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
ePDF Processor	⋮	System

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

The Install Wizard has four steps to configure:

1. Innova Online Setup: Data from Innova Online portal

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

Reports

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

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

When you execute report from ePDF Reports page,

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	☑	☐	Success	
1114	R001	15/11/2018	☑	☐	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 | ☑ | ☐ | Success | |

Batch Reports

The solution allows to execute reports in batch process.

The standard system has the Job Queue Entries functionallity.

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.

Default Reports

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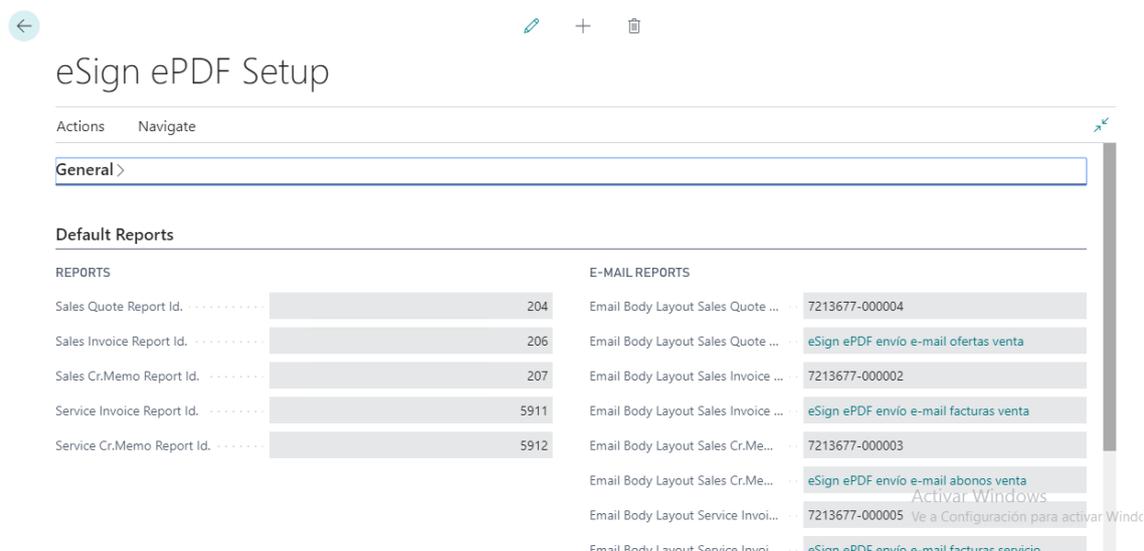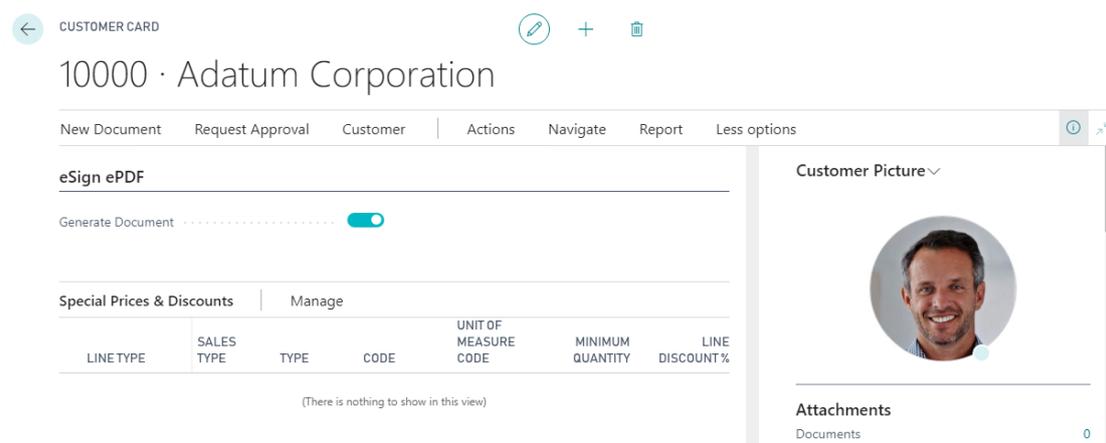
When a Sales Invoice is posted, for example, the solution generates a PDF document with Report format indicated in Sales Invoice Report Id. And it sends an e-mail to the customer with template e-mail indicated in Email Body Layout Sales Invoice, if it is necessary.

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.
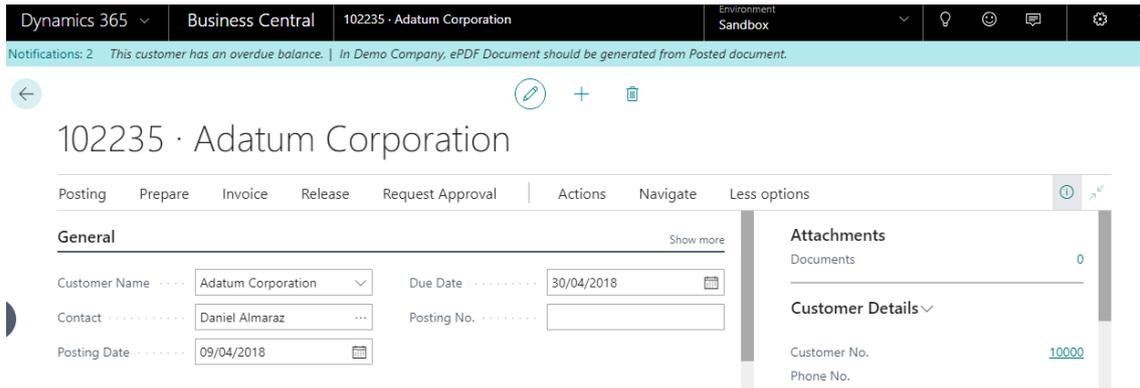
You can generate signed PDF documents manually from Invoiced document.

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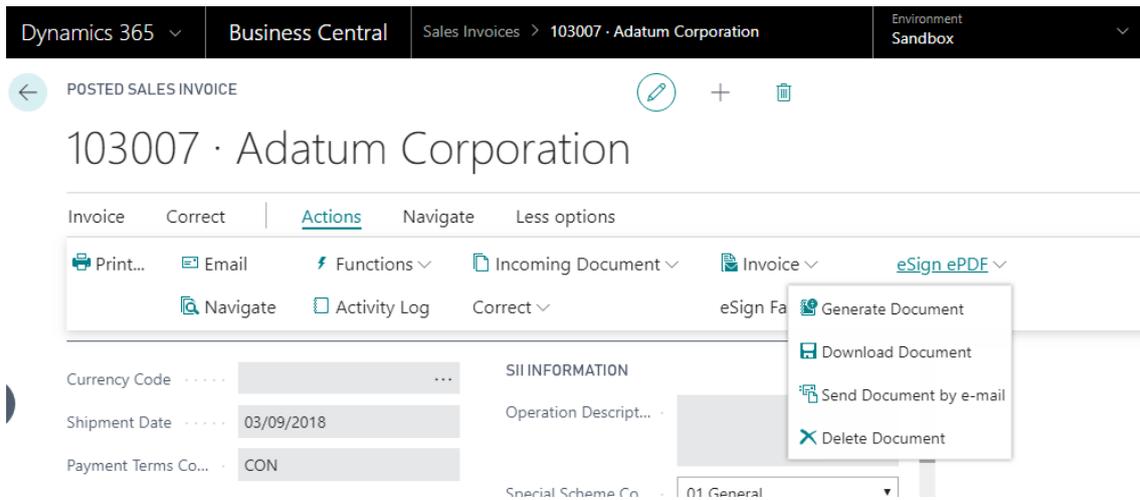
Generate document from invoiced document

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:

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.