

INSTALLATION & QUICK SETUP – eSign ePDF

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

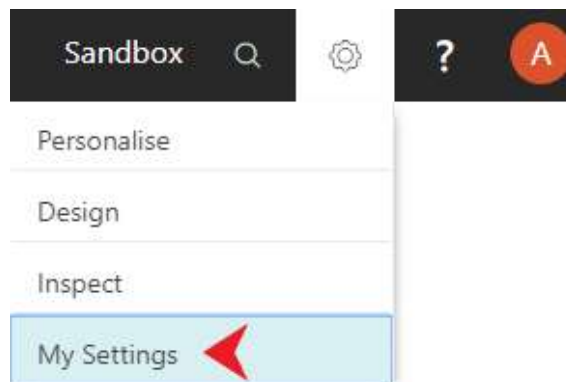
Change dashboard interface

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.

EDIT - MY SETTINGS 

Role	eSign ePDF	...
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 07:44.

OK

Cancel



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

	Administration
	Administration of users, user groups and permissions
	Business Manager
	Dispatcher - Customer Service
	Docuten eSign
→	eSign ePDF
	Finance

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.

CRONUS International Ltd. | Setup ▾ Sales ▾ Posted documents ▾ | ≡

✕ eSign ePDF is pending to setup. Set up eSign ePDF ▾

HEADLINE

Want to learn more about Business Central?

ACTIONS

- + Reports
- + Sales return order
- + Service invoice
- + Sales quote
- + Sales invoice
- + Service credit memo
- + Sales order
- + Sales credit memo

Activities

Information REPORTS

REPORTS			REPORTS ENTRIES				OTHER		MANAGEMENT LOG	
TOTAL	DEFAULT	MANUAL	SUCCESS	SIGNED	UNSIGNED	WITH ERRORS	CUSTOMERS	TOTAL		
5	3	2	15	13	3	1	1	11		
>	>	>	>	>	>	>	>	>		

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.

INSTALL ESIGN EPDF WIZARD

⚙️

INNOVA ONLINE SETUP

Provide information to configurate Innova Online portal.

Customer Id <customer id>

If you have not an user in Innova Online portal, you can Register User from this link.

[Register User](#)

Back Next Finish

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

INSTALL ESIGN EPDF WIZARD



ESIGN EPDF SETUP

Provide information to configure ePDF.

Certificate Id <certificate id>

Certificate Password

Sign Document ☒

Actions for Document Save in database

Email Body Layout Code

Email Body Layout Description

Back

Next

Finish

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.

CRONUS International Ltd.

Setup

Sales

Posted Documents

ACTIONS

+ Reports

+ Sales Return Order

+ Service Invoice

+ Sales Quote

+ Sales Invoice

+ Service Credit Memo

+ Sales Order

+ Sales Credit Memo

INSIGHT FROM LAST MONTH

The biggest sales order was
for 12.254 kr

Activities

Information REPORTS

TOTAL	DEFAULT	MANUAL	SUCCESS	SIGNED	UNSIGNED	WITH ERRORS	CUSTOMERS
0	0	0	0	0	0	0	0

Insights

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

Code	Description	Report Id.	Def... Rep...	Report Name	E-mail
R001	Customer List	101		Customer List	
R002	Vendor List	301		Vendor List	

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

← TOTAL 📄 ↗

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

📄 Report Request Page
📄 Execute Report
📄 Execute Report Foreground
📌

→ R001	⋮	Customer List	101	<input type="checkbox"/>	Customer List
R002		Vendor List	301	<input type="checkbox"/>	Vendor List

CUSTOMER LIST ↗

Filter: Customer

× No.

▼

× Search Name

× Customer Posting Group ...

▼

+ Filter...

Filter totals by:

+ Filter...

OK

Cancel

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

← TOTAL 📄 ↗

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

📄 Report Request Page
📄 Execute Report
📄 Execute Report Foreground
📌

→ R001	⋮	Customer List	101	<input type="checkbox"/>	Customer List
R002		Vendor List	301	<input type="checkbox"/>	Vendor List

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

← TOTAL

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

Entries

Entry No.	Code	Execution Date	Signed	Batch Process	Status	Error Message
→ R001	Customer List	101	<input type="checkbox"/>	Customer List		
R002	Vendor List	301	<input type="checkbox"/>	Vendor List		

← ESIGN EPDF REPORT ENTRIES ✓ SAVED

Search Open in Excel Actions Fewer options

Entry No. ↑	Code	Execution Date	Signed	Batch Process	Status	Error Message
→ 3	R001	11/02/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Success	

You can execute the follow actions from Report Entries:

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

← ESIGN EPDF REPORT ENTRIES ✓ SAVED

Search Open in Excel Actions Fewer options

Download Document Send Document by e-mail Delete Document

Entry No.	Code	Execution Date	Signed	Batch Process	Status	Error Message
→ 3	R001	11/02/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Success	

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

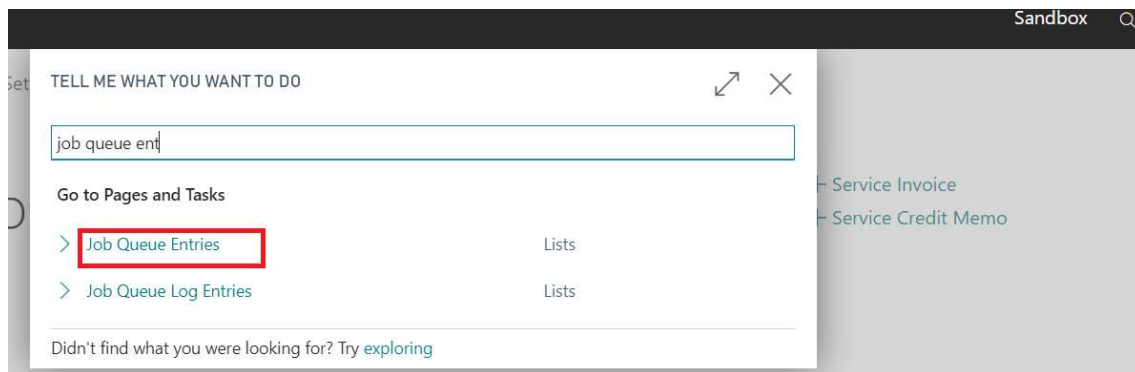
R001-3.pdf 1 / 10

No.	Customer Posting Group	Cust./Item Disc. Gr.	Invoice Disc. Code	Price Group Code	Fin. Charge Terms Code	Payment Terms Code	Salesperson Code	Currency Code	Credit Limit (LCY)	Balance (LCY)
01121212	FOREIGN		01121212		2.0 FOR	1M30D	JR	USD	0	0.00
Spotmeyer's Furnishings, 612 South Sunset Drive, Miami, FL US-FL 33126, USA Contact: Mr. Mike Nash										
01445544	FOREIGN	RETAIL	01445544		2.0 FOR	14 DAYS	JR	USD	0	1,499.03
Progressive Home Furnishings, 3000 Roosevelt Blvd., Chicago, US-IL 61236, USA Contact: Mr. Scott Mitchell										
01454545	FOREIGN	LARGE ACC	01454545		2.0 FOR	CM	JR	USD	0	222,241.32
New Concepts Furniture, 705 West Peachtree Street, Atlanta, GA US-GA 31172, USA Contact: Mr. Tammy L. McDonald										
01905893	FOREIGN		01905893		2.0 FOR	1M30D	JR	CAD	0	0.00
Candory Canada Inc., 18 Cumberland Street, Thunder Bay, CA-ON P7B 1S2, Canada Contact: Mr. Rob Young										
01905899	FOREIGN	RETAIL	01905899		2.0 FOR	14 DAYS	JR	CAD	0	0.00
Elkhorn Airport, 105 Buffalo Dr., Elkhorn, CA-NB R0M 0N1, Canada Contact: Mr. Ryan Danner										
01905902	FOREIGN	LARGE ACC	01905902		2.0 FOR	CM	JR	CAD	0	0.00
London Candory Storage Campus, 120 Wellington Rd., London, CA-ON N6B 1Y1, Canada Contact: Mr. John Kane										
10000	DOMESTIC		10000		1.5 DOM	1M30D	PS		0	168,364.41
The Cannon Group PLC, 191 Market Square, Birmingham, B27 4ET, Great Britain Contact: Mr. Andy Teal										

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.

A screenshot of the 'JOB QUEUE ENTRY CARD' form. The title is 'Report · 101 · Customer List'. Below the title, there are tabs: 'Process', 'Report', and 'More options'. The 'Report' tab is selected. The form is divided into sections: 'General', 'Report Parameters', and 'Recurrence'. In the 'General' section, there are fields for 'Object Type to Run' (set to 'Report'), 'Object ID to Run' (set to '101'), 'Object Caption to Run' (set to 'Customer List'), 'Description' (set to 'Customer List'), 'Earliest Start Date/Time' (with a calendar icon), and 'Status' (set to 'On Hold'). The 'Report Parameters' section has a 'Report Request Page' toggle (turned on) and a 'Report Output Type' dropdown (set to 'PDF'). The 'Recurrence' section has a 'Printer Name' field and a '0' button. The 'Object Type to Run', 'Object ID to Run', and 'Report Output Type' fields are highlighted with red rectangular boxes.

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.

← JOB QUEUE ENTRY CARD ✎ + 🗑 ✓ SAVED 📄 ↗

Report · 101 · Customer List

Process | Report | More options

🗨 Set Status to Ready ⏸ Set On Hold ⚠ Show Error ▶ Restart 📋 Log Entries 🔗

Report Request Page ... ☐ Printer Name ...

Report Output Type ...

Recurrence

Recurring Job ☐

Run on Mondays ☐

Run on Tuesdays ☒

Run on Wednesdays ☐

Run on Thursdays ☐

Run on Fridays ☐

Run on Saturdays ☐

Run on Sundays ☐

Next Run Date Formula

Starting Time

Ending Time

No. of Minutes between...

Inactivity Timeout Per...

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

CRONUS International Ltd. | Setup ▾ Sales ▾ Posted Documents ▾ | ☰

● ○ ○

Activities

Information REPORTS			REPORTS ENTRIES				OTHER
TOTAL	DEFAULT	MANUAL	SUCCESS	SIGNED	UNSIGNED	WITH ERRORS	CUSTOMERS
0	0	0	0	0	0	0	0
>	>	>	>	>	>	>	>

Insights

Report Inbox ▾

Created Date-Time ↓	Description	Output Type
11/02/2020 16:00	Customer List	PDF

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.

←
✎ + 🗑
✓ SAVED 📌 📧 ↗

eSign ePDF Setup

Actions
Navigate

Default Reports

SALES QUOTE

Sales Quote Report Id. < ⋮

Sales Quote Dataset < ⋮

Email Body Layout Sa... < ⌵

Email Body Layout Sa... <

SALES INVOICE

Sales Invoice Report Id. < ⋮

Sales Invoice Dataset < ⋮

Email Body Layout Sa... < ⌵

Email Body Layout Sa... <

SALES CR.MEMO

Sales Cr.Memo Repor... < ⋮

Sales Cr.Memo Dataset < ⋮

Email Body Layout Sa... < ⌵

Email Body Layout Sa... <

SERVICE INVOICE

Service Invoice Repor... < ⋮

Service Invoice Dataset < ⋮

Email Body Layout Se... < ⌵

Email Body Layout Se... <

SERVICE CR.MEMO

Service Cr.Memo Rep... < ⋮

Service Cr.Memo Dat... < ⋮

Email Body Layout Se... < ⌵

Email Body Layout Se... <

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.

OBJECTS

	ID ↑	Object Caption
	204	Sales - Quote
	215	Archived Sales Quote
	404	Purchase - Quote
	415	Archived Purchase Quote
	1016	Job Quote
→	1304	⋮ Sales - Quote

SALES - QUOTE

Options

Log Interaction ☒

Archive Document ☐

Filter: Sales Quote

× No.

× Sell-to Customer No.

× No. Printed

+ Filter...

Filter totals by:

+ Filter...

OK Cancel

eSign ePDF Setup

Actions Navigate

Default Reports

SALES QUOTE

Sales Quote Report Id.

Sales Quote Dataset

Email Body Layout Sa...

Email Body Layout Sa...

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

CUSTOMER CARD

10000 · The Cannon Group PLC

New Document Request Approval Navigate Customer More options

Statistics >

eSign ePDF


Generate Document ☒

Special Prices & Discounts Manage

Line Type ↑	Sales Type ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Unit Price	Starting Date ↑
-------------	--------------	--------	--------	------------------------	--------------------	-----------------	------------	-----------------

Details Attachments (0)

Customer Picture



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”.

TELL ME WHAT YOU WANT TO DO

sales quote

On current page (Customers)

Sales Quote

Offer items or services to a customer.

Go to Pages and Tasks

> Sales Quotes

Lists

> Sales Quotes - Microsoft Dynamics 365 Sales

Lists

SALES QUOTE

1001 · The Cannon Group PLC

Process Quote Request Approval Print/Send Release Navigate More options

General

Customer Name

The Cannon Group PLC

Due Date

11/03/2020

External Document No.

Requested Delivery Date

Contact

Mr. Andy Teal

Lines Manage More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
→ Item	1000	Bicycle	BLUE	1	0	PCS	4,000.00		4,000.00

You should execute the action eSign ePDF/Generate Document.

SALES QUOTE

1001 · The Cannon Group PLC

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

Quote Create Request Approval Functions eSign ePDF DocuSign eSign

Customer Name The Cannon Group PLC Generate Document Download Document Send Document by e-mail Delete Document

External Document No. 11/03/2020

Contact Mr. Andy Teal

Lines Manage More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
→ Item	1000	Bicycle	BLUE	1	0	PCS	4,000.00		4,000.00

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

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

OK

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.

TOTAL

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

Code ↑	Description	Report Id. ↑	Def... Rep...	Report Name	E-mail
→ 1001	Sales Quote 1001	1304	<input checked="" type="checkbox"/>	Sales - Quote	test@test.com
R001	Customer List	101	<input type="checkbox"/>	Customer List	
R002	Vendor List	301	<input type="checkbox"/>	Vendor List	

ESIGN EPDF REPORT ENTRIES

Search Open in Excel Actions Fewer options

Entry No. ↑	Code	Execution Date	Signed	Batch Proc...	Status	Error Message
→ 7	1001	11/02/2020	<input checked="" type="checkbox"/>		Success	

You can execute the follow actions from Sales Quote now:

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

← SALES QUOTE ✎ + 🗑

1001 · The Cannon Group PLC

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

Quote ▾ Create ▾ Request Approval ▾ Functions ▾

eSign ePDF ▾ Docuten eSign ▾

Generate Document

Download Document

Send Document by e-mail

Delete Document

Customer Name The Cannon Group PLC

External Document No.

Contact Mr. Andy Teal

ed Delivery Date

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

← ESIGN EPDF REPORT ENTRIES ✓ SAVED 🔗 🔗

🔍 Search 📄 Open in Excel Actions Fewer options 🔍 ☰

Entry No. ↑	Code ▼	Execution Date	Signed	Batch Proc...	Status	Error Message
→ 7	1001	11/02/2020	✓	☐	Success	
8	1001	11/02/2020	✓	☐	Success	

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

Sales Quote
1001



CRONUS, Birmingham RC.

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

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

+44-161 818192

Document Date 11. February 2020 Valid to Salesperson Peter Sadow

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

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