

## eSign Facturae (Installation & Quick Setup)

These are the steps to follow in order to generate a complete cycle of the eSign Facturae solution.

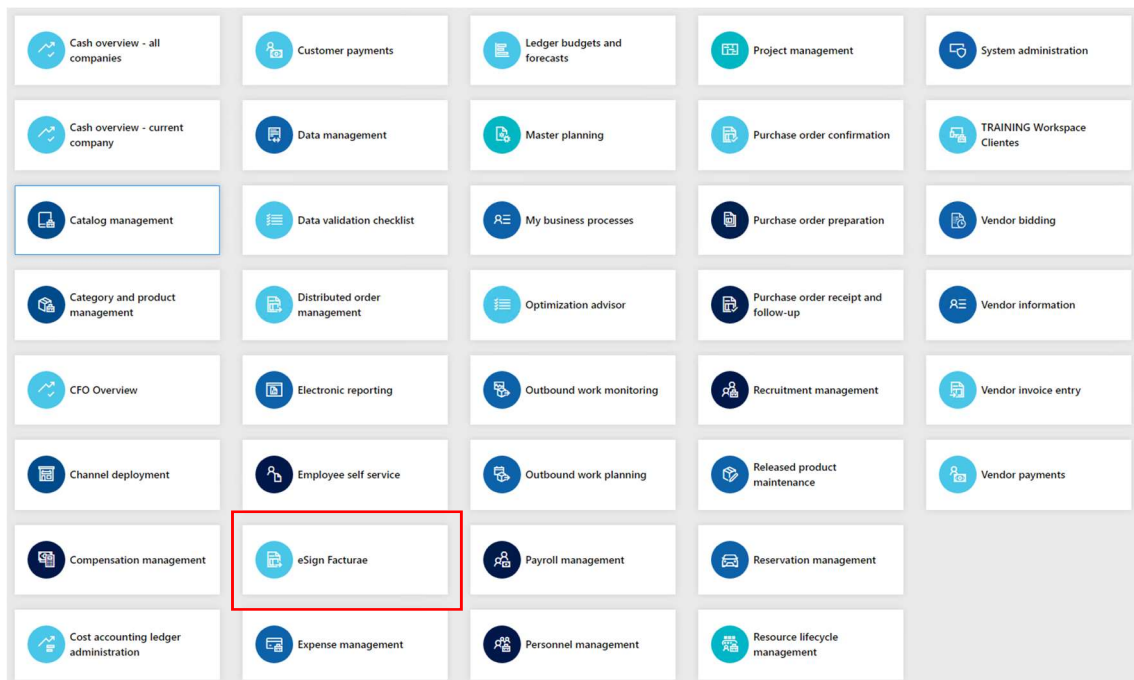
### Installation

Once the solution has been installed, the next field is ready to be used:

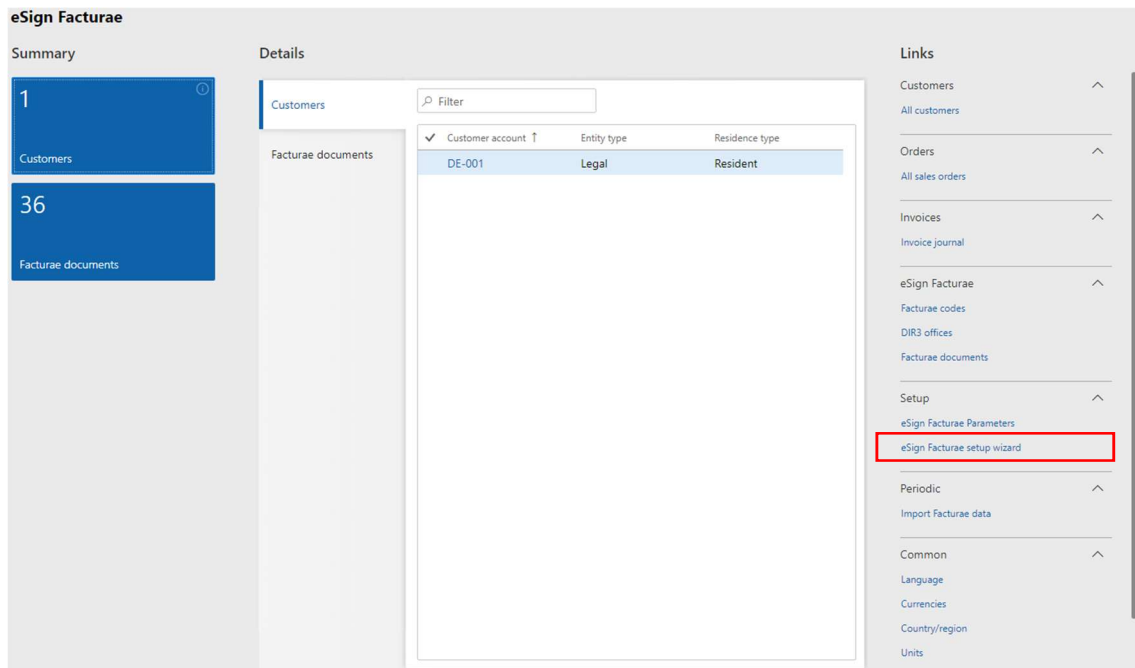
- eSign Facturae work area is available.

### Initial Setup

The first step is to open eSign Facturae work area.

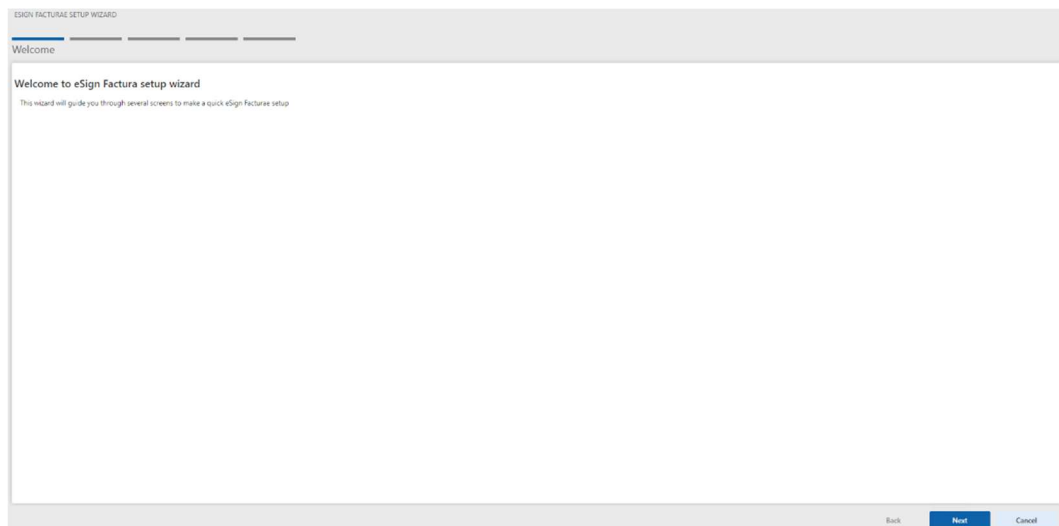


Within the eSign Facturae work area we will need to configure the solution through the Setup Wizard.



The Setup Wizard has four steps to configure:

1. Welcome.



2. Load data Facturae codes and DIR3 offices. The data is used in standard entities: Currencies, Languages, etc.).

ESIGN FACTURAE SETUP WIZARD

Data

**eSign Facturae data**

You must load Facturae codes and DIR3 offices.  
This operation can take a few minutes (to 20 minutes)

[Load Facturae data](#)

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### 3. Facturae Setup: General, Signature, Default Data, Document and Email.

ESIGN FACTURAE SETUP WIZARD

Setup

**eSign Facturae setup**

You can configure the main solution data from here:

COMPANY		SIGNATURE	DEFAULT DATA	DOCUMENT	E-MAIL
Residence type Resident	Section 1	Customer Id 0a1ee7bc-2b50-494f-b569-c7ef...	Default language es	Sign document Yes	e-mail template INNESGFe
Book 1	Volume 1	Certificate Id	Default currency EUR	Actions for documents Save in database	
Registration Number 1	Other registry data 1	Certificate password *****		Amount change margin 0.00	
Sheet 1	Industrial classification 12345				
Page 1					

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### 4. Manual Steps: The steps to configure manually are Facturae codes, DIR3 Offices, Currencies, Languages, Countries, Units of Measure, Payment Methods and VAT Posting Setup.

ESIGN FACTURAE SETUP WIZARD

Setup manual

**Entity system setup manual**

You can configure manually the system entities for assign Facturae codes: currencies, languages, etc:

Facturae codes setup Yes	Unit of measure setup Yes	
DIR3 offices setup Yes	Country setup Yes	
Language setup Yes	Customer payment mode setup Yes	
Currency Setup Yes	Tax table setup Yes	

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For Currency setup, for example, we will need to fill the Facturae Code in "Currency".

**CURRENCIES** | 0 : 0A1E7BC-2850-484F-8369-C7E77BF9C907

Currency code	Name	Symbol	Reference currency for triangulation
EUR	Euro	€	Yes

**Currency converter**

ONLINE NUMERIC CONVERSION TOOL

Conversion: No ☒

Prefix:

Suffix:

**Rounding rules**

**Currency gender**

**Electronic invoices**

**eSign Facturae**

ESIGN FACTURAE

Facturae code: EUR

## Customers Setup

In order to use eSign Facturae, customers must check the field “Generate document”. Then, the other fields can be completed.

**ALL CUSTOMERS**

**DE-001 : Contoso Europe**

**Transportation**

**Direct debit mandates**

**Retail**

**eSign Facturae**

**GENERAL**

Generate document: Yes ☒

Entity type: Legal

Residence type: Resident

Corporate name: Contoso Europe

First surname:

Second surname:

Xml format: 3.2.2

Gateway:

Management body:

Transact Unit:

Proposing body:

**DIR3 OFFICES**

Account office:

## Generate Facturae Document

The process for “Generate Facturae Document” is as it follows:

When a standart Invoice or Credit Note is posted, eSign Facturae generates a Facturae Document.

You can generate Facturae documents manually from “Invoiced Document” or “Entity Facturae Documents”.

### Generate Document from Invoiced Document

The first step is to generate an invoice and fill the next fields:

SALES ORDER DETAILS

**000863 : Contoso Europe**

Lines Header Invoiced

Transportation

Financial dimensions

**eSign Facturae**

GENERAL	Gateway	DIR3 OFFICES	CORRECTIVE INVOICE	Fiscal effects start date
Invoice Type		Account office	Corrected invoice number	
FC	Start date period			Fiscal effects end date
Invoice class		Management body	Correct method code	
OO	End date period			
Xml format	Transfer/Direct debit bank no	Transact Unit	Correct reason code	
3.2.2		Proposing body		

The fields “Invoice Type” and “Invoice Class” are filled from “Invoice” or “Credit Note”.

The other fields will be filled from the “Customers” area.

When the invoice is posted, the Facturae Document will be created.

FACTURAE DOCUMENTS | CIV-00000719 : DE-001

Header

GENERAL	Gateway	Total outstanding amount - Equivalent L.	BP post code and town	Transact Unit	Total general discount
Document type		0.00	Berlin 10115		0.00
Invoice	Invoice Type	Total executable amount - Total amount	BP phone no	Proposing body	Total gross amount before taxes
Document No	FC	0.00	01234 56789		0.00
CIV-00000719	Invoice class	Total executable amount - Equivalente L.	BP fax no		Total tax outputs
Customer account	OO	0.00			0.00
DE-001	Start date period	Invoice currency code	BP home page	ISSUE DATE	Total taxes withheld
Series code		EUR		Issue date	0.00
	End date period		BP e-mail	6/18/2019	Invoice total
Document counter signed			contoso europe@vendor8.cons...	Inv. Invoice currency code	0.00
1				Exchange rate	Total outstanding amount
Document counter unsigned	BATCH IDENTIFIER	BUYER PARTY	BP CnoCnae	136.99	0.00
0	Batch identifier	BP address	BP contact	Exchange rate date	Total executable amount
	CIV-00000719	Bahnhofstrasse 510115 Berlindeu		6/18/2019	0.00
Last modify date time	Total invoice amount - Total amount	BP post code		Inv. Tax currency code	
6/18/2019 08:18:46 AM	0.00	10115		EUR	
Last modify by user id	Total invoice amount - Equivalent in eu...	BP town	DIR3 OFFICES	Language name	
Admin	0.00	Berlin	Account office	en	
		BP province			

The present entity has been created to generate XML documents, and these documents will be signed in Innova Online portal.

The entity can be modified and generated whenever needed.

From this page, we can execute the next actions:

- Generate document
- Download document (blob)
- Send document to customer email (blob)
- Delete document (blob)

*Note: The generation of eSign Facturae documents can have limits in Innova Online portal depending on the selected plan.*