

# Dionix Ltd.

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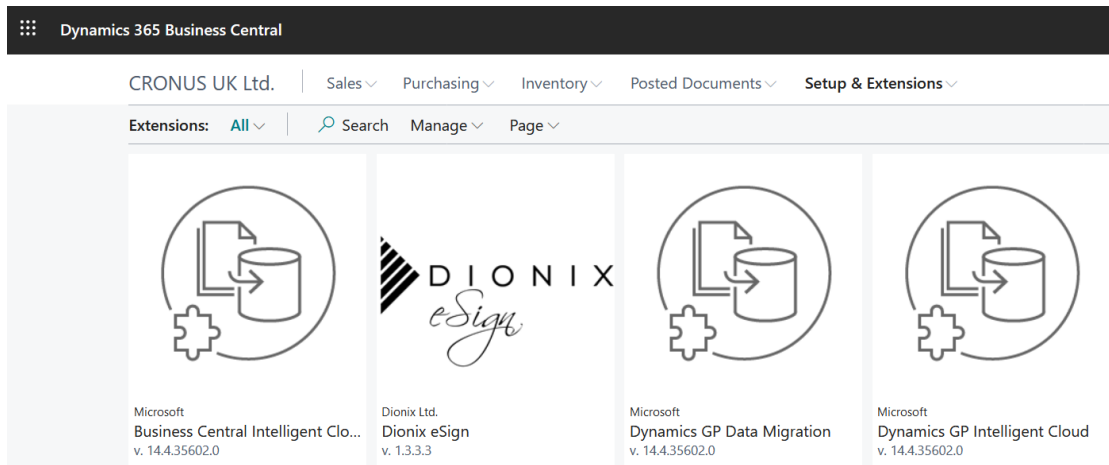
## Dionix eSign

September 2019

# Key Usage Scenarios

## Installation & Setup

1. Install the extension from the Microsoft AppSource store or manually using the .app extension file.



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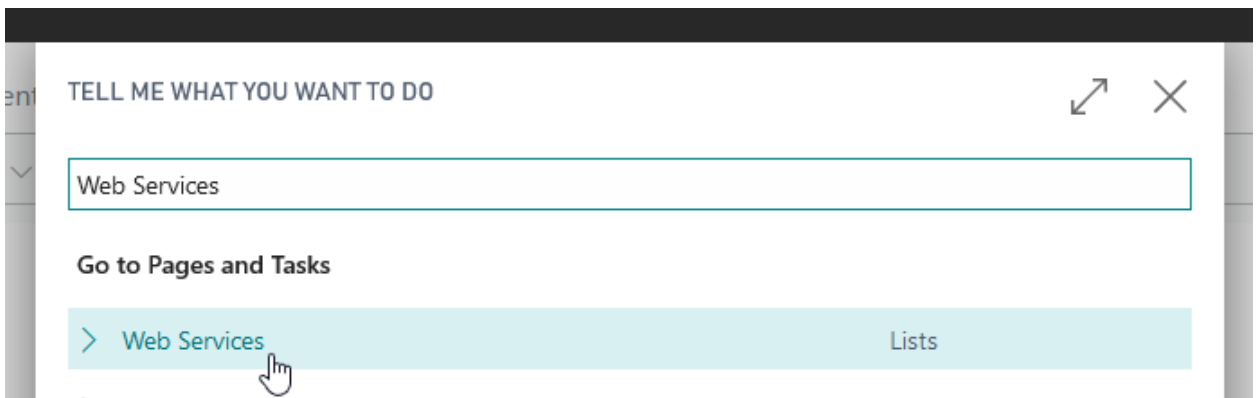
- Open Web Services and input an entry for the Dionix eSign Mgt. Codeunit. Once this has been done take a copy of the SOAP URL for use later.

Object Type: Codeunit

Object ID: 70397525 (Dionix eSign Mgt.)

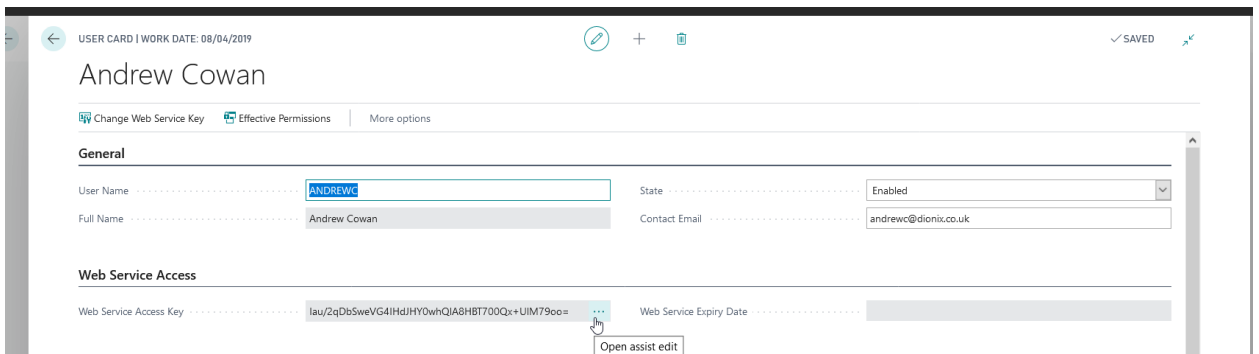
Service Name: SignatureMgt

Example URL: <https://api.businesscentral.dynamics.com/v1.0/ab94677f-bcf0-4faa-a07d-e22932387b2b/WS/CRONUS%20UK%20Ltd./Codeunit/SignatureMgt>



OBJECT TYPE 1	OBJECT ID	OBJECT NAME	SERVICE NAME 1	ALL TEN.	PUB.	ODATA V4 URL	ODATA URL	SOAP URL
Codeunit	1801	Company Setup Service	CompanySetupService	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://api.businesscentral.dynami...
Codeunit	50100		D365DraycirCreditHoundConnect...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://api.businesscentral.dynami...
Codeunit	1803	Encrypted Key/Value Management	EncryptedKeyValue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://api.businesscentral.dynami...
Codeunit	5324	Exchange Service Setup	ExchangeServiceSetup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://api.businesscentral.dynami...
Codeunit	90000	Dionix eSign Mgt.	SignatureMgt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://api.businesscentral.dynami...
Codeunit	1544	Workflow Webhook Subscription	WorkflowActionResponse	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not applicable	Not applicable	https://api.businesscentral.dynami...

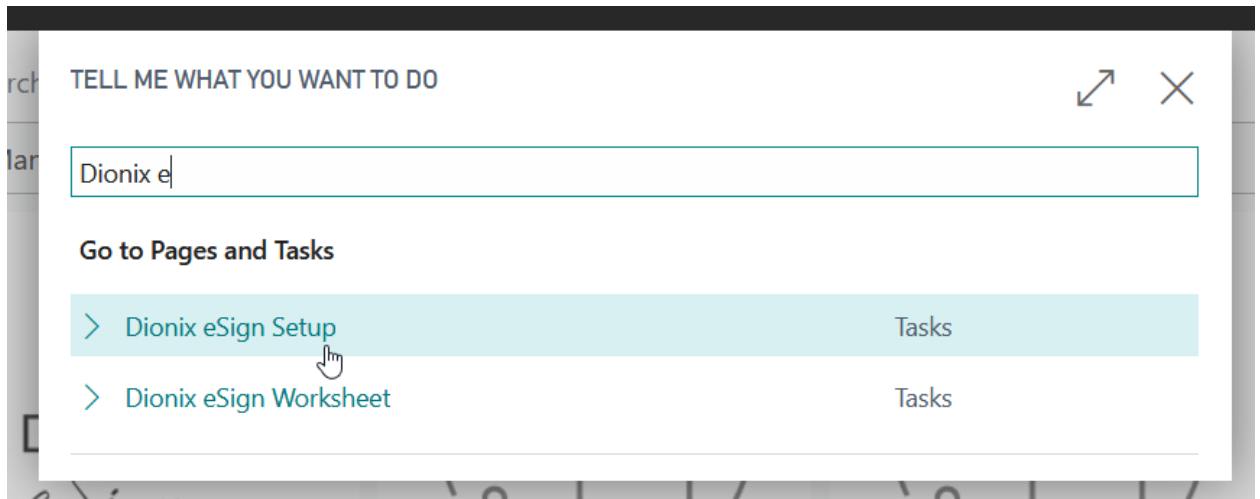
- Choose a designated Web Service User and assign this user with a Web Service Key. Make a copy of this Key. In this case I am choosing the user "ANDREWC".



4. Also give this user the “DIONIX ESIGN” permission.

DIONIX ESIGN	Dionix eSign	Dionix eSign	Tenant
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5. After this search for Dionix eSign Setup within Microsoft Dynamics 365 Business Central.



6. From the Dionix eSign Setup page the following actions must be performed:

### General Fast Tab

- Turn on “Enable eSign Capture” check box.
- Populate the “eSign Company Title” this will be visible from the eSign web form.
- Populate the Disclaimer / Free Text field, this will be visible from the eSign web form. It is useful for T&C text and/or any pertinent information.

### License & Web Service Fast Tabs

- Input the Dionix eSign “License Key”. A free trial is available and will be provided upon enquiry.
- Populate the WS URL, WS User Name and WS Access Key fields. These should have been setup in the previous setup steps.

### GDPR / Data Retention Fast Tab

- Populate the “Signature Retention” timeframe. This can be used to clear any signatures over a specific timeframe. Eg. **2Y** (2 Years)

The screenshot displays the 'Dionix eSign Setup' interface. At the top, there are navigation icons (back, edit, add, delete) and a 'SAVED' status indicator. Below the title, there are tabs for 'Check License', 'Actions', and 'Fewer options'. The main content is organized into four sections:

- General:** Includes a toggle for 'Enable eSign Capture' (turned on), a 'Disclaimer / Free Text' field with a text area containing 'You are implicitly agreeing to the Terms of Use and Consumer Disclosure when signing the agreement, no', and an 'eSign Company Title' field with the value 'Cronus UK'.
- Licence:** Includes a 'License Key' field with a long alphanumeric string, a 'License Status' field with the value 'Valid', a 'License Name' field with the value 'Cronus UK', and a 'License Expiry' field with the value '31/08/2020'.
- Web Service:** Includes a 'WS URL' field with the value 'https://api.businesscentral.dynamii', a 'WS Access Key' field with a long alphanumeric string, and a 'WS User Name' dropdown menu with the value 'ANDREW C'.
- GDPR / Data Retention:** Includes a 'Signature Retention' field with the value '2Y'.

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7. Now that the setup page has been populated you need to validate the license using the “Check License” page action. If all goes well the License Status will change to “Valid”.

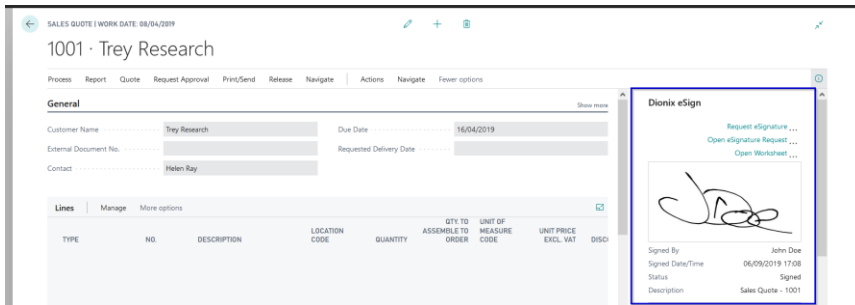
You should now be set up and ready to go!

## Usage

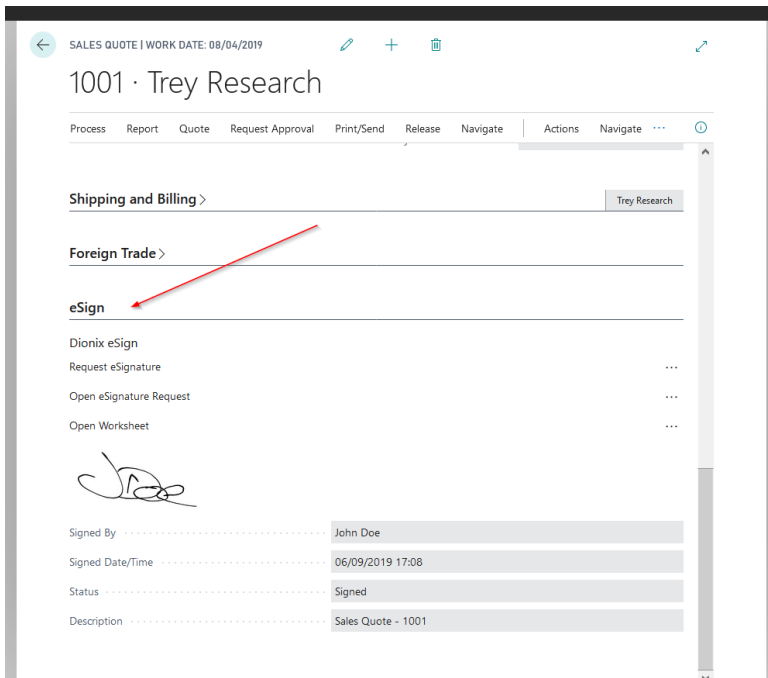
Dionix eSign allows Microsoft Dynamics 365 Business Central users to sign any document with an electronic signature. This can be done from any device, Desktop, Web, Tablet and Mobile.

A set of pre-defined documents have been set up with Fast Tabs and Fact Boxes that allow users to generate a signature request.

### Fact Box Example



### Fast Tab Example

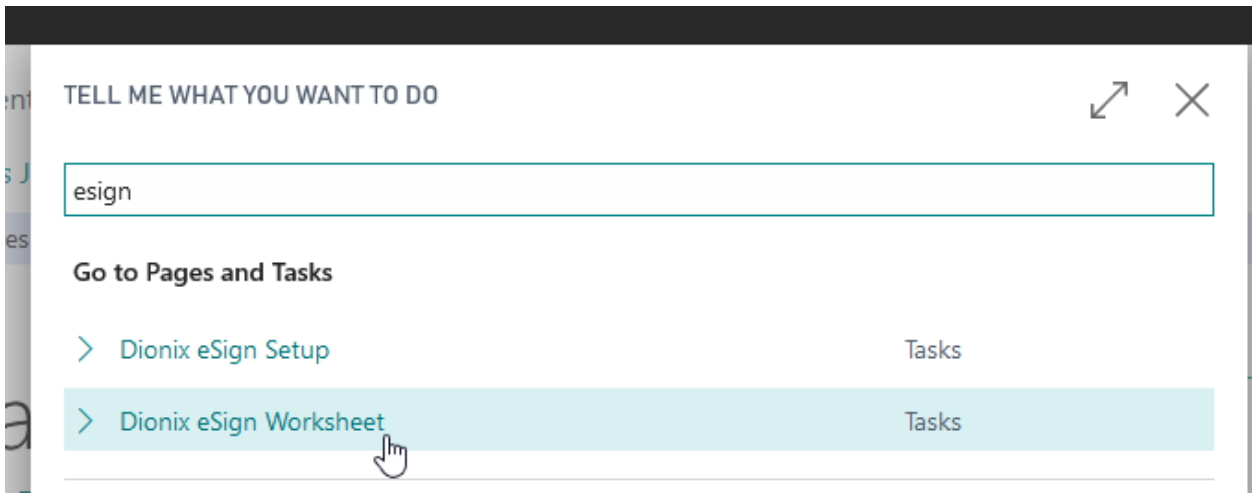


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These predefined documents are as follows:

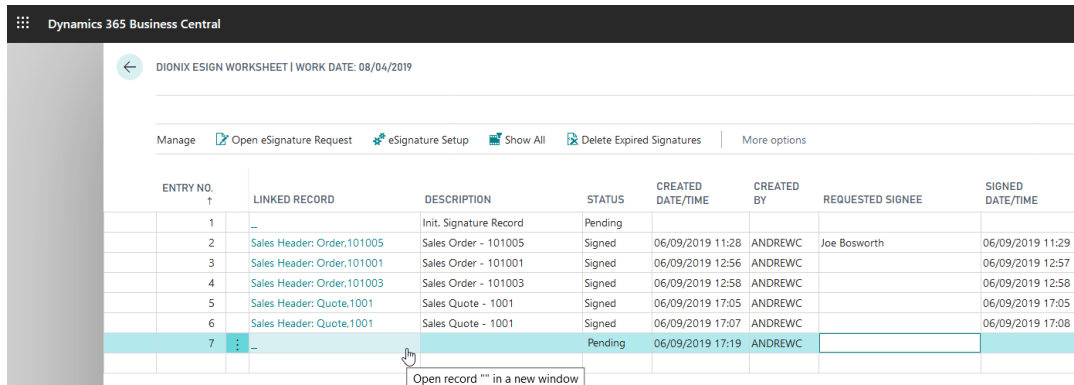
Sales	Purchase	Other
Sales Quote	Purchase Quote	Job
Sales Order	Purchase Order	Service Order
Sales Invoice	Purchase Invoice	Service Contract
Posted Sales Invoice	Posted Purchase Invoice	Pick
Posted Sales Credit Memo	Posted Purchase Cr. Memo	Put
Customer	Vendor	

However by the use of the Dionix eSign Worksheet virtually any document / NAV entity can be reference and an eSignature applied against it.



The eSign Worksheet contains every signature record, whether it is created from a Sales Quote or Purchase Order. The eSign Worksheet can be used as follows.

- a. Create a new Dionix eSign Worksheet entry. In this example, Entry No. (7).



- b. Click the “Linked Record” field – this will give the user a popup box to select a table. Type in “Customer” or “Sales Quote” or 18 (Customer Table ID). This will

then allow the user to manually create a link to this record. Alternatively **no** linked record is required and the Description field can manually be populated.

- c. In my example I typed “Customer” and then selected the popup for Customer: 10000. This then inserted a “Description” based off the selected record.

ENTRY NO. ↑	LINKED RECORD	DESCRIPTION	STATUS	CREATED DATE/TIME	CREATED BY	REQUESTED SIGNEE	SIGNED DATE/TIME
1	-	Init. Signature Record	Pending				
2	Sales Header: Order.101005	Sales Order - 101005	Signed	06/09/2019 11:28	ANDREW C	Joe Bosworth	06/09/2019 11:29
3	Sales Header: Order.101001	Sales Order - 101001	Signed	06/09/2019 12:56	ANDREW C		06/09/2019 12:57
4	Sales Header: Order.101003	Sales Order - 101003	Signed	06/09/2019 12:58	ANDREW C		06/09/2019 12:58
5	Sales Header: Quote.1001	Sales Quote - 1001	Signed	06/09/2019 17:05	ANDREW C		06/09/2019 17:05
6	Sales Header: Quote.1001	Sales Quote - 1001	Signed	06/09/2019 17:07	ANDREW C		06/09/2019 17:08
7	Customer: 10000	Customer: 10000	Pending	06/09/2019 17:19	ANDREW C		

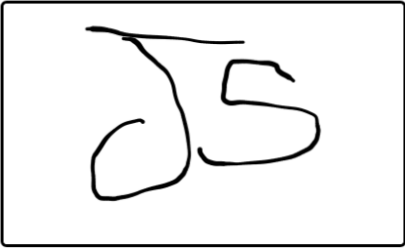
- d. I’m going to populate the “Requested Signee” field as I know who I am targeting this signature request to, this can remain blank if you do not yet know who will be signing the document as this can be populated from the Dioix eSign website. I will use the value “John Smith”.
- e. At this point I can select the “Open eSignature Request” action to open the eSign web page. The web page that opens will pass through the “Signee” but this can be over-typed if the signee changes. The signature can be signed and submitted through this page. Once this has been submitted this will be reflected in Microsoft Dynamics 365 Business Central.

Cronus UK powered by Dionix eSign

Dionix eSign: 8

John Smith

Submit Clear Undo



*You are implicitly agreeing to the Terms of Use and Consumer Disclosure when signing the agreement, no other action is required.*

Cronus UK powered by Dionix eSign

## Success

Please close the page.

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- f. Finally, we can see the signature has been captured against the record, in this case Customer 10000.

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 08/04/2019

10000 · Adatum Corporation

Report New Document Request Approval Navigate Customer More options

**General** Show more

No. ....	10000	Credit Limit (LCY) .....	0.00
Name .....	Adatum Corporation	Blocked .....	
Balance (LCY) .....	-105.00	Total Sales .....	51,012.00
Balance Due (LCY) .....	-105.00	Costs (LCY) .....	26,121.00

**Address & Contact** Show more

**ADDRESS**


Address .....	Station Road 21	<b>Show on Map</b>
Address 2 .....		
Country/Region Code .....	GB	

**CONTACT**

Contact Name .....	Robert Townes
Phone No. ....	

**Dionix eSign**

Request eSignature ...  
Open eSignature Request ...  
Open Worksheet ...



Signed By: John Smith  
Signed Date/Time: 06/09/2019 17:36  
Status: Signed  
Description: Customer: 10000