

Odoo Sign:

Electronic Signature Made Easy

Antoine Sencie • Functional consultant

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BENEFITS OF ODOO DIGITAL SIGNATURE

With Odoo Digital Signature:

Prepare templates for your recurrent documents such as recruitment contracts, etc.

Instantly submit signature requests to your partners all over the world

Follow-up on ongoing signature requests

Automatic archiving of your signed document in your Odoo instance

With Odoo Digital Signature:

Get fast signatures

Decrease administrative workload with easy follow-up and automatic archiving

Clean up space by working paperless

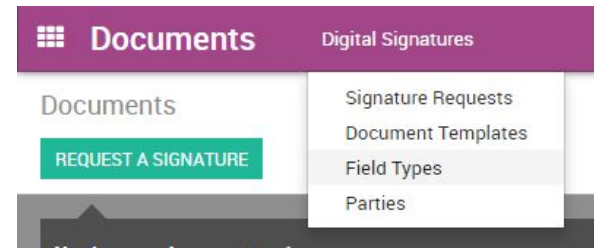
Easily detect antedated documents



HOW IT WORKS

How it works - Prepare

1. Prepare your templates



- Define possible roles (parties): customer, etc
- Upload your file (PDF or image)
- Insert blocks to be completed by the parties:

Phone:

Email:

How it works - Send

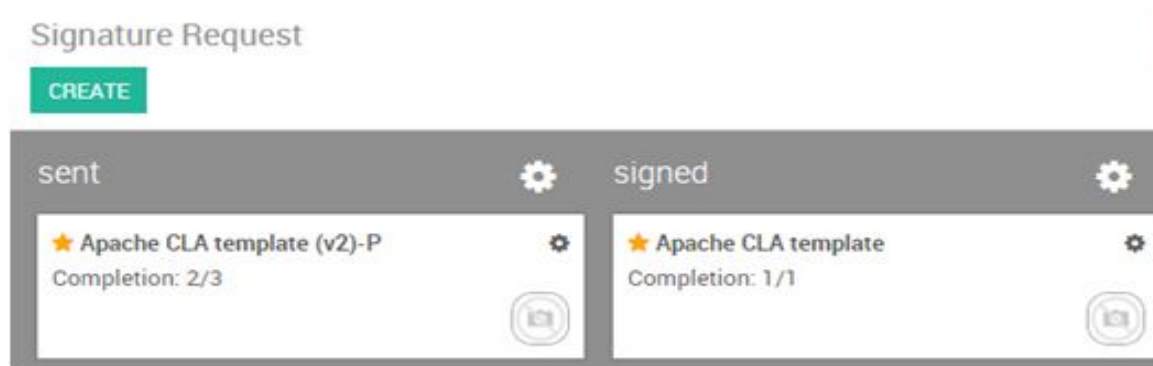
2. Send secure links to signees: 2 possibilities

SEND a template to many people so that several parties will sign the same copy together. Eg. a recruitment contract

SHARE a link so that every signee will entirely fill in his/her own copy.

How it works - Follow up

3.1. Track status of sent documents



3.2. Check signature per signee (use the list view)

The screenshot shows the 'Signature Request' list view. At the top, there is a 'View' button and a progress indicator showing 66%. Below the title, there are fields for 'Filename' (Apache CLA template (v2)-P) and 'Template' (Apache CLA template (v2)). The main part of the interface is a table with the following data:

Partner	Email	Role	State
Demo Officer	odoo.demo.officer@gmail.com	Anybody else	Completed
Patrick	klp@openerp.com	Employee	Completed
Demo Officer	odoo.demo.officer@gmail.com	Customer	Waiting for completion



LIVE DEMONSTRATION

FLOW 1 - Send to one and CC

1. Create a new party if needed
2. Upload a document & prepare the template
3. **SEND** it to:
 - a. The person who needs to sign the document
 - b. A manager (in copy)
4. As the employee, sign and submit
5. Check results

FLOW 2 - Send to many

From existing template, create a new one

1. **SEND** it to:
 - a. Two new employees
2. Sign with both and see updates

Note: A single copy is signed and returned

FLOW 3 - Share a link

From existing template, create a new one

1. **SHARE** to:
 - a. odoo.demo.user@gmail.com as Contributor
 - b. odoo.demo.officer@gmail.com as Employee
2. Sign with both and see updates

Note: We will have as many copies as number of clicks on the link

TIPS

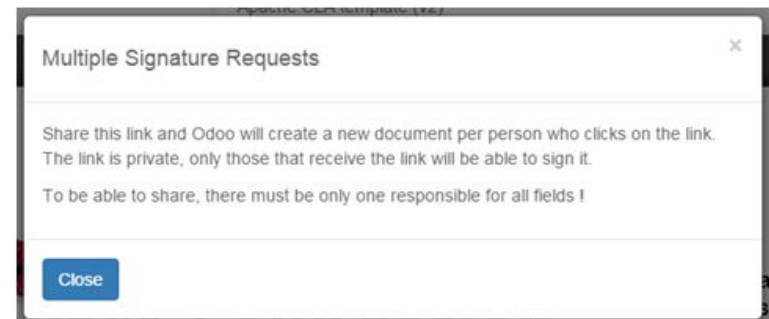
Once a template has been created it can no longer be edited. You need to create a copy of it.

Template "Apache CLA template"

Apache CLA template

This template is used by some signature requests. If you want to edit it, [click here](#) to start a new template from this one !

Since the SHARE button creates a copy for each recipients, all the fields on the template to share need to have the same responsible





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*“Save Paper, It’s good
for your business and
for the planet”*



Q & A

Thank you.



#odooexperience