

02

Sending for Signature

Odoo 19 Enterprise · Sign

Upload a document and define who signs where.

1 Upload and configure a document

Sign  Upload a PDF

Click Upload a PDF to add a document. After uploading, the PDF editor opens and you can drag signature fields, name fields, date fields, and text fields onto the document wherever signatures or information is required. Each field is assigned to a specific signatory role (e.g. "Customer", "Company Representative").

2 Send for signature

SEND

Click Send. Enter the email address for each signatory role. Add a message. Click Send. Each signatory receives an email with a link to the document. They sign in their browser (no account needed, no software to install). You are notified when each party signs and when the document is fully completed.

SIGNING OPTIONS

Signature Type	Draw: freehand drawing. Type: typed name. Upload: upload an image of their signature.
Validation	SMS validation adds a one-time code sent to mobile for identity verification before signing.
Expiry Date	Date after which the signing link expires. Prevents signatures on outdated documents.