



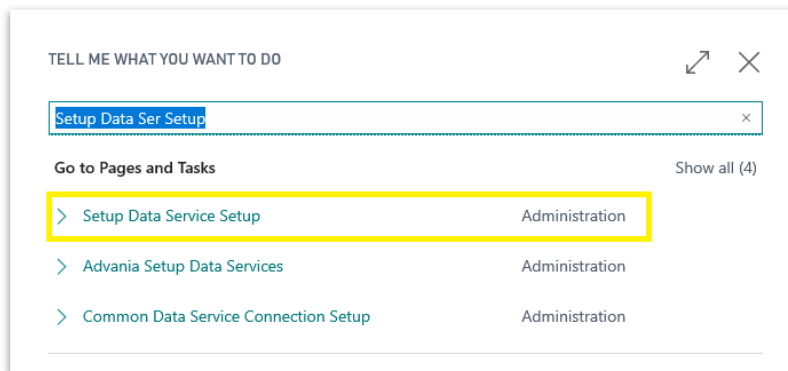
Advania Creditinfo Connection
Setup and instructions

Advania Creditinfo Connection

1. ADVANIA SETUP DATA SERVICES

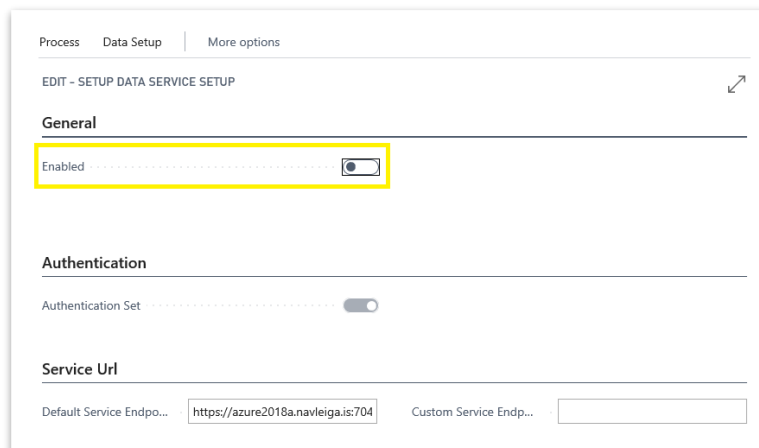
To make our and customers lives easier, Advania developed *Setup Data Services* solution which can download and setup all necessary data for solutions. Following the steps below, setup data will be downloaded for standard tables, so even if database is empty, with downloaded data *Business Central* will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

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



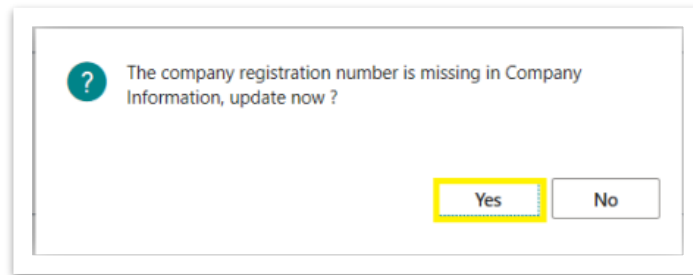
“Tell me”

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



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:

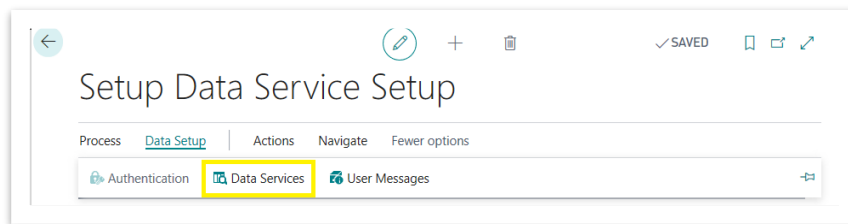


Registration No. needs to be filled on *Company Information* page in so the system can be able to download the data.

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

3. Run *Data Services* action:

1.

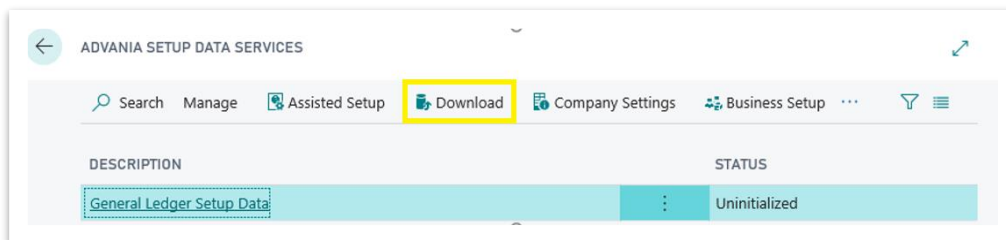


2.

Setup Data Services Setup

3.

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



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:

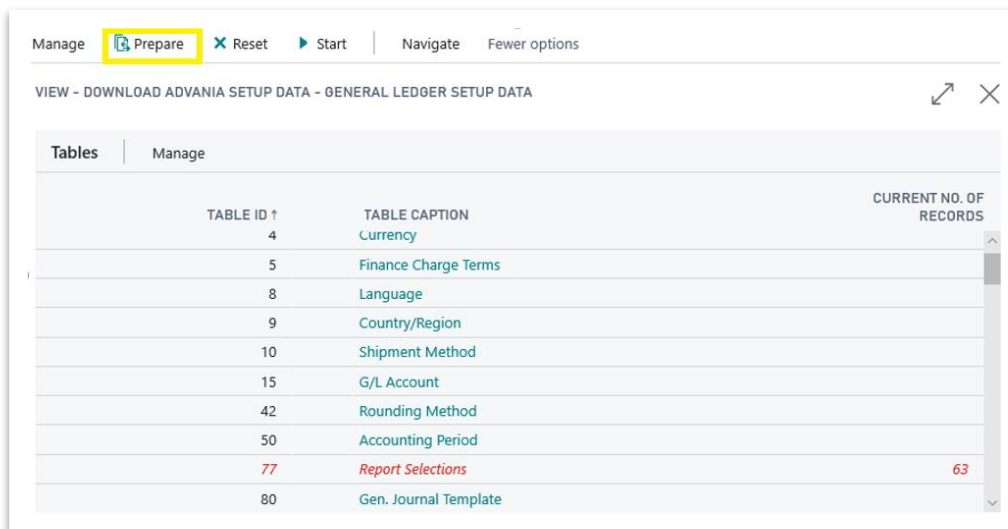
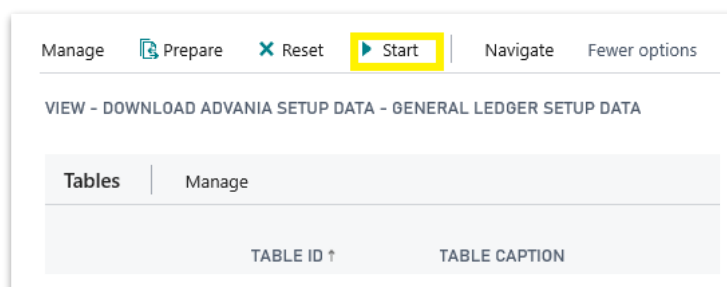


TABLE ID ↑	TABLE CAPTION	CURRENT NO. OF RECORDS
4	Currency	
5	Finance Charge Terms	
8	Language	
9	Country/Region	
10	Shipment Method	
15	G/L Account	
42	Rounding Method	
50	Accounting Period	
77	Report Selections	63
80	Gen. Journal Template	

Download Advania Setup Data

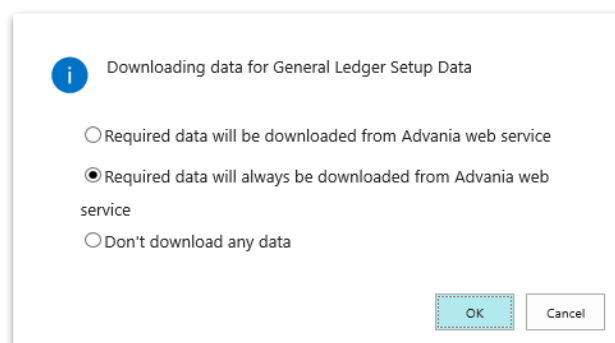
The tables that are empty are colored in green. On the other hand, tables that already have some records, are colored in red.

- 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:

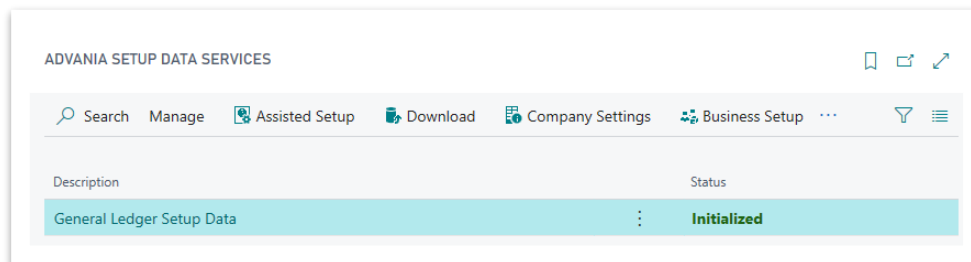


Wait until the system finishes the download:

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**:

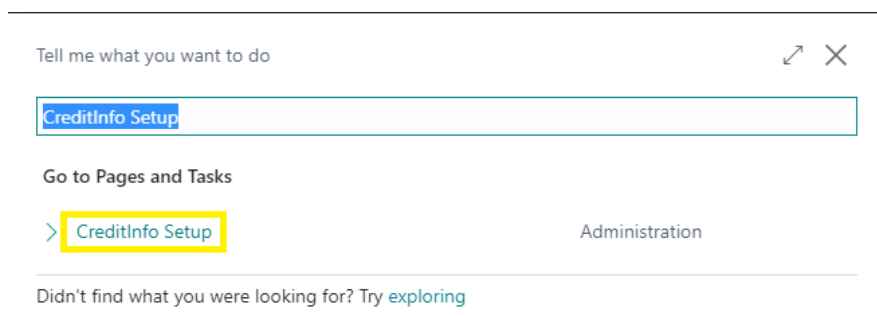


Advania Setup Data Services

2. SETTING UP CREDITINFO

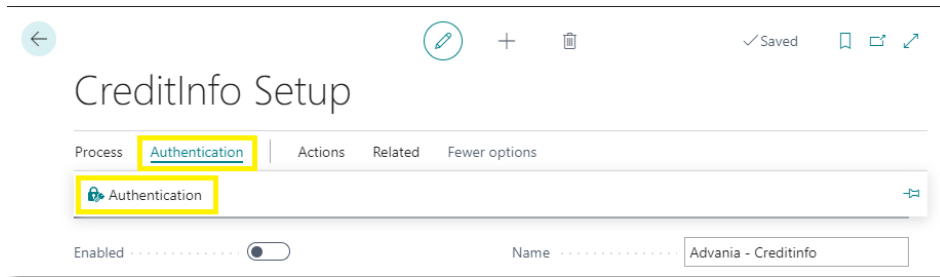
CreditInfo Setup page

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



"Tell me"

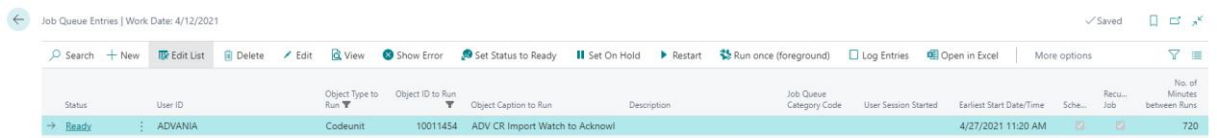
Authentication must be set up. For testing purposes, you can use next credentials: **Username:** ws.advania.test1, **Password:** Cr.2019.InfoTest. This can be set up using *Authentication* action.



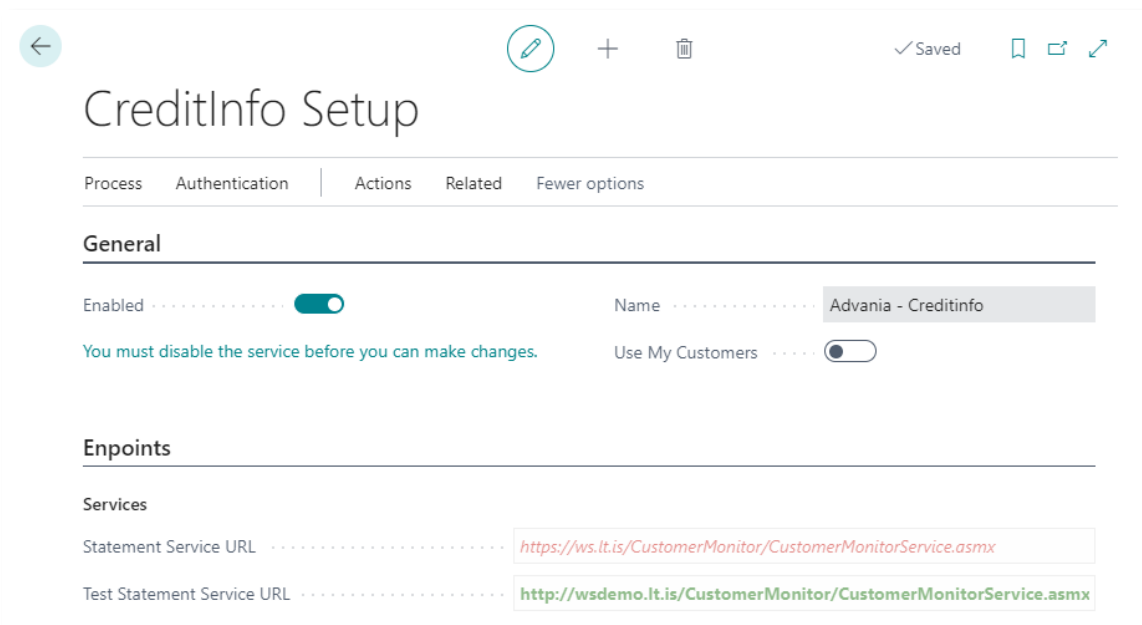
Setting up username and password

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.

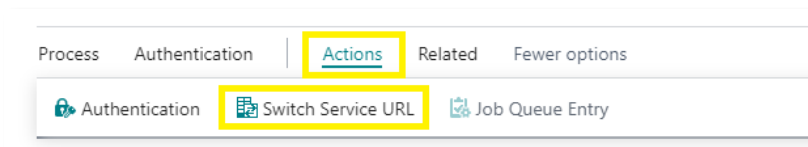


Job Queue Entry that is created for CreditInfo tracking



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.

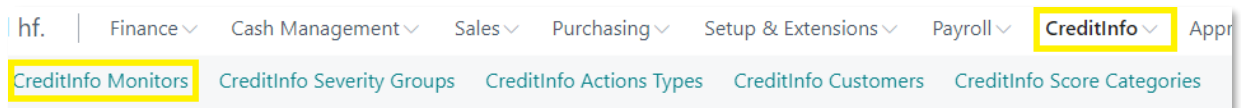


Switch Service URL action

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

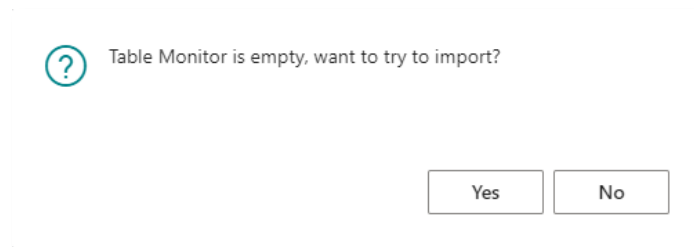
CreditInfo monitors

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

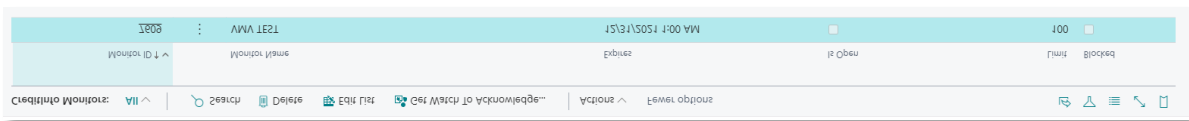


Role Center actions

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



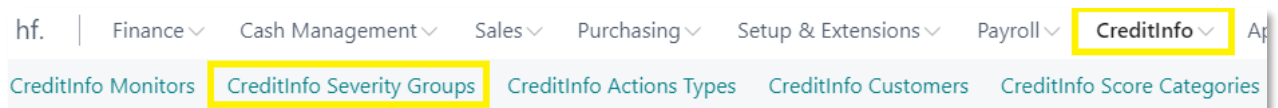
After confirming you will get one monitor.



CreditInfo Monitors page

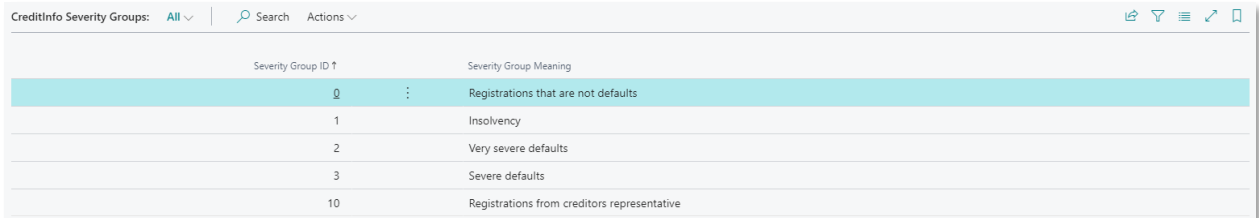
CreditInfo Severity Groups

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



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.

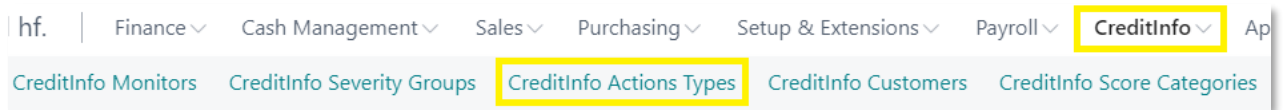


Severity Group ID ↑	Severity Group Meaning
0	Registrations that are not defaults
1	Insolvency
2	Very severe defaults
3	Severe defaults
10	Registrations from creditors representative

CreditInfo Severity Groups page

CreditInfo Action Types

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



Role Center actions

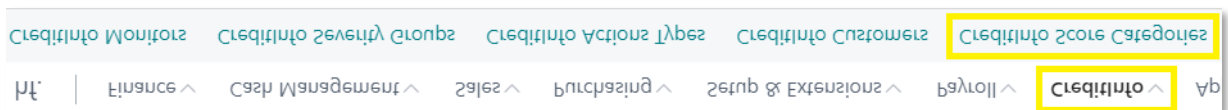
If you are starting this for the first time, you will get similar message like it was in the previous chapter. This dialog has to be confirmed. After confirming this dialog Action types will be downloaded.

Type †	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
bst	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 Restructuring		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 bankruptcy of the debtor's estate pr...	1
gj	Bankruptcy	A bankruptcy is when an individual or a company declare themse...	1
gifg		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 settlement	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.



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.

CreditInfo Actions Types: All Search Actions

Type ↑	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
bst	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 Restructuring		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 bankruptcy 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
ies	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.

Customers

Search + New Manage Process Report New Document Customer Navigate Prices & Discounts Actions Related Reports SmartList Fewer options

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments
10000	Adatum Corporation				Alvaro Carrera	732,778	732,778	14,580,410	16,995
20000	Trey Research				Catalina Grimes	1,024,773	946,839	3,825,300	3,716
30000	School of Fine Art				Meagan Bond	3,509,240	3,384,980	14,560,980	11,051
40000	Alpine Ski House				Ian Deberry	598,510	598,510	4,658,280	3,976
50000	Relecloud				Carlton Nason	674,027	438,960	5,473,850	6,113
C00010	Folda sf.					0	0	0	

Details Attachments (0)

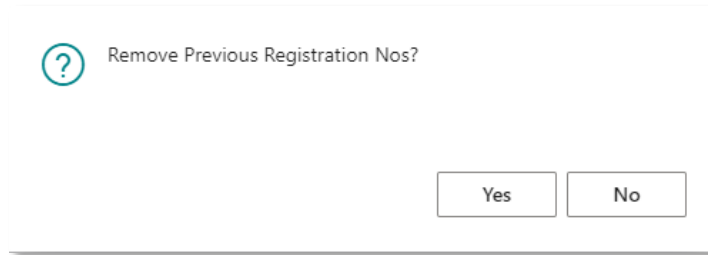
CreditInfo Watch

- Toggle Watch
- Show Card

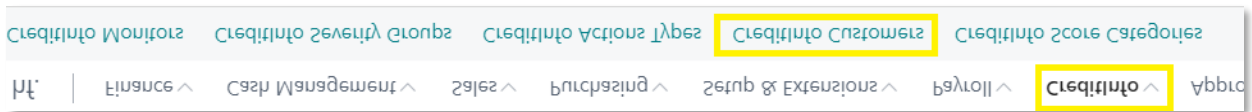
New Category Code
Severity Group
Is Default Debtor

Customer List - Toggle Watch action

Dialog box opens. You should click „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.

Customer No.	Registration No.	Name	Score Date	Old Category Code	Old Category Name	New Category Code	New Category Name	Record Date	Type ID
C00010	6305120260								

CreditInfo Customers

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

Monitor ID	Monitor Name	Expires	Is Open	Limit	Blocked
7609	VMV TEST	12/31/2021 1:00 AM	<input type="checkbox"/>	100	<input type="checkbox"/>

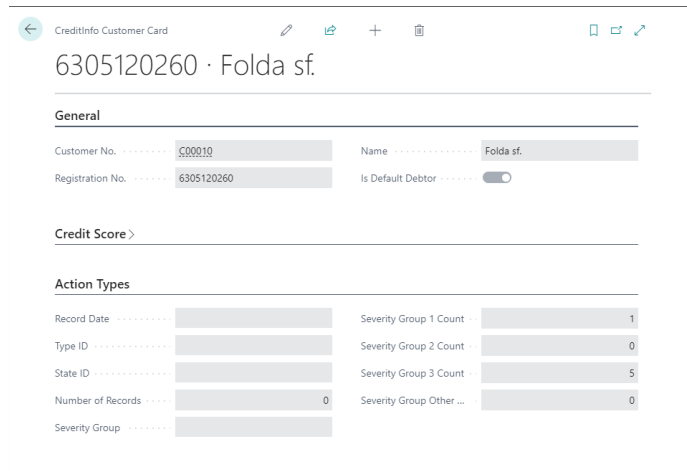
CreditInfo Monitors

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

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	Severity Group Count
C00010	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.



CreditInfo Customer Card

6305120260 · Folda sf.

General

Customer No. C00010 Name Folda sf.
 Registration No. 6305120260 Is Default Debtor

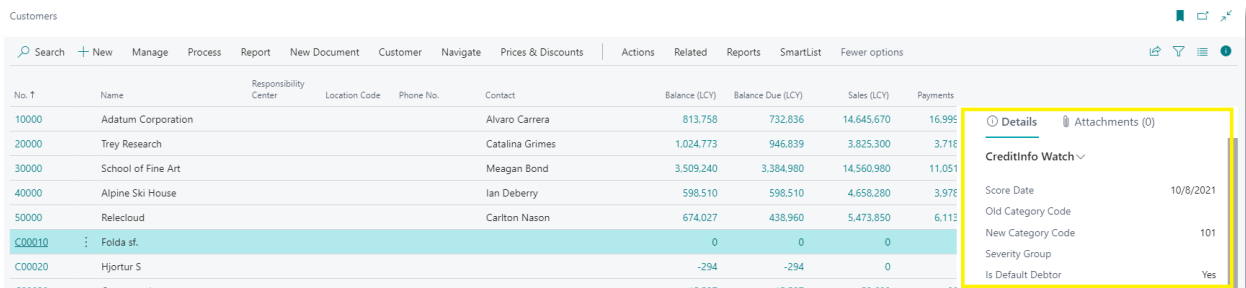
Credit Score >

Action Types

Record Date		Severity Group 1 Count	1
Type ID		Severity Group 2 Count	0
State ID		Severity Group 3 Count	5
Number of Records	0	Severity Group Other ...	0
Severity Group			

CreditInfo Customer Card

Data are also updated on Customer list.



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	16.995
20000	Trey Research				Catalina Grimes	1.024.773	946.839	3.825.300	3.718
30000	School of Fine Art				Meagan Bond	3.509.240	3.384.980	14.560.980	11.051
40000	Alpine Ski House				Ian Deberry	598.510	598.510	4.658.280	3.978
50000	Relecloud				Carlton Nason	674.027	438.960	5.473.850	6.113
C00010	Folda sf.					0	0	0	
C00020	Hjortur S					-294	-294	0	

Details Attachments (0)

CreditInfo Watch ▾

Score Date 10/8/2021

Old Category Code

New Category Code 101

Severity Group

Is Default Debtor Yes

Customer List – CreditInfo Watch part

The same part is also available on Customer card.