

# Sign documents with Odoo Sign

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Functional Track @ Lauzelle

# AGENDA

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1 Business benefits of Odoo Digital Signature

2 How it works

3 Demonstration

4 Q & A

5 Conclusion

Sign documents with Odoo

# BENEFITS OF ODOO DIGITAL SIGNATURE

# Benefits for your Business

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With Odoo Digital Signature:

- ✓ Prepare templates for your recurrent documents such as recruitment contracts, CLAs, NDAs, etc.
- ✓ Instantly submit signature requests to your partners all over the world
- ✓ Follow up on ongoing signature requests
- ✓ Automatic archiving of your signed documents in your Odoo instance

# WHY IT MATTERS

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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

Sign documents with Odoo

## HOW IT WORKS

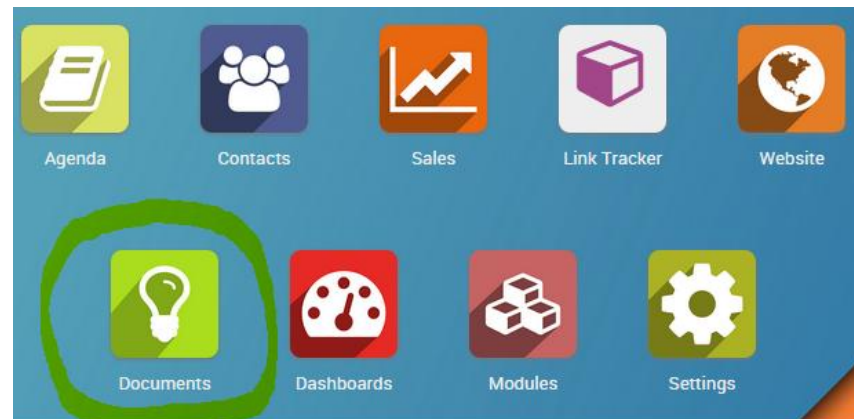
# HOW IT WORKS- Install

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- Go to Modules and remove the “Apps” filter
- Search for **Digital Signatures** and one-click install



- To be able to configure parties, fields and documents templates, activate the technical features for your user.
- Go to “Documents”



# HOW IT WORKS- Prepare & send

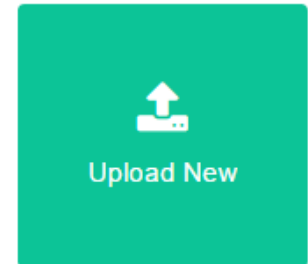
## Prepare your templates

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

Telephone:

E-Mail:

### Documents Templates



## 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
- Or **SHARE** a link so that every signee will entirely fill in his/her own copy (NDAs, CLAs, etc.)









# HOW IT WORKS- Follow up



## Track status of sent documents

Signature Request

CREATE

sent  signed 

★ Apache CLA template (v2)-P   
Completion: 2/3 

★ Apache CLA template   
Completion: 1/1 

## Check signature status per signee

66% View

### Signature Request

Filename Apache CLA template (v2)-P  
Template Apache CLA template (v2)

Partner	Email	Role	State
Demo Officer	odoo.demo.officer@gmail.com	Anybody else	Completed
Patrick	k1p@openerp.com	Employee	Completed
Demo Officer	odoo.demo.officer@gmail.com	Customer	Waiting for completion

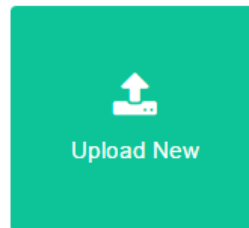
# HOW IT WORKS- Archive

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All documents are automatically archived by status:

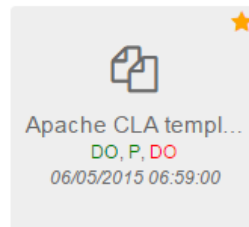
## Documents Templates

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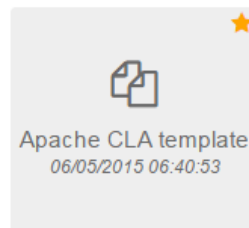
## Signatures in Progress

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## Fully Signed

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**LIVE DEMONSTRATION**

# DEMO Flow1 - Send to one and CC

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1. Installation
2. Define a new party: Contributor
3. Upload a document & prepare template
4. **SEND** to:
  - a. [odoo.demo.user@gmail.com](mailto:odoo.demo.user@gmail.com) as Contributor
  - b. [odoo.demo.manager@gmail.com](mailto:odoo.demo.manager@gmail.com) in copy

The user in copy only receives notifications

## DEMO Flow 2 - Send to many

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1. From existing template, create a new one
2. **SEND** to:
  - a. [odoo.demo.user@gmail.com](mailto:odoo.demo.user@gmail.com) as Contributor
  - b. [odoo.demo.officer@gmail.com](mailto:odoo.demo.officer@gmail.com) as employee
3. Sign with both and see updates

Note: A single copy is signed and returned!

## DEMO Flow 2 - Share a link

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1. From existing templates, create a new one
2. **SHARE** with:
  - a. [odoo.demo.user@gmail.com](mailto:odoo.demo.user@gmail.com) as Contributor
  - b. [odoo.demo.officer@gmail.com](mailto:odoo.demo.officer@gmail.com) employee
3. Sign with both and see updates

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

# TIPS

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1. Once a template has been sent out it can no longer be edited. You need to create a copy of prior:

Template "Apache CLA template"

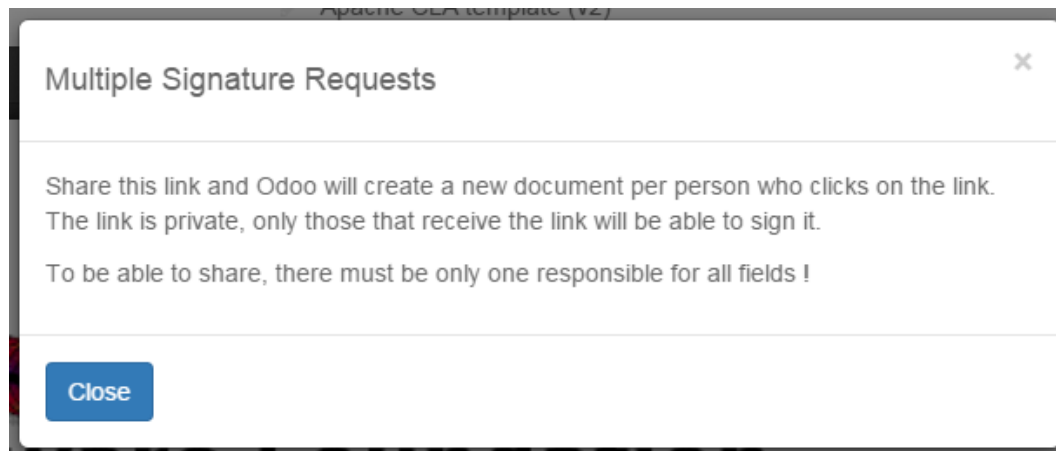
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Apache CLA template

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

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2. Since the SHARE button creates a copy for each, all the fields on the template to share need to



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Q & A



# Thank You

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