



Electronic Signatures for Acumatica Cloud ERP

v03 — Last update: November 2, 2023

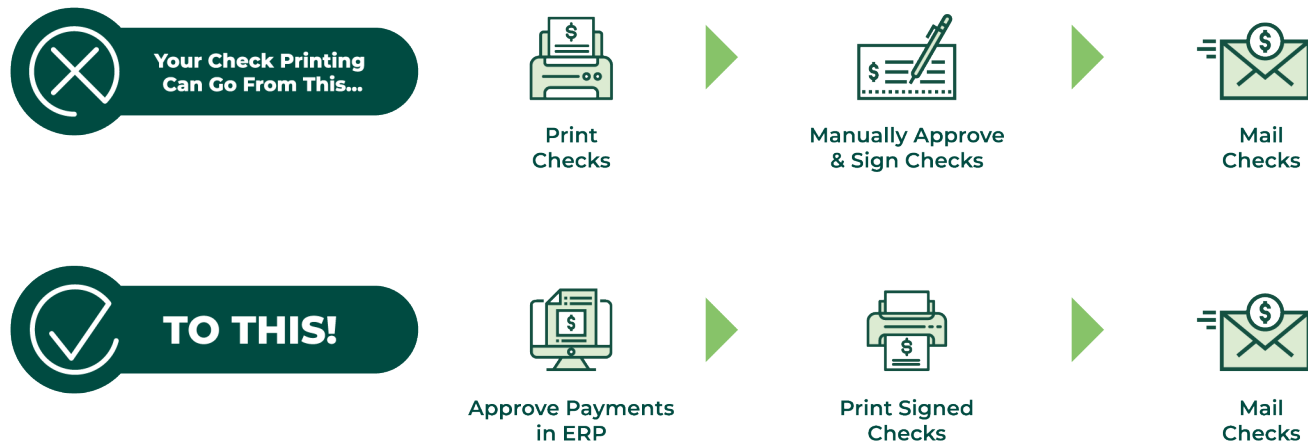
Mekorma

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1. Introduction to Mekorma Electronic Signatures

Mekorma Electronic Signatures works in conjunction with Acumatica Payment Approval workflow to keep organizations from having to manually sign checks.



Changing your workflow in this way has several advantages:

1. Your approvers (check signers) do not need to be physically present to sign, as they can approve the payments remotely.
2. The approval workflow applies to all payments, so your electronic payments also get approved, not just your checks.
3. You free your executives from the labor of hand-signing payments.



For assistance with this user guide, review to [How to Use This Guide](#).

Last modified: November 2, 2023

2. Prior to Configuring

This guide explains how to configure the signature portion of this solution. Please refer to [Acumatica documentation](#) for configuration of the payment approval maps or [contact Mekorma Professional Services](#) for assistance.

Prior to installing electronic signatures, there are several things that you should prepare:

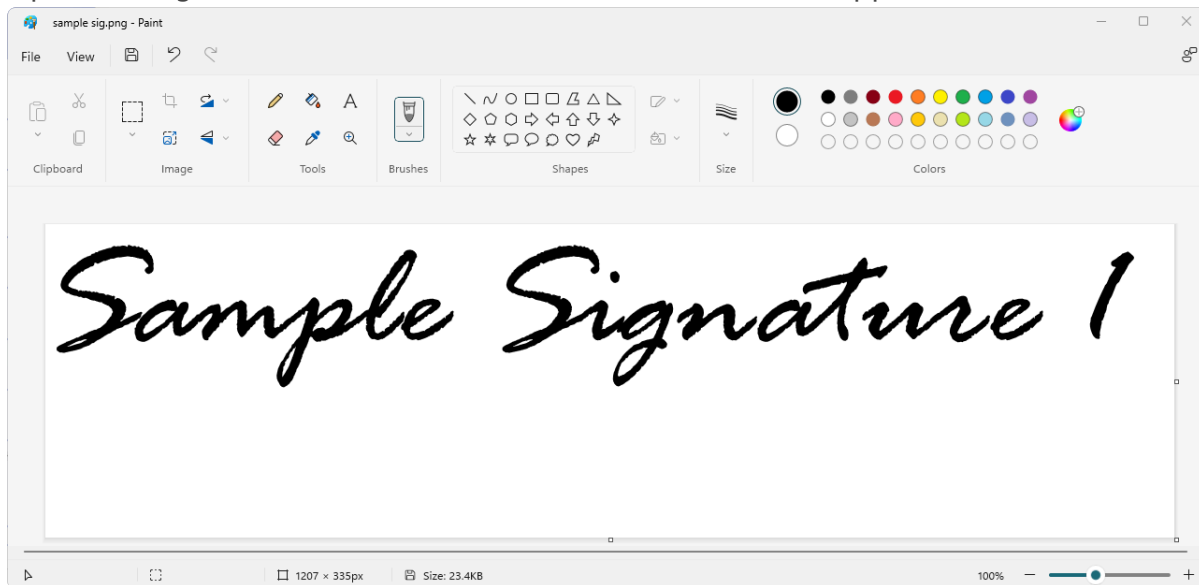
- You will need to know the answers to these questions for a successful implementation of Mekorma Electronic Signatures:
 - For each checking account, who are the signers on the account?
 - What amounts require one signature?
 - What amounts require two signatures?
 - Is there an amount above which you want a handwritten signature rather than an electronic signature?
 - Is there an amount above which you want two handwritten signatures?
 - You can see how this information is used in the section [Setting Up Thresholds](#)
- Gather signatures. The section [Creating a Digital Signature](#) explains the guidelines for gathering and digitizing your signatures.

Last modified: March 29, 2023

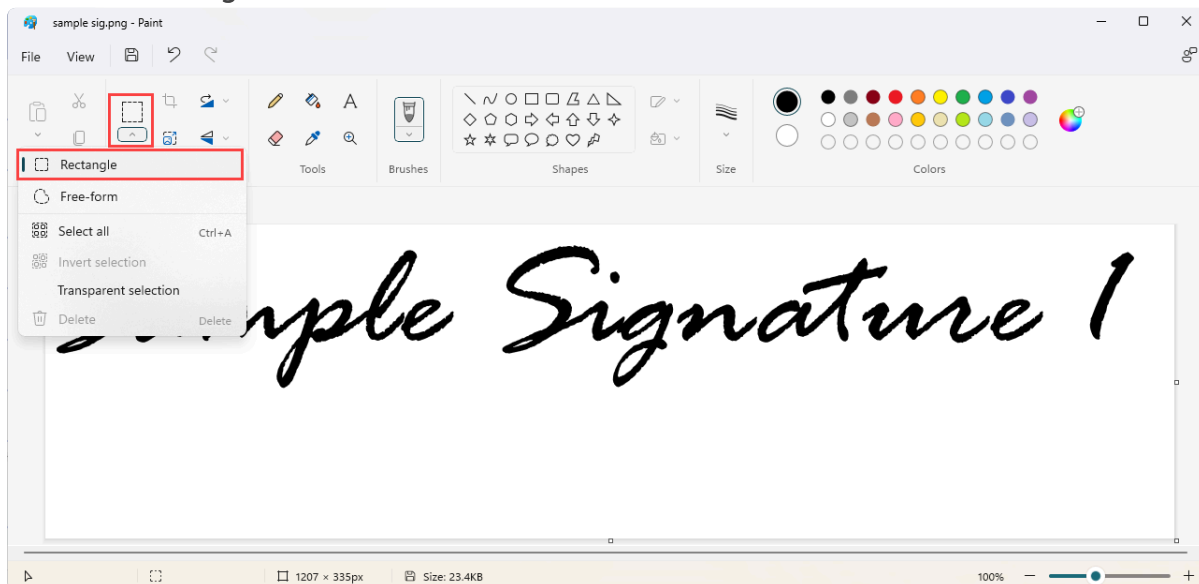
3. Creating a Digital Signature

Here are the step-by-step instructions, as recommended by Mekorma, to provide the digital signatures you want to print on your checks:

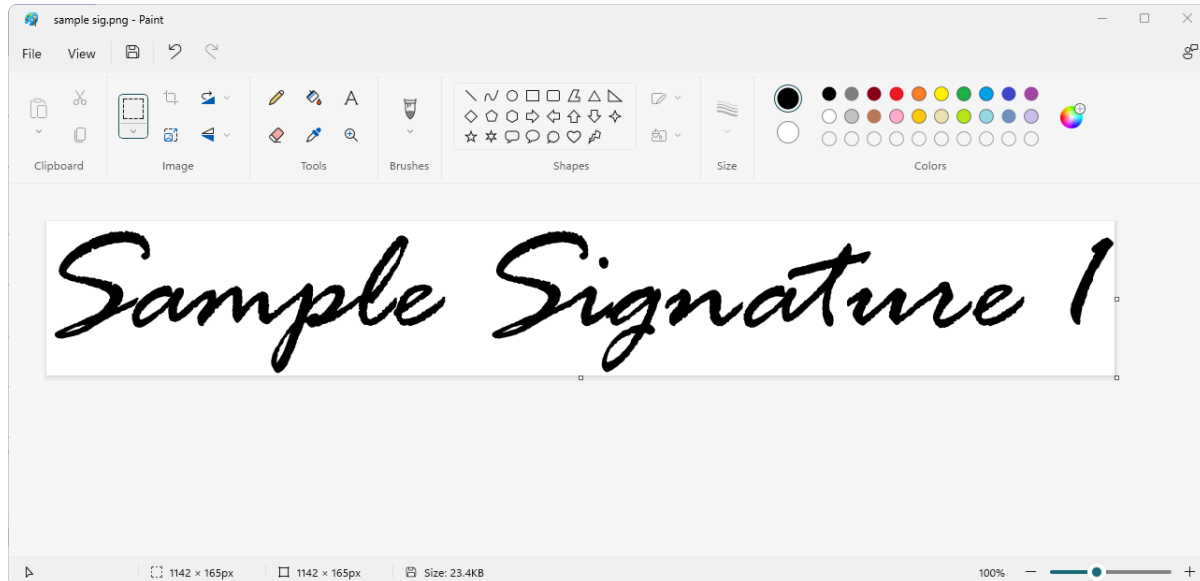
1. Print out our [template for Gathering Signatures](#).
2. Ask each check signer to reproduce their signature within a rectangle.
3. Use your scanner equipment to scan each signed sheet of paper into a computer.
4. Open the signatures one at a time in the Microsoft Paint application.



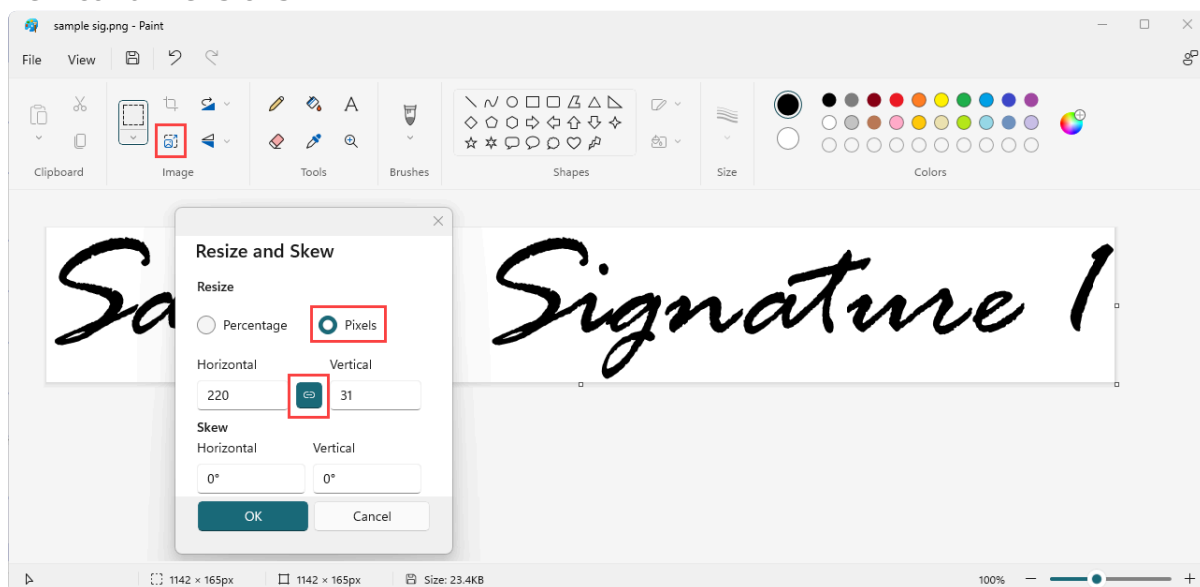
5. With one of the signatures opened in Paint, click on the Select drop-down menu and choose Rectangular selection.



6. Draw the selection box around the signature as closely as possible and then click Crop. The cropped signature should look like the example below:



7. In the **Resize and Skew** window, click on **Resize** and choose the **Pixels** radio button. Be sure that the **Maintain aspect ratio** checkmark is selected. Adjust either the horizontal or vertical dimensions.



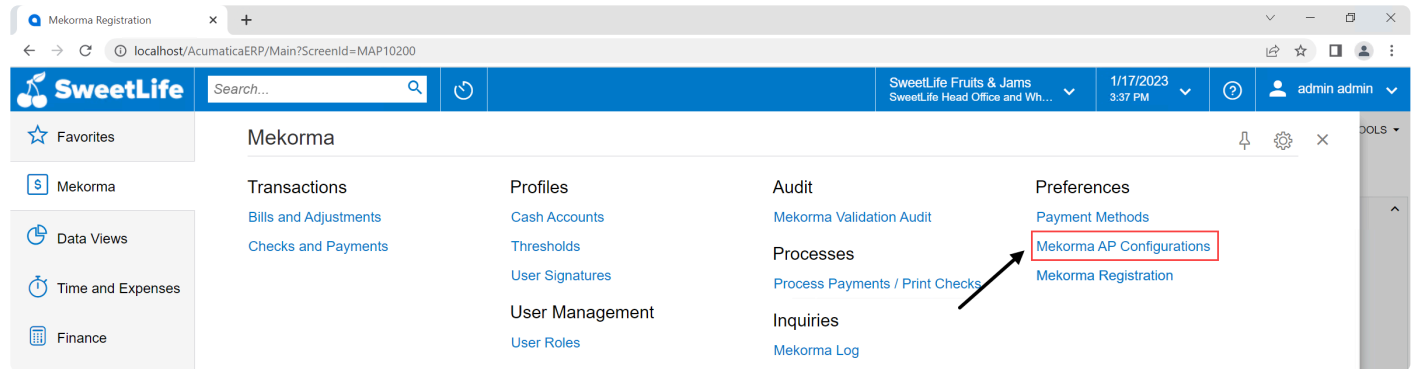
- **Note:** A signature file with dimensions of 220 x 50 pixels works best with Acumatica.

8. Click on the **File** menu option, then select **Save** to save your signature as a Portable Network Graphics (.png) file. This file format produces the best results for check printing.
9. Repeat the same procedure for all needed signatures and store them in a location accessible to an administrator for use.

Last modified: September 28, 2023

4. Configuring Electronic Signatures

To configure the general settings for Electronic Signatures, navigate to **Mekorma AP Configurations** in the Mekorma menu.



In the Electronic Signatures tab, configure the settings to meet your company needs.

1. Toggle **Auto Enroll Mekorma Users In Role** to automatically enroll all Mekorma users configured with a signature file into the selected security role.
 - This allows all users with a signature file access to print checks with signatures on them.

Mekorma AP Configurations

 A screenshot of the 'Mekorma AP Configurations' settings page. The page has a header with 'AP Hub Version: 22.1.3.6' and 'MEKORMA LOG SETTINGS' with dropdowns for 'Verbosity' (Normal) and 'Log Level' (Error). Below this are tabs for 'ELECTRONIC SIGNATURE', 'PROVIDERS', and 'TIN PROVIDER'. The 'ELECTRONIC SIGNATURE' tab is active, showing 'ELECTRONIC SIGNATURE SETTINGS'. A checkbox labeled 'Auto Enroll Mekorma Users In Role' is checked and circled in red. Below it is a field for 'Security Role Name' with the value 'AP ADMIN' and a search icon to its right.

2. Use the search icon to the right of the Security Role Name field to navigate to your desired role. The Security Role Name determines which users are allowed to print signatures on checks.

Mekorma AP Configurations

AP Hub Version: 22.1.3.6

MEKORMA LOG SETTINGS

* Verbosity: Normal

* Log Level: Error

ELECTRONIC SIGNATURE PROVIDERS TIN PROVIDER

ELECTRONIC SIGNATURE SETTINGS

☒ Auto Enroll Mekorma Users In Role

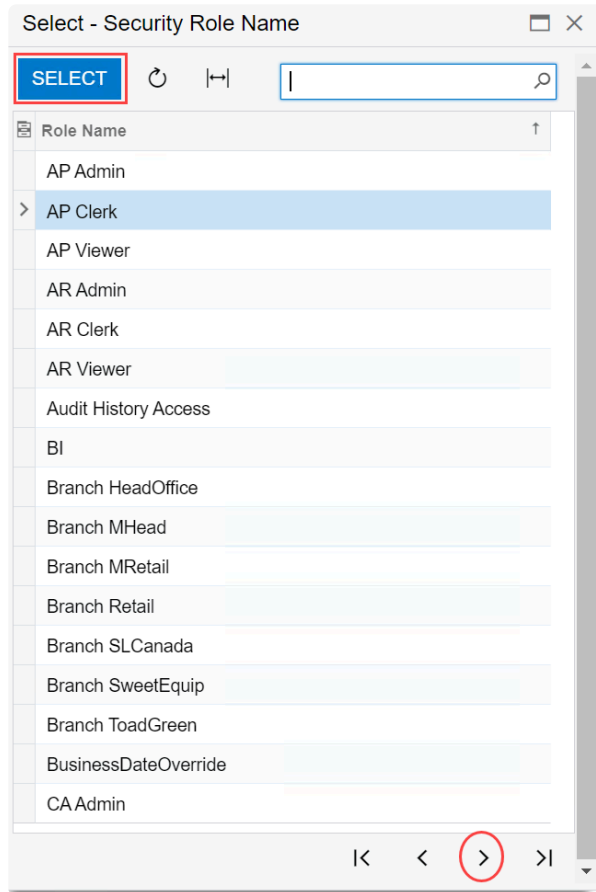
* Security Role Name: AP ADMIN

Select - Security Role Name

SELECT

Role Name
> AP Admin
AP Clerk
AP Viewer
AR Admin
AR Clerk
AR Viewer
Audit History Access
BI
Branch HeadOffice
Branch MHead
Branch MRetail
Branch Retail
Branch SLCanada
Branch SweetEquip
Branch ToadGreen
BusinessDateOverride
CA Admin

3. Select the desired security role and click the Select button.



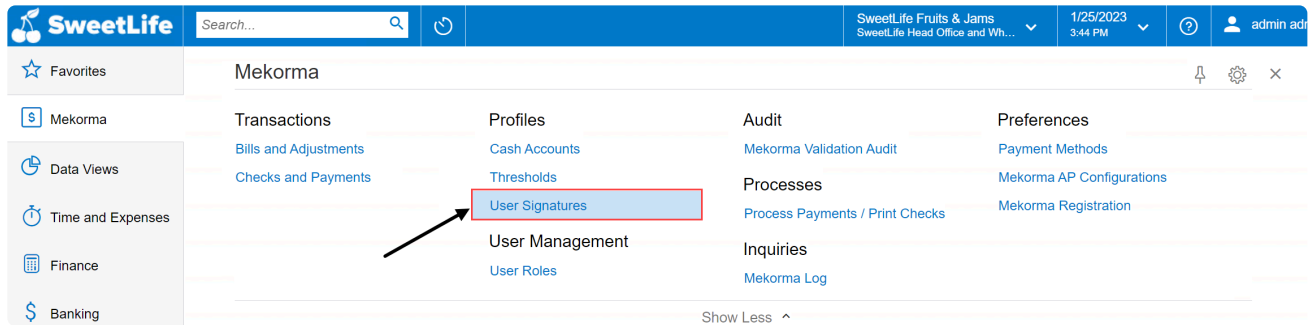
4. The selected security role is now the designated role for printing checks with signatures.
5. Mekorma Electronic Signatures is configured, and you are ready to begin importing signatures and setting up user profiles.

Last modified: June 13, 2023

5. Importing Signatures

Next, you'll import all signature files you want on your checks and link them to the correct users.

1. In the main Mekorma menu, navigate to User Signatures.



2. Click + to add a new signature.

User Signatures ☆



3. The New Record window opens.

- Check the box labeled **Is Active** to use the signature. If left unchecked, the signature cannot be used on a check
- **Security Group Enrolled** is noneditable and shows if the user is enrolled in an authorized security role, as configured in step 2 of [Configuring Electronic Signatures](#)

User Signatures

New Record

← ↶ ⌂ + ↷

* User:

Signature Title:

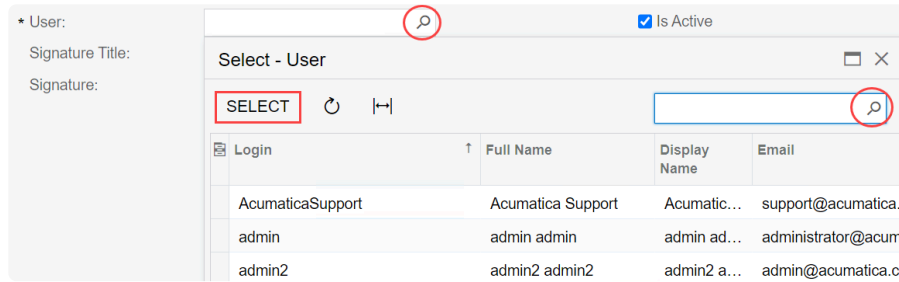
Signature:

☒ Is Active

☐ Security Group Enrolled

Drag and drop the image here to upload it.

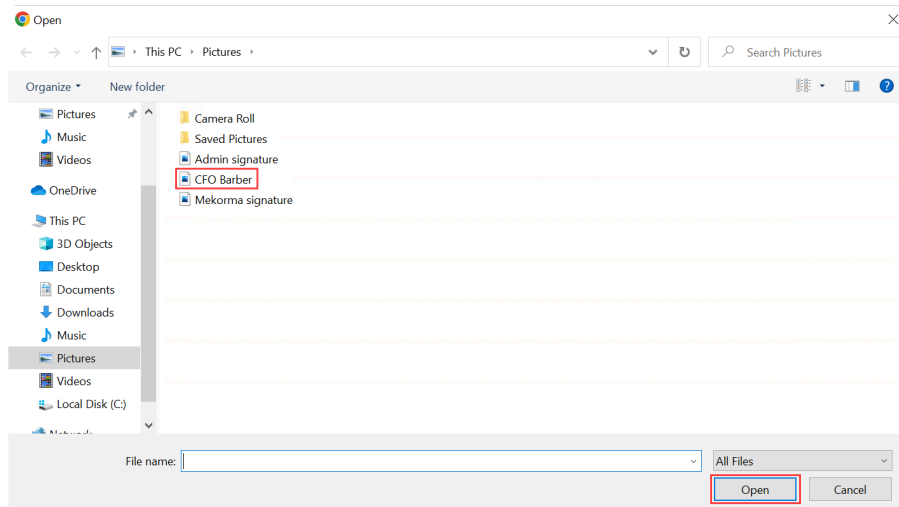
4. Click the search icon next to **User** to find and add the user you want associated with the signature file. Use the search field within this window to search for a user, or browse manually. Once the user is selected, click **Select**.



5. Manually enter the **Signature Title** you want printed on the check (e.g., Finance Manager, CEO, etc.).

Signature Title:

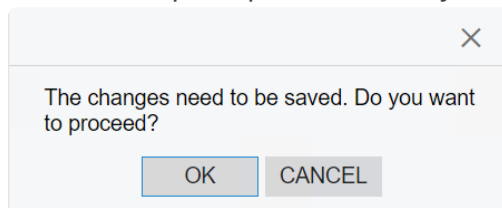
6. Click **Browse** to select the signature file you previously created, or drag and drop the file into the upload area.



7. Click **Open** to select the file.
 8. Upload the selected file into Acumatica.

Signature:

9. You will be prompted to save your changes to proceed. Click **OK** to continue.



10. The signature is now uploaded and displays in the signature box. Click the **Save** button to save the user signature.

User Signatures
BARBER

← ↺ 📄 + ↻

* User: BARBER 🔍
Signature Title: CFO
Signature: CFO Barber.png × Browse Upload

☒ Is Active
☒ Security Group Enrolled


Barber

11. Using the back arrow, return to the main User Signatures page and the newly uploaded signature now appears in the list of signatures. Repeat steps 2-10 to add additional signatures.

User Signatures

↺ ↻ + ✎ |↔| 🗑

Drag column header here to configure filter

	Login	Display Name	Last Name
>	barber	Andrew Barber	Barber
	carver	Edith Carver	Carver

Last modified: June 13, 2023

6. Setting Up Thresholds

Signature Thresholds are used to set up signature rules based on your organization's policies. They ensure the correct signature appears on the check at print time. You can control whether signature lines are printed or not, whether you are using one or two signatures, or you can turn off lines and titles if you are using pre-printed checks.

Prior to setting up thresholds, we recommend that you gather the following information:

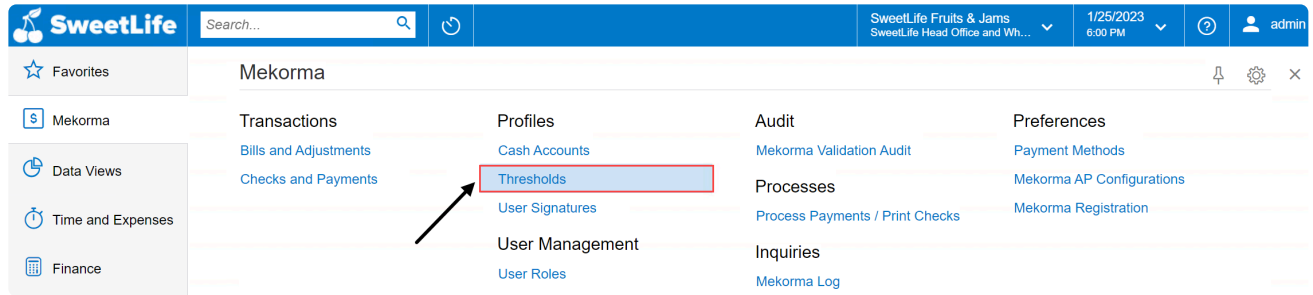
- For each checking account, who are the signers on the account?
- What amounts require one signature?
- What amounts require two signatures?
- Is there an amount above which you want a handwritten signature rather than an electronic signature?
- Is there an amount above which you want two handwritten signatures?

Here, we will use this example:

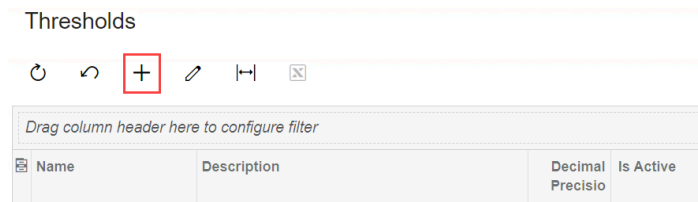
Question	Answer
For each Checking account, who are the signers on the account?	Barber, CFO Carver, CEO
What amounts require one signature?	Check payments up to 50,000.00 only require Barber's signature
What amounts require two signatures?	Checks between 50,000.01 and 200,000.00 require both Barber's and Carver's signature
Is there an amount above which you want a single handwritten signature rather than an electronic signature?	In this case, no
Is there an amount above which you want two handwritten signatures?	Yes, checks above 200,000.01 require two handwritten signatures

Follow these steps to set up a signature threshold:

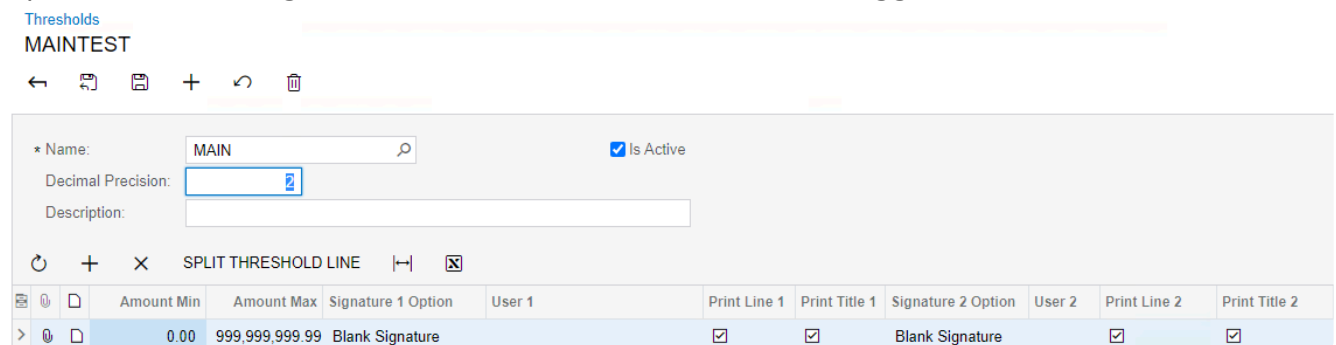
1. In the main Mekorma menu, navigate to **Thresholds**.



2. Click + to create a new threshold.



3. Name your new threshold. After you name your threshold, press enter on your keyboard and the first threshold line will auto populate. The threshold will default the minimum amount to 0.00 and the maximum amount to 999.999.999.99 and set the signature options to Blank Signature and Print Line and Print Titles toggled on.




4. Double click the **Signature 1 Option** field to select which signature to use:

- **Approver Signature** means the payment approver's signature will be printed for this threshold level. This signature is mapped from roles set up as approvers.
- **User Signature** allows you to define a specific user's signature for this threshold level.
- **Blank Signature** does not print an electronic signature, so you can hand sign checks as desired.




5. If **User Signature** is selected, click the search icon in **User 1** to add the respective user for this threshold. This field can be blank if **Approver Signature** or **Blank Signature** are




selected.


User 1	Pri
BARBER	

6. Toggle **Print Line 1** and **Print Title 1** on/off if you want a line and/or title printed on the check.
 - With the example above, only Barber's signature is required for the first threshold, so leave Signature 2 Option as blank and deselect the checkboxes for Print Line 2 and Print Title 2

 With Electronic Signatures, you can add two signature lines to each check. Configure Signature 2 the same way as Signature 1.

7. When done configuring threshold line 1, add a second level to the threshold by selecting **Split Threshold Line**.




SPLIT THRESHOLD LINE



8. The **Split Threshold Line** window appears. Enter the amount you want to split the threshold line at. Per the example above, we want to set the first threshold maximum to 50,000.

Split Threshold Line ✕

Current Line

Current Line Min Amount: 0.00

Current Line Max Amount: 999,999,999.99

New Line

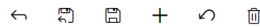
Split at Amount: 50,000.00

OK
CANCEL

9. Click **OK** and the second threshold line is now entered.
10. Configure threshold line 2 the same way you did threshold line 1. Per the example above, this threshold has Barber as the first signature and Carver as the second signature.
 - Note that when you split a threshold line, it will default to include Print Line 2 and Print Title 2, so ensure that you deselect those checkboxes if not requiring a second signature for that threshold.

Thresholds

MAIN



* Name: ☒ Is Active

Decimal Precision:

Description:

SPLIT THRESHOLD LINE

	Amount Min	Amount Max	Signature 1 Option	User 1	Print Line 1	Print Title 1	Signature 2 Option	User 2	Print Line 2	Print Title 2
	0.00	50,000.00	User Signature	BARBER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Blank Signature		<input type="checkbox"/>	<input type="checkbox"/>
	50,000.01	999,999,999.99	User Signature	BARBER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	User Signature	CARVER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

11. Repeat steps 7-10 to add a third threshold line. This time, in the **Split at Amount** field of the **Split Threshold Line** window, enter 200,000.00.
12. The third threshold requires two handwritten signatures, so we will set the **Signature 1 Option** and **Signature 2 Option** to **Blank Signature** and deselect the **Print Title 1** and **Print Title 2** checkboxes; just lines will be printed on the checks in this threshold.
 - If **Print Title** is unchecked, the system defaults to print “Authorized Signatory” below the line

Thresholds

MAIN



* Name: ☒ Is Active

Decimal Precision:

Description:

SPLIT THRESHOLD LINE

	Amount Min	Amount Max	Signature 1 Option	User 1	Print Line 1	Print Title 1	Signature 2 Option	User 2	Print Line 2	Print Title 2
	0.00	50,000.00	User Signature	BARBER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Blank Signature		<input type="checkbox"/>	<input type="checkbox"/>
	50,000.01	200,000.00	User Signature	BARBER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	User Signature	CARVER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	200,000.01	999,999,999.99	Blank Signature		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Blank Signature		<input checked="" type="checkbox"/>	<input type="checkbox"/>

13. Once your threshold is complete, click the **Save** button at the top of the screen. All saved thresholds will appear in the **Thresholds** window.



Drag column header here to configure filter				
	Name	Description	Decimal Precision	Is Active
	MAIN		2	<input checked="" type="checkbox"/>
	MAINTTEST		2	<input checked="" type="checkbox"/>

You are now ready to begin using your threshold. Next, learn how to [apply your threshold to a cash account](#).

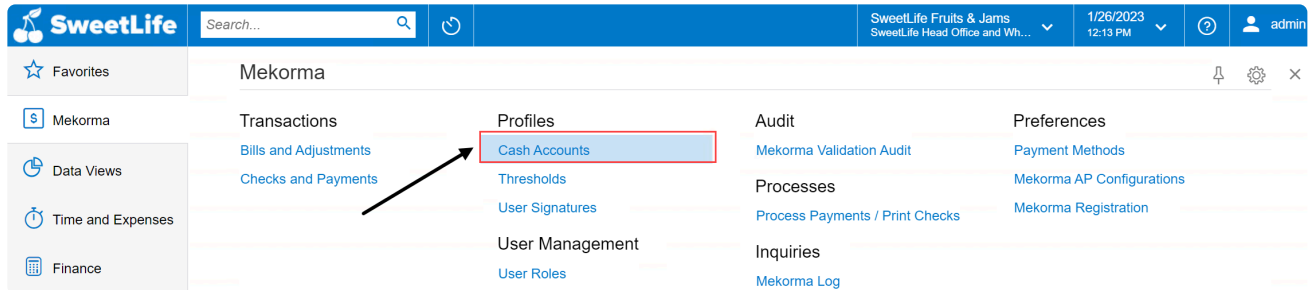
Last modified: June 13, 2023

7. Applying a Threshold to a Cash Account

You can apply a specific threshold to each of your cash accounts. In many cases, you may have different check signing rules in your organization based on your different cash accounts. Creating multiple thresholds and applying them to each account as necessary will help you ensure you follow your organizational rules.

To apply a threshold to a cash account, follow these steps:

1. In the main Mekorma menu, navigate to **Cash Accounts**.



2. In the **Cash Accounts** list page, click on the cash account you would like to add signatures to.

Cash Accounts

⌂ ↶ + ✎ |≡ ☒

Drag column header here to configure filter

		Cash Account	Description	Currency	Active	External Ref. Number	Clearing Account	Requires Reconcili
>	🔗	10100ST	SweetStore Petty Cash	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	🔗	10200EQ	Equipment Checking	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	🔗	10200MF	Muffins Checking	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	🔗	10200TG	ToadGreen Checking Account	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
	🔗	10200WH	Wholesale Checking	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
	🔗	10210WH	KeyBank Checking	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
	🔗	10250ST	Company Merchant Account	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	🔗	10300WH	Cathay Bank Savings	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
	🔗	10600WH	Wholesale Credit Card Account	USD	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

3. In the specific **Cash Account** page, navigate to the **Signatures** tab. Select the **Mekorma Threshold** radio button and use the search icon in the **Threshold** field to select the threshold you would like to apply to the Cash Account.

Cash Accounts

10200WH - Wholesale Checking



* Cash Account: 10200WH - Wholesale Check

☒ Active

Account: 10200 - Company Checking Accr

Branch: HEADOFFICE - SweetLife Head

Currency: USD

External Ref. Number:

Reconciliation Numbering Sequ... CARECON - CA Reconciliatio

Bank ID:

Statement Import Service: PX.Objects.CA.OFXStatermer

☐ Clearing Account

☒ Requires Reconciliation

☐ Restrict Visibility with Branch

☐ Match Bank Transactions to Batch Payments

☐ Use for Corporate Cards

Description: Wholesale Checking

PAYMENT METHODS CLEARING ACCOUNTS ENTRY TYPES **SIGNATURES**

Use Signature from:

☐ Cash Account ☒ Mekorma Threshold

Threshold:

Signature:

4. Once you have chosen your threshold, click **Select**.

PAYMENT METHODS CLEARING ACCOUNTS ENTRY TYPES **SIGNATURES**

Use Signature from:

☐ Cash Account ☒ Mekorma Threshold

Threshold:

Signature:

Select - Threshold

SELECT

Name

> **MAIN**

5. Save the record. The threshold is now applied to your Cash Account. All checks from this account will have signatures print according to the assigned Threshold logic.

Cash Accounts

10200WH - Wholesale Checking



6. Use the back button to return to the main Cash Accounts list page.

[Cash Accounts](#)

10200WH - Wholesale Checking



7. Repeat steps 2-6 for each cash account you would like to add signatures to.

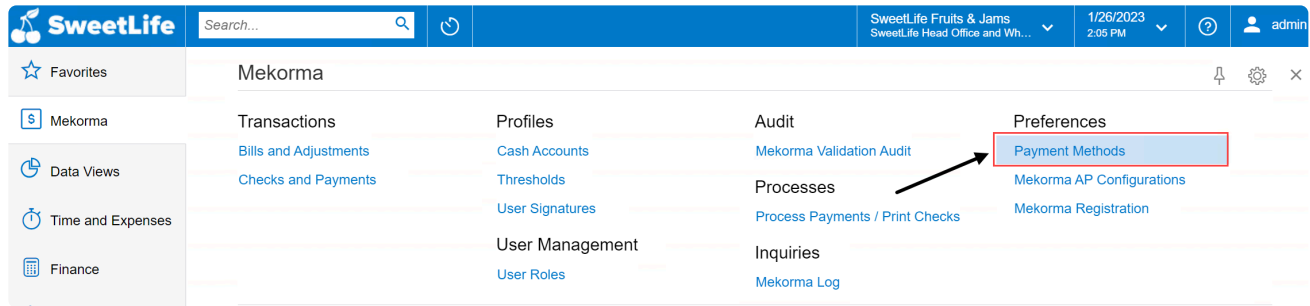
Last modified: June 13, 2023

8. Selecting Mekorma Check Formats

Electronic Signatures provides four check layout formats with support for electronic signatures. If you have a pre-configured check layout you would like to use, please [contact Mekorma Professional Services](#).

Select one of the four supported formats by following these steps:

1. In the main Mekorma menu, navigate to Payment Methods.



2. Select the Check option for payment method.

Payment Methods

Payment Methods

Drag column header here to configure filter

	Payment Method ID	Description	Means of Payment	Use in AP	Use in AR	Active
	CASH	Cash Payment	Cash/Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>	CHECK	Check Payment	Cash/Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	FEDWIRE	Fedwire	Cash/Check	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	FEDWIREBA	Fedwire Balanced	Cash/Check	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	ONLINE	eCommerce Online Payment	Cash/Check	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	VISA	Credit Card Payments	Credit Card	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	WIRE	Wire Transfer	Direct Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Navigate to the Settings For Use In AP tab. Click the search icon in the Reports field.

Payment Methods

CHECK - Check Payment

* Payment Method ID: CHECK

☒ Active ☒ Use in AP ☐ Set Payment Date to Bank Transaction Date

☒ Use in AR ☐ Require Remittance Information for Cash Account

Means of Payment: Cash/Check

* Description: Check Payment

ALLOWED CASH ACCOUNTS SETTINGS FOR USE IN AR **SETTINGS FOR USE IN AP**

ADDITIONAL PROCESSING

☒ Print Checks ☐ Create Batch Payments ☐ Not Required

CHECK PRINTING SETTINGS

* Report:

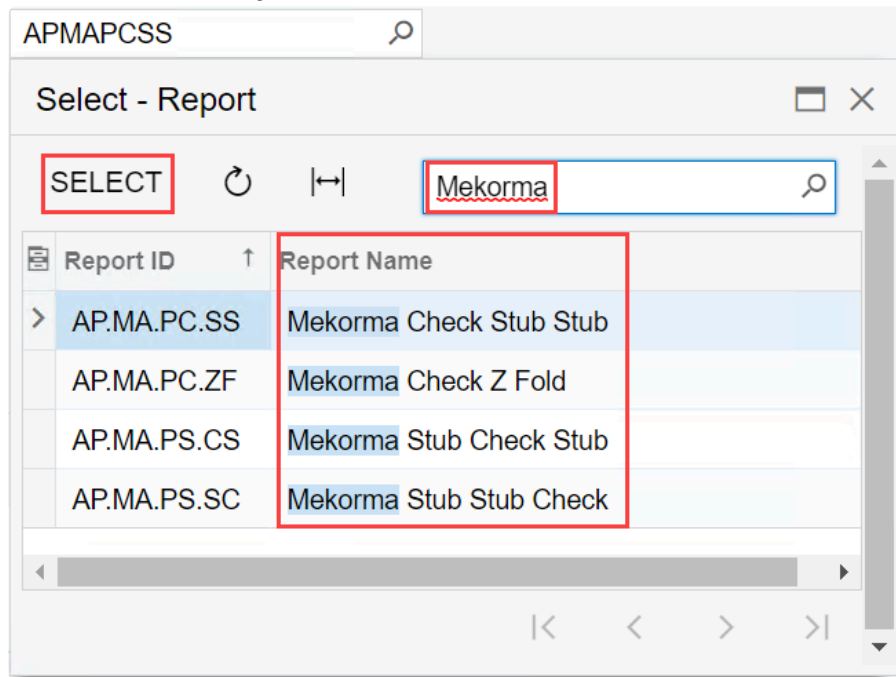
Lines per Stub: 10

☐ Print Remittance Report

Remittance Report:

4. Type in *Mekorma*, or search the specific Report ID, to bring up the Mekorma check

formats. Choose your desired format and click **Select**.



5. This format now applies to all *check* payment methods.
6. Click **Save** in the top menu to save.
7. Repeat steps 2-6 to apply check formats to different payment methods.

You can review examples of each check format [here](#).

Last modified: June 13, 2023

8.1. Check Format Examples

Below are examples of each Mekorma check format. If you have a pre-configured check layout you would like to use, please [contact Mekorma Professional Services](#).

Check Stub Stub

1/26/2022

All Fruits Mall

****150.00

ONE HUNDRED FIFTY AND XX/100*****

All Fruits Mall

3340 Deans Lane
O Fallon, MO 63366Barber

CFO

Authorized Signature

1/26/2022 All Fruits Mall

Date	Doc Type	Reference	Original Amt.	Balance Due	Payment
1/26/2023				Outstanding Balance	150.00
				Check Amount	150.00

10200WH Wholesale Checking

1/26/2022 All Fruits Mall

Date	Doc Type	Reference	Original Amt.	Balance Due	Payment
1/26/2023				Outstanding Balance	150.00
				Check Amount	150.00

10200WH Wholesale Checking

Check Number: 0023

Check Z Fold

12/22/2022 All Fruits Mall

Date	Doc Type	Reference	Original Amt.	Balance Due	Payment
3/1/2023			Outstanding Balance		150.00
			Check Amount		150.00

10200WH Wholesale Checking

12/22/2022

All Fruits Mall
ONE HUNDRED FIFTY AND XX/100*****

****150.00

All Fruits Mall

3340 Deans Lane
O Fallon, MO 63366

Barber

CFO

All Fruits Mall

3340 Deans Lane
O Fallon, MO 63366

Stub Check Stub

12/21/2022 All Fruits Mall

Date	Doc Type	Reference
3/1/2023		

Original Amt.	Balance Due	Payment
	Outstanding Balance	150.00
	Check Amount	150.00

10200WH Wholesale Checking

All Fruits Mall

ONE HUNDRED FIFTY AND XX/100*****

All Fruits Mall

3340 Deans Lane
O Fallon, MO 63366

12/21/2022

****150.00

Barber

CFO

12/21/2022 All Fruits Mall

Date	Doc Type	Reference
3/1/2023		

Original Amt.	Balance Due	Payment
	Outstanding Balance	150.00
	Check Amount	150.00

10200WH Wholesale Checking

Check Number: 0027

Stub Stub Check

12/1/2022 All Fruits Mall

Date	Doc Type	Reference	Original Amt.	Balance Due	Payment
3/1/2023			Outstanding Balance		150.00
			Check Amount		150.00

10200WH Wholesale Checking

12/1/2022 All Fruits Mall

Date	Doc Type	Reference	Original Amt.	Balance Due	Payment
3/1/2023			Outstanding Balance		150.00
			Check Amount		150.00

10200WH Wholesale Checking

Check Number: 0028

All Fruits Mall

12/1/2022

****150.00

ONE HUNDRED FIFTY AND XX/100*****

All Fruits Mall

3340 Deans Lane
O Fallon, MO 63366Barber

CFO

Last modified: March 29, 2023

9. Auditing Signatures on Posted Payments

In some instances, you may want to review which signatures were used on specific payments. This can be helpful to maintain consistency and assist with any potential audits. Access a payment by navigating to **Checks and Payments** and selecting a payment. When the payment opens, navigate to the **Threshold Signatures** tab.

In **Threshold Signatures**, you will see the name, title, and signature used for each signatory.

Checks and Payments

Prepayment 000033 - All Fruits Mall

NOTES ACTIVITIES FILES CUSTOMIZATION

RELEASE

Type:	Prepayme...	Vendor:	ALLFRUITS - All Fruits Mall	Payment Amount:	150.00
Reference Nbr.:	000033	Validation Stat.:		Applied to Order:	0.00
Status:	Printed	Location:	MAIN - Primary Location	Unapplied Balance:	150.00
Application Date:	12/1/2022	Payment Meth.:	CHECK	Application Amount:	0.00
Application Pe.:	10-2022	Cash Account:	10200WH - Wholesale Checking	Finance Charges:	0.00
* Payment Ref.:	0028	Description:			

DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL ORDERS REMITTANCE CHARGES COMPLIANCE **THRESHOLD SIGNATURES**

SIGNATORY 1

User 1 Name: BARBER

Printed Title 1: CFO

Comment Signatu... Threshold Line User Signature Used

Barber

☒ Print Title 1

☒ Print Line 1

SIGNATORY 2

User 2 Name:

Printed Title 2:

Comment Signatu... Blank Signature Assigned on Threshold Line

☐ Print Title 2

☐ Print Line 2

Last modified: March 29, 2023

10. Template for Gathering Signatures

Template for Gathering Signatures	

Last modified: March 29, 2023

11. Requesting Support, Implementation, or Customization

We are here to help!

If you are having a specific issue with your Mekorma products and require assistance from our Customer Success team, please log in to our [online portal](#) and open a new case.

- [Technical Support](#) is included with your yearly enhancement plan. [Open a support case](#).
- [Implementation Support](#) is available to help you prepare, install, or configure any aspect of Mekorma Electronic Signatures for Acumatica.
- [Customization Support](#) is available if you want to go beyond the built-in feature set of our product.

Last modified: October 9, 2023

12. How to Use This Guide

New users can follow step-by-step installation, configuration, and usage instructions delivered via written content and video demonstrations. Experienced users can review this guide for any applicable new feature information, or use it as an ongoing reference tool:

- Pull targeted results using the **Search** functionality in the top menu bar.
- Use the **expandable menu** on the left sidebar to discover topics of interest.
- Bookmark pages or share links with colleagues, as each page in the guide has its own unique URL.
- Print individual pages by clicking on the **printer icon** at the top right corner of any page.
- Download/Print the entire user guide by clicking on the **Download as PDF** button at the very bottom of the left-hand menu.
- **Contact us with your ideas** if there are any new features or enhancements you would like to see in a product, by using the link at the bottom of each page.

If you are looking for a more tailored experience, our dedicated Customer Success team is ready to support you, guide you through product implementations, and assist you with any customized build requests. For more information, see [Requesting Support, Implementation, or Customization](#), or visit us at our [website](#).

Last modified: November 2, 2023