



## INSTALLATION & QUICK SETUP – Docuten eSign

This document indicates the steps to follow to create a complete cycle of the Docuten eSign solution. This solution generates documents in the system and sends them to an external platform called Docuten (this document is referred to as the Docuten platform). This platform is in charge of carrying out the signing process and the solution links between Dynamics 365 Business Central and the Docuten platform.

### Role center

The role center area can be changed by accessing the configuration menu:

On the top right corner you can search for a **settings icon** like in **Figure 1** and click it.



Figure 1: My Settings button

Then click on **My Settings** as shown in **Figure 2**, a new window will pop up.

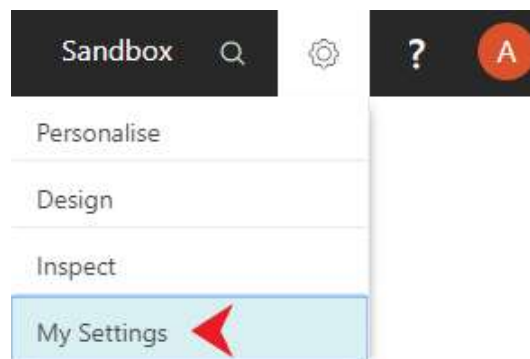




Figure 2: My Settings


At the Role Center (**Figure 3**) row, click the **dots** to unfold the list.



EDIT - MY SETTINGS 

Role ..... Docuten eSign ...

Company ..... CRONUS International Ltd. ...

Work Date ..... 27/01/2022 

**REGION & LANGUAGE**

Region ..... Spanish (Spain) ...

Language ..... English (United States) ...

Time Zone ..... (UTC+01:00) Amsterdam, Berlin, Bern, ... ...

Notifications ..... [Change when I receive notifications.](#)

Your last sign in was on 06/05/20 10:36.

**OK** **Cancel**

Figure 3: Role Center profile

At the end of the list you can find the Docuten eSign Profile like in **Figure 4**. Please select it and then click OK to confirm your action.

	Display Name
	<a href="#">IN Translate Docker</a>
	<a href="#">IN Apps Analyzer</a>
	<a href="#">IN Data Manager</a>
→	<a href="#">Docuten eSign</a>
	<a href="#">IN Translate</a>

Figure 4: Profile selection

## Setup

You must configure the **Docuten eSign** solution from Setup menu (**figure 5**).

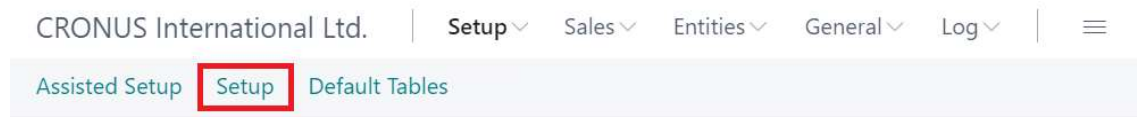


Figure 5: Setup

You must configure the Customer Id. from Innova Online portal Setup (**figure 6**).



CRONUS International Ltd. | Setup Sales Entities General Log

Setup: All | Buscar | Open in Excel | Más opciones

Name
Innova Online Setup
eSign ePDF Setup
Docuten eSign Setup

# Innova Online Setup

Navigate

## General

Customer Id.

Figure 6: Innova Online Setup

You must configure Docuten eSign. You should indicate credentials for the Docuten platform, reports to generate sales quotes and sales invoices and serial numbers for creating the entities of the solution (**figure 7**). If you active the field Sent to Docuten automatically, the system uses the customer data for create a signer when you create a document from sales quote or sales invoices and this document is sent to Docuten platform directly.

CRONUS International Ltd. | Setup Sales Entities General Log

Setup: All | Buscar | Open in Excel | Más opciones

Name
Innova Online Setup
eSign ePDF Setup
Docuten eSign Setup



## Docuten eSign setup

Actions

---

**Docuten API**

---

API url ..... [REDACTED] API key ..... [REDACTED]

---

**General**

---

Send to Docuten automatically ..... ☐

---

**Default reports**

---

Sales quote report id. ....	1304	Posted sales invoice report id. ....	1306
Sales quote dataset .....	Header	Posted sales invoice dataset .....	Header

---

**No. series**

---

Report templates nos. ....	DEPT	Document nos. ....	DED
File storage nos. ....	DEFS		

Figure 7: Docuten eSign Setup

## Report Templates to create Documents to send to Docuten platform

Report templates allow you to generate PDF documents from any system report. These PDF documents are stored in a **Document** entity from which the digital signature process is generated on the Docuten platform.

Access to the Report Templates from the role center (**figure 8**).



Figure 8: Report Templates

You must indicate a No. and select the Report Id. (**figure 9**).

No. ↑	Description	Report Id.	Report Name	Default Table Id.	Default Table Caption
→ RT00000002	Customer List	101	Customer List	0	
RT00000003	Sales - Quote	1304	Sales - Quote	18	Customer

Figure 9: Create Report Template

You must add the filters to execute the Report from action **Report Request Page** (**figure 10**).



Report Request Page Document

→ RT00000002	:	Customer List	101	Customer List	0
RT00000003		Sales - Quote	1304	Sales - Quote	18 Customer

CUSTOMER LIST

Filter: Customer

× No. .... 10000|20000|30000

× Search Name .....

× Customer Posting Group ...

+ Filtrar...

Filtrar totales por:

+ Filtrar...

OK Cancel

Figure 10: Report Request Page

The action **Document/Create** allows creating a **Document** to send it to the Docuten platform below (**figure 11**).

Report Request Page Document

→ RT00000002	:	Cus	101	Customer List	0
RT00000003		Sale	304	Sales - Quote	18 Customer

Figure 11: Create Document

The action **Document/Update** allows updating a **Document** (pdf) pending to send o sent to the Docuten platform (**figure 12**).

Report Request Page Document

→ RT00000002	:	Cus	101	Customer List	0
RT00000003		Sale	304	Sales - Quote	18 Customer

Figure 12: Update Document

You must select a Document to update it (**figure 13**).



Select a Document No. to update the file of document.

Document No. ....

Yes

No

Figure 13: Select a Document to update

### Files Storage to create Documents to send to Docuten platform

The file storage is an entity that allows importing documents and associating them with system entities such as customer, vendors, items, bank accounts, fixed assets, etc. You can generate the **Document** entity from file storage with format PDF. The signature process in Docuten platform is generated from **Document** entity.

Access to the Files Storage from the role center (figure 14).

#### DOCUMENT MANAGEMENT



Figure 14: Documents Container

You can drag and drop a document in the **Drag & Drop** area. This action creates a file storage and it can be associated to the system record from fields **Table Id.** and **Record Id.** (figure 15).

DOCUMENT MANAGEMENT						
No. ↑	Title	PDF	Document No.	Document Status	Table Id.	Record Id. Text
→ DC00000051	doc2.txt	<input type="checkbox"/>	..	Pending	18	Customer: 20309920
DC00000054	doc2.txt	<input type="checkbox"/>	..	Pending	18	Customer: 20000
DC00000055	Invoice103001.pdf	<input checked="" type="checkbox"/>	D000000065	Pending	0	
DC00000057	Test PDF.pdf	<input checked="" type="checkbox"/>	..	Pending	23	Vendor: 01254796
DC00000058	D000000044.pdf	<input checked="" type="checkbox"/>	D000000048	Multi	23	Vendor: 01254796
DC00000059	Sales - Quote	<input checked="" type="checkbox"/>	..	Pending	18	Customer: 10000
DC00000060	doc1.pdf	<input checked="" type="checkbox"/>	D000000054	Sent	18	Customer: 10000
DC00000061	doc1.pdf	<input checked="" type="checkbox"/>	D000000055	Ready	18	Customer: 20000
DC00000062	doc1.pdf	<input checked="" type="checkbox"/>	D000000056	Sent	18	Customer: 20000
DC00000064	doc1.pdf	<input checked="" type="checkbox"/>	D000000057	Sent	18	Customer: 10000



Figure 15: Create File Storage

The action **File/Download** allows downloading the file and the action **File/Update** updates the file selecting a new file from the system (figure 16).



Figure 16: Actions in File menu

The action **Document/Create** allows creating a **Document** entity. The signature process in Docuten platform is launched from the Document entity. This action is active when file is PDF and there are no **Documents** created for file storage (figure 17).

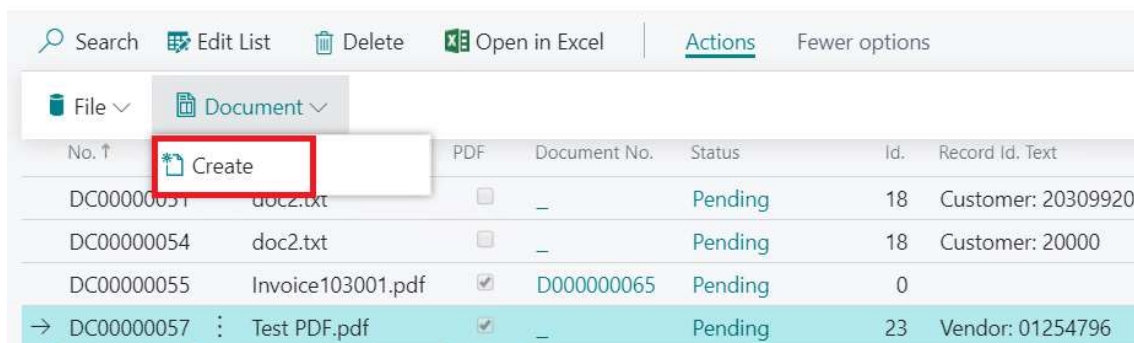


Figure 17: Create Document

### Files Storages created from standard entities

The file storage can be created manually, but they can be created from system entities too. These entities are customers, vendors, items, bank accounts and fixed assets.

Access to the customer list and show the FactBox panel to see the section **Drag & Drop** (figure 18).



Figure 18: Create File storage from Customer

When you drag a document to the **Drag & Drop** section a file storage has been created and this is associated to the customer through the fields **Table Id.** and **Record Id.**



You can see the associated Documents and update it from section **Docuten eSign Documents** (figure 19).

No. ↑	Title
DC00000059	Sales - Quote
DC00000060	doc1.pdf
DC00000064	doc1.pdf
DC00000069	R003-7.pdf
DC00000070	R002-2.pdf

Figure 19: Update file storage from Customer

Create Files Storages from Report Templates.

The Documents are created from Report Templates as we have seen above. You can create a file storage from Report Templates too. This can be useful for linking a report to the system record.

You must indicate a Default Table in Report Template to generate a Document and a file storage from Report Template. The Default Tables can be configured from the role center (figure 20).

CRONUS International Ltd.	Setup	Sales	Entities	General	Log	
Report Templates	Files Storage	Documents	Default Tables	Signers		

Figure 20: Default Tables

These default tables are indicated in the field Default Table in Report templates (figure 21).

No. ↑	Description	Report Id.	Report Name	Default Table Id.	Default Table Caption
RT00000002	Customer List	101	Customer List	0	
→ RT00000003	Sales - Quote	1304	Sales - Quote	18	Customer

Figure 21: Report Template Default Table

You must indicate a system record to associate the document to the report when you execute the action **Document/Create** (figure 22).





Select a Record Id. related to table to create a new document container. The document container will not created if Record Id. is not selected and only will be create a Document.

Record Id. Text .....

Yes

No

Figure 22: Select Record to create file storage

## Documents to Docuten platform

The Document entity allows generating the signature process in Docuten platform.

The Document should pass through the different states to generate the signature process: Pending, Ready, Sent, Signed. There are others status such as Canceled and Deleted that can be executed if status is Sent. There is a special status Multi.

You can access to the Documents from work area (**figure 23**).

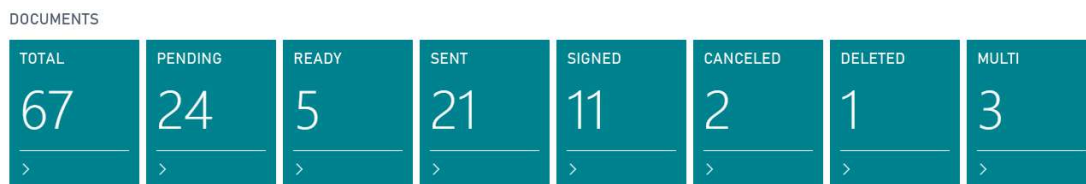


Figure 23: Documents

Access to the Document list clicking a **Document** icon (**figure 24**).

No. ↑	Title	Description	Posting Date	Docum... Version	Has Sign...	Has Atta...	Document Status	Status Code	Signatures Total	Signatures Done	Id.
D000000020	DOC020_multi		28/01/2021	0	✓	☐	Ready		0	0	
D000000024	DOC019_multi		28/01/2021	1	✓	☐	Signed	ENDED	1	1	4227
D000000025	DOC019_multi		28/01/2021	1	✓	☐	Sent	PENDING	1	0	4227
D000000026	DOC019_multi		28/01/2021	1	✓	☐	Sent	PENDING	1	0	4227
D000000027	DOC027		28/01/2021	1	✓	☐	Sent	EXPIRED	1	0	4227
D000000028	DOC028		28/01/2021	1	✓	☐	Signed	ENDED	2	2	4228
D000000029	DOC029		28/01/2021	1	✓	☐	Sent	REJECTED	1	0	4228
D000000030	DOC030		28/01/2021	1	✓	☐	Sent	CANCELED	1	0	4228
D000000031	DOC031		28/01/2021	1	✓	☐	Signed	ENDED	1	1	4228

Figure 24: Document List

You can access to the Document by clicking on **No.** field. This action opens the Document card and you can see information to send to Docuten platform (**figure 25**).



D000000088

Actions Navigate

### General

No.	D000000088	Description	
Posting Date	28/01/2021	Expiration Date	
Document Status	Pending	Notification Date	
Document Type	Document Container	Has Signers	<input type="checkbox"/>
Document Type No.	DC00000101	Has Attachments	<input type="checkbox"/>
Title	D000000087.pdf		

### Docuten Data

Id.		Status Code	
Document Version	0	Status Name	
Signatures Total	0	Public Id.	
Signatures Done	0	File Name	

Figure 25: Document Card

The first step to generate the signature process is putting the **Document Signers**. These are the people that will sign the documents in Docuten platform. You can put the Documents Signers from **Navigate/Signers** menu (figure 26).

D000000088

Actions Navigate

**Signers** History Attachments Log

No.	D000000088	Description	
Posting Date	28/01/2021	Expiration Date	
Document Status	Pending	Notification Date	
Document Type	Document Container	Has Signers	<input type="checkbox"/>
Document Type No.	DC00000101	Has Attachments	<input type="checkbox"/>
Title	D000000087.pdf		

Figure 26: Document Signers Menu

The fields **Email** and **Name** are mandatory in Document Signers (figure 27).

DOCUTEN ESIGN DOCUMENT SIGNER LIST | WORK DATE: 28/01/2021

Document No. ↑	Email ↑	Name	Nif	Mobile
→ D000000088	test1@test.es	Test 1		
D000000088	test2@test.es	Test 2		

Figure 27: Document Signers

The signers of document can be saved in a Signer list to facilitate later use. They can be managed from work area (figure 28 and 29).

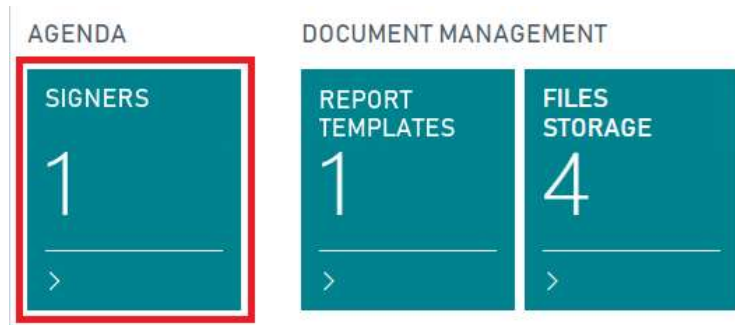


Figure 28: Signers

TOTAL

✓ SAVED

Search + New Edit List Delete Open in Excel

Email	Name	Nif	Mobile
test1@test.es	Test 1	11111111H	
test2@test.es	Test 2		600111111
test3@test.es	Test 3		

Figure 29: Signers

You can change the status to **Ready** and **Sent** (figure 30 and 31).

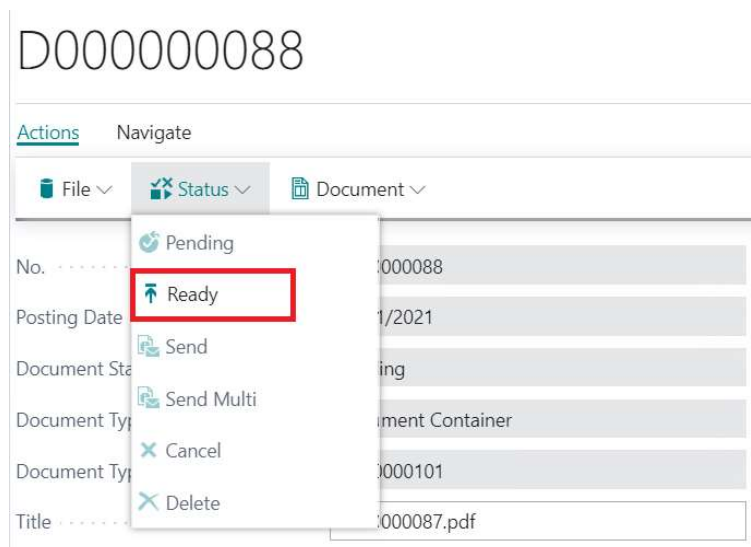


Figure 30: Document Status Ready



D000000088

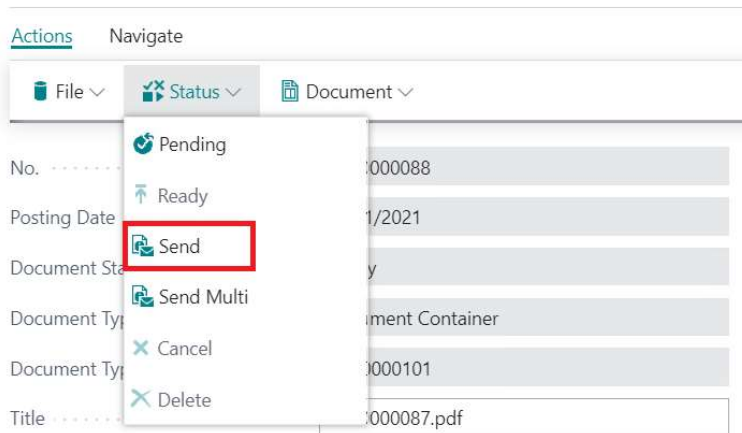


Figure 31: Document Status Send

Once sent the document to the Docuten platform, the platform data is retrieved automatically (figure 32).

D000000088



Figure 32: Docuten Data

The signature process is executed externally in the Docuten platform. You can get the document detail from action **Get Detail** (figure 33).



D000000088

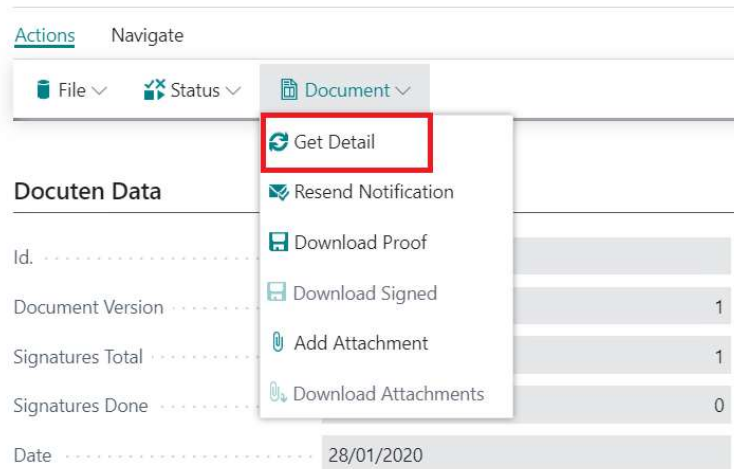


Figure 33: Get Detail Document

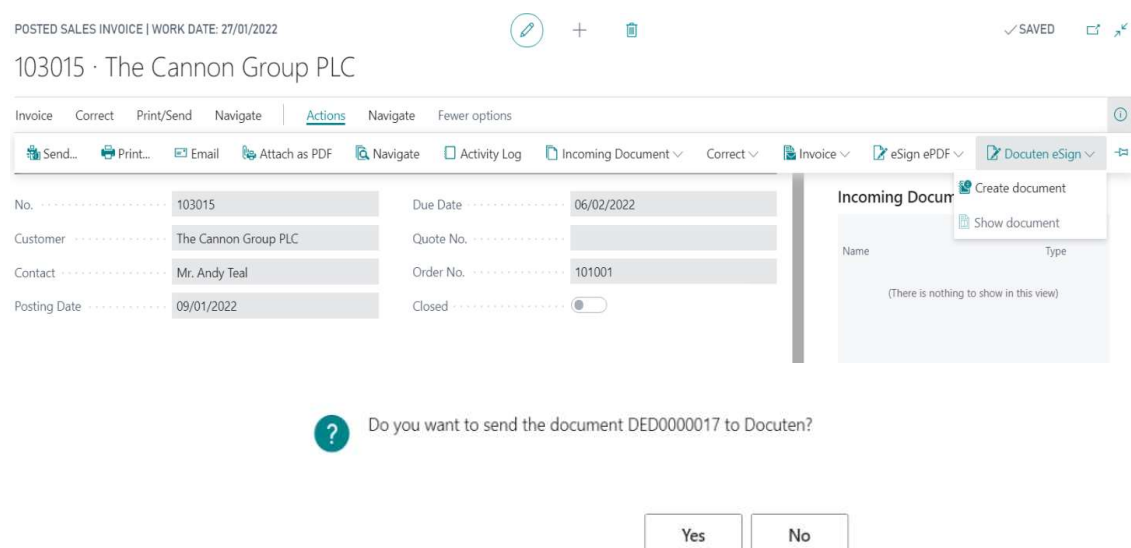
There are other actions that allow updating the signature process in Docuten platform such as **Resend Notification** or **Add Attachment**. You can **Download Proof**, **Download Signed** and **Download Attachments** too.

There are other actions navigating in the menu. These are **Historical**, **Attachments** and **Log**. These allow checking information referred to the Docuten platform.

Documents created from sales documents (sales quote, sales order, sales shipment and posted sales invoice).

You can create a Document to send Docuten from sales documents. This process is explained for posted sales invoice.

From posted sales invoice, you should execute the action Docuten eSign, Create document.



This action creates the document to send Docuten and sent it when:



- The customer has name and email.
- The field Send to Docuten automatically is active in Docuten eSign setup.

## Docuten eSign setup

Actions

Docuten API >

### General

Send to Docuten automatically ☒

Reminder date calculation 3D

The document will have the signer with customer data.

DOCUTEN ESIGN DOCUMENT | WORK DATE: 27/01/2022



DED0000017

Actions

Navigate

File

Status

Document

### General

No. DED0000017

Description

Posting date 27/01/2022

Expiration date

Document status Sent

Notification date

Source document type File storage

Language Spanish

Source document no. DEFS000016

Has signers ☒

Title Posted sales Invoice 103015

Has attachments ☐

Access to signers from Navigate, Signers.

DOCUTEN ESIGN DOCUMENT SIGNER LIST | WORK DATE: 27/01/2022

✓ SAVED

Search + New Edit List Delete Open in Excel Actions Fewer options

Document no. ▼	Email	Name	Nif	Mobile	Signature type	Role	Langu...	Notification order ↑	Signer public id.
→ DED0000017		The Cannon Gr...			OTP	Signer	Spanish	1	96cc1a1e-21d8-4911-84d8-ed...

## Queries

There are two queries in the rol center.

### QUERIES





## Documents

This query allows you review the documents generated from documents: sales quote, sales order, sales shipment and posted sales invoice.

This query has information about the document (sales quote, etc.) and you can access to document to send Docuten from Navigate, Document.

DOCUMENTS | WORK DATE: 27/01/2022

No. ↑	Title	Posting date	Status	Customer no.	Sales document type	Sales document no.	Sales document posting date
DED0000001	Factura venta registrada 103027	27/01/2022	Sent	35451236	Posted sales invoice	103027	27/01/2022
DED0000003	Factura venta registrada 103026	27/01/2022	Sent	35963852	Posted sales invoice	103026	26/01/2022
DED0000004	Factura venta registrada 103025	27/01/2022	Sent	47563218	Posted sales invoice	103025	25/01/2022
DED0000005	Factura venta registrada 103024	27/01/2022	Sent	20000	Posted sales invoice	103024	24/01/2022
DED0000006	Factura venta registrada 103023	27/01/2022	Canceled	01445544	Posted sales invoice	103023	24/01/2022
DED0000009	Factura venta registrada 103001	27/01/2022	Pending	10000	Posted sales invoice	103001	24/01/2022
DED0000010	Oferta venta 1002	27/01/2022	Pending	10000	Sales quote	1002	27/01/2022
DED0000011	Oferta venta 1003	27/01/2022	Signed	10000	Sales quote	1003	27/01/2022
DED0000014	Sales order 101005	27/01/2022	Pending	30000	Sales order	101005	13/01/2022
DED0000015	Sales order 101016	27/01/2022	Sent	10000	Sales order	101016	27/01/2022
DED0000017	Posted sales Invoice 103015	27/01/2022	Sent	10000	Posted sales invoice	103015	09/01/2022

## Reminders

This query allows you review the documents sent to Docuten with expire date but not yet signed.

In this query, only the documents whose expiration date is close to the limit indicated in the field Reminder data calculation in Docuten eSign setup.

### Docuten eSign setup

Actions

Docuten API >

General

Send to Docuten automatically ☒

Reminder date calculation 3D

From this query you can navigate to document to send Docuten and send a custom message to signer from actions.

REMINDERS | WORK DATE: 27/01/2022

No. ↑	Title	Posting date	Status	Expiration date
DED0000001	Factura venta registrada 103027	27/01/2022	Sent	12/07/2020
DED0000005	Factura venta registrada 103024	27/01/2022	Sent	17/07/2020

For send custom message, you should configure SMTP setup and template email in Docuten eSign setup.



## Docuten eSign setup

Actions

Docuten API >

General >

Default reports >

No. series >

Send email

Reminder subject mail ..... Firmas pendientes

Reminder email body layout code ..... 7226678-000001

Reminder email body layout description ..... Copy of Built-in layout

## Tasks

There is a task “Send sales documents” to send documents to Docuten from sales quote, sales order, sales shipment and posted sales invoice. This task can be executed from rol center.

CRONUS International Ltd. | Setup ▾ Sales ▾ Entities ▾ General ▾ Queries ▾ Log ▾ | ≡

SIGNATURES

There are 0 signatures today.

ACTIONS

+ Report template + File storage > Tasks

Send sales documents

○ ○ ●

This task requires a date and checks to send documents. Use the posting date to filter documents. Although, the customer should be active the field “Periodical send”.

Docuten eSign

Periodical send ..... ☒





#### BATCH SEND SALES DOCUMENTS



##### Options

Posting date .....	<input type="text"/>
Send sales invoices .....	<input checked="" type="checkbox"/>
Send sales quotes .....	<input checked="" type="checkbox"/>
Send sales orders .....	<input checked="" type="checkbox"/>
Send sales shipments .....	<input checked="" type="checkbox"/>

Schedule...

OK

Cancel

### Job Queue

You can create job queue to execute codeunits for send documents to Docuten from sales quote, sales order, sales shipment and posted sales invoice. You can use the codeunits:

- INNDOCeSSendSalesQuotes
- INNDOCeSSendSalesOrders
- INNDOCeSSendSalesShipments
- INNDOCeSSendSalesInvoices

These codeunits uses the today date to filter the documents and require the field "Send periodical" in customers.