## Advania Creditinfo Connection

Setup and instructions





# Advania Creditinfo Connection

## **1.** Advania Setup Data Services

To make our and customers lives easier, Advania developed *Setup Data Services* solution which can download and setup all necessary data for solutions. Following the steps below, setup data will be downloaded for standard tables, so even if database is empty, with downloaded data *Business Central* will be prepared for working.

1. On the Home Page, click Search icon and type Setup Data Services Setup

Setup Data Ser Setup		×
Go to Pages and Tasks		Show all (4
> Setup Data Service Setup	Administration	
> Advania Setup Data Services	Administration	
> Common Data Service Connection Setup	Administration	

"Tell me"

2. Click Advania Setup Data Services and set *Enabled* to true.:

		More options	Data Setup	rocess
k		ICE SETUP	SETUP DATA SERVICE	EDIT - SE
			ral	Genera
			d · · · · · · · · · · · · · · · · · · ·	Enabled
			entication	Auther
			itication Set	
	Custom Service Endp	https://azure2018a.navleiga.is:704	ntication Set	Authentio

## Setup Data Services Setup

In case that *Setup Data Service* functionality is not enabled and there is no *Registration No.* in *Company Information* table, confirmation dialog will pop up:



?	The company registration number is missing in Company Information, update now ?
	Yes No

**Registration No.** needs to be filled on *Company Information* page in so the system can be able to download the data.

\*Important: For testing purpose Registration No. 5902697199 will be used, to be able to download.

3. Run Data Services action:

1.

$\leftarrow$	(♂) + III ✓ SAVED □ □	2
	Setup Data Service Setup	
	Process Data Setup Actions Navigate Fewer options	
	Authentication I Data Services I User Messages	-12

3.

4. *Setup Data Service Setup* page is opened, click on *Download* action to open the Download page:

ADVANIA SET	or brinde						ĸ
🔎 Search	Manage	🕵 Assisted Setup	🕏 Download	🐻 Company S	ettings	a, Business Setup	7 ■
DESCRIPTIO	Ň					STATUS	
General Led	ger Setup Da					Uninitialized	

Advania Setup Data Services

5. Click Prepare page action to download the list of tables that are going to be filled in after the download:

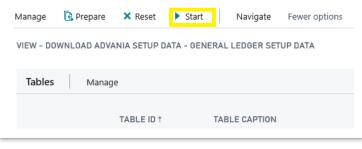


/IEW - DOWNLOAD ADVANIA SETUP DATA	- GENERAL LEDGER SETUP DATA	2>
Tables Manage		
	74.01 5.04.07.01	CURRENT NO. OF
TABLE ID ↑ 4	TABLE CAPTION Currency	RECORDS
5	Finance Charge Terms	
8	Language	
9	Country/Region	
10	Shipment Method	
15	G/L Account	
42	Rounding Method	
50	Accounting Period	
77	Report Selections	63
80	Gen. Journal Template	

Download Advania Setup Data

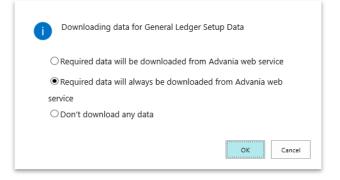
The tables that are empty are colored in green. On the other hand, tables that already have some records, are colored in red.

6. Once the table list is prepared, click on Start page action to run the setup data download.



Download Advania Setup Data

Choose whether the data will be downloaded from Advania web service once, always or cancel the download by selecting one of the following options:



Wait until the system finishes the download:



Working on it... Please wait while the server is processing your request. This may take several minutes.

7. Check if all tables in the list are colored in red, which means that data was downloaded. Close *Download Advania Setup Data* page. After the data was downloaded, *General Ledger Setup Data* will have status Initialized:

DVANIA SET	UP DATA SE	RVICES				ď	ĸ
✓ Search	Manage	😵 Assisted Setup	ily Download	Company Settings	Setup	7	-
Description					Status		
General Led	ger Setup Da	ata		:	Initialized		

Advania Setup Data Services

## 2. SETTING UP CREDITINFO

## **CreditInfo Setup page**

To start using a solution, *CreditInfo Connection* solution needs to be enabled in *CreditInfo Setup* page. *CreditInfo Setup* page can be accessed after typing *CreditInfo Setup* into Search bar

CreditInfo Setup		
Go to Pages and Tasks		
CreditInfo Setup	Administration	

"Tell me"

Authentication must be set up. For testing purposes, you can you next credentials: **Username:** ws.advania.test1, **Password**: Cr.2019.InfoTest. This can be set up using Authentication action.



<i></i>		12
CreditInfo Setup		
Process <u>Authentication</u> Actions	Related Fewer options	
Real Authentication		-17
Enabled · · · · · · · · · · · ·	Name · · · · · · Advania - Creditinfo	

Setting up username and password

After enabling solution Job Queue Entry is created. This work queue gets informations from CreditInfo web service. This queue entry can be seen *using Job Queue Entry* action under tab *Actions* from this setup page.

Job queue is created automatically and it runs every 5 minutes. If there is a need to run less often, then the time needs to be changed.

J	ob Queue En	tries   Wor	k Date: 4/12/202	1											√ Saved		3 74
	,  P Search	+ New	🕼 Edit List	🔋 Delete	🖊 Edit	<b>View</b>	Show Error	🔎 Set Status to Ready	Set On Hold	Restart	😤 Run once (foreground)	Log Entries	🖷 Open in Excel	More optic	ms	2	7 🔳
	Status		User ID			Object Type to Run <b>T</b>	Object ID to Run	Object Caption to Run	Descr	ription	Job Queue Category Code	User Session St	arted Earliest Start Dab	e/Time Sche	Recu Job		No. of linutes n Runs
	→ Ready		ADVANIA			Codeunit	10011454	ADV CR Import Watch	to Acknowl				4/27/2021 11:	20 AM			720

Job Queue Entry that is created for CreditInfo tracking

		+ 1		√ Saved	
CreditInfo Setup					
Process Authentication Actions	Related Fewer	r options			
General					
Enabled · · · · · · · · · · · · · · · · · · ·		Name · · · · · ·	Advar	nia - Creditinfo	
You must disable the service before you can ma	ake changes.	Use My Custome	rs · · · · ·	)	
Enpoints					
Services					
Statement Service URL	https://w	ws.lt.is/CustomerMonit	tor/CustomerMon	itorService.asm	x
Test Statement Service URL	http://w	wsdemo.lt.is/Custom	erMonitor/Cust	tomerMonitorS	Service.asmx

Credit Info setup page

Under tab Endpoints Service URLs can be set. Path that is coloured green represents active URL. This can be changed using Switch Service URL action.

🎰 Authentication 🔡	Switch Service UR	L 🗟 Job Queue Entry



#### Switch Serice URL action

After this setup there are few things more that have to be adjusted.

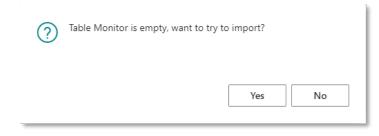
## **CreditInfo monitors**

Click on the *CreditInfo Monitors* action on the main Role Center.

hf.		Finance $\lor$	Cash Management $\smallsetminus$	Sales $\vee$	Purchasing $\vee$	Setup & Extensions $\smallsetminus$	$Payroll{\smallsetminus}$	CreditInfo $\smallsetminus$	Appr
Credit	Info	Monitors	CreditInfo Severity Groups	credit	Info Actions Type	s CreditInfo Customers	CreditInf	o Score Catego	ries

#### Role Center actions

If you are starting this for the first time, you will get next message. This dialog has to be confirmed.



After confirming you will get one monitor.

<u>7609</u>	:	VMV TEST		12/31/2021 1:00 AM		100
Monitor ID † V		Monitor Name		Expires	ls Open	Limit Blocked
CreditInfo Monitors: All $\vee$	∕⊃ Se	arch 🧃 Delete 🐺 Edi	List 💀 Get Watch To Acknowledge A	ctions ~ Fewer options		rs ∠ ≡ ∿ ∐

CreditInfo Monitors page

## **CreditInfo Severity Groups**

Click on the *CreditInfo Severity Groups* action on the main Role Center.

hf. Finance $\vee$	Cash Management $\smallsetminus$ S	Sales $\lor$	Purchasing $\smallsetminus$	Setup & Extensions $\smallsetminus$	Payroll $\smallsetminus$	<b>CreditInfo</b> ∨ A¢
CreditInfo Monitors	CreditInfo Severity Groups	CreditIn	nfo Actions Types	CreditInfo Customers	CreditIn	fo Score Categories



Role Center actions

If you are starting this for the first time, you will get similar message like it was in the previous chapter. This dialog has to be confirmed. After confirming this dialog Severity Groups will be downloaded.

CreditInfo Severity Groups: All $\sim$ $\mathcal{P}$ Search Actions $\sim$		& 7 ≡ 2 1
Severity Group ID ↑	Severity Group Meaning	
Q	Registrations that are not defaults	
1	Insolvency	
2	Very severe defaults	
3	Severe defaults	
10	Registrations from creditors representative	

CreditInfo Severity Groups page

## **CreditInfo Action Types**

Click on the CreditInfo Action Types action on the main Role Center.

hf.		Finance $\lor$	Cash Management $\smallsetminus$	Sales $\lor$	Purchasing $\smallsetminus$	Setup & Extensions $\smallsetminus$	Payroll $\lor$	CreditInfo $\smallsetminus$	Ap
Credit	tInfo	0 Monitors	CreditInfo Severity Groups	s Credit	tInfo Actions Types	CreditInfo Customers	CreditIn	fo Score Categor	ries

#### Role Center actions

If you are starting this for the first time, you will get similar message like it was in the previous chapter. This dialog has to be confirmed. After confirming this dialog Action types will be downloaded.



CreditInfo Actions Types: All $\checkmark$ Search Actions $\checkmark$			
Туре т	Type Meaning	Type Description	Severity Group
aa	Court-signed subpoena, guarantor	IF the defendant (the Guarantor) does not show up at the prelimi	3
af	Attachment without (positive) results	The District Commissioner has completed an attachment when a	1
ages	Requisition of solvency not met	The creditor can demand that the debtor's estate be declared ba	1
as	Court-signed subpoena	If the defendant (the guarantor) does not show up at the prelimi	2
bk	Marriage settlement, changes	A marriage settlement is a legal act between a married or betrot	0
bst	Served with subpoena	A subpoena is the formal notification by the plaintiff (creditor) to	3
bsta	Served with subpoena, guarantor	A subpoena is the formal notification by the plaintiff (creditor) to	3
da	Court judgement for debt, guarantor	The written conclusion of a court on the subject of a certain case	3
do	Court judgement for debt	The written conclusion of a court on the subject of a certain case	2
fe	Financial restructuring authorized		0
ffe	Extension of Authorisation for Financial R	estructuring	0
fn	Initiation of forced sale proceedings	Forced sale is a procedure for selling a property regardless of the	2
gaft		Registration stops. An applicant for a composition of adjusted pa	10
gbn	Request for bankruptcy	A creditor files a request for bankrutpcy of the debtor's estate pr	1
gj	Bankruptcy	A bankruptcy is when an individual or a company declare themse	1
glfg		No longer published. Applicant for debt mitigation is no longer i	10
gmot		No longer published. A confirmation that the Debtor's Ombuds	10
gsah		No longer published. A debt mitigation agreement for an individ	10
gsam		No longer published. A debt mitigation agreement for an individ	10
gsas	Debt mitigation agreement	A debt mitigation agreement proposal for an individual is consid	10
gst	Moratorium of payments	A moratorium of payments is among the options available to a d	1
iesa	A proclamation of type A due to private s	ettlement Beneficiaries that have received permission for a private settleme	0

#### CreditInfo Action Types page

## **CreditInfo Score Categories**

Click on the *CreditInfo Score Categories* action on the main Role Center.

CreditIn	fo Monitors	CreditInfo Severity Group	s Credit	Info Actions Types	s CreditInfo Customers	CreditInf	fo Score Categories	
hf.	$Finance \vee$	Cash Management $\vee$	Sales $\vee$	Purchasing $\vee$	Setup & Extensions $\vee$	Payroll $\sim$	CreditInfo $\vee$ A	/b

Role Center actions

If you are starting this for the first time, you will get similar message like it was in the previous chapter. This dialog has to be confirmed. After confirming this dialog Score Categories will be downloaded.



reditInfo Actions Types: All $\sim$ $>$ Search	Actions $\lor$			☞ ♡ ≡ 2
Type ↑		Type Meaning	Type Description	Severity Group
<u>aa</u>		Court-signed subpoena, guarantor	IF the defendant (the Guarantor) does not show up at the prelimi	.3
af		Attachment without (positive) results	The District Commissioner has completed an attachment when a	1
ages		Requisition of solvency not met	The creditor can demand that the debtor's estate be declared ba	1
as		Court-signed subpoena	If the defendant (the guarantor) does not show up at the prelimi	2
bk		Marriage settlement, changes	A marriage settlement is a legal act between a married or betrot	0
bst		Served with subpoena	A subpoena is the formal notification by the plaintiff (creditor) to	3
bsta		Served with subpoena, guarantor	A subpoena is the formal notification by the plaintiff (creditor) to	3
la		Court judgement for debt, guarantor	The written conclusion of a court on the subject of a certain case	3
lo		Court judgement for debt	The written conclusion of a court on the subject of a certain case	2
e		Financial restructuring authorized		0
fe		Extension of Authorisation for Financial Restructuring		0
n		Initiation of forced sale proceedings	Forced sale is a procedure for selling a property regardless of the	2
gaft			Registration stops. An applicant for a composition of adjusted pa	10
Jbn		Request for bankruptcy	A creditor files a request for bankrutpcy of the debtor's estate pr	1
Ú		Bankruptcy	A bankruptcy is when an individual or a company declare themse	1
lfg			No longer published. Applicant for debt mitigation is no longer i	10
imot			No longer published. A confirmation that the Debtor's Ombuds	10
jsah			No longer published. A debt mitigation agreement for an individ	10
isam			No longer published. A debt mitigation agreement for an individ	10
sas		Debt mitigation agreement	A debt mitigation agreement proposal for an individual is consid	10
ist		Moratorium of payments	A moratorium of payments is among the options available to a d	1
esa		A proclamation of type A due to private settlement	Beneficiaries that have received permission for a private settleme	0

#### CreditInfo Score Categories page

## **3.** CUSTOMER MONITORING

Adding customer to watch list can be done using *Toggle Watch* action from *CreditInfo Watch* part on *Customer List* or *Customer Card*. This action is used also for removing customer from watch list.

	New Manage Process	Report New Document Customer Nav	igate Prices & Discounts A	Actions Related I	Reports SmartList	Fewer options		r V
lo. †	Name	Responsibility Center Location Code Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments	
0000	Adatum Corporation		Alvaro Carrera	732,778	732,778	14,580,410	16,999	Details     I Attachments (0)
0000	Trey Research		Catalina Grimes	1,024,773	946,839	3,825,300	3,718	
0000	School of Fine Art		Meagan Bond	3,509,240	3,384,980	14,560,980	11,051	CreditInfo Watch ∨ Z Toggle Watch
0000	Alpine Ski House		lan Deberry	598,510	598,510	4,658,280	3,978	<u> </u>
0000	Relectoud		Carlton Nason	674,027	438,960	5,473,850	6,113	Show Card
	Folda sf.			0	0	0		New Category Code

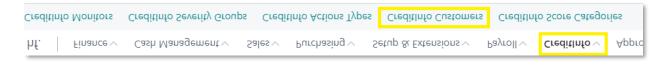


Dialog box opens. You should click "No".



?	Remove Previous Registration Nos?		
		Yes	No

## Click on the *CreditInfo Customers* action on the main Role Center.



#### Role Center actions

This action will open list with customers that are monitored.

CreditInfo Custome	ers: All 🗸	🔎 Search								
Customer No. ↑	Registration No.	Name	Score Date	Old Category Code	Old Category Name	New Category Code	New Category Name	Record Date	Type ID	s
<u>C00010</u>	6305120260	)								

CreditInfo Customers

Get Watch To Acknowledge action on CreditInfo Monitors page is used for manually resfreshing data on CreditInfo Customers list.

CreditInfo Monitors: All ~		📋 Delete	🔛 Edit List	💕 Get Watch To Acknowledge	Action	ns∨ Fewer options		Ŀ	♡ ≡ 2 []
Monitor ID ↑	м	onitor Name			E	xpires	Is Open	Limit	Blocked
<u>7609</u>	: v	MV TEST			1	12/31/2021 1:00 AM		100	

CreditInfo Monitors

Go back to CreditInfo Customers list and you will see that new data is downloaded.

CreditInfo Custom	ner	List: All 🗸	, Search										☞ 7 ■	» <sup>к</sup> П
Customer No. †		Registration No.	Name	Score Date	Old Category Code	Old Category Name	New Category Code	New Category Name	Record Date	Type ID	State ID	Number of Records	Severity Group	Severit Group Coun
<u>C00010</u>		6305120260	Folda sf.	10/8/2021 1:31 PM			101					0		

#### CreditInfo Customers



For more detailed information about CreditInfo data you may go to page by clicking on *Customer No.* field.

6305120260 · Folda sf.									
General									
Customer No.	C00010		Name ····· Folda sf.						
Registration No.	6305120260		Is Default Debtor						
Action Types			Severity Group 1 Count	1					
Action Types			Severity Group 1 Count	1					
Action Types Record Date				1 0 5					
Credit Score > Action Types Record Date Type ID State ID Number of Records		0	Severity Group 2 Count						

#### CreditInfo Customer Card

Data are also updated on Customer list.

Customers									
⊖ Search	+ New Manage Process	Report New Document Customer	Navigate Prices & Discounts	Actions Related	Reports SmartList	Fewer options		1	8 7 ≣
No. †	Name	Responsibility Center Location Code Phone	No. Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments		
10000	Adatum Corporation		Alvaro Carrera	813,758	732,836	14,645,670	16,999	① Details ① Attachments (0)	)
20000	Trey Research		Catalina Grimes	1.024.773	946.839	3.825.300	3,718	CreditInfo Watch~	
30000	School of Fine Art		Meagan Bond	3,509,240	3,384,980	14,560,980	11,051	Creditinto watch~	
40000	Alpine Ski House		lan Deberry	598.510	598.510	4,658,280	3,978	Score Date	10/8/2021
50000	Relectoud		Carlton Nason	674,027	438,960	5,473,850	6,113	Old Category Code	
200010	Folda sf.			0	0	0		New Category Code	101
00020	Hjortur S			-294	-294	0		Severity Group	
					15.507			Is Default Debtor	Yes

Customer List – CreditInfo Watch part

The same part is also available on Customer card.