

Integration with SAP Business One



Introduction

Validated ID is a company that offers a digital signature service for multiple scenarios. VIDsigner is an electronic signature service adapted to both face-to-face and remote situations, combining cryptography and biometrics to offer a secure way to electronically sign documents and contracts with full legal validity.

02

Integration with SAP Business One, will incorporate digital signature process to the usual business workflows. By default, will provide necessary tools to connect with sales and purchase modules.

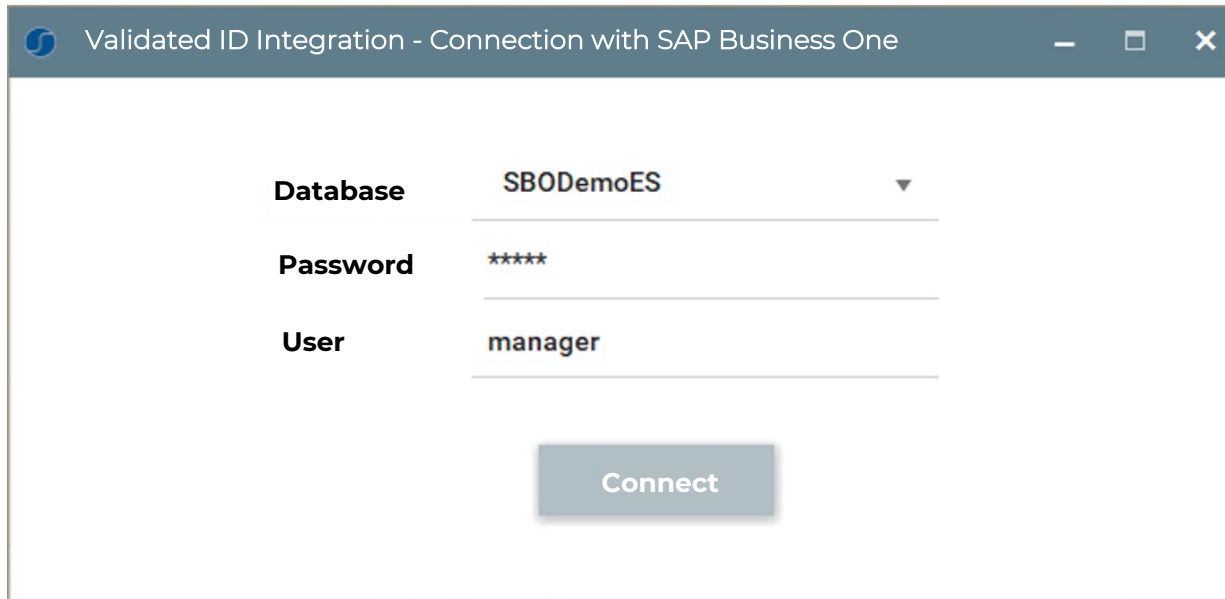
There will be an add-on for SAP and a windows desktop solution, both developed using .NET. Communication with Validated ID will be through their API, the following options will be implemented:

- Send a PDF document to sign.
- Query document status.
- Attach signed documents to SAP.
- Remote signature of documents

SAP Business One connection

The program can be run outside SAP. The first screen of the interface allows us to connect to a specific database of the server we have configured. If we run it inside an SAP add-on, the program already obtains the connection data and the user automatically.

03



Validated ID Integration - Connection with SAP Business One

Database	SBODemoES ▼
Password	*****
User	manager

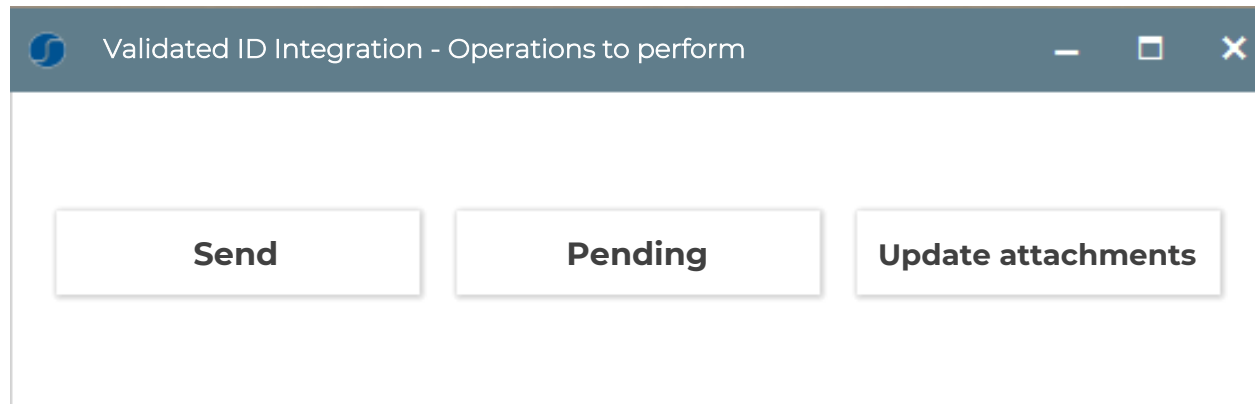
Connect

Operations to perform

Once the connection to a SAP Business One company has been established, the program allows us to perform the following operations:

- Send a PDF document to sign.
- Query document status.
- Attach signed documents to SAP.

04



Sign PDF document

The application allows to send a document to sign by calling the Validated ID API. We can select the document linked to SAP or a document imported by the user:

- Table B1: SAP object, to be selected from a list
- Number: SAP object code
- Mail: Account to sign the document
- File: File uploaded by the user

05

Validated ID Integration – Sign document

☒ SAP Document
☐ User Document

Table B1

Number

Email

Sign

Validated ID Integration – Sign document

☐ SAP Document
☒ User Document

Table B1

Number

Email

File ...

Sign

Sign PDF document

The SAP document option gets the default document associated to the form from the SAP Business One object. The user option allows you to import a document directly from the desktop.

06

Client order

Client: C23900
 Name: Tecnologías Martín, S.A.
 Contact person: Bruno Tomás Martínez
 Customer Ref. number:
 Local currency:

Nº: Primary
 Status: Open
 Accounting date: 26/11/20
 Delivery date: 26/11/20
 Document date: 26/11/20

Type of item/service	Item	Item number	Catalog number	Description of.	Quantity	Price per unit	% of...	Group of units	Indicator	Total (LC)
1	LINIA EJEMPLO			LINIA EJEMPLO	1	1.000,00 EUR	0,00	Manual	R3	1.000,00 EUR
2							0,00		R3	

Sales employee: Bruno Tomás Martínez
 Holder: Tomás Martínez, Bruno

Total before discount: 1.000,00 EUR
 Discount: %
 Shipping:
 Rounding:
 Tax: 210,00 EUR
 Total: 1.210,00 EUR

Comments:

OK Cancel Send for signature Copy from Copy to

Layout and sequence

Select document type
 Order (items)

#	Layout
2	Order confirmation (System)
3	Master order model (System)
4	Layout and sequence
5	Order Confirmation (DIN) (System)
6	Order Confirmation (System)
7	Order Master Template (System)
8	Order (System)

Manage Layout

OK Cancel Set as standard

Pending documents to be signed

The interface shows the list of pending documents to be signed for the connected user. We can see information about the SAP table and its primary key, the date on which the document to be signed was sent, the associated email account and the document in question.

07

Validated ID Integration – Pending documents				
Table	Number	Sent date	Email	File
OINV - Sales Invoice	20210012345	01/03/2021	oinv@seidor.es	EjemploFactura.pdf
OPOR - Purchase orders	20210012345	10/03/2021	opor@seidor.es	EjemploPedido.pdf
> OHEM - Employees	123	10/03/2021	ohem@seidor.es	FicheroEmpleado.pdf

Attach signed documents to SAP

We make a request to the Validated ID API to confirm if there are signed documents. We download the documents and update them in the SAP forms attachments tab. Filtering by table and code.

An alert is sent to the user once the signed document is attached, which he/she receives within SAP in the alerts menu.

[illegible][illegible]

Table user record of completed deliveries

Each call we make to the VIDsigner service will leave a record in a SAP user table, so that we can keep track of the shipments made and possible errors.

09

	Sent date	Sent time	SAP user	Document type	Document number	Email account	Request number	Response	Received

- **Sent date:** date of service request
 - **Sent time:** time of service request
 - **SAP user:** user making the request
 - **Document type:** document for which we generate the request
 - **Document number:** Document number
- **Email account:** Account that has to sign the document
 - **Request number:** Request number for a document and account
 - **Response:** VIDsigner service response
 - **Received (Y/N):** Indicates whether the signed document has been revived

Remote Signature: Default documents

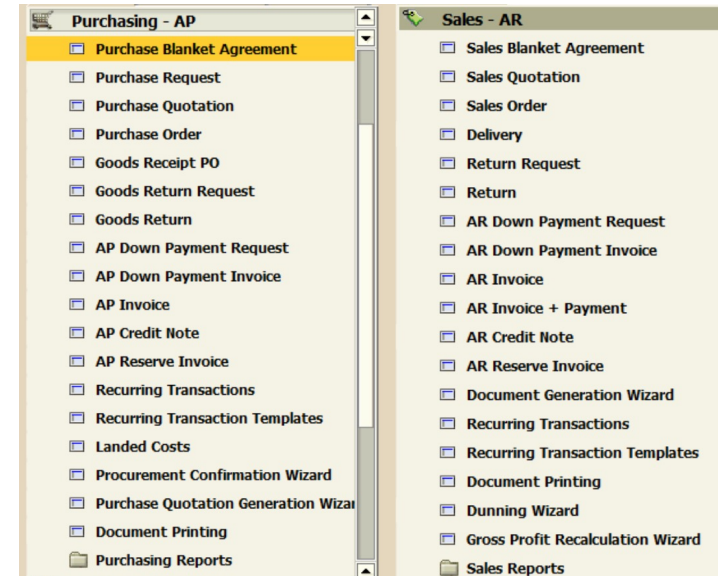
Signature process is added by default to the following modules:

Purchasing - AP:

- Purchase Quotation
- Purchase Order
- Goods Receipt PO
- Goods Return
- AP Invoice
- AP Credit Note

Sales - AR:

- Sales Quotation
- Sales Order
- Delivery
- Return
- AR Invoice
- AP Invoice



Remote Signature: Process

Document signature process is enabled on created documents using the right click menu option Send to Sign:

- Configure multiple signers.
- Sign custom file or default Crystal Report linked to document.

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Remote Signature: Default Crystal Report

Using SAP layout and sequence designer we can setup a default Crystal Report for a document:

12

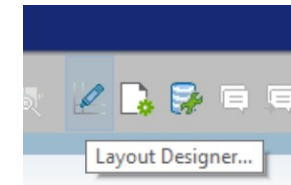
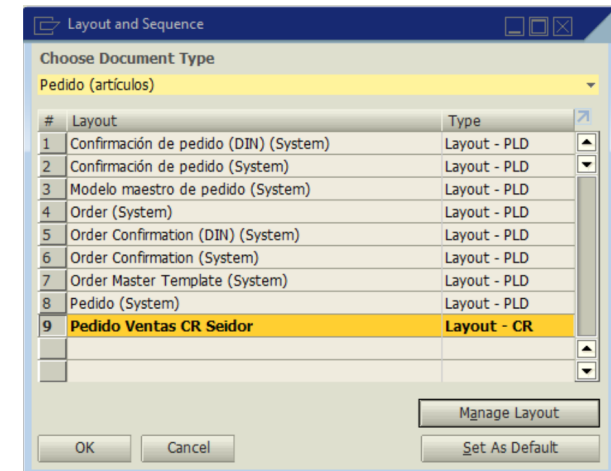


Sales Order

Customer: CLIENTE
 Name: Demo VidSigner
 Contact Person: [dropdown]
 Customer Ref. No.: [dropdown]
 Local Currency: [dropdown]

No.: Primario 22
 Status: Closed
 Posting Date: 25/10/21
 Delivery Date: 24/11/21
 Document Date: 25/10/21

#	Item No.	Quantity	Unit Price	Discount %	VAT Code	Gross Price af...	Total (LC)	Distr. Rule	Project
1	VID001	1	50,00 EUR	0,00	R3	60,50 EUR	50,00 EUR		
2	VID002	3	25,00 EUR	0,00	R3	30,25 EUR	75,00 EUR		

Layout and Sequence

Choose Document Type
 Pedido (artículos)

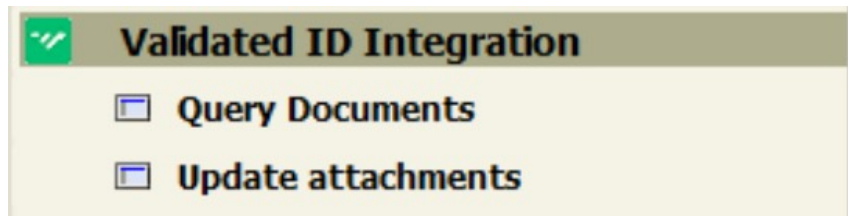
#	Layout	Type
1	Confirmación de pedido (DIN) (System)	Layout - PLD
2	Confirmación de pedido (System)	Layout - PLD
3	Modelo maestro de pedido (System)	Layout - PLD
4	Order (System)	Layout - PLD
5	Order Confirmation (DIN) (System)	Layout - PLD
6	Order Confirmation (System)	Layout - PLD
7	Order Master Template (System)	Layout - PLD
8	Pedido (System)	Layout - PLD
9	Pedido Ventas CR Seidor	Layout - CR

Manage Layout
 OK Cancel
 Set As Default

User Menu

Add-on adds a user menu that will help us handle the documents sent to the Validated ID API, the following options are enabled:

- Query Documents
- Update attachments



User Menu: Query document status

Menu that lists all documents not yet signed for a specific user. API Response will also show specific errors in case document does not reach Validated ID.

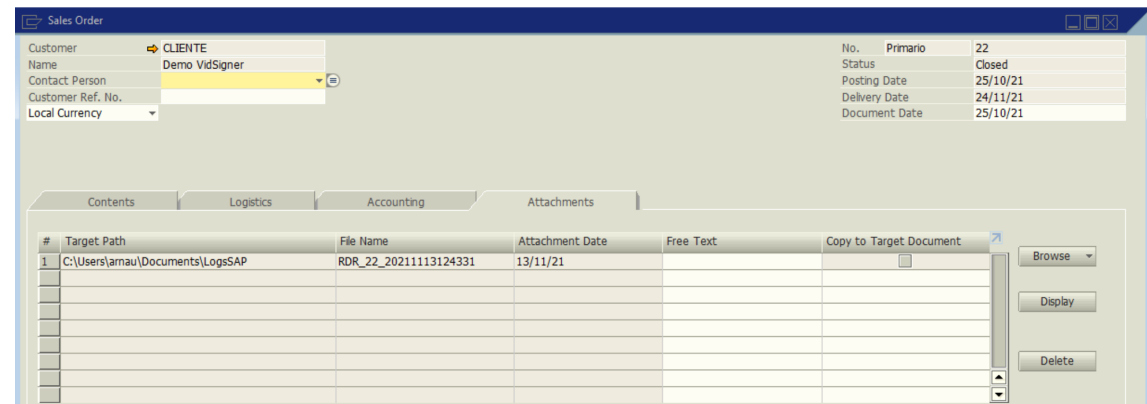
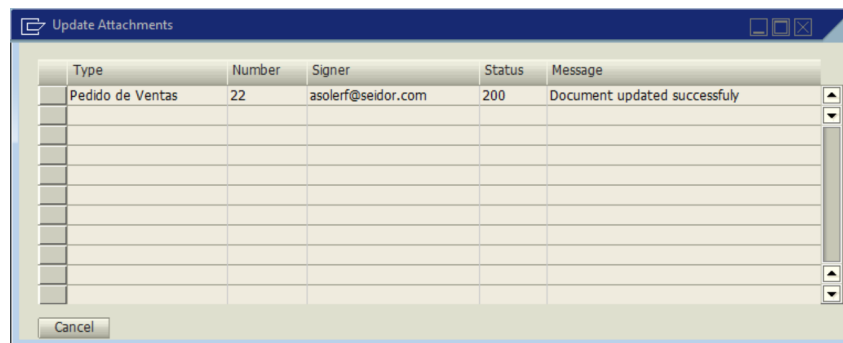
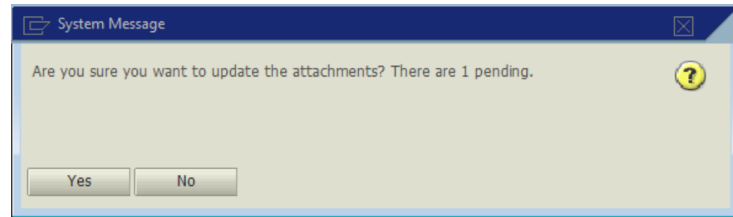
Delete errors button lets user delete selected entries from the table. Documents that have a DocGUI, have been already registered in the API, so they will also be removed from there.

[illegible]

User Menu: Attach signed documents to SAP

New menu used to retrieve signed documents from Validated ID and attach them to their respective SAP documents. Process starts with a popup window indicating the number of pending documents. Finally, a user form shows the result of the execution.

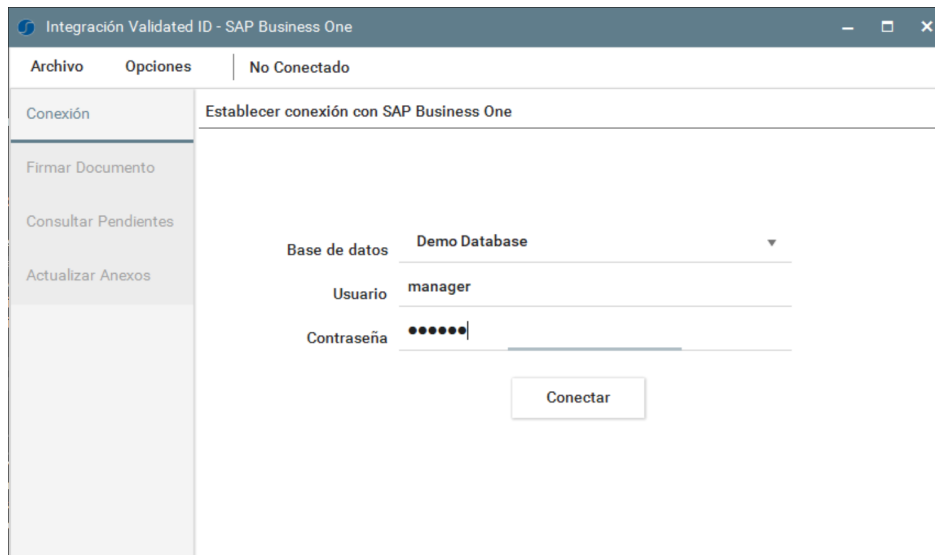
15



Desktop Solution

There is a desktop solution for Windows that has the same functionality as the add-on. The advantage is that a scheduled task can be configured to run the program unattended, for example, to upload attachments to SAP daily.

16



Integración Validated ID - SAP Business One

Archivo Opciones No Conectado

Conexión Establecer conexión con SAP Business One

Firmar Documento

Consultar Pendientes

Actualizar Anexos

Base de datos Demo Database

Usuario manager

Contraseña ●●●●●●

Conectar

Thank you!

