**How to setup and use E-Sign Signature Approvals on a Window button**

In this example, E-Sign Signature Approval will be assigned to the Save button in the Customer Maintenance window.

**Assign E-Sign Approvers**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | System Settings**.
2. In the **Auditor System Settings** window, in the **E-Sign Approvers** section, mark the **Users** who will be E-Sign Approvers along with, **Message Center**, **Email** (including an Email address), or both.



1. Click **OK**.

**Setup Pre-Defined Reason Code (Optional)**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | Reason Codes.**
2. In the **Reason codes** window, click the **New Reason Group** button.



1. Enter **Customer** for the Reason Group.
2. Enter the **Note/Reason,** and then click **Insert**.
3. Repeat the step above for any other notes/reasons for a Customer change.



1. Click **OK**.

**Create E-Sign Signature**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | E-Sign Signatures**.
2. In the **E-Sign Signature Definition Maintenance** window, enter a **Signature Name** and **Description**. For example:
	1. Signature Name: **Customer\_Save\_Button**
	2. Description: **Customer Save Button**
3. Select if a **Reason Code** is Required, Optional, or None.
	1. In this example, select **Optional**.
	2. Select the **Customer** Reason Code if one was created from steps in Setup Pre-Defined Reason Code section above. **Note:** You can drill back on the Reason Groups to create pre-defined reasons for the Users who are making the Customer additions or changes.
4. Mark **Approval Required.**
5. In the **Approver Assignment** section, mark which **User(s)** you want to approve Customer additions or changes.
6. In the **Company Access** section, mark which **Company(ies)** you want to have access to the E-Sign Signature.
7. In the **User Access** section, mark which **User(s)** you want to have access to the E-Sign Signature.
8. Click **Save**.



**Assign the E-Sign Signature**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | E-Sign Signature Assignments**.
2. In the **E-Sign Signature Assignment** window, click the **Add Assignment** button.



1. In the **Signature Assignment Wizard Welcome** window, click **Next**.



1. Click the **Signature Name** lookup button, select **Customer\_Save\_Button**, and then click **Select**.
2. Select **No** for **Can this Signature be Queued**? **Note**: E-Sign Signatures on Buttons must be approved before the User can continue in Microsoft Dynamics GP.



1. **Click Next.**
2. Open the window where you would like to assign the Signature to. In this example, go to **Cards | Sales | Customer**.
3. Once the window is open, the Signature Assignment Wizard will be updated.



1. Click **Next**.
2. Move the cursor to the field you would like to assign the Signature to. In this example, click the **Save** button and the Signature Assignment Wizard will be updated.



**Note**: If Yes was selected for the option of Can this Signature be Queued, the warning message below will appear at this time. Click Yes to change the setting to a non-queued E-Sign Signature Approval.

*If you want to use a push button field as the Signature Field, then this signature cannot be queued. You have chosen to allow queued approvals. Would you like to change this setting?*

1. Click **Next**.
2. Select each field in the window that you want the Approver to see when the Signature is requested. In this example, put your cursor in the following fields and then click the Select button for each of them.**Note**: If a field is grayed out, use the scrolling arrows to pull up a record with the field available.
	1. Customer ID
	2. Name
	3. Statement Name
	4. Class ID
	5. Address ID
	6. Contact
	7. Address
	8. Phone 1
	9. Salesperson ID
	10. Payment Terms
	11. Price Level



1. Click **Next**.
2. Review the information.



1. Click **Next**.
2. Mark to **Display the Signature Assignment**, and then click **Finish**.



1. Click **OK**.

**Test the E-Sign Signature Approval Button**

**LESSONUSER1 adds a new Customer record.**

1. Log into Microsoft Dynamics GP as a User who has access to add Customers. In this example, I am going to log in as LESSONUSER1.
2. Go to **Cards | Sales | Customer**.
3. In this example, enter the following information in the **Customer Maintenance** window.
	1. Customer ID, Name, Short Name, and Statement Name: TEST
	2. Class ID: USA-MNWI-T4
	3. Address ID: PRIMARY
	4. Contact: Sue Johnson
	5. Address: One Microsoft Way
	6. City: Redmond
	7. State: WA
	8. ZIP Code: 98052
	9. Phone: (555) 555-5555
	10. Price Level: Retail
	11. Comment 1: Contact Sue or Mary.
4. Click **Save**.
5. In the **E-Sign Approval Needed** window, enter **LESSONUSER1’s password**.
6. Select or enter a **reason** for the change.



1. Click the **Approver** lookup button.
2. In the **Approvers** window, select a **User** to approve the change and then click **Select**. In this example, select Anna, and then click Select.



1. In the **E-Sign Approval Needed** window, click **Submit**.

**Note**: If Anna was nearby, you could click Approve and Anna could enter their password on your machine and the change would be approved.



**Anna approves the new Customer request**

1. Anna is currently logged into Microsoft Dynamics GP.
2. The **E-Sign Pending Approval Requests** window will open.
3. In the **E-Sign Pending Approval Requests** window, double click on the **item**.
4. In the **E-Sign Complete Approval** window, view the information. Note: To see the reference fields, click the **blue expansion** button.





1. Click **Approve**.
2. Enter **Anna’s password**, and then click **Approve**.
3. Click **OK**.
4. Close the **E-Sign Pending Approval Requests** window.

**LESSONUSER1 accepts approval**

1. In the **E-Sign Approval Needed** window, click **Redisplay**, and then click **OK** to accept the Approval from Anna.



1. In the **Customer Maintenance** window, click **Save**, and then **close** the window.