Advania Signet Connection

Setup and instructions

Advania Signet Connection

1. SETUP

Setup for *Advania Signet Connection* extension is available from *Service Connections* page.

On the Home Page search for *Service Connections.*

Click on Advania – Signet Connection.
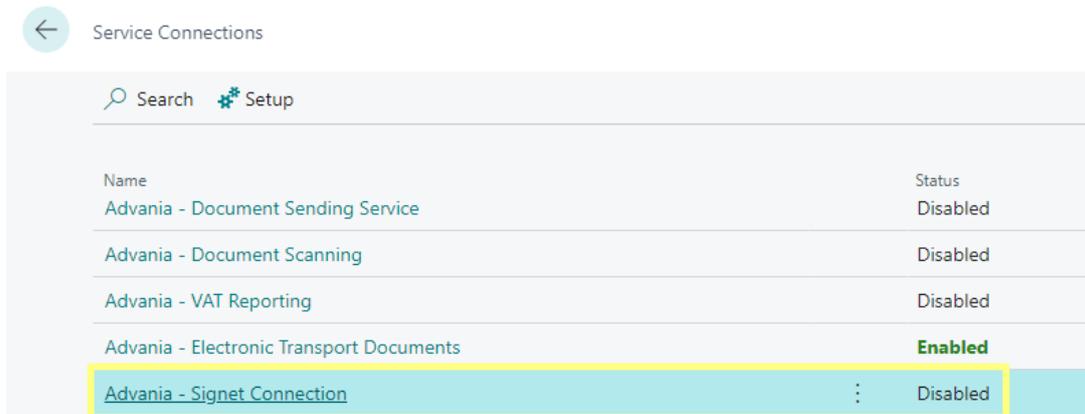
Next, you will type in your *Country Code, User ID,* and *Service Password* and *enable* the solution.

To test the solution, make sure that the *Test Service URL* is **Green**. If it is **Red**, Click *Toggle Service* to switch to Test Service while the solution is disabled.

You will be asked to confirm the change of services.

? Advania Web Services are changed by user.
Agree to be changed according to usage?

| Yes | No |

Don't forget to re-enable the solution after making the necessary changes.

Edit - Signet Connection Setup

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

Manage   🗐 Toggle Service   🗋 Signet Transaction   🏛 Copyright Advania, Iceland   ❓ Version   Page

General

Enable · · · · · · · · · · ⬤   Country Code · · · · · · · · 354

Service Connection

User ID · · · · · · · · · · ADVANIA_BC   Service URL · · · · · · · · · *https://traust.vottun.is/UtilitiesSer...*

Service Password · · · · · · ●●●●●●●●●●   Test Service URL · · · · · · · **https://prufa.signet.is/utilities...**

| Close |

2. GENERAL INFO

Signet Authentication is used in two ways, for financial approval and delivery approval. Financial approval is accessible on the pages **Sales Order**, **Sales Quote,** and **Sales Invoice**. Delivery approval is accessible on the pages **Posted Sales Invoice** and **Posted Sales Shipment**.

You can access all Signet transactions from the **Signet Connection Setup** page or via search.

3. SIGNET AUTHENTICATION

The process for Sales Orders, Sales Quotes, Sales Invoices, Posted Sales Invoices, and Posted Sales Shipment is very similar, so below we will show just Sales Order as an example.

To send Signet Authentication on Sales Order start by Selecting O*rder* and then *Signet Authentication.*
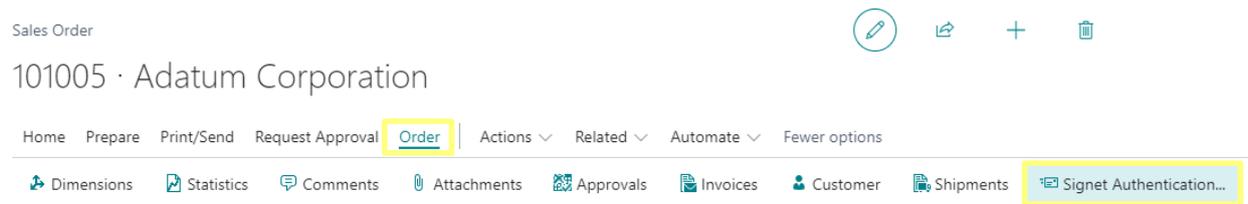
After clicking the *Signet Authentication* button, you will get a window (*Send Authentication Msg.*) with a field for **Phone No.** and the **Authentication text** that will be sent to the phone.

If the sales order has a contact in the field **Contact No.** and that contact has a value in the field Phone no.

Then that phone no. will appear in the Phone No. field in the *Send Authentication Msg*. window.

If the contact that is selected on the sales order is not the one you want to Authenticate you can just replace the number in Phone No. field.

The Authenticator will receive a message in their phone that they need to respond to.

The message will contain the name of the company that is asking for the authentication.

Possible documents that can be received are a sales order, sales quote, sales invoice, or delivery.

The message also contains the no. of the document.
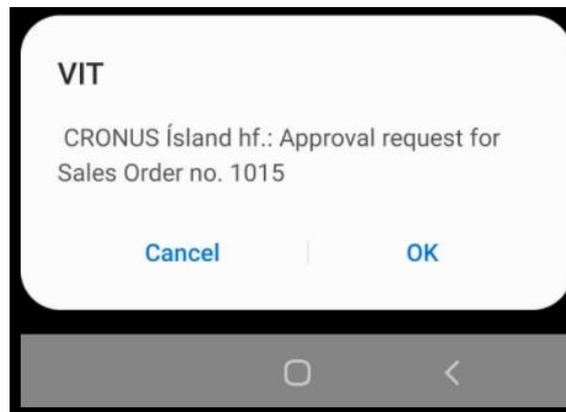
After you send authentication, the authenticator has up to 2 min to react to the request. If there is no reaction at that time, the authentication is canceled. Whatever the action of the authenticator is, you will get a message back with information on the action.

On the **Sales Order** page you can find the Fact Box **Signet Authentication.**

There you can see the authentications that have been accepted for that sales order.

The fact box contains Name, SSN, Phone No. and Date and time accepted, Signet Type (Financial or delivery) and amount. More information for each transaction can be found in the Signet Connector Transaction page.

Signet Connection chains/links:

- If a Sales Quote has a Signet Authentication Transaction and is then changed to Order/Invoice, then that Transaction will get the same Document No. and Type as the new Order/Invoice.

On the List pages for Sales Order, Sales Quote, Sales Invoice, Posted Sales Invoice and Posted Sales Shipment you can find a Column with the name **Signet Signature**. If it is blank then there is no signature behind that document, but if it has the value *Financial* (Sales Order, Sales Quote, Sales Invoice) or *Delivery* (Posted Sales Invoice and Posted Sales Shipment) there is a signature. If the

Column has a value, you can click on it, and it will open a new window with the signature for that document.