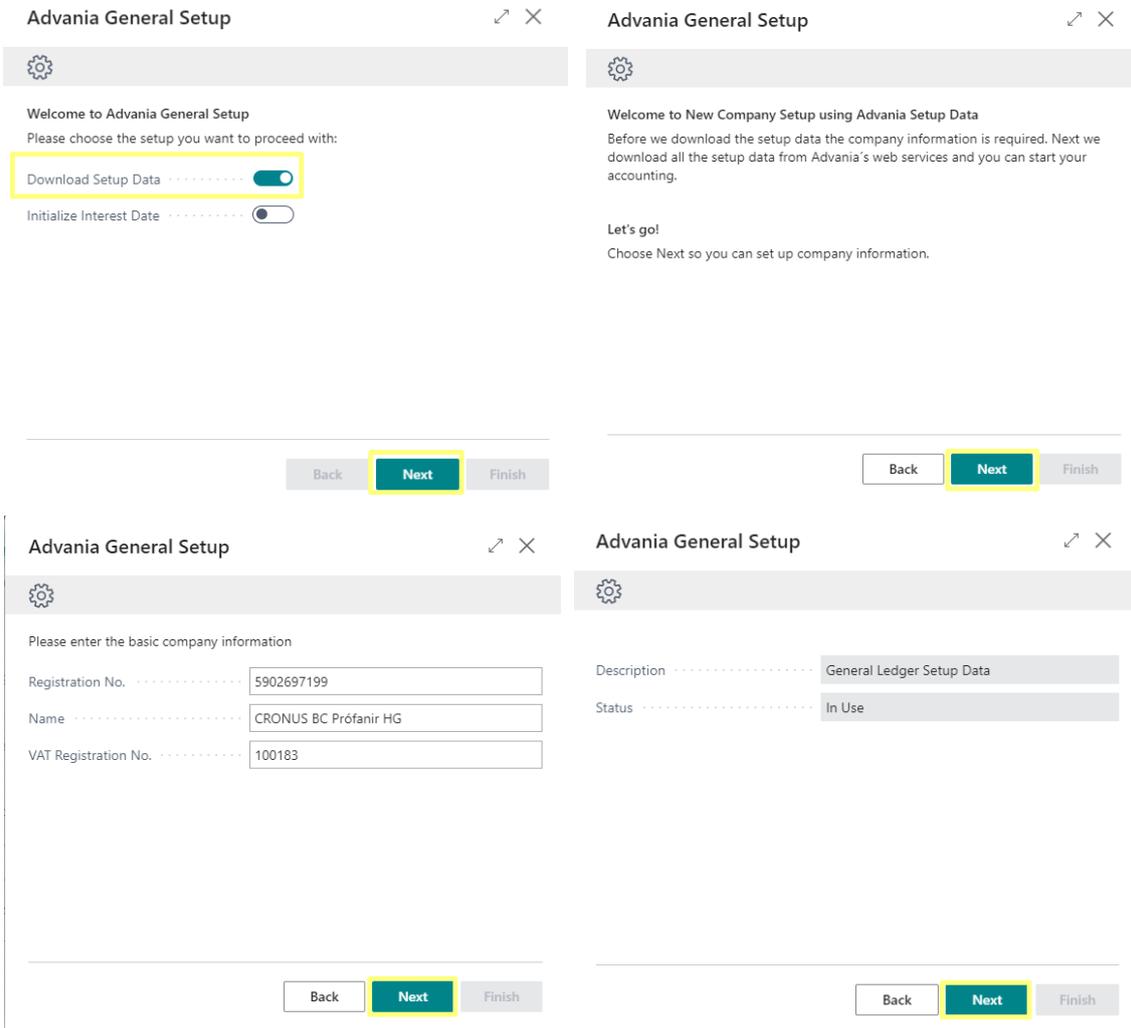
## Advania General Setup

Setup data can also be downloaded via Advania General Setup wizard found in *Assisted Setup* page.



Assisted Setup page

When running the wizard, choose Download Setup Data option, and click Next. The wizard will then guide you through the rest of the download process.



The image displays four sequential screenshots of the Advania General Setup wizard:

- Top Left:** 'Welcome to Advania General Setup'. The 'Download Setup Data' toggle is turned on and highlighted with a yellow box. The 'Next' button at the bottom is also highlighted.
- Top Right:** 'Welcome to New Company Setup using Advania Setup Data'. It explains that company information is required for downloading setup data. The 'Next' button at the bottom is highlighted.
- Bottom Left:** 'Please enter the basic company information'. Fields include:
  - Registration No.: 5902697199
  - Name: CRONUS BC Prófanir HG
  - VAT Registration No.: 100183
 The 'Next' button at the bottom is highlighted.
- Bottom Right:** Shows the 'Description' as 'General Ledger Setup Data' and 'Status' as 'In Use'. The 'Next' button at the bottom is highlighted.

Before finishing, click on Details in the last wizard step to download Verifone setup data.

### Advania General Setup



To add more setup data before starting your accounting, choose Details

Process finished.

To complete the basic G/L Accounting Setup, choose Finish.



If disabled, *Setup Data Services Setup* page will open. Enable the setup and run Data Services action found in Data Setup tab.

## Setup Data Service Setup

Home [Data Setup](#) | More options

[Data Services](#) [Upload data](#) [User Messages](#)

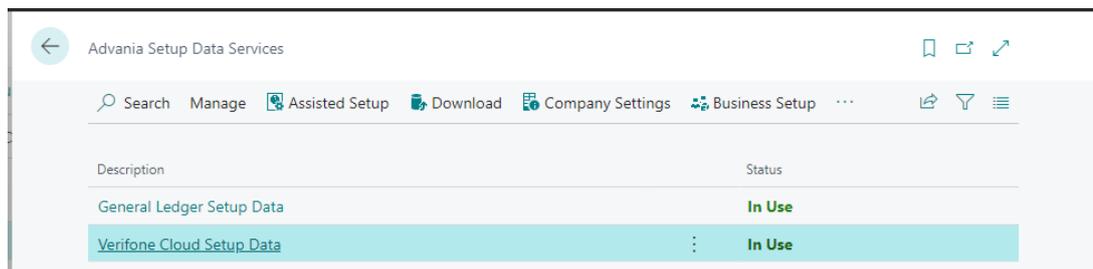
### General

Enabled

You must disable the service before you can make changes.

*Setup Data Service Setup page*

*Advania Setup Data Services* page will open. Click on Verifone Cloud Setup Data.



*Advania Setup Data Services page*

**\*Note: If Verifone Cloud Setup is not enabled before running Data Service action, it will not appear in the list.**

In *Download Advania Setup Data – Verifone Cloud Setup Data* page, click on Prepare action.

View - Download Advania Setup Data - Verifone Setup Data

Manage **Prepare** ✕ Reset ▶ Start Page | Related Fewer options

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Tables | Manage

Table ID ↑	Table Caption
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Download Advania Setup Data

The page will then show the tables which data will be downloaded when running Start action. The tables marked in blue don't have any data, while tables marked in red already have some data in them.

View - Download Advania Setup Data - Verifone Cloud Setup Data

Manage **Prepare** ✕ Reset ▶ Start Page | Related Fewer options

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Tables | ✕ Delete Line ➕ Add Setup Table... ✕ Remove Setup Table... ✎ Edit Setup Table Filter...

Table ID ↑	Table Caption	Current No. of Records
→ 10051587	Card Issuer	10

Download Advania Setup Data

After the setup data has been downloaded, go to *Verifone Cloud Card Issuers* page, and set correct Bal. Account Type and Bal. Account No. in all lines.

Tell me what you want to do

On current page (Verifone Cloud Setup)

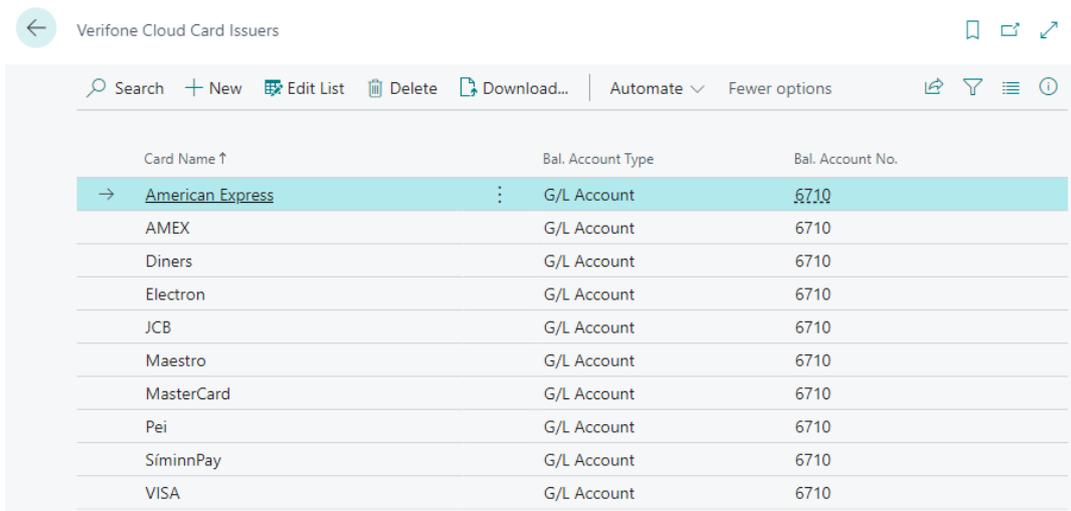
- Verifone Card Issuers**  
List of Verifone Card Issuers

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Go to Pages and Tasks

- > Verifone Cloud Card Issuers** Lists

Verifone Cloud Card Issuers



Verifone Cloud Card Issuers

Card Name ↑	Bal. Account Type	Bal. Account No.
→ <a href="#">American Express</a>	G/L Account	6710
AMEX	G/L Account	6710
Diners	G/L Account	6710
Electron	G/L Account	6710
JCB	G/L Account	6710
Maestro	G/L Account	6710
MasterCard	G/L Account	6710
Pei	G/L Account	6710
SiminnPay	G/L Account	6710
VISA	G/L Account	6710

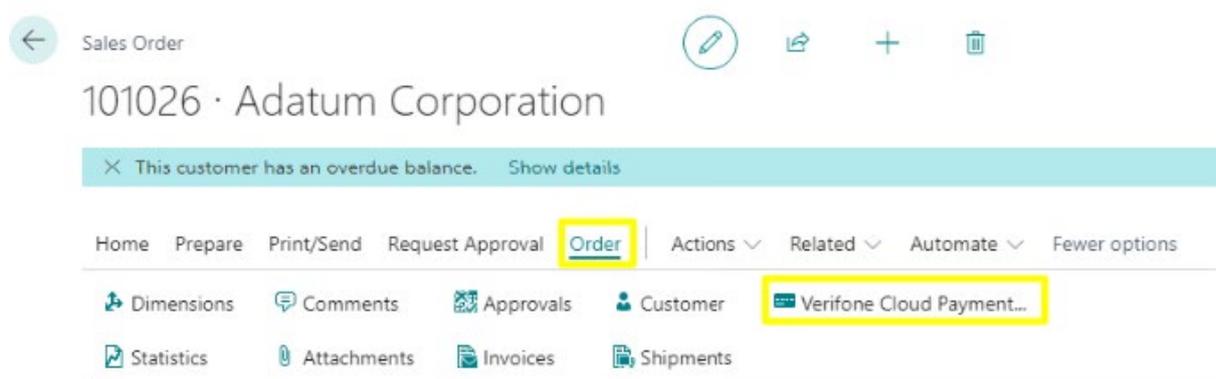
Verifone Cloud Card Issuers page

With this, installation is complete.

### 3. INSTRUCTIONS

Advania Verifone Cloud Connection solution enables Sales Orders, Sales Invoices, Sales Credit memo and Sales Return Order to be processed into POI Payments>Returns. There is also an option to Void Transactions. To show the process we will take sales order as an example.

We start by open *Sales Orders* page and create a new Sales Order. After we have selected the customer and added items to the Sales Order, we go to the action *Orders* and then select *Verifone Cloud Payments*.



Sales Order

101026 · Adatum Corporation

✕ This customer has an overdue balance. [Show details](#)

Home Prepare Print/Send Request Approval **Order** Actions Related Automate Fewer options

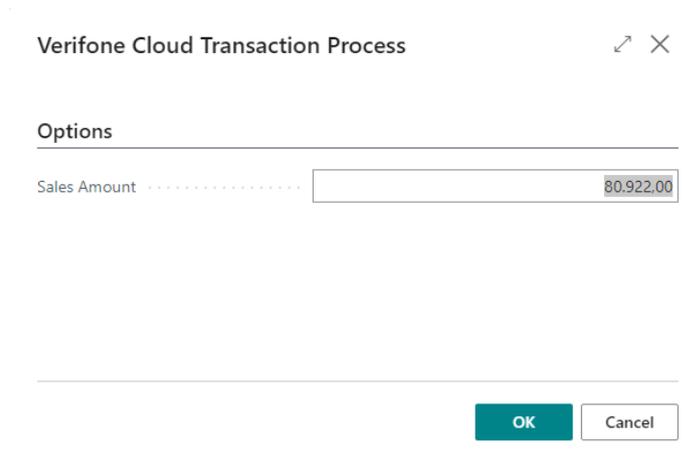
[Dimensions](#)
[Comments](#)
[Approvals](#)
[Customer](#)
**[Verifone Cloud Payment...](#)**

[Statistics](#)
[Attachments](#)
[Invoices](#)
[Shipments](#)

Sales Order page

When running this action, a window with remaining Sales Order amount will appear.

If you want to pay the remaining amount with POI you just select OK, else type in the amount you want to pay through the POI.



Verifone Cloud Transaction Process window

If the amount is 0 or you choose to cancel the action, the window closes and no attempt of communication with POI is made.

If the amount is chosen and OK button is selected, the transaction goes to POI and BC waits for the transaction to be completed there. After that, the confirmation of payment or some other message will appear (e.g., if a card is rejected).

The option to print receipt will appear on the POI (if it is equipped with printer).

After the transaction you will get a new Verifone Transaction Line, with information about the transaction (if it was successful/Failed plus other information) which you can see on the Sales Order under *Verifone Payment Lines*.

Verifone Payment Lines										
Entry No. ↑	Customer No.	Posting Date	Document Type	Document No.	Post...	Response Code	Payment Type	Card Name	Masked Card No.	Cardholder
→ 179	: 10000	20.7.2023	Invoice	103231	<input type="checkbox"/>	SUCCESS	NORMAL	MasterCard	541333****...	/

Now if the Sales Order is Posted, the *Verifone Cloud Connection* solution will also post the Verifone Transaction as Payment.

The process for Sales Invoices, Sales Credit memo, and Sales Return Order is the same.

If for some reason you want to VOID a POI transaction, you can do so for example in the Sales Order under *Verifone Payment Lines*. Select the line you want to void and then click *Void Card Transaction*.

This will send a Void command to the POI and a new Verifone Transaction line will be added in the transaction line.

Verifone Payment Lines										
Entry No. ↑	Customer No.	Posting Date	Document Type	Document No.	Post...	Response Code	Payment Type	Card Name	Masked Card No.	Cardholder
→ 179	: 10000	20.7.2023	Invoice	103231	<input type="checkbox"/>	SUCCESS	NORMAL	MasterCard	541333****...	/

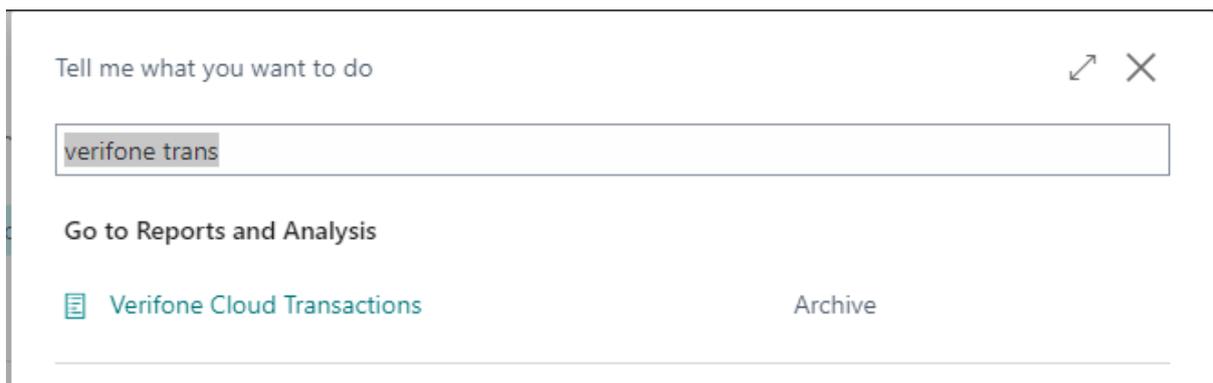
If a Transaction line has already been Voided or the transaction line is not authenticated by the POI, you will not be able to select the *Void Card Transaction*.

If you need to reprint from the POI, then you can do that under the *Verifone Payment Lines* by selecting the line you want to reprint then click *Print Receipt*. That will send a command to the POI device to print a receipt.

Verifone Payment Lines ✕ Delete Line ✕ Void Card Transaction... Print Receipt...

Entry No. ↑	Customer No.	Posting Date	Document Type	Document No.	Post...	Response Code	Payment Type	Card Name	Masked Card No.	Cardholder
→ 179	: 10000	20.7.2023	Invoice	103231	<input type="checkbox"/>	SUCCESS	NORMAL	MasterCard	541333****...	/

If you want to access a list of all the transaction lines you can do that by searching for “Verifone Cloud Transaction Lines”.



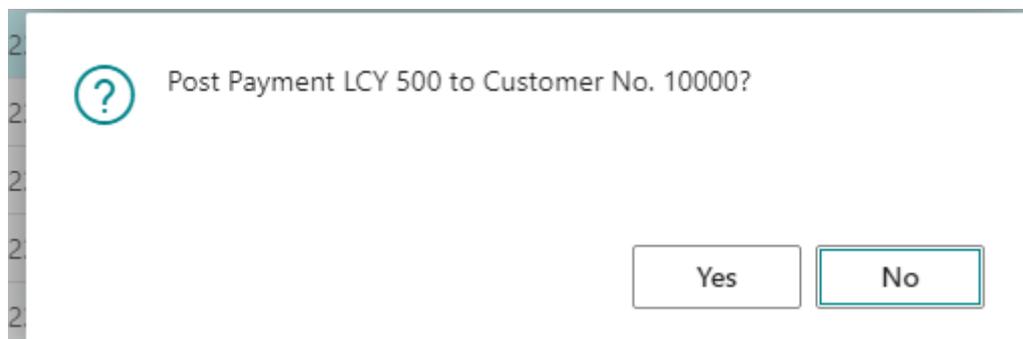
If for some reason a Transaction line dint post with a posted document, you have the option to post it by itself. To do that you need to open the page *Verifone Cloud Transaction*. Filter on the line you want to post and click *Post Transaction*.

← Verifone Cloud Transactions

Search **Post transaction...** Automate Fewer options

Entry No. ↑	Customer No.	Posting Date	Document Type	Document No.	Order No.	Post...	Transaction Type	Verifone Request Type
138	10000	18.7.2023	Invoice	103217		<input type="checkbox"/>	VOID	Reversal
142	10000		Invoice	103217		<input type="checkbox"/>	VOID	Reversal
143	10000	18.7.2023	Invoice	103217		<input type="checkbox"/>	VOID	Reversal
144	10000	18.7.2023	Invoice	103217		<input type="checkbox"/>	VOID	Reversal
145	10000	18.7.2023	Invoice	103224	101019	<input type="checkbox"/>	NORMAL	Payment
146	10000	18.7.2023	Invoice	103224		<input type="checkbox"/>	VOID	Reversal
147	10000	18.7.2023	Invoice	103225	101020	<input type="checkbox"/>	NORMAL	Payment
150	10000	18.7.2023	Invoice	103225		<input type="checkbox"/>	VOID	Reversal
151	10000	10.4.2023	Invoice	103225	101020	<input type="checkbox"/>	NORMAL	Payment
152	10000	18.7.2023	Invoice	103226	101021	<input type="checkbox"/>	NORMAL	Payment
153	10000	18.7.2023	Invoice	103226	101021	<input type="checkbox"/>	VOID	Reversal
155	10000	18.7.2023	Invoice	103226	101021	<input checked="" type="checkbox"/>	NORMAL	Payment

After that you will get a confirmation window with the amount and customer no.



By pressing Yes the selected transaction will be posted as payment (Or Refund, depending on the type).