

INSTALLATION & QUICK SETUP – eSign ePDF

These are the steps to follow to generate a complete cycle of the eSign ePDF solution.

Installation

When the solution is installed, the next actions are:

- ePDF Processor Role Center is created.

Note: These tables are necessary to configure other tables.

Initial Setup

The first step is to assign the ePDF Processor Role Center to the user.

AVAILABLE ROLE CENTERS

DESCRIPTION	APP NAME	SCOPE
Director de TI		System
Director de ventas		System
Director ventas y relaciones		System
Distribuidor - Servicio al cliente		System
Envío y recepción - Pedido a pedido		System
Envío y recepción - Sistema de gestión de almacenes		System
<u>ePDF Processor</u>		System

Once in the ePDF Role center, we must configure the solution through the Install Wizard.

Environment: Sandbox

CRONUS ES | Setup | Sales | Posted Documents

INSIGHT FROM LAST WEEK

The largest posted sales invoice was for 3.480 €

ACTIONS

- + Reports
- + Sales Quote
- + Sales Order
- + Sales Return Order
- + Sales Invoice
- + Sales Credit Memo
- + Service Invoice
- + Service Credit Memo

Activities

Information REPORTS

TOTAL	DEFAULT	MANUAL
8	7	1

REPORTS ENTRIES

SUCCESS	SIGNED	UNSIGNED	WITH ERRORS
13	13	0	0

OTHER

CUSTOMERS
1

The Install Wizard has four steps to configure:

1. Innova Online Setup: Data from Innova Online portal

INSTALL ESIGN EPDF WIZARD



INNOVA ONLINE SETUP

Provide information to configurate Innova Online portal.

Customer Id

2. ePDF Setup: Data to process documents ePDF. A Body Layout must be configured from report 7213677 (INNESGePReportsEntryBodyEmail).

INSTALL ESIGN EPDF WIZARD



ESING EPDF SETUP

Provide information to configurate ePDF.

Certificate Id 2828a190-9a8b-4a7e-8d25-7f34cb8e5ur6

Certificate Password

Sign Document

Actions for Document Save in database

Email Body Layout Code 7213677-000007

Email Body Layout Description esign ePDF envío e-mail genérico

Reports

Once the solution is configured, you can create reports to generate PDF documents. You must indicate a code and report number.



eSign ePDF Reports

CODE	DESCRIPTION	REPORT ID.	DEFA... REPO...	REPORT NAME
1003	Oferta de venta 1003	204	<input checked="" type="checkbox"/>	Sales - Quote
103002	Factura de venta 103002	206	<input checked="" type="checkbox"/>	Sales - Invoice
103007	Sales Invoice 103007	206	<input checked="" type="checkbox"/>	Sales - Invoice
103007	Sales Invoice 103007	7213678	<input checked="" type="checkbox"/>	INNESGePSalesInvoiceTest
104001	Sales Credit Memo 104001	207	<input checked="" type="checkbox"/>	Sales - Credit Memo
I001	Informe mejores clientes	111	<input type="checkbox"/>	Customer - Top 10 List
SERVA-000003	Service Cr.Memo SERVA-000003	5912	<input checked="" type="checkbox"/>	Service - Credit Memo
SERVF-000010	Service Invoice SERVF-000010	5911	<input checked="" type="checkbox"/>	Service - Invoice

For each report, you must indicate the report request page and execute report for generating PDF documents in the Innova Online portal.

←

eSign ePDF Re

Search + New Edit List Delete Open in Excel

Report Request Page

1003	Oferta d
103002	Factura
103007	Sales In
103007	Sales In
104001	Sales Cr
I001	Informe
SERVA-000003	Service
SERVF-000010	Service

EDIT - SALES - QUOTE

Options

No. of Copies

Show Internal Information

Archive Document

Log Interaction

Sales Quote

Show results:

Where: Document Type is: Quote

And: No. is: 1003

And: Sell-to Customer No. is:

And: is:

OK Cancel

When you execute report from ePDF Reports page,

Manual

CODE	DESCRIPTION	REPORT ID.	REPORT NAME	E-MAIL
R001	Customer List	101	Customer List	

you will see the next message:



A Scheduler Task has been created for generate ePDF document.
This process could take a few minutes.

OK

Note: This action executes a process in background because the PDF document generation in the system could take a few minutes depending of size of document. Estimated time can be 30 seconds.

When process in background has finished, the entry will be on the Report Entries page.

eSign ePDF Report Entries

Search Open in Excel Actions Less options

ENTRY NO.	CODE ▼	EXECUTION DATE	SIGNED	BATCH PROCES...	STATUS	ERROR MESSAGE
61	R001	09/11/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Success	
1114	R001	15/11/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Success	

When a PDF document is generated, you can see the entries created and execute actions for it.

- Download Document
- Send Document by e-mail
- Delete document



eSign ePDF Report Entries

Search Open in Excel Actions Less options

Download Document Send Document by e-mail Delete Document

1046	1003	18/10/2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Success	
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Batch Reports

The solution allows to execute reports in batch process.

The standard system has the Job Queue Entries functionality.

← JOB QUEUE ENTRY CARD ✎ + 🗑

Report · 111 · Customer - Top 10 List

Process Report | Actions Navigate Less options ↗

Object Type to Run	Report	User ID	ADMIN
Object ID to Run	111	Maximum No. of Attempts to Run	0
Object Caption to Run	Customer - Top 10 List	Last Ready State	18/10/2018 12:20
Description	Cliente - Listado 10 mejores	Earliest Start Date/Time	25/10/2018 12:21
Parameter String		Expiration Date/Time	
Job Queue Category Code		Status	Ready

Report Parameters

Report Request Page Options	<input type="checkbox"/>	Printer Name	
Report Output Type	PDF		

When we create a Job Queue Entry with report output Type PDF and we have configured a Solution Report with same Report, the system generates a PDF document.

We can see the reports created by the standard system in role center.

CRONUS ES | Setup ▾ Sales ▾ Posted Documents ▾ ↗

Activities

Information

REPORTS			REPORTS ENTRIES				OTHER
TOTAL	DEFAULT	MANUAL	SUCCESS	SIGNED	UNSIGNED	WITH ERRORS	CUSTOMERS
8	7	1	13	13	0	0	1
>	>	>	>	>	>	>	>

Insights

Report Inbox ▾

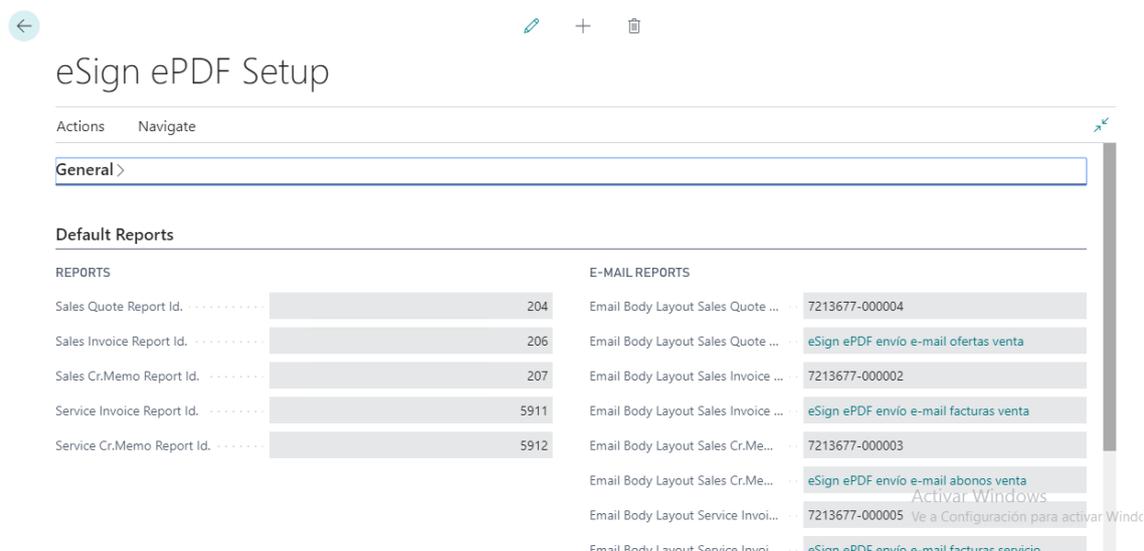
CREATED DATE-TIME	DESCRIPTION	OUTPUTTYPE
18/10/2018 12:23	⋮ Cliente - Listado 10 mejores	PDF
18/10/2018 12:21	Cliente - Listado 10 mejores	PDF

Default Reports

The solution has default reports to generate PDF. The default reports are:

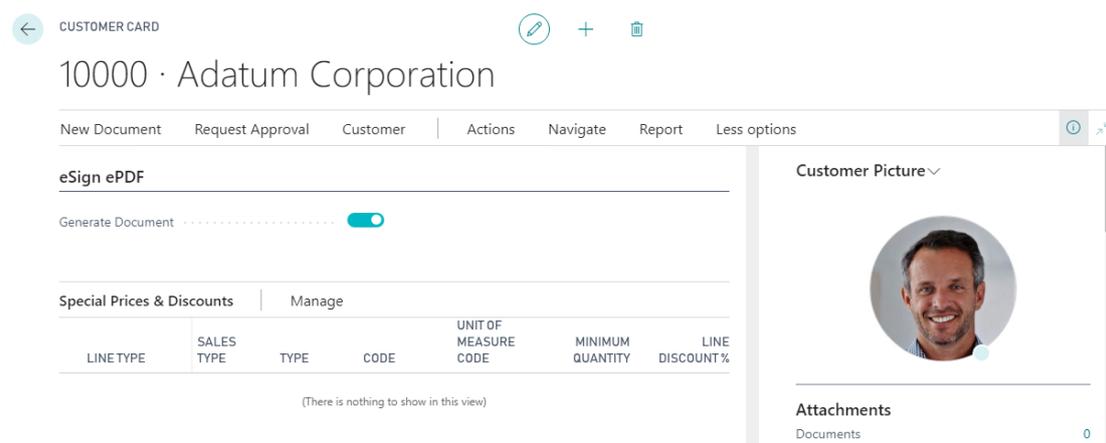
- Sales Quote
- Sales Invoice
- Sales Credit Memo
- Service Invoice
- Service Credit Memo

These reports are configured in the eSign ePDF Setup and you must fill the e-mail templates for sending e-mails to customers.



When a Sales Invoice is posted, for example, the solution generates a PDF document with Report format indicated in Sales Invoice Report Id. And it sends an e-mail to the customer with template e-mail indicated in Email Body Layout Sales Invoice, if it is necessary.

In order to use the eSign ePDF solution default reports, the field Generate document must be checked.



Generate ePDF Document

The process to generate a signed PDF document is very simple.

When a standard Sales/Services Invoice or Credit Memo is posted, the solution generates the PDF Document.

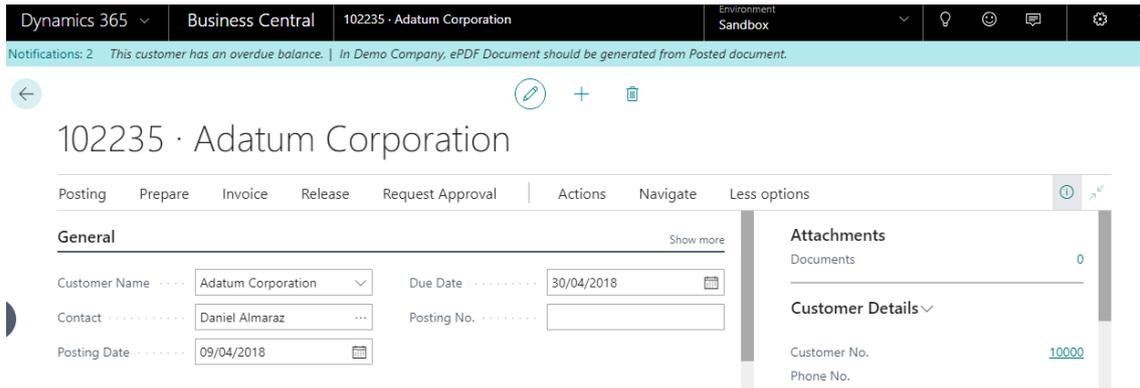
You can generate signed PDF documents manually from Invoiced document.

Note: In Company demo, the PDF document is only generated manually.

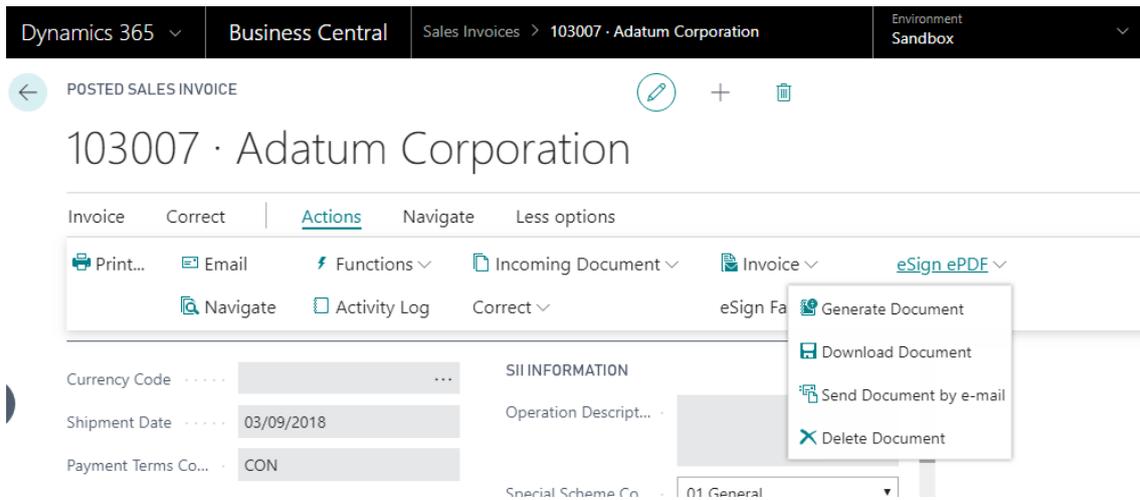
Generate document from invoiced document

The first step is to generate an Invoice.

When the Invoice is posted, we access to Invoiced document and Generate ePDF Document.



When the document is generated, we can access this.



Note: This action generate an ePDF Report and ePDF Report Entry from posted document and show the next message:

 A Scheduler Task has been created for generate ePDF document.
This process could take a few minutes.

OK

It behaves as in the previous case.

From this page, we can have the next actions:

- Generate document
- Download document (blob)
- Send document to customer e-mail (blob)
- Delete document (blob)

Note: The document generation can have limits in the Innova Online portal depending on the selected plan.