



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.

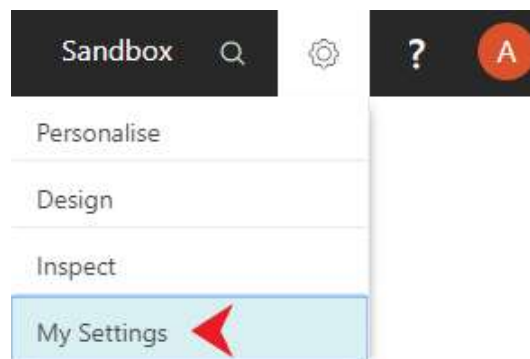




Figure 2: My Settings


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
	IN Translate Docker
	IN Apps Analyzer
	IN Data Manager
→	Docuten eSign
	IN Translate

Figure 4: Profile selection

Setup

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

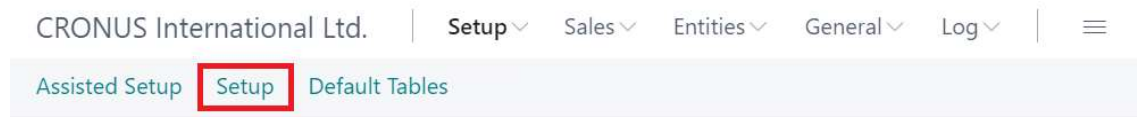


Figure 5: Setup

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

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

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

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						Docuten eSign Upload Document	
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).

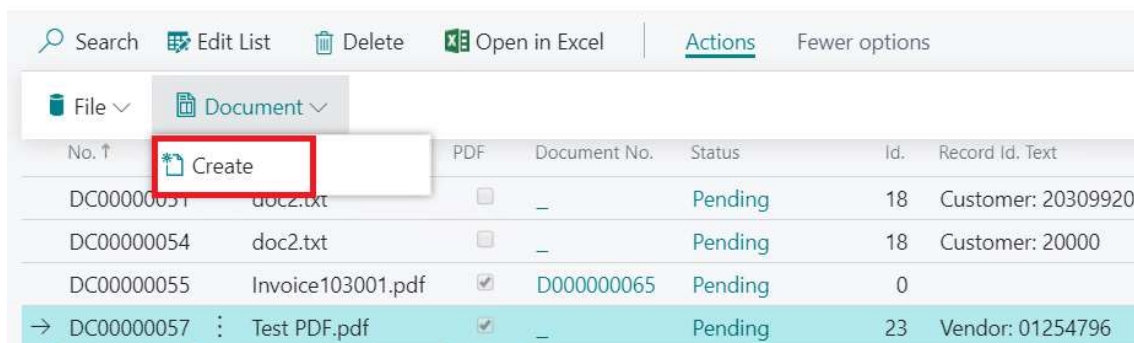


Figure 17: Create Document

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).

Docuten eSign Documents ▾

Update

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).

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

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 be 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**).

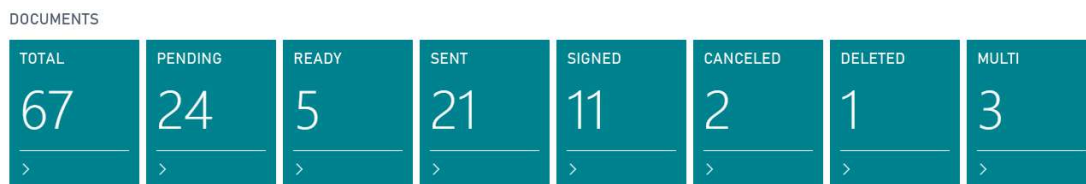


Figure 23: Documents

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

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		

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

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

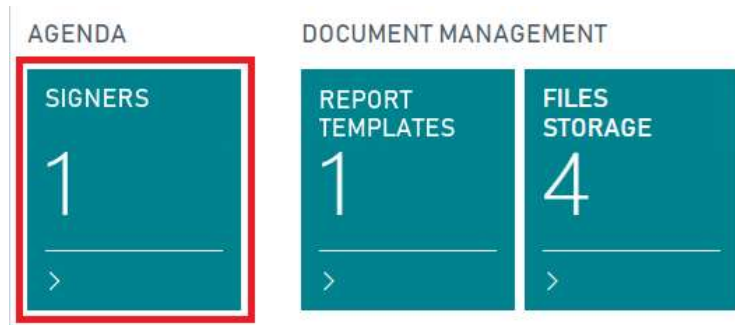


Figure 28: Signers

← 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).

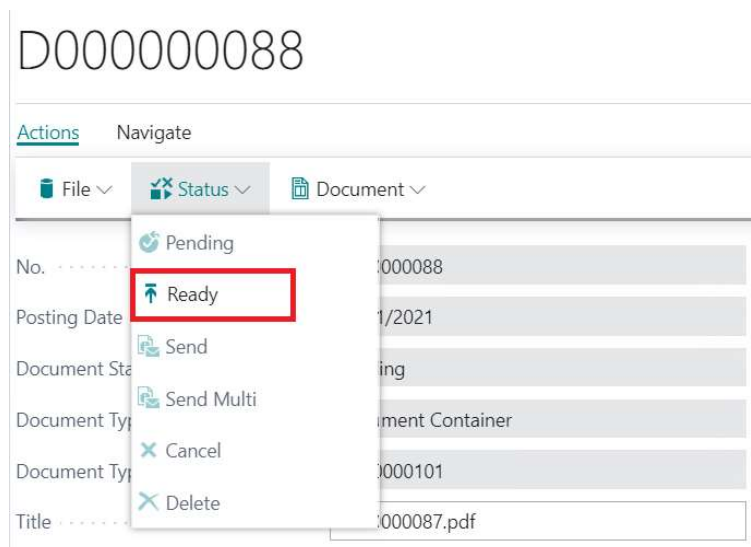


Figure 30: Document Status Ready



D000000088

Actions Navigate

File ▾ Status ▾ Document ▾

No. 000088

Posting Date ... 1/2021

Document Sta ... y

Document Typ ... ment Container

Document Typ ... 0000101

Title 000087.pdf

Pending

Ready

Send

Send Multi

Cancel

Delete

Figure 31: Document Status Send

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

D000000088

Actions Navigate

General >

Docuten Data

Id.	43106	Status Code	PENDING
Document Version	1	Status Name	Pendiente de firmas
Signatures Total	1	Public Id.	642436e7-7211-4ca4-899f-a61d8610b862
Signatures Done	0	File Name	
Date	28/01/2020		

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

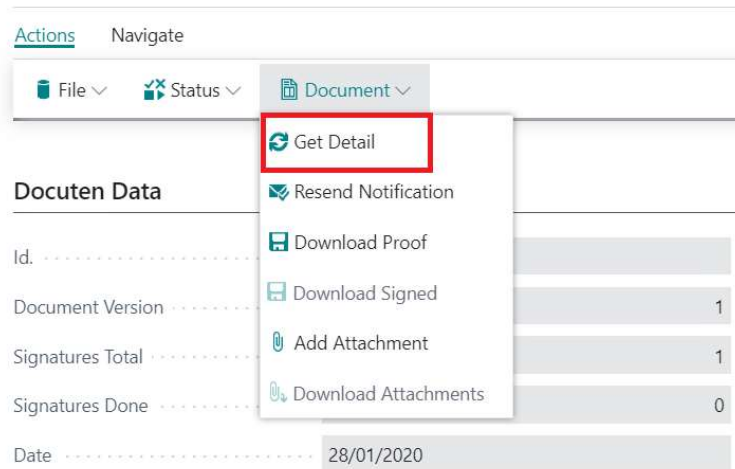


Figure 33: Get Detail Document

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.