# INSTALLATION & QUICK SETUP – eSign ePDF

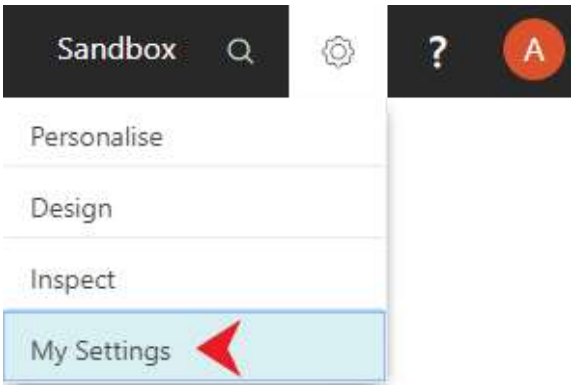
This document indicates the steps to follow to use the eSign ePDF app.

## Change dashboard interface

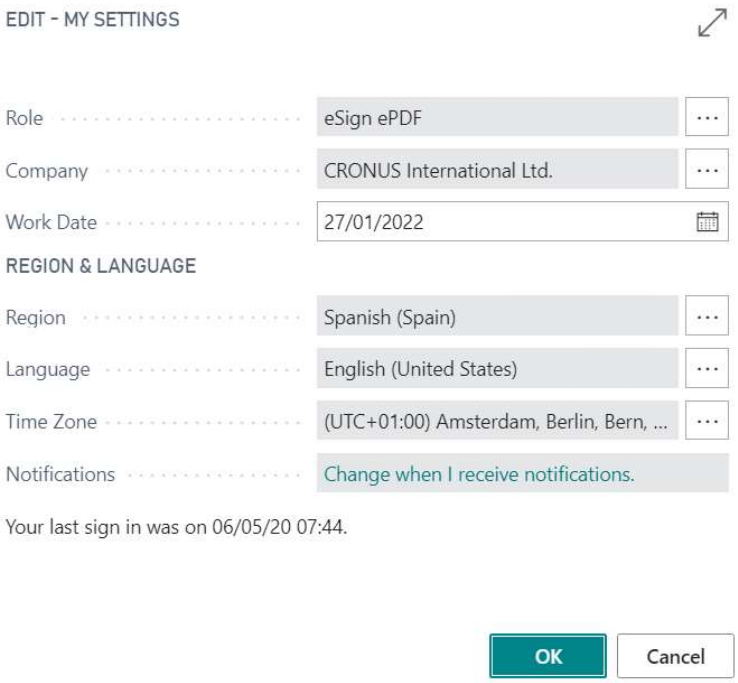
The homepage related with the eSign ePDF interface can be changed as follows, if it is not already established:

On the top right corner search for a **settings icon** and click it.

Then clicking on **My Settings**, a new window will pop up.

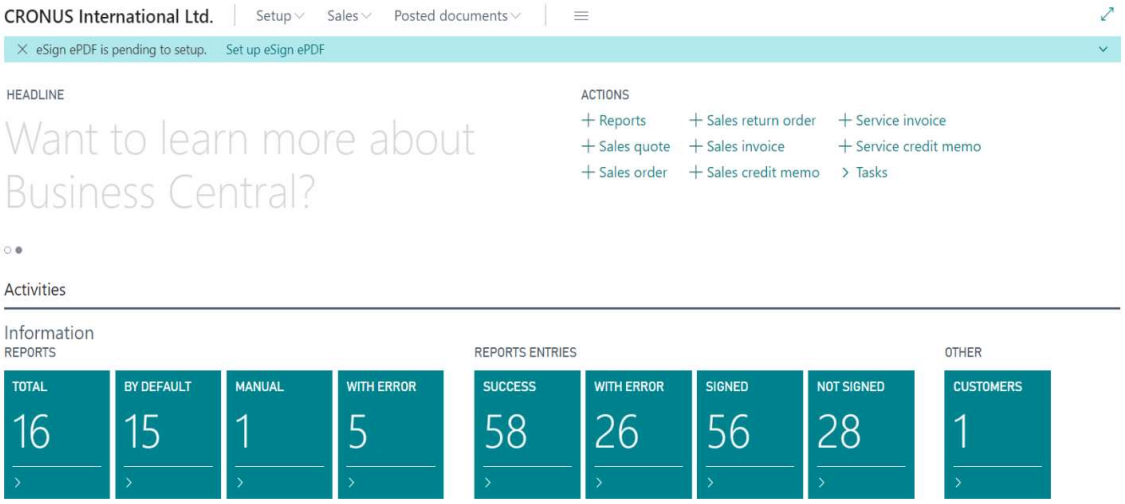



On the Role Center row, click the **dots** to unfold the list.



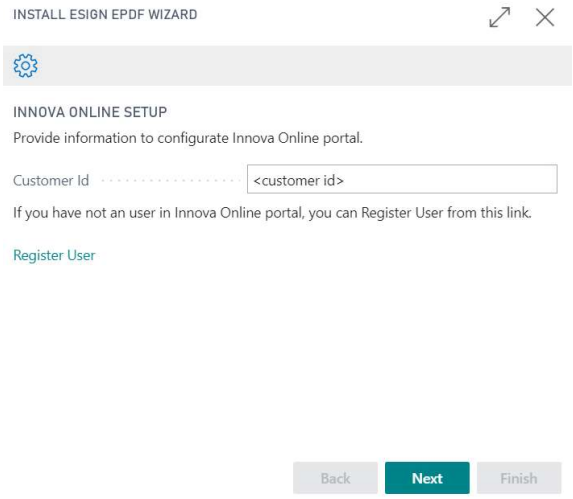
At the end of the list you can find the eSign ePDF. Please select it and then click OK to confirm your action.

Once time in the ePDF Role center, we must configure the solution through the Install Wizard. You should be click in “Set up eSign ePDF” from notification bar.

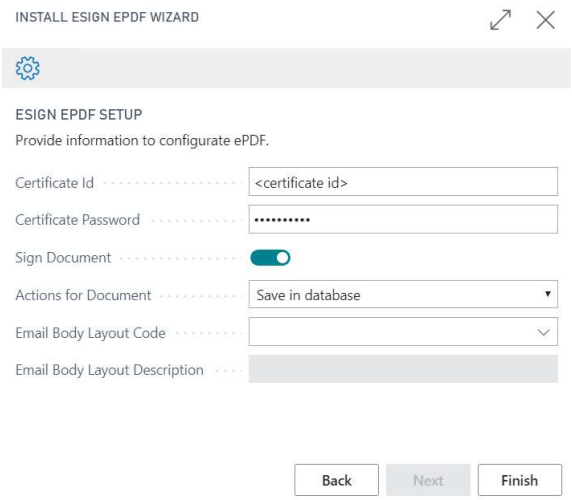



The Install Wizard has four steps to configure:

1. Innova Online Setup: Data from Innova Online portal. The Customer Id are in the last section of document.

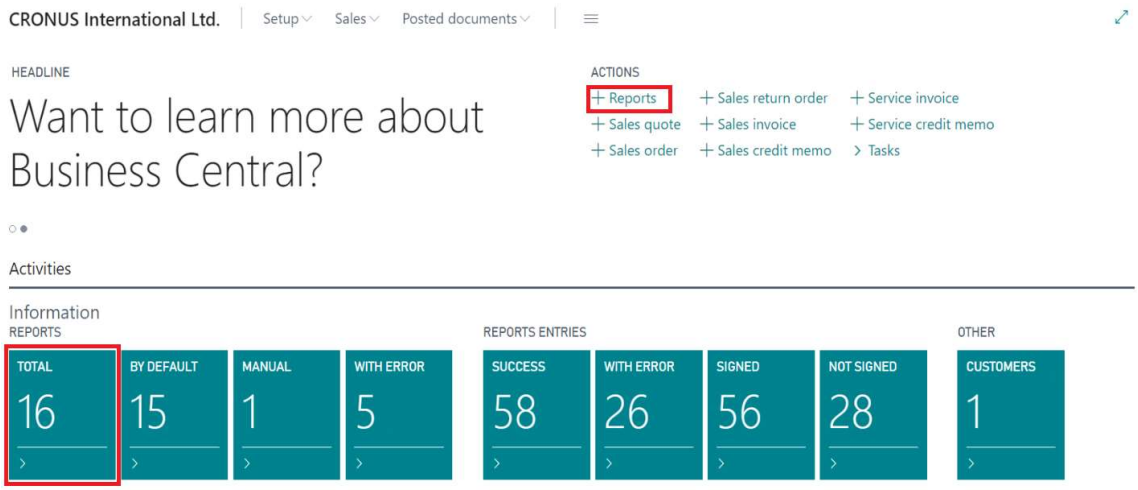



2. ePDF Setup: Data to process documents ePDF. The Certificate Id and Certificate Password are in the last section of document.

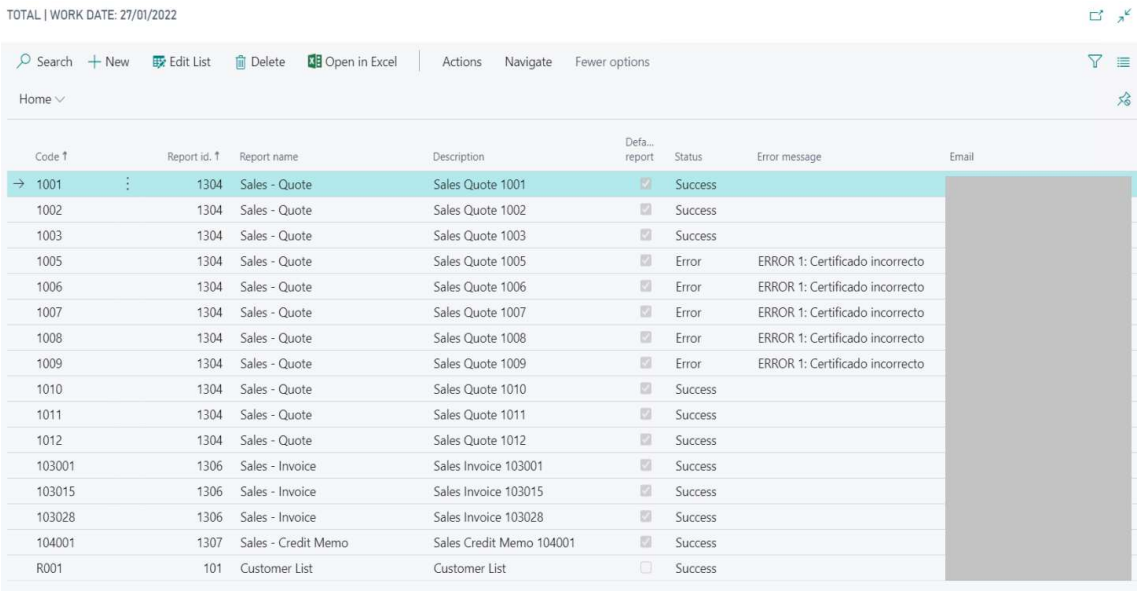



## Reports

Once solution is configured, you can create reports to generate PDF documents. You can create these from Report tile or New Report form creation section.

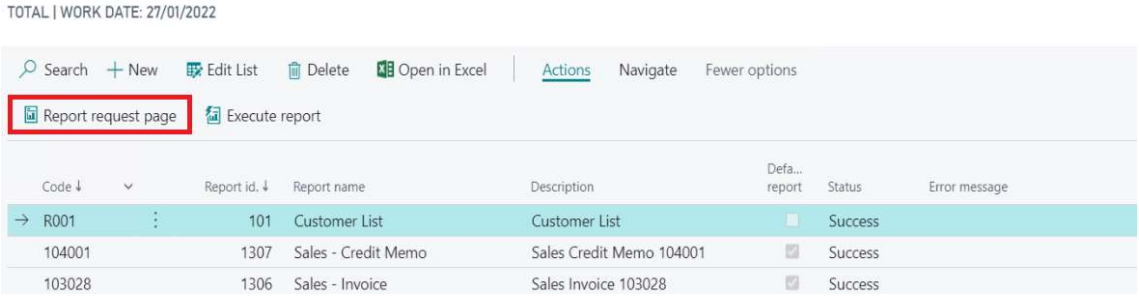



You must indicate “Code” and “Report Id.” in the Reports page.

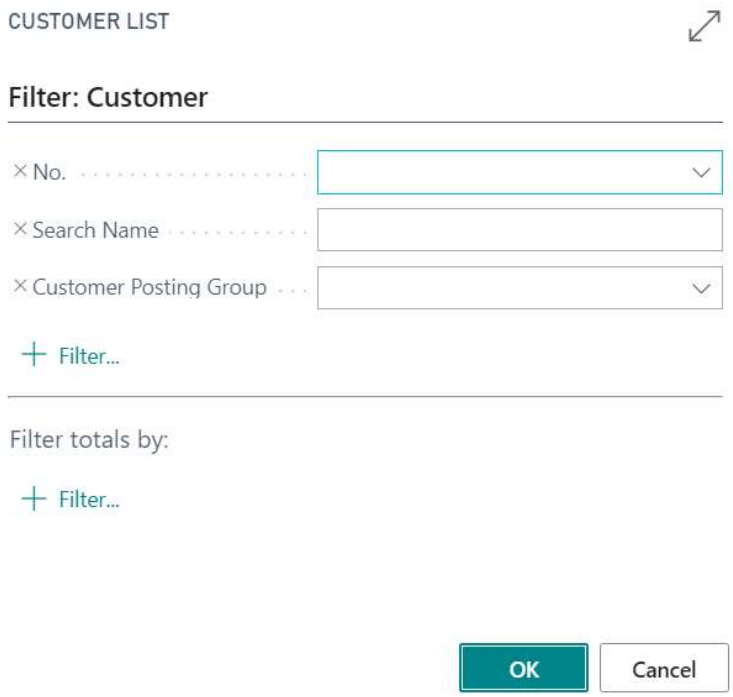



| Code | Report id. | Report name | Description | Defa... report | Status | Error message | Email |
|---|---|---|---|---|---|---|---|
| 1001 | 1304 | Sales - Quote | Sales Quote 1001 | ☑ | Success | | |
| 1002 | 1304 | Sales - Quote | Sales Quote 1002 | ☑ | Success | | |
| 1003 | 1304 | Sales - Quote | Sales Quote 1003 | ☑ | Success | | |
| 1005 | 1304 | Sales - Quote | Sales Quote 1005 | ☑ | Error | ERROR 1: Certificado incorrecto | |
| 1006 | 1304 | Sales - Quote | Sales Quote 1006 | ☑ | Error | ERROR 1: Certificado incorrecto | |
| 1007 | 1304 | Sales - Quote | Sales Quote 1007 | ☑ | Error | ERROR 1: Certificado incorrecto | |
| 1008 | 1304 | Sales - Quote | Sales Quote 1008 | ☑ | Error | ERROR 1: Certificado incorrecto | |
| 1009 | 1304 | Sales - Quote | Sales Quote 1009 | ☑ | Error | ERROR 1: Certificado incorrecto | |
| 1010 | 1304 | Sales - Quote | Sales Quote 1010 | ☑ | Success | | |
| 1011 | 1304 | Sales - Quote | Sales Quote 1011 | ☑ | Success | | |
| 1012 | 1304 | Sales - Quote | Sales Quote 1012 | ☑ | Success | | |
| 103001 | 1306 | Sales - Invoice | Sales Invoice 103001 | ☑ | Success | | |
| 103015 | 1306 | Sales - Invoice | Sales Invoice 103015 | ☑ | Success | | |
| 103028 | 1306 | Sales - Invoice | Sales Invoice 103028 | ☑ | Success | | |
| 104001 | 1307 | Sales - Credit Memo | Sales Credit Memo 104001 | ☑ | Success | | |
| R001 | 101 | Customer List | Customer List | ☐ | Success | | |

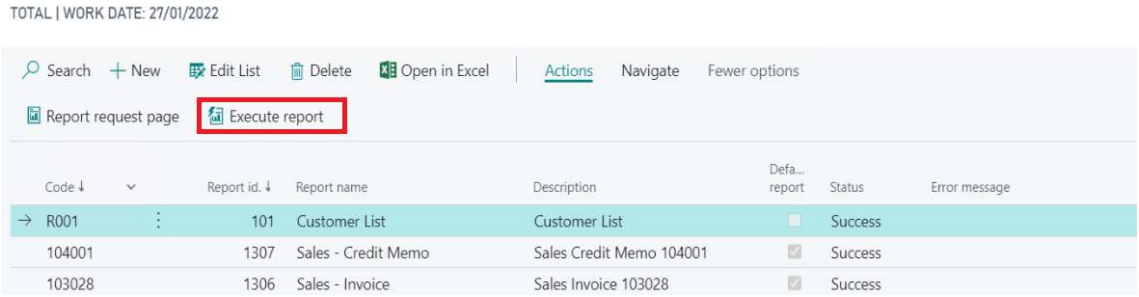
For each report, you must indicate “Report Request Page” to put the filters in reports.



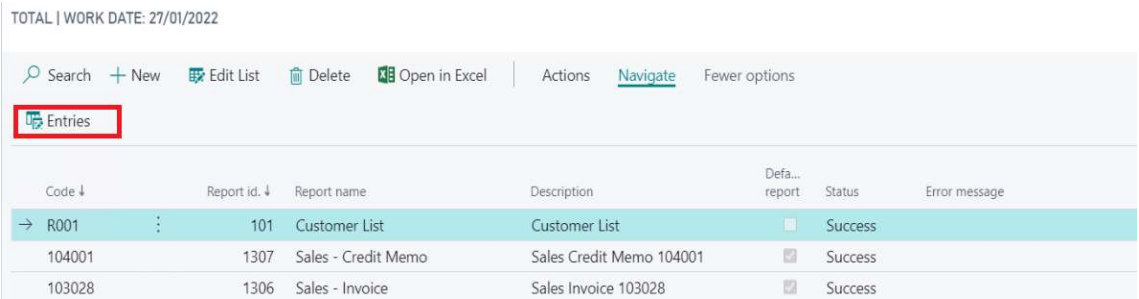

| Code | Report id. | Report name | Description | Defa... report | Status | Error message |
|---|---|---|---|---|---|---|
| R001 | 101 | Customer List | Customer List | ☐ | Success | |
| 104001 | 1307 | Sales - Credit Memo | Sales Credit Memo 104001 | ☑ | Success | |
| 103028 | 1306 | Sales - Invoice | Sales Invoice 103028 | ☑ | Success | |



You can execute the action “Execute Report” for create the report filtered in PDF format and sign it in Innova Online portal.

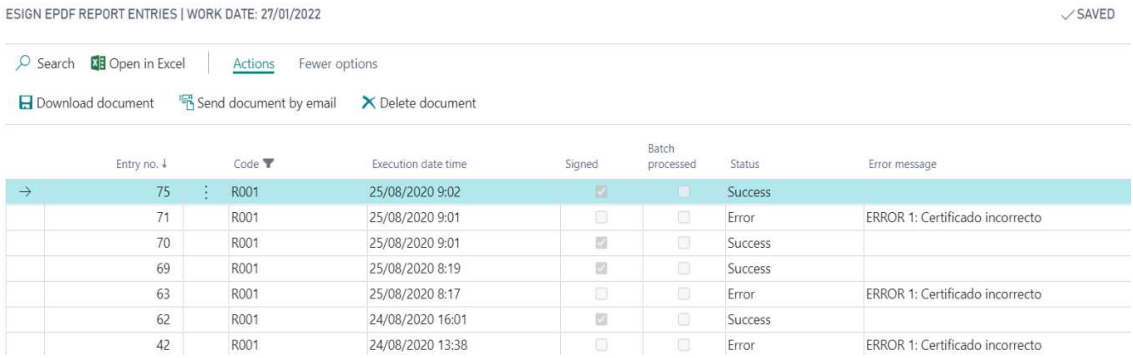



When this action is executed a Report Entry for Report is created. You can access to the Report Entry from menu Navigate/Entries.

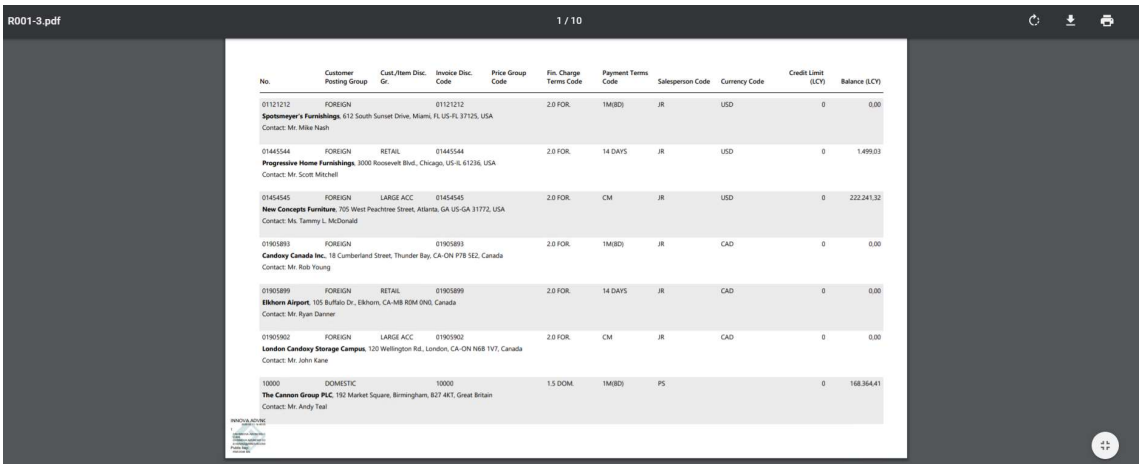



You can execute the follow actions from Report Entries:

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



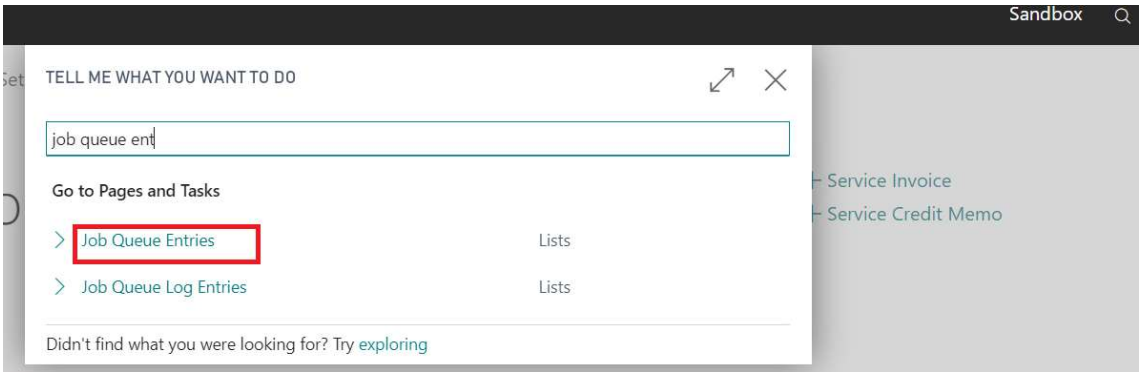

The action “Download Document” download the signed document saved in database.




Note: You can modify the “Request Report Page” to put another filter and execute the action “Execute Report Foreground” again, so a new Report Entry will be created.

## Batch Reports

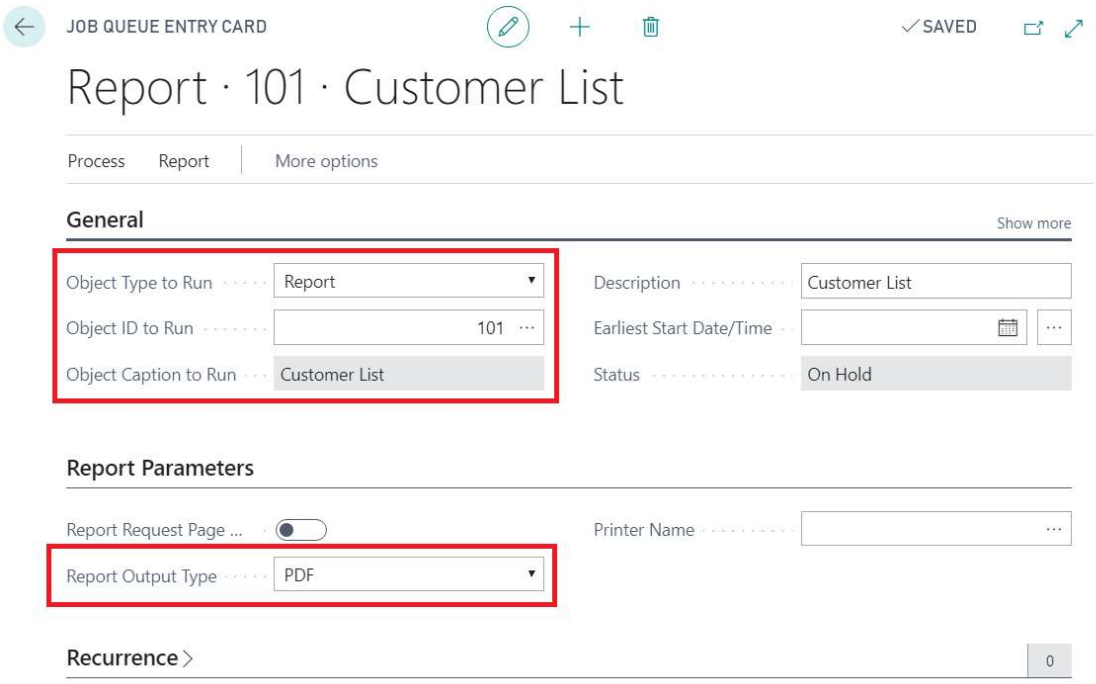
The solution allows use the standard functionality “Job Queue Entry” to sign PDF generated from this functionality.




We should create a Job Queue Entry with these data:

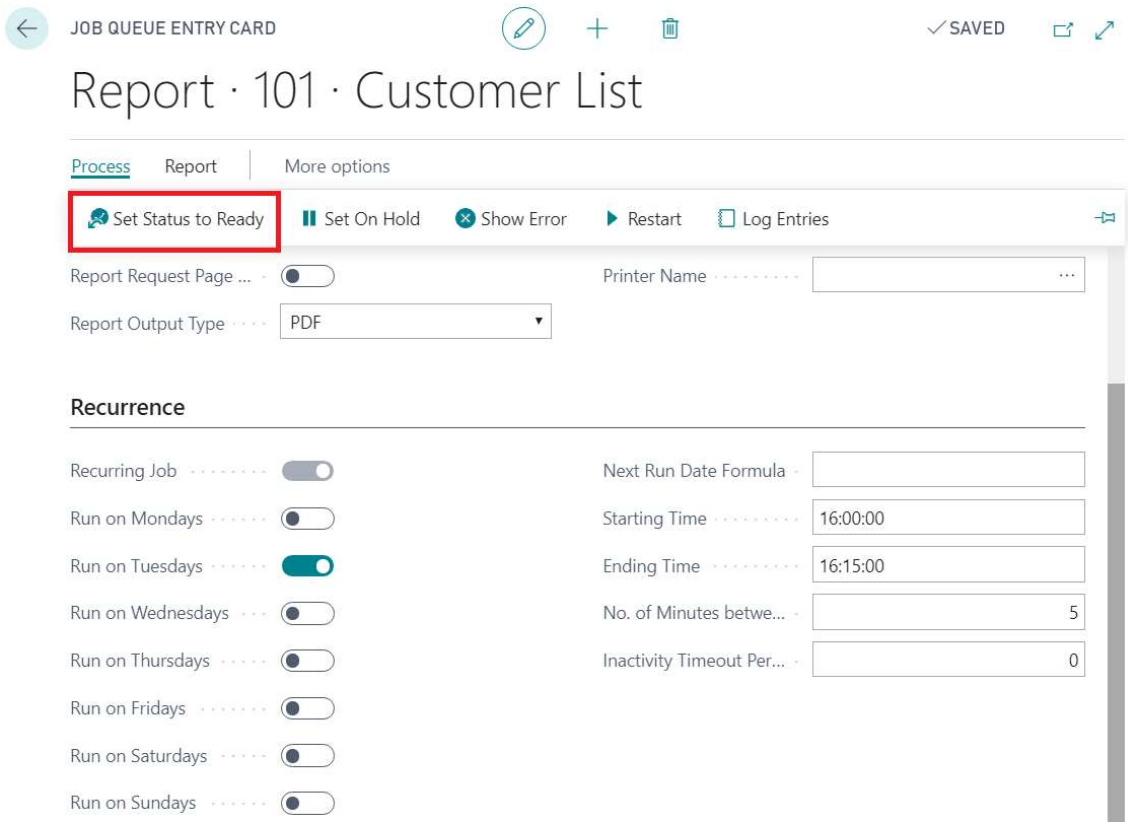
- Object Type to Run: Report.
- Object Id to Run: 101
- Report Output Type: PDF.

Note: The “Object Id to Run” should be a Report Id. configured in entity “Report” explained above and “Report Output Type” PDF.

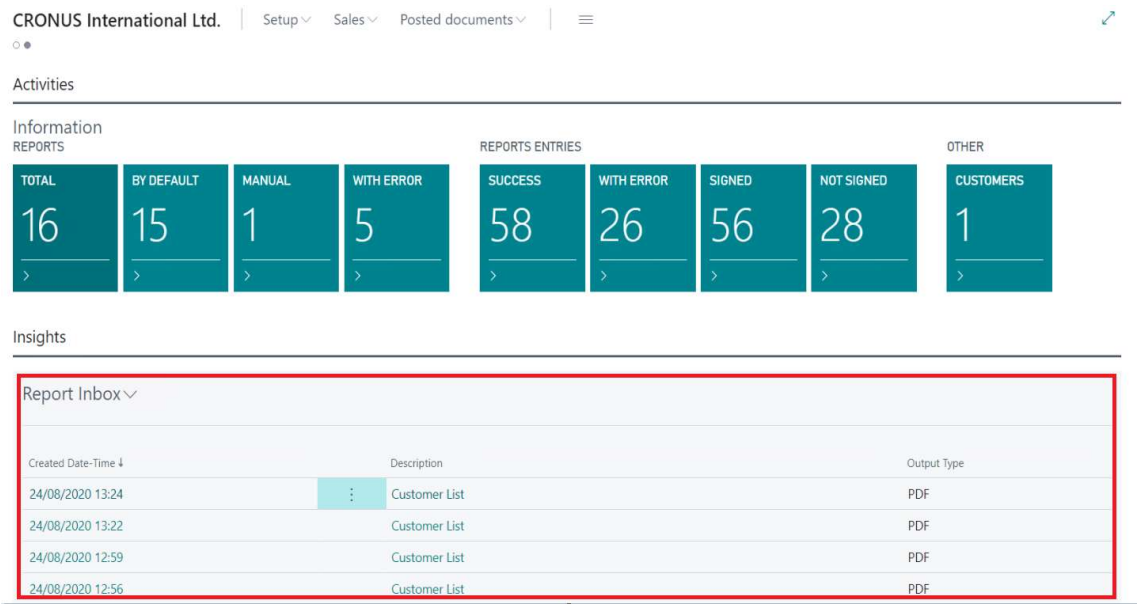



You should put the Recurrence. For example: execute the report in background on Tuesday between 16:00 and 16:15 for each 5 minutes.

You should execute the action “Set Status to Ready” to begin the process.




You can see all executions of “Job Queue Entry” in the Role Center.

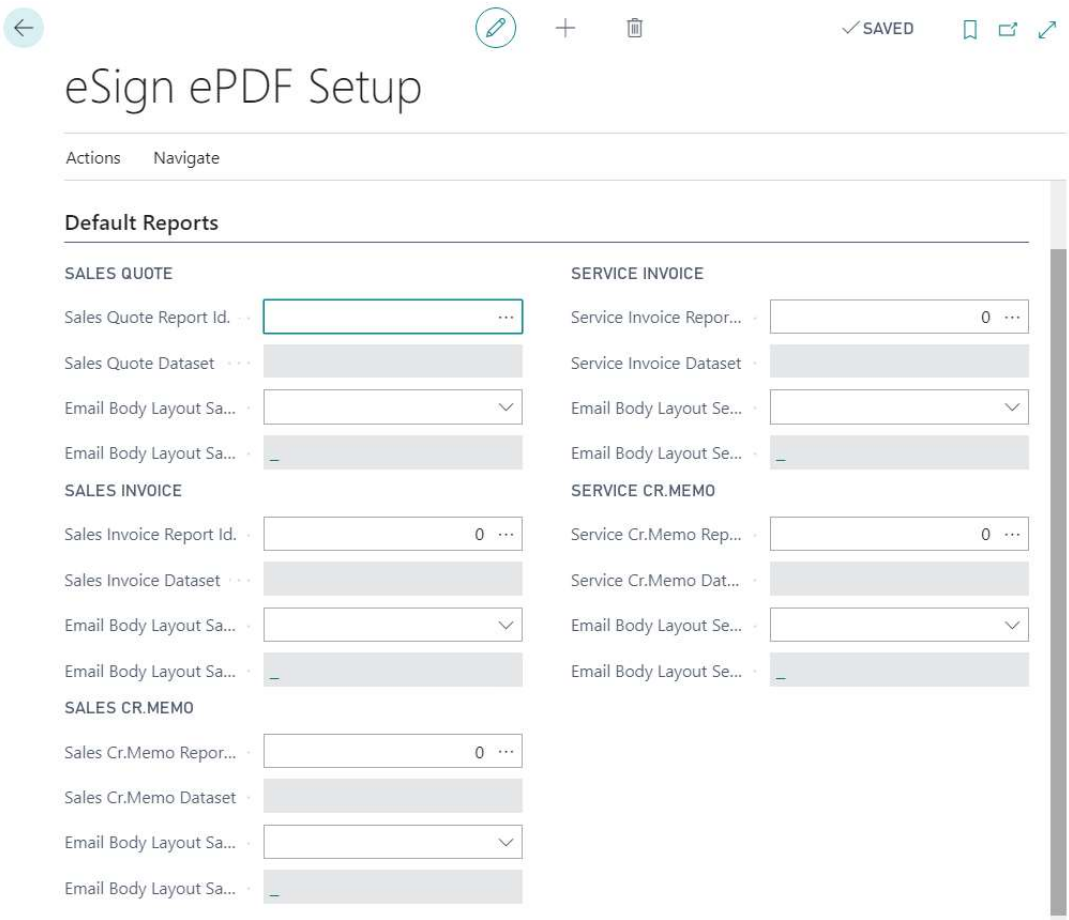



## Default Reports

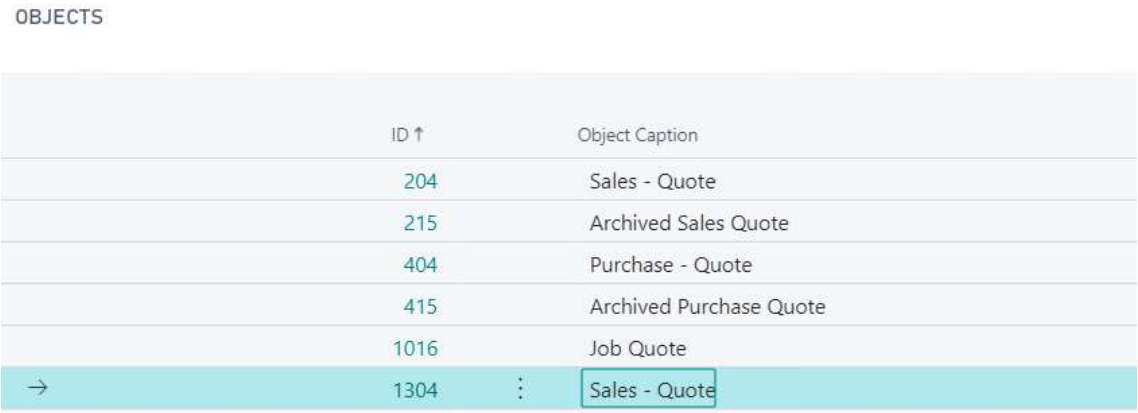
The solution has default reports to generate PDF. The default report are:

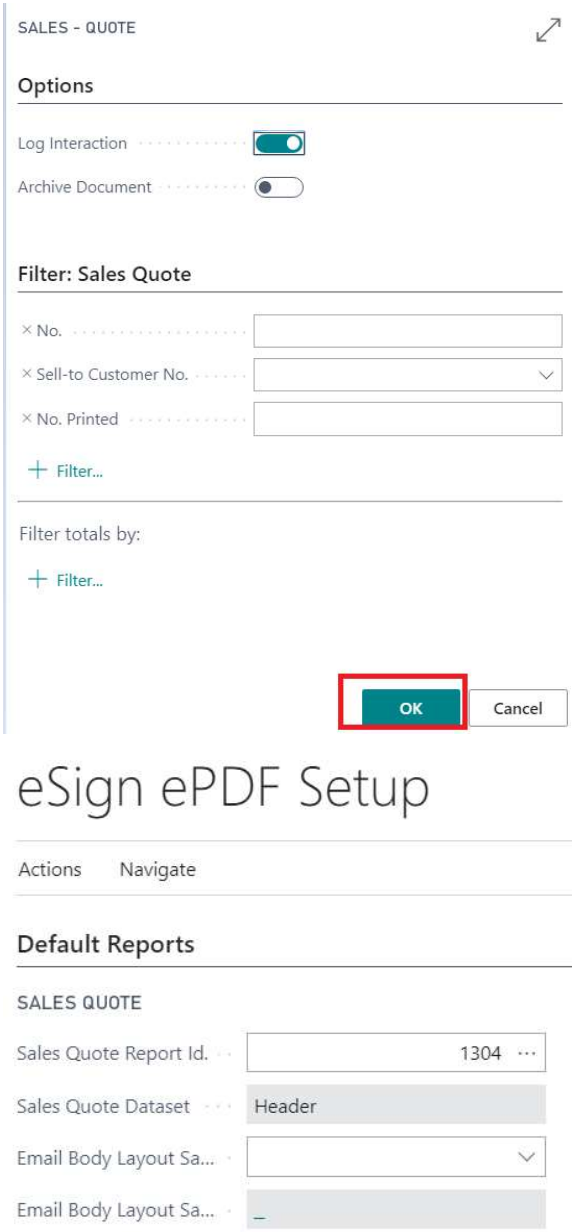
- Sales Quote
- Sales Invoice
- Sales Credit Memo
- Service Invoice
- Service Credit Memo

These reports are configured in eSign ePDF.

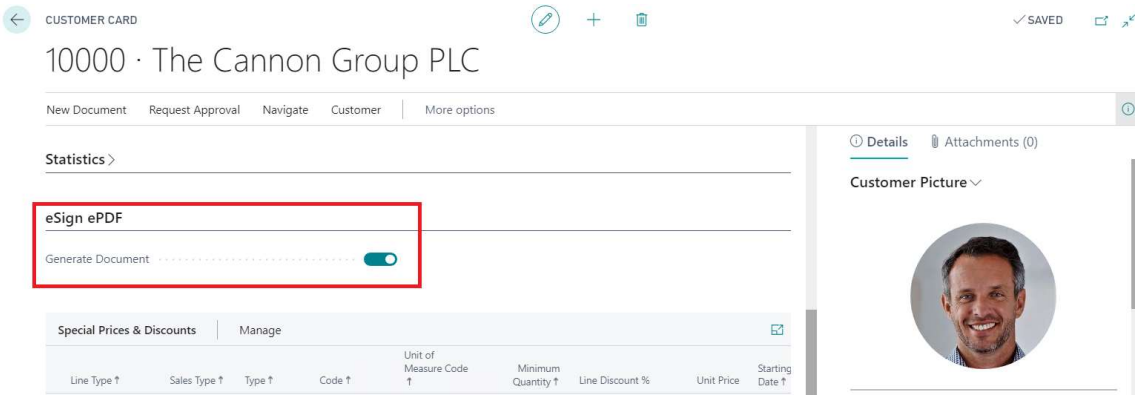



When you select a “Sales Quote Report Id.” from dots, the “Report Request Page” apper and you should click Ok button. This action obtain the “Sales Quote Dataset” and this is mandatory to generate the PDF.






For use eSign ePDF solution reports default, the customers must be checked the field Generate document.



## Generate ePDF Document

The process for generate ePDF document is very simple.

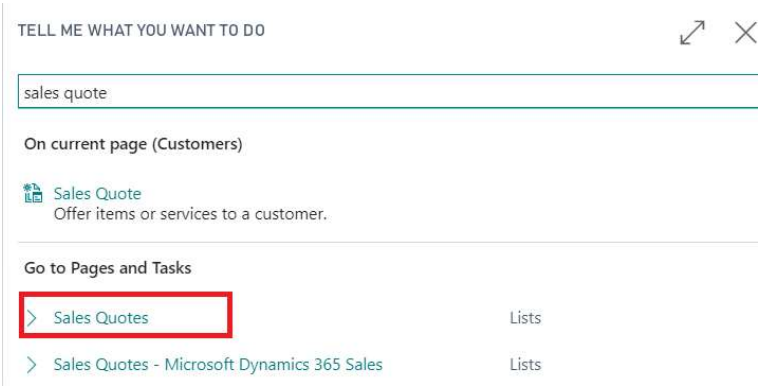
When a standard Sales/Services Invoice or Credit Memo is posted, the solution generates ePDF Document. For Sales Quotes, you can execute the PDF generation manually.

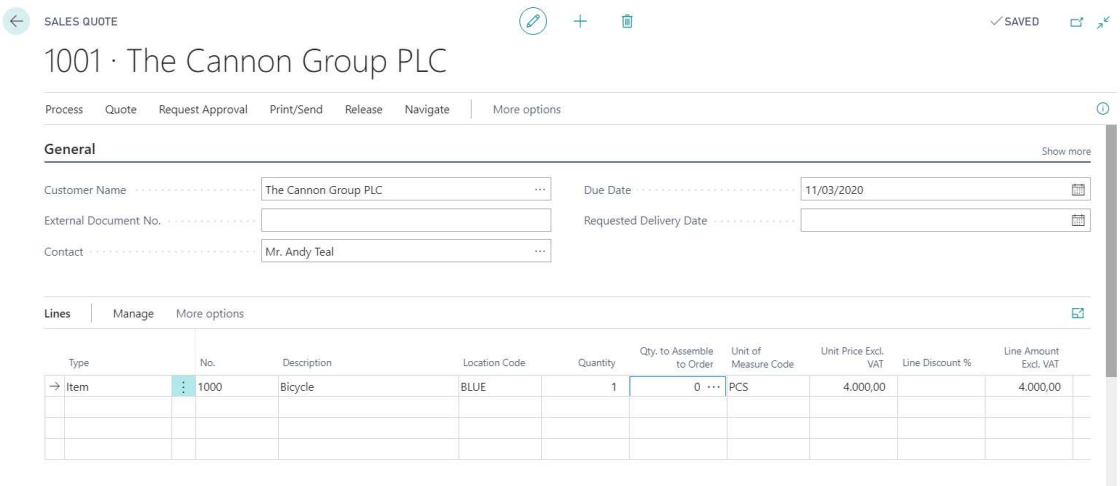
You can generate ePDF document manually from Invoiced document.

*Note: In Company demo, the ePDF document only generate manually.*

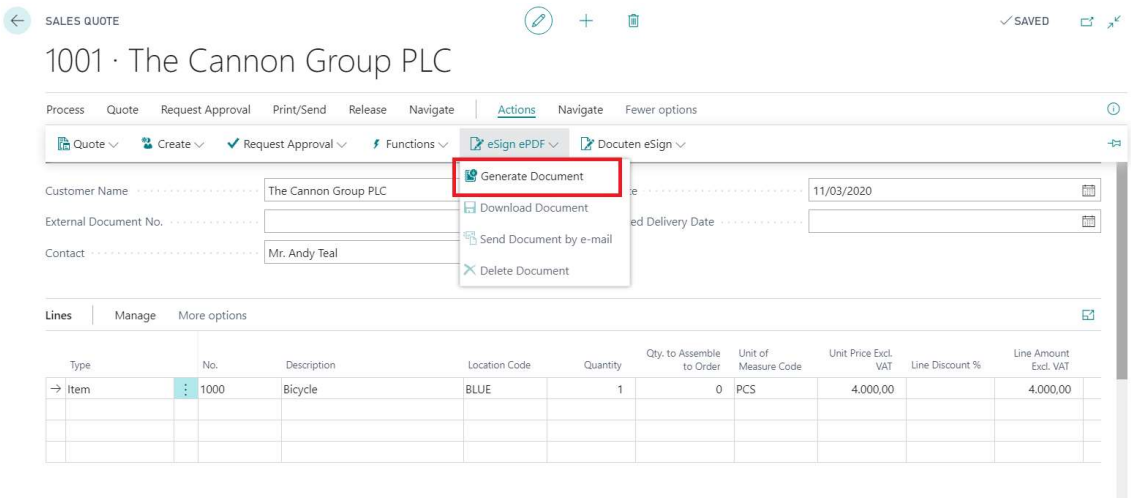
### Generate document from sales quote

The first step is generating a new sales quote for the customer with mark “Generate Document”.

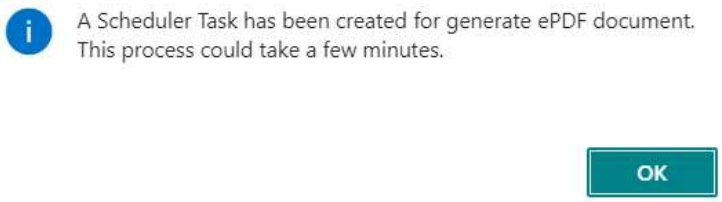


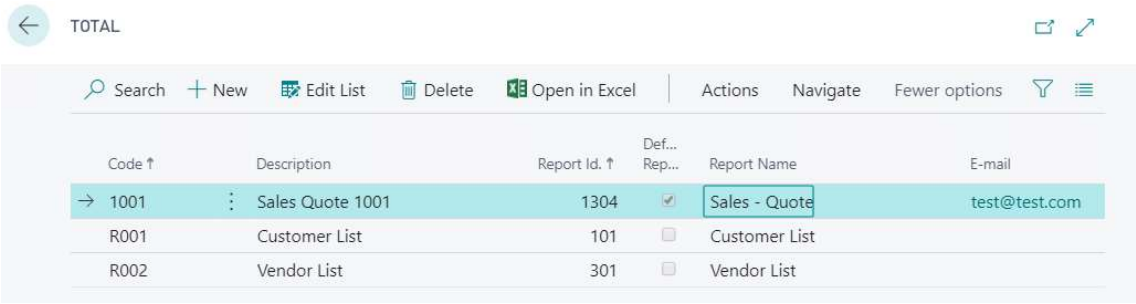

You should execute the action eSign ePDF/Generate Document.

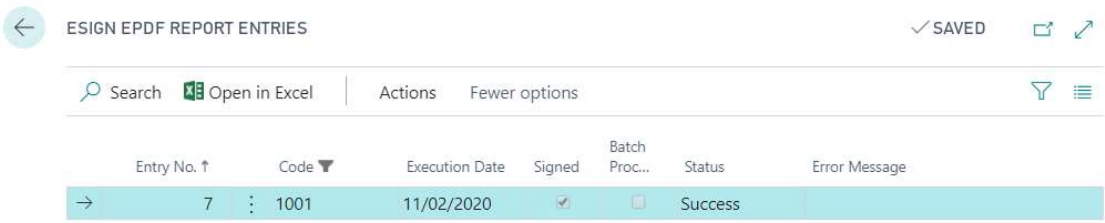



This process could take a few minutes and is executed in background.



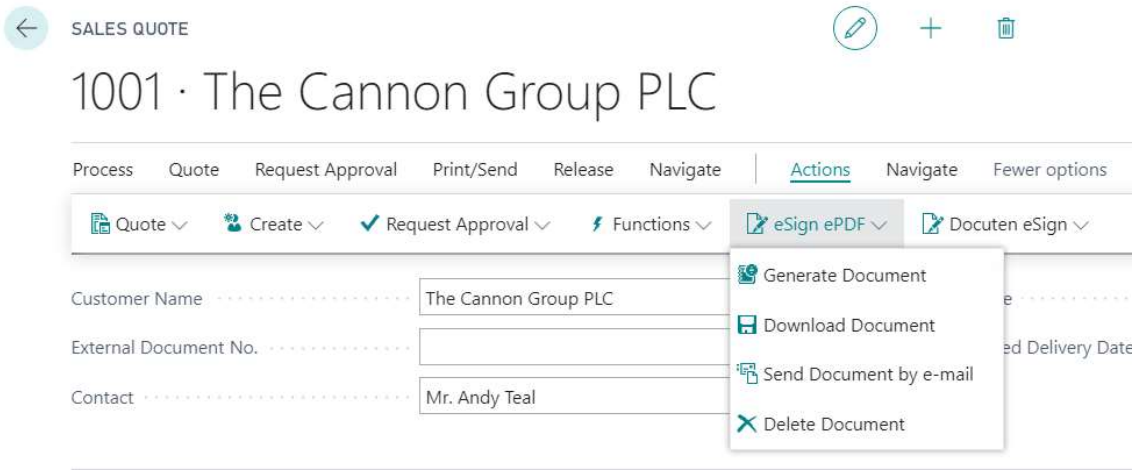

When this process finalizes, a “Report” record for the “Report Id” = 1304 and the filters Nº = 1001 has been created and a “Report Entry” record is created too.



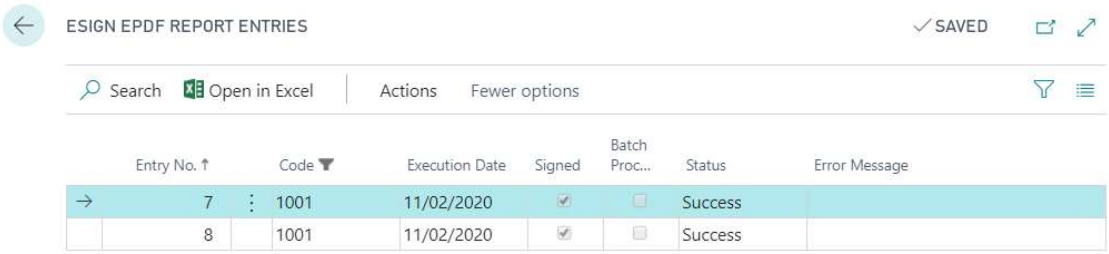




You can execute the follow actions from Sales Quote now:

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




The action Generate Document create a new “Record Entry” if the “Record” exists.




The action “Download Document” download the signed document saved in database.

Sales Quote
1001

cronus

CRONUS, Birmingham RC.
Aaron Nicholls
Main Street, 14
Birmingham, B27 4KT
Great Britain

+44-161 818192

**The Cannon Group PLC**
**Mr. Andy Teal**
**192 Market Square**
**Birmingham, B27 4KT**
**Great Britain**

| Document Date | Valid to | Salesperson |
|---|---|---|
| 11. February 2020 | | Peter Saddow |

| No. | Description | Quantity | Unit | Unit Price Excl. VAT | VAT % | Line Amount Excl. VAT |
|---|---|---|---|---|---|---|
| 1000 | Bicycle | 1 | Piece | 4.000,00 | 25 | 4.000,00 |
| | | | | | Subtotal | 4.000,00 |
| | | | | | 25% VAT | 1.000,00 |
| | | | **Total £** | | | **5.000,00** |

| Bank | Bank Branch No. | Account No. | VAT Registration No. |
|---|---|---|---|
| World Wide Bank | BG99999 | 99-99-888 | 777777777 |

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