

Advania Document Sending Service

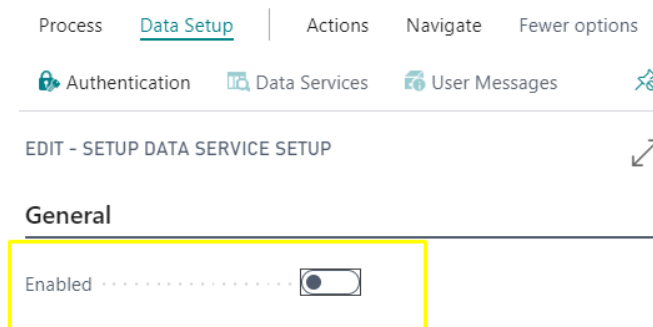
Setup and instructions



Advania Document Sending Service

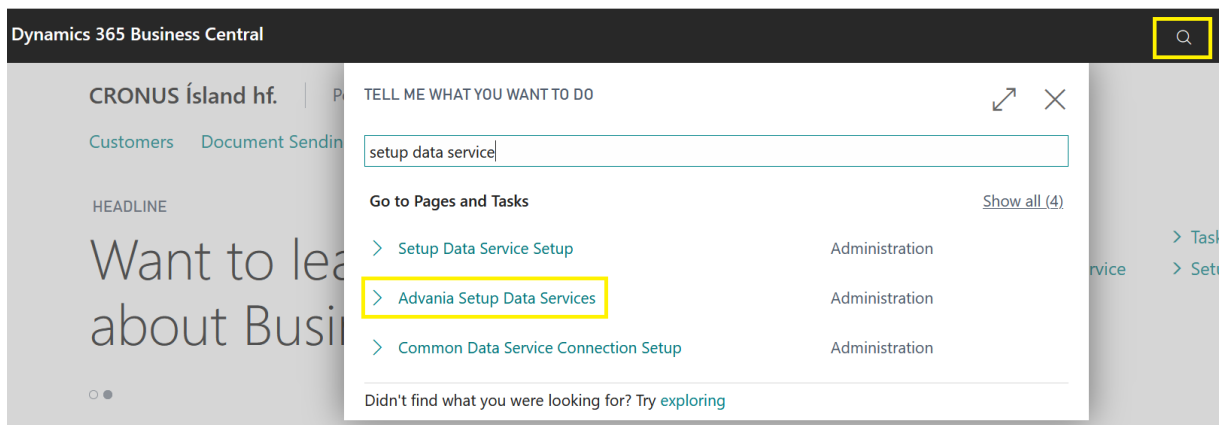
1. SETUP

On the Home page, click Search icon and type Setup Data Service. Open the page and click Enabled field in order to enable data download.



Then click Search icon and type Advania Setup Data Services.

Click Advania Setup Data Services. Advania Setup Data Services page opens.



Click on Company Settings page action in order to open Company Information page. Registration No. needs to be populated on Company Information page for the system to be able to download the data.

← ADVANIA SETUP DATA SERVICES ↗

Search Manage Assisted Setup Download **Company Settings** Business Setup ... Filter Menu

DESCRIPTION STATUS

Click Download to open the download page.

← ADVANIA SETUP DATA SERVICES ↗

Search Manage Assisted Setup **Download** Company Settings Business Setup ... Filter Menu

DESCRIPTION STATUS

Manage Prepare Reset Start More options

VIEW - DOWNLOAD ADVANIA SETUP DATA - GENERAL LEDGER SETUP DATA ↗ ✕

Tables	Manage
Table ID ↑	Table Caption
	Current No. of Records
(There is nothing to show in this view)	




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



Manage **Prepare** Reset Start More options


VIEW - DOWNLOAD ADVANIA SETUP DATA - GENERAL LEDGER SETUP DATA ↗ ✕

Tables	Manage
Table ID ↑	Table Caption
	Current No. of Records
(There is nothing to show in this view)	




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

Manage  Prepare  Reset  Start | More options





VIEW - DOWNLOAD ADVANIA SETUP DATA - GENERAL LEDGER SETUP DATA  

Tables	Manage			
	Table ID ↑		Table Caption	Current No. of Records
→	3		Payment Terms	
	4		Currency	
	5		Finance Charge Terms	
	8		Language	
	9		Country/Region	1
	10		Shipment Method	

Click Manage page action:
It opens a list of options to handle the table list.




Manage  Prepare  Reset  Start | Navigate Fewer options

VIEW - DOWNLOAD ADVANIA SETUP DATA - GENERAL LEDGER SETUP DATA

Tables	Manage
 Delete Line	 Add Setup Table...
 Remove Setup Table...	 Edit Setup Table Filter...

Add Setup Table:	Enables user to include new table into Setup Data download process
Remove Setup Table:	Removes the table from the setup list, so data would not be downloaded to it.
Edit Setup Table Filer:	enables user to set table filter in order to download data to a specific set of records only.

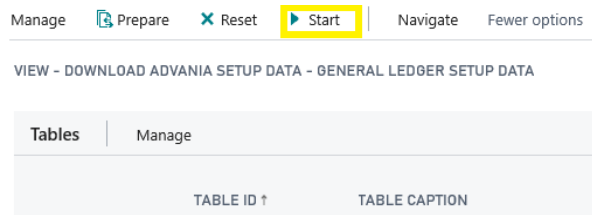
To clear the table list, click Reset page action and run Prepare action again:

Manage  Prepare  Reset  Start | Navigate Fewer options

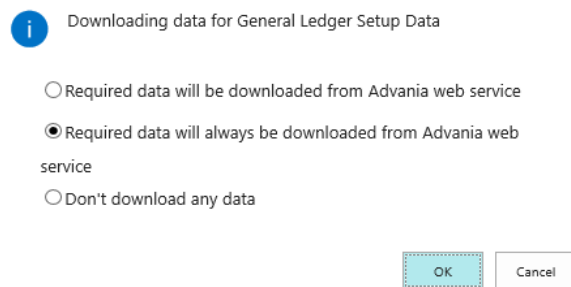
VIEW - DOWNLOAD ADVANIA SETUP DATA - GENERAL LEDGER SETUP DATA

Tables	Manage	
	TABLE ID ↑	TABLE CAPTION

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



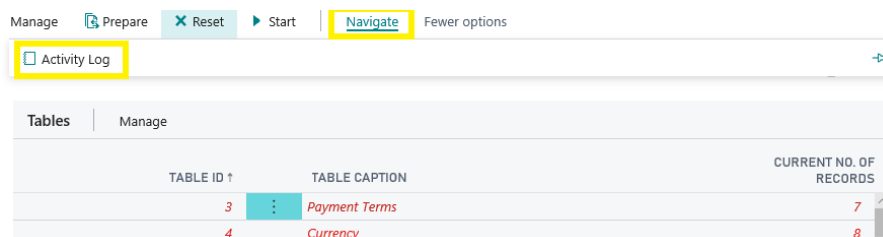
Choose whether the data will be downloaded from Advania web service once, always or cancel the download by selecting one of the following options:



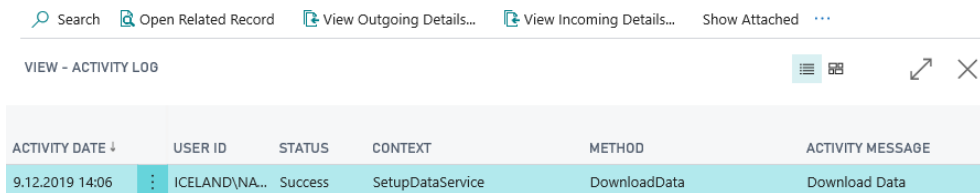
Wait until the system finishes the download:

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

Check if all tables in the list are colored in red, which means that data was downloaded. Click Navigate page action and select Activity log.



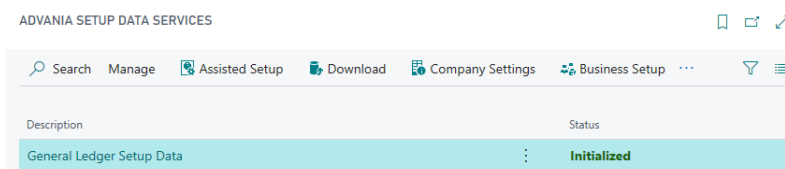
It will open the list that will show the history of setup data download:



ACTIVITY DATE ↓	USER ID	STATUS	CONTEXT	METHOD	ACTIVITY MESSAGE
9.12.2019 14:06	ICELAND\NA...	Success	SetupDataService	DownloadData	Download Data

Close Download Advania Setup Data page.

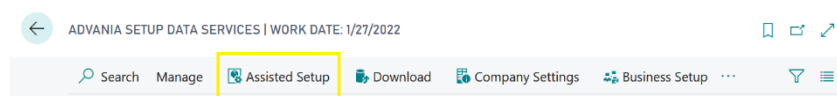
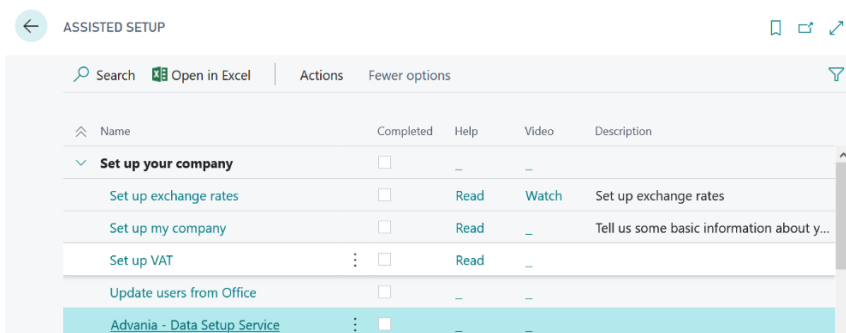
After the data was downloaded, General Ledger Setup Data will have status Initialized:



Description	Status
General Ledger Setup Data	Initialized


If the status is Uninitialized, that means that Setup data has not been downloaded yet, we can use Assisted Setup for download Setup Data.

Click Assisted Setup page action on Advania Setup Data Services page:







Name	Completed	Help	Video	Description
Set up your company	<input type="checkbox"/>	-	-	
Set up exchange rates	<input type="checkbox"/>	Read	Watch	Set up exchange rates
Set up my company	<input type="checkbox"/>	Read	-	Tell us some basic information about y...
Set up VAT	<input type="checkbox"/>	Read	-	
Update users from Office	<input type="checkbox"/>	-	-	
Advania - Data Setup Service	<input type="checkbox"/>	-	-	

In case that data download was already run, the following message will be displayed:

 You have already completed the Advania - Data Setup Service assisted setup guide. Do you want to run it again?

If you decide to continue, this will launch the wizard for this process:

DOWNLOAD SETUP DATA  





WELCOME TO NEW COMPANY SETUP USING ADVANIA SETUP DATA


Before we download the setup data the company information is required. Next we download all the setup data from Advania's web services and you can start your accounting.

LET'S GO!

Choose Next so you can set up company information.

Click Next, enter the required company information and click Next again:

DOWNLOAD SETUP DATA  




Please enter the basic company information

Registration No. 5902697199

Name CRONUS SDS Island hf.

Once the following page is displayed, press the Download button to run Setup Data download:

DOWNLOAD SETUP DATA ↗ ✕











To download setup data, choose Download.

Description	General Ledger Setup Data
Status	Uninitialized

Once the download is complete, go to Document Sending Setup page. Verify that the field Enabled is set to false. Then select Actions and click on Download Setup Data.

Document Sending Setup

 Job Queue Entry  Copyright Advania, Iceland | Actions Fewer options

 Job Queue Entry  Download Setup Data...  Activity Log  Copyright Advania, Iceland  Version 

Enabled

After the download is complete, set the field Enabled to true.

Document Sending Setup

Job Queue Entry | Copyright Advania, Iceland | Actions Fewer options

General

You must disable the service before you can make changes. Enabled

Queue Settings

Queue PDF Queue Electronic Doc...
 Queue E-Mail Verify Shipment Date

Error Message page opens to inform you that Queue Electronic Document option isn't enabled.

ERROR MESSAGES | WORK DATE: 1/27/2022 ✉ ↗



Search | Open Related Record | Open in Excel | Actions Fewer options 🔍 ☰

Message Type ↑	Description	Context	Context Field Name	Source	Source Field Name
Information	'Queue Electronic Document' in '... ADV Docu...			ADV Docume...	Queue Electr

You can close this page.

Next you need to go to SMTP Mail Setup page and fill the necessary fields in order to send emails from within Business Central. The picture below is just an example how setup fields should be filled. Please provide valid User ID and Password and fill out other fields according to your company settings.

SMTP Mail Setup

 Apply Office ...Server Settings  Test Email Setup | Actions Fewer options

General

SMTP Server	<input type="text" value="smtp.office365.com"/>	Password	<input type="password" value="....."/>
SMTP Server Port	<input type="text" value="587"/>	Secure Connection	<input checked="" type="checkbox"/>
Authentication	<input type="text" value="Basic"/> ▾	Send As	<input type="text"/>
User ID	<input type="text"/>	Allow Sender Substitu... ..	<input type="checkbox"/>

2. USER GUIDE

Document Sending Service app creates job queue entries when posting Sales Orders/Invoices, Sales Credit Memos and Sales Return Receipts. These queue entries can be seen in the page Document Sending Queue.

CRONUS Ísland hf. | Posted Documents ▾ | Setup & Extensions ▾ | ☰

Document Sending Queue: All ▾ | 🔍 Search | 🗑️ Delete | 📄 Job Queue Entry | 📄 Open in Excel | ⌵ Actions ▾ | Fewer options | 🔍 ☰ 📄 ↗️

Status	Process Type	Table No.	Record View	Created	User ID	Entry No. ↑
In Process	E-Mail	112	Field3=0(103034)	7/10/2020 11:31 AM	ICELANDCLOUD\...	35

Queue entries are created according to selected settings on Document Sending Setup page. In this page we can find the following available options: **Queue PDF**, **Queue E-Mail** and **Queue Electronic Document**.

Document Sending Setup

📄 Job Queue Entry | 📄 Copyright Advania, Iceland | ⌵ Actions | Fewer options

General

You must disable the service before you can make changes. Enabled

Queue Settings

Queue PDF Queue Electronic Doc...

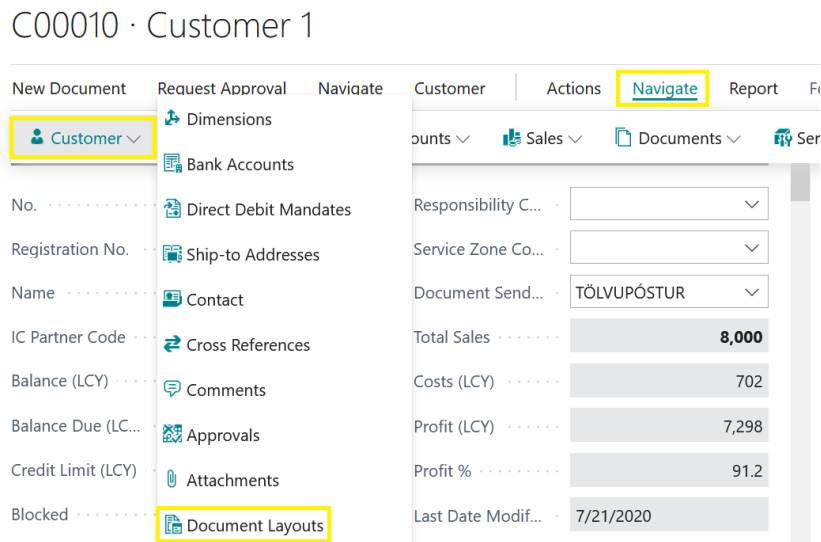
Queue E-Mail Verify Shipment Date

Queue PDF option creates job queue that generates PDF report and stores it as a document attachment of the posted document. You can choose which reports are going to be used for PDF creation and e-mail sending in Document Sending Setup page at section Report Selection. Attachment can be stored inside the database or in an external database.

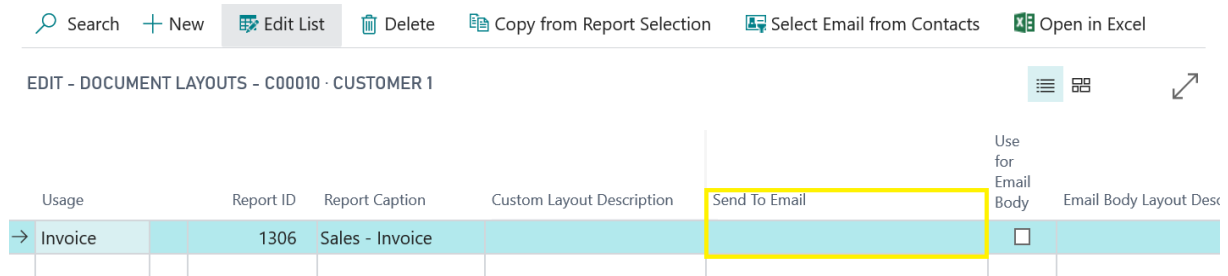
Report Selection

Sales Inv. PDF Report... · <input type="text" value="1306"/> ▾	Sales Cr.Memo PDF R... · Sales - Credit Memo
Sales Inv. PDF Report... · Sales - Invoice	Return Receipt PDF R... · <input type="text" value="6646"/> ▾
Sales Cr.Memo PDF R... · <input type="text" value="1307"/> ▾	Return Receipt PDF R... · Sales - Return Receipt

Queue E-Mail option is used to create job queue that sends the e-mail with posted document as a PDF attachment to the customer. There are two ways posted documents can be sent via e-mail. The first way is to go to Customer Card, select Navigate, select Customer and then click on the Document Layouts.



Document Layouts page opens.



Here you can choose which reports are to be used for Invoice and Credit Memo sending via e-mail. You also need to fill out the field Send to Email. This option has the priority when e-mails are sent.

Another way to use this functionality is to define e-mail address on the Customer Card for this option to work properly. Reports that are to be used are the ones defined in the Document Sending Setup page.

C00010 · Customer 1

New Document Request Approval Navigate Customer More options

Address & Contact

Show less

ADDRESS

Address Address 1

Address 2

Country/Region... IS

City Reykjavík

Post Code 108

CONTACT

Contact Code CT000258

Contact Name

Phone No.

Email

Fax No.

In the Document Sending Setup page there are some additional settings for the e-mail sending. Here you should define e-mail subject, body text, sender e-mail and optionally carbon copy e-mail address.

Document Sending Setup

Job Queue Entry Copyright Advania, Iceland Actions Fewer options

E-Mail Settings

Sales Invoice Subject ... Reikningur nr. %1 sendur úr Busi

Sales Cr. Memo Subj... Kreditreikningur nr. %1 sendur úr

Return Receipt Subject ... Vöruskilamóttaka nr. %1 send úr

Body Text Sjálfvirk skjalasending Business Central

Sender E-Mail

Carbon Copy E-Mail ...

Queue Electronic Document creates the job queue that sends electronic document after sales order/invoice or sales credit memo posting. First you must define Document Sending Profile in the Customer Card.

C00010 · Customer 1

New Document Request Approval Navigate Customer More options

General

Show less

No. C00010

Registration No. ...

Name Customer 1

Responsibility C... ..

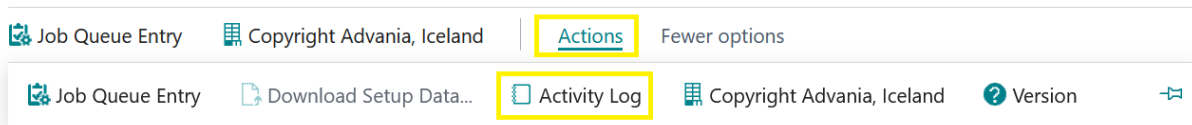
Service Zone Co... ..

Document Send... .. TÖLVUPÓSTUR

Verify Shipment Date Verifies that shipment date has been specified before sales order is posted.

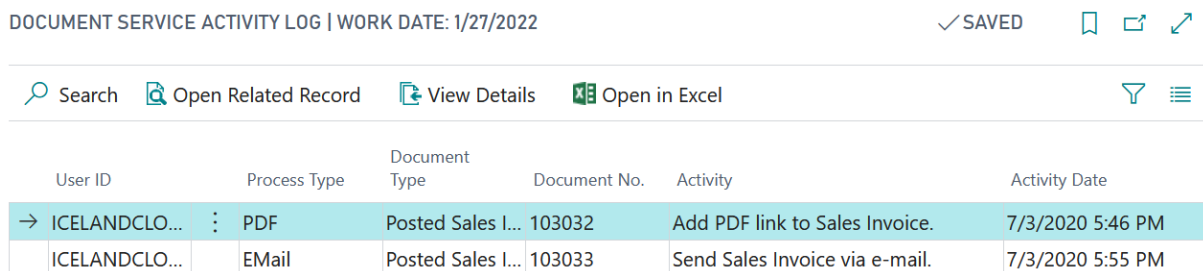
In the Document Sending Setup page you can see the activity log of all executed jobs by clicking Actions, and then Activity Log.

Document Sending Setup



The screenshot shows a navigation bar with several items. The 'Actions' button is highlighted with a yellow box. Below it, the 'Activity Log' button is also highlighted with a yellow box. Other visible items include 'Job Queue Entry', 'Download Setup Data...', 'Copyright Advania, Iceland', and 'Version'.

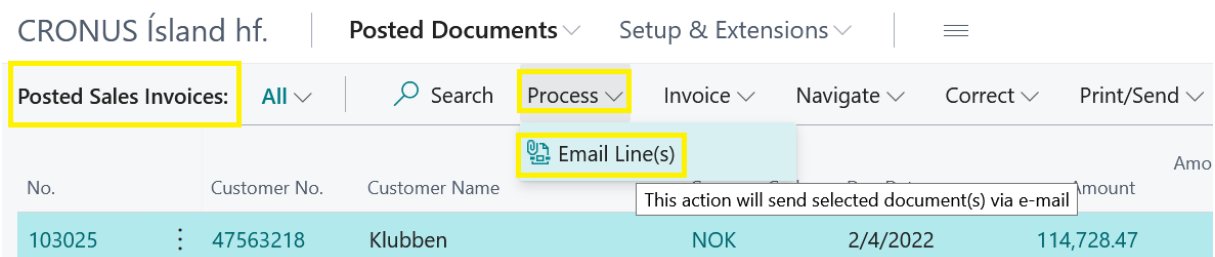
Document Service Activity Log page opens.



The screenshot shows the 'DOCUMENT SERVICE ACTIVITY LOG | WORK DATE: 1/27/2022' page. It includes a search bar, 'Open Related Record', 'View Details', and 'Open in Excel' buttons. Below these is a table with the following data:

User ID	Process Type	Document Type	Document No.	Activity	Activity Date
→ ICELANDCLO...	PDF	Posted Sales I...	103032	Add PDF link to Sales Invoice.	7/3/2020 5:46 PM
ICELANDCLO...	Email	Posted Sales I...	103033	Send Sales Invoice via e-mail.	7/3/2020 5:55 PM

Users can also send a pdf copy of the sales documents by e-mail directly. The action can be found in Posted Sales Invoices and Posted Sales Credit Memos.



The screenshot shows the 'CRONUS Ísland hf. | Posted Documents' page. The 'Posted Sales Invoices' tab is highlighted. The 'Process' dropdown menu is open, and the 'Email Line(s)' option is highlighted with a yellow box. A tooltip below it reads: 'This action will send selected document(s) via e-mail'. Below the menu is a table with the following data:

No.	Customer No.	Customer Name	Amount
103025	47563218	Klubben	114,728.47

When selecting Email Line(s) action, the following page is opened.

Manage **E-Mail**

EDIT - DOCUMENT SENDING VIA EMAIL ↗

General

E-Mail Address Message Body

Close

User should fill out the E-Mail Address field and then click on action E-Mail. Then a message appears.

Working on it...

The report is being rendered. This can take a while, depending on the number of rows that have been generated.

After that the e-mail is sent and you can click Close.

Users have the possibility to create job queues manually. Go to page Document Sending Queue. Click Actions. There you will see PDF Creation action group where you can choose posted documents to create a job queue that creates PDF document attachment.

DOCUMENT SENDING QUEUE | WORK DATE: 1/27/2022 🔖 📄 ↗

Search Manage **Job Queue Entry** **Open in Excel** **Actions** Fewer options 🔍 ☰

PDF Creation ▾ E-Mail ▾ Electronic Document ▾ **Show Error Message** Activity Log 🔖

DOCUMENT SENDING QUEUE | WORK DATE: 1/27/2022 🔖 📄 ↗

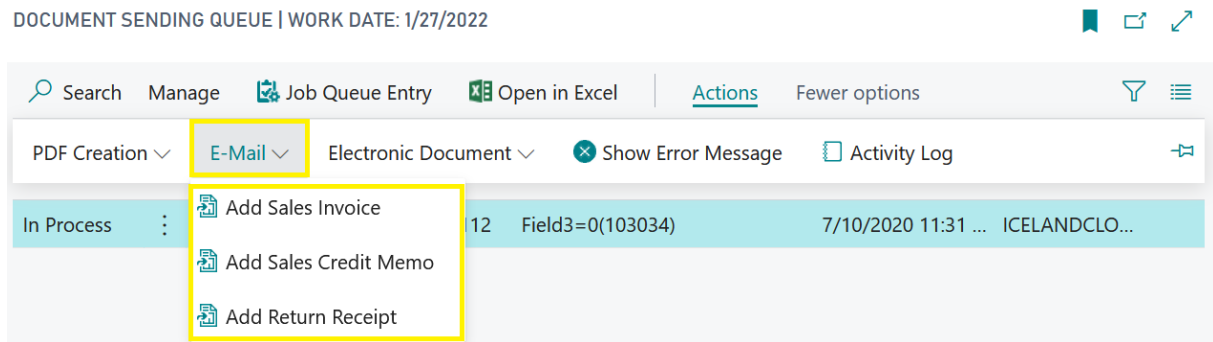
Search Manage **Job Queue Entry** **Open in Excel** **Actions** Fewer options 🔍 ☰

PDF Creation ▾ E-Mail ▾ Electronic Document ▾ **Show Error Message** Activity Log 🔖

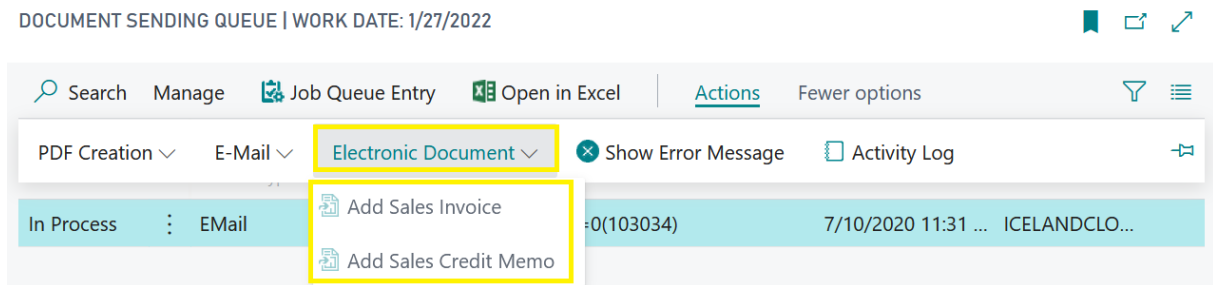
- Add Sales Invoice**
- Add Sales Credit Memo
- Add Return Receipt

112	Field3=0(103034)	7/10/2020 11:31 ... ICELANDCLO...
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E-Mail action group contains options that can create queues for e-mail sending.

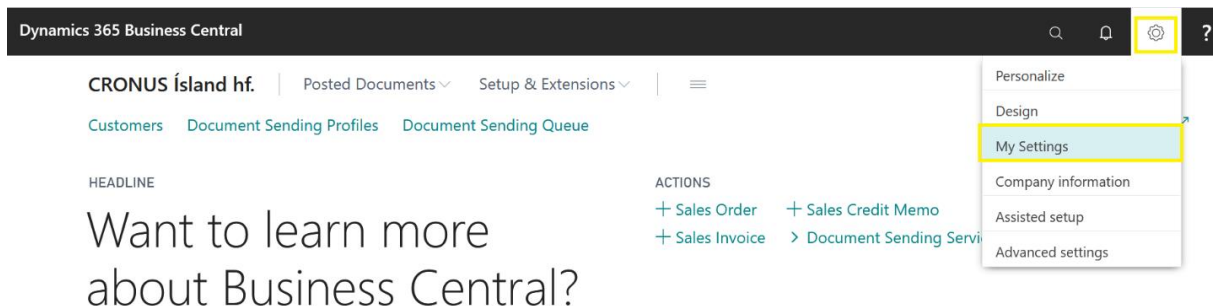


Electronic Document action group contains options for creating job queues for electronic document sending. In this example, these actions are not enabled because Queue Electronic Document option is not enabled in the Document Sending Setup page.



As a result of each of these actions, you should see a new record in the Document Sending Queue page.

Users have the possibility to setup Document Sending Service role in the Business Central Home page.



When you select My Settings, a new page opens where one can choose its role. There you can click on Assist Edit and then select Document Sending Service from the Available Roles list.

EDIT - MY SETTINGS



Role	Document Sending Service	...
Company	CRONUS Ísland hf.	...
Work Date	1/27/2022	