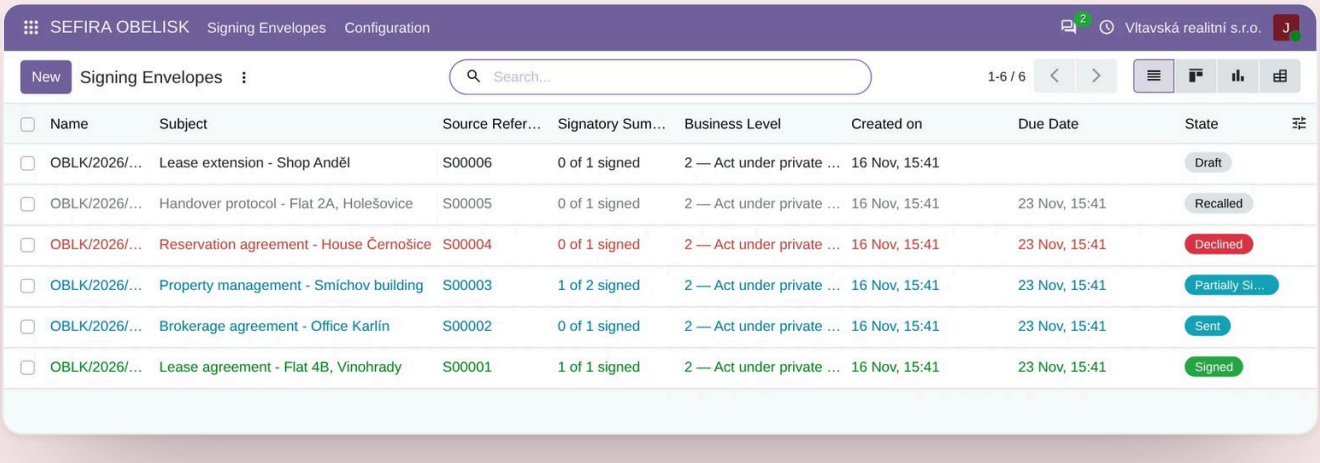
CONNECTOR GUIDE · E-SIGNATURE

SEFIRA OBELISK connector for Odoo

Send documents from Odoo for signature with SEFIRA OBELISK and get the signed PDF back on the same document.

Odoo 17 · 18 · 19 · 20 | 14-day trial, no card | Edition of 18-11-2026





Real Odoo 20 screenshot. The list of signing envelopes with their status, and the detail of an envelope already signed.

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This guide describes version 20.0.3.0.4 of the module (Odoo branch 20.0, commit 8e7bfa8800). Everything in it comes from its published code, the platform's official documentation or real screenshots.

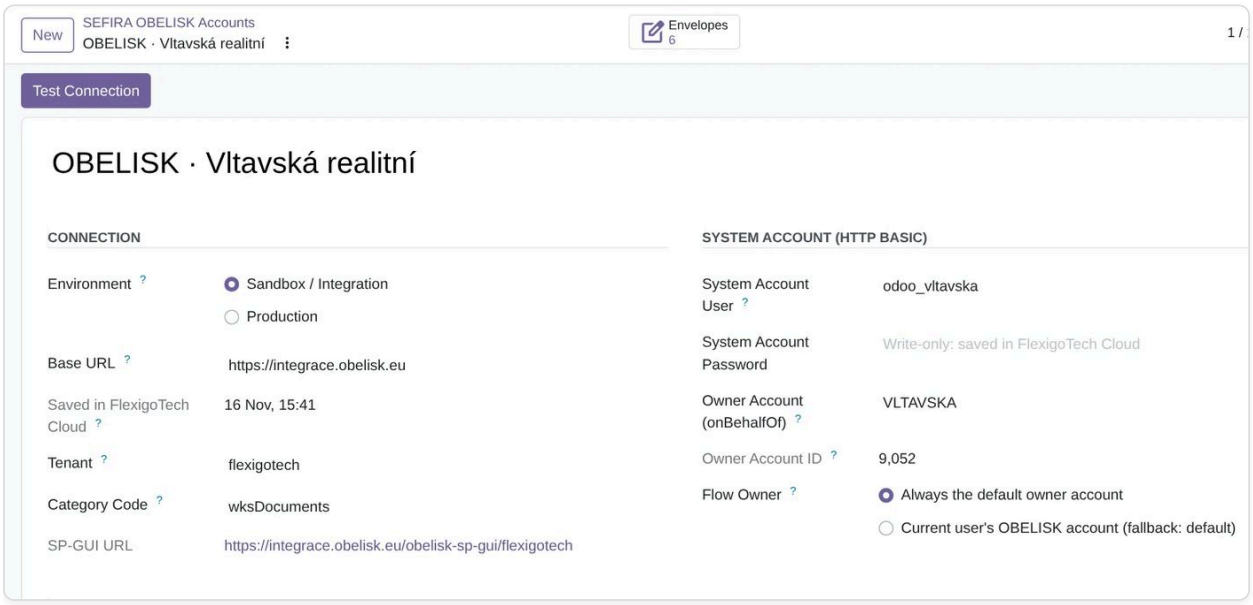
The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to SEFIRA OBELISK. The module also has a version for Odoo 17, 18 and 19.

1 Who it is for and what it solves

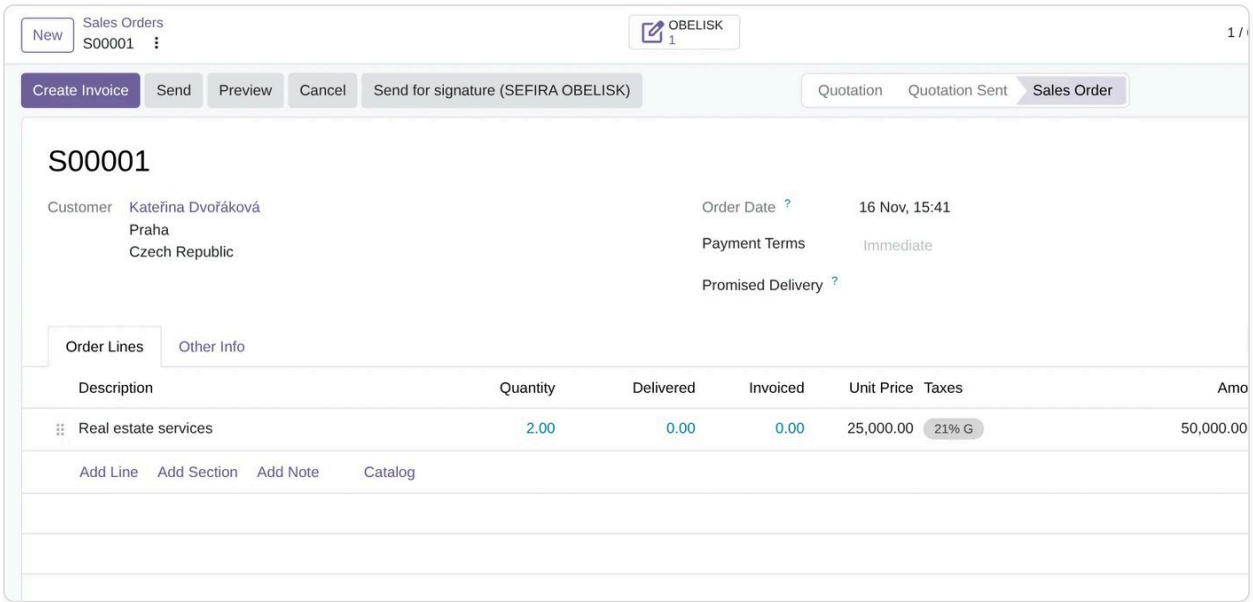
> The connector needs FlexigoTech Cloud: every call to OBELISK goes through it and asks for its trial or subscription. This guide explains how the published module works, with screenshots from a test database in which OBELISK is simulated.

Without the connector, someone downloads the PDF from Odoo, uploads it to the signing platform and notifies each signatory. Then they check when each person has signed and upload the signed PDF back to Odoo to keep it alongside the document.

The connector sends quotations, invoices, purchase orders and any PDF for signature. It tracks each signatory and saves the signed PDF in Odoo with its eIDAS signature. Each connection to OBELISK is an account in **SEFIRA OBELISK › Configuration › Accounts**.



- **Real Odoo 20 screenshot.** The form of a SEFIRA OBELISK account with its connection and the system account.



- **Real Odoo 20 screenshot.** A quotation with the **Send for signature (SEFIRA OBELISK)** button.

What changes day to day

- You send the document for signature from its own screen in Odoo, without downloading it or uploading it to another website.
- Each send is listed in **Signing Envelopes**, with its status and a summary of signatories.
- If SEFIRA registers your account's address, OBELISK's notifications reach Odoo; in addition, a scheduled task checks pending envelopes every hour.
- Expired envelopes are cancelled automatically by a scheduled task that runs every 6 hours.
- When everyone has signed, the signed PDF is saved in Odoo and, on a quotation, the order is confirmed automatically.

What it does not do

- It does not register you with SEFIRA OBELISK: the tenant, the category, the system account and the portal users are set up by SEFIRA.
- It does not bring into Odoo the flows you created in OBELISK outside Odoo, nor does it import the business levels of your tenant: these are set up by hand.
- External signatories, webhooks and level 3 signing depend on SEFIRA enabling them in your tenant, and they have not yet been tested against OBELISK.
- It does not work on Odoo Online or without FlexigoTech Cloud.

2 The connector in figures

4
Odoo versions (17, 18, 19 and 20)

3
scheduled tasks, active on installation

3 and 10
accounts on the Standard and the Pro plan

10
PDF documents at most per envelope

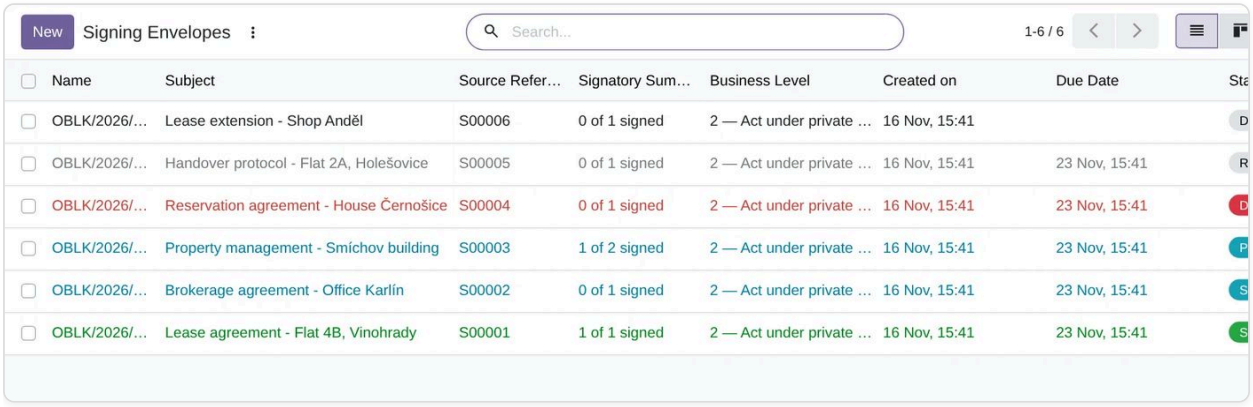
3
standard business levels

328
automated tests on Odoo 20

The module is published for Odoo 17, 18, 19 and 20. According to its dependencies, it requires the Sales, Invoicing and Purchase apps, as well as Mail and Portal, and the FlexigoTech Cloud module.

How it has been tested. The module's automated tests (328 on Odoo 20) run on Odoo 17, 18, 19 and 20 against a simulator built from the OBELISK integration manual. In July 2026, an earlier version of the connector, on Odoo 19 and calling OBELISK directly, was tested in the integration environment SEFIRA provided: a quotation sent from Odoo was signed end to end in the OBELISK portal, with a level 2 signature in PAdES format; the signed PDF came back to Odoo automatically and the order was confirmed automatically. Withdrawing an envelope, several documents in one envelope, the capability check, signature placement and flow records were also tested there. The published version, which calls OBELISK through FlexigoTech Cloud, has not yet been tested against OBELISK, and neither have Odoo 17, 18 and 20. External and temporary signatories, webhooks, level 3, the validator and signing by a third party have never been tested against OBELISK: the integration environment did not have them enabled.

3 Where you see it in your Odoo



- **Real Odoo 20 screenshot.** The **Signing Envelopes** list with the subject, the signatories and the status of each envelope.

SEFIRA OBELISK › Signing Envelopes	Open the **Signing Envelopes** list: the documents sent for signature and their status.
SEFIRA OBELISK › Configuration › Accounts	Open **SEFIRA OBELISK Accounts**: each connection to the platform.
SEFIRA OBELISK › Configuration › Business Levels	Open the **Business Levels** list, the OBELISK signing levels.
SEFIRA OBELISK › Configuration › Webhook Events	Open the **Callback Events** list, the notifications OBELISK sends to your Odoo.

Outside its app, the connector places the **Send for signature (SEFIRA OBELISK)** button on sales quotations and orders, on customer invoices and customer credit notes, and on purchase orders, with an **OBELISK** button that counts each document's envelopes. In the quotations list, the action menu includes **Send for signature (SEFIRA OBELISK)** to send several at once. In **Settings › SEFIRA OBELISK**, the **SEFIRA OBELISK Connector** block sets the **Default Account** and links to **Manage accounts**. Signatories see their pending documents in the Odoo portal.

4 What you need before you start

- A SEFIRA OBELISK account with a tenant provisioned by SEFIRA. You need its name (the tenant), your tenant's address, the document category code, and the system account user and password.
- The name of a real portal user account in that tenant, which will own the flows created by the connector.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server. Odoo Online does not work, because it does not allow installing third-party modules.
- An Odoo administrator user: only they can set the system account password and accept the consent for FlexigoTech Cloud.
- The FlexigoTech Cloud trial or subscription. Without one of the two, the connector does not talk to SEFIRA OBELISK.

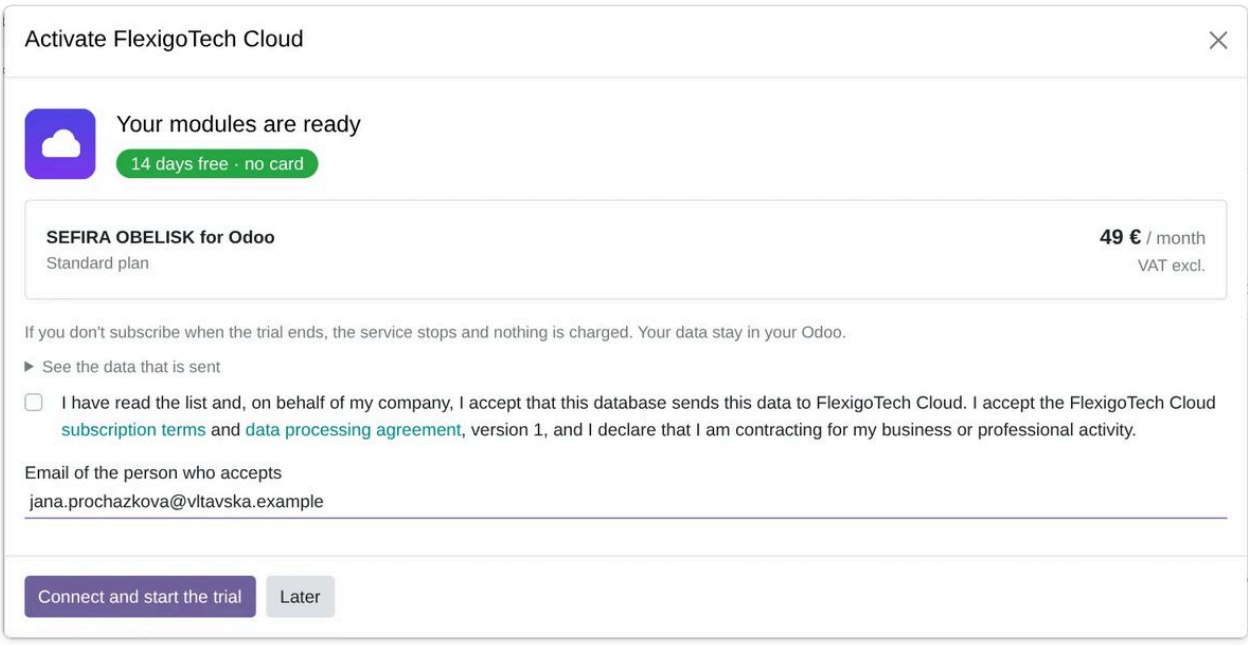
> The connector does not register you with SEFIRA OBELISK. The tenant, the category code, the system account and the activation and final policies are configured by SEFIRA. SEFIRA also registers the external identification namespaces and the webhook address you provide on your tenant, and external signatories only work if SEFIRA enables them. Ask them before you begin.

It is installed like any third-party Odoo module, on Odoo.sh or on your server. Odoo installs `flexigotech_cloud` at the same time, the connection to FlexigoTech Cloud, along with the apps it depends on: Sales, Invoicing and Purchase.

5 The FlexigoTech Cloud trial

1. **Click Activate in the bar at the top**

   It appears as soon as you install the module. It opens the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card required.



- **Real Odoo 20 screenshot.** The activation window: read the list of data, tick the box and enter your email.

2 **Accept and enter your email**

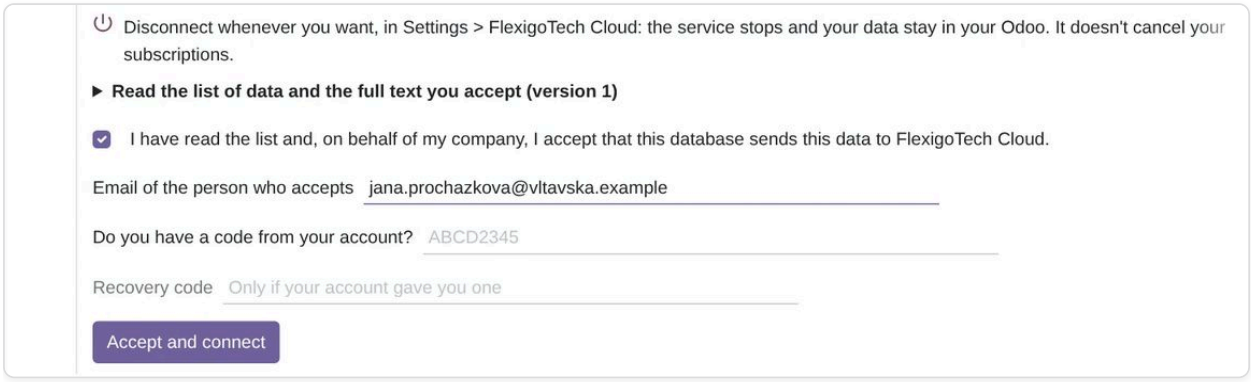
Tick «I have read the list and, on behalf of my company…» (this covers the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module's trial. If you prefer to do it later, **Later** closes the window.

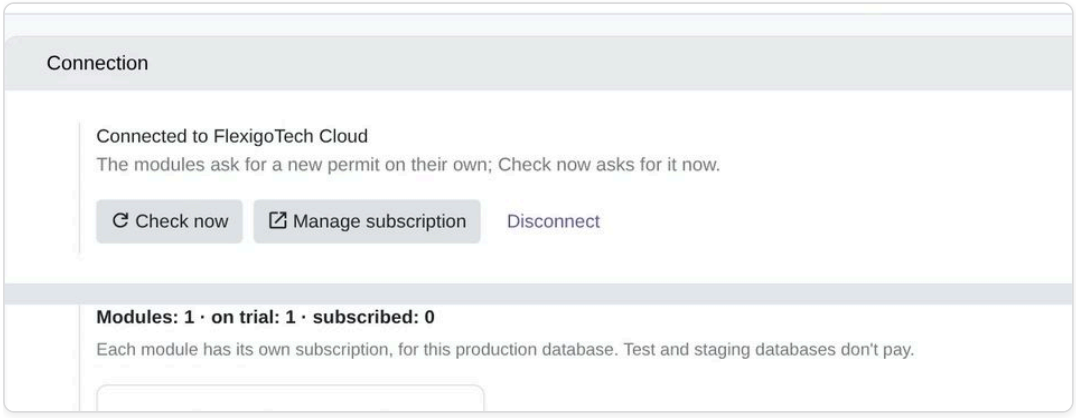
The same, from Settings

In **Settings › FlexigoTech Cloud** you will find the full list of what the database sends. Tick the box, enter the email and click **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the ticked box, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, and so on. From there you choose the plan (Standard or Pro, monthly or yearly) and click **Subscribe**: payment is made on the Stripe page, outside Odoo.



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the connector on trial.

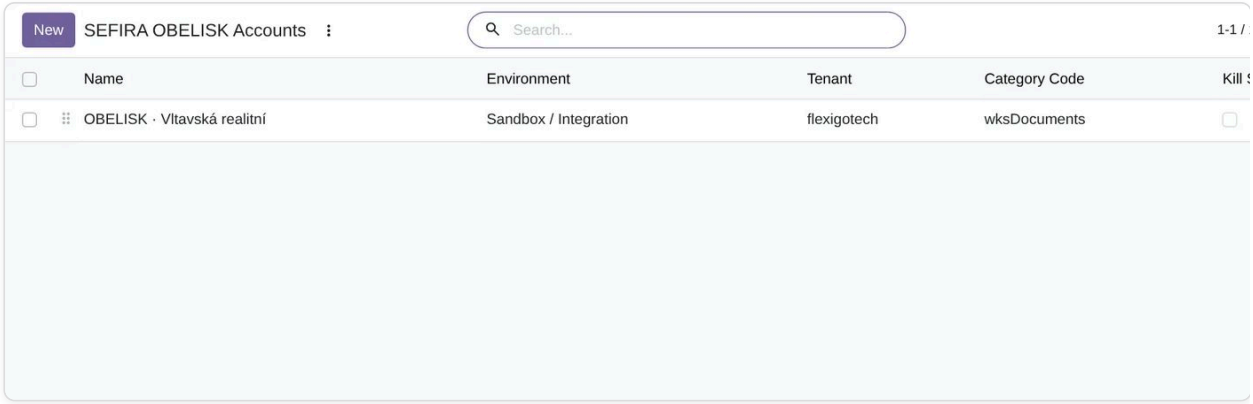
Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged; your data stays in your Odoo. **Check now** requests permission immediately (otherwise the module renews it automatically every 6 hours).

> You cannot start a trial on a neutralised copy (staging) or on a database with demo data: Settings says so with «This database is a neutralised copy or has demo data, so trials can't be started here.»

6 Connecting your account step by step

1 Open the accounts menu

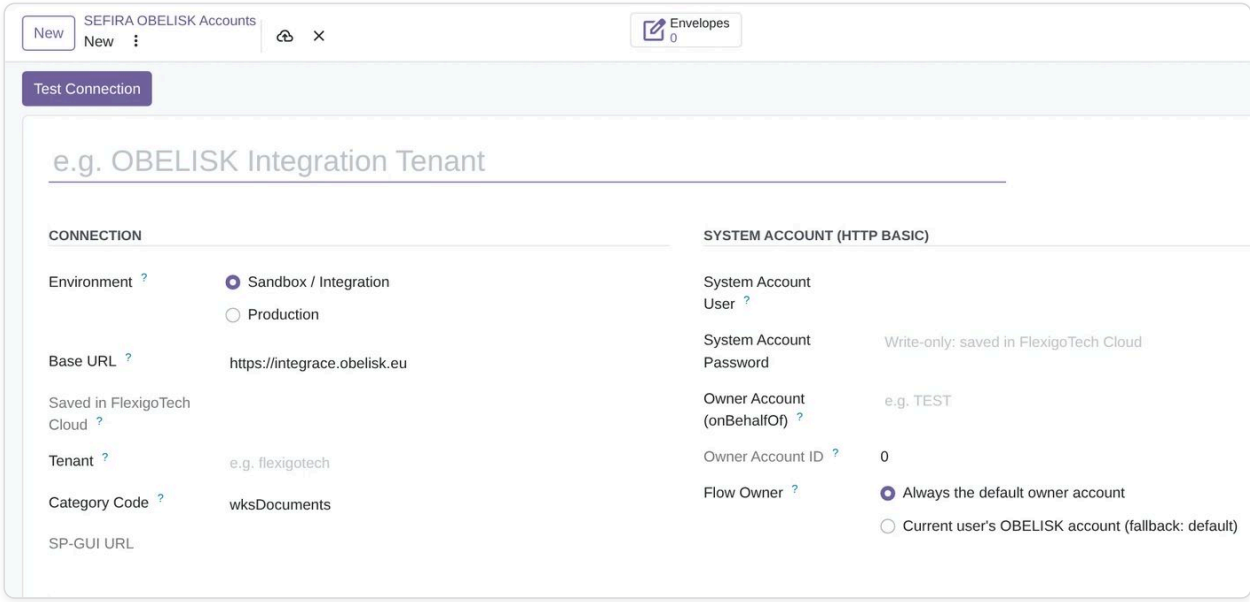
Go to **SEFIRA OBELISK › Configuration › Accounts**. The **SEFIRA OBELISK Accounts** list opens.



- **Real Odoo 20 screenshot.** The **SEFIRA OBELISK Accounts** list with the **OBELISK** account.

2 Click New

The form for an empty account opens.



- **Real Odoo 20 screenshot.** Form for a new account, with the **Connection** group and the **Test Connection** button.

3 Enter the name and choose the environment

In **Environment** choose **Sandbox / Integration** or **Production**. It is only a label: OBELISK tenants are isolated by the tenant name.

4 Fill in the connection

Enter the **Base URL** of your tenant, which must be in the form **https://name.obelisk.eu**, without a port or path. Also enter the **Tenant** and the **Category Code** SEFIRA gave you.

5 Set the system account

In **System Account (HTTP Basic)** enter the **System Account User** and the **System Account Password**. Without the user and the **Base URL**, Odoo does not send the password.

6 **Specify the owner account**

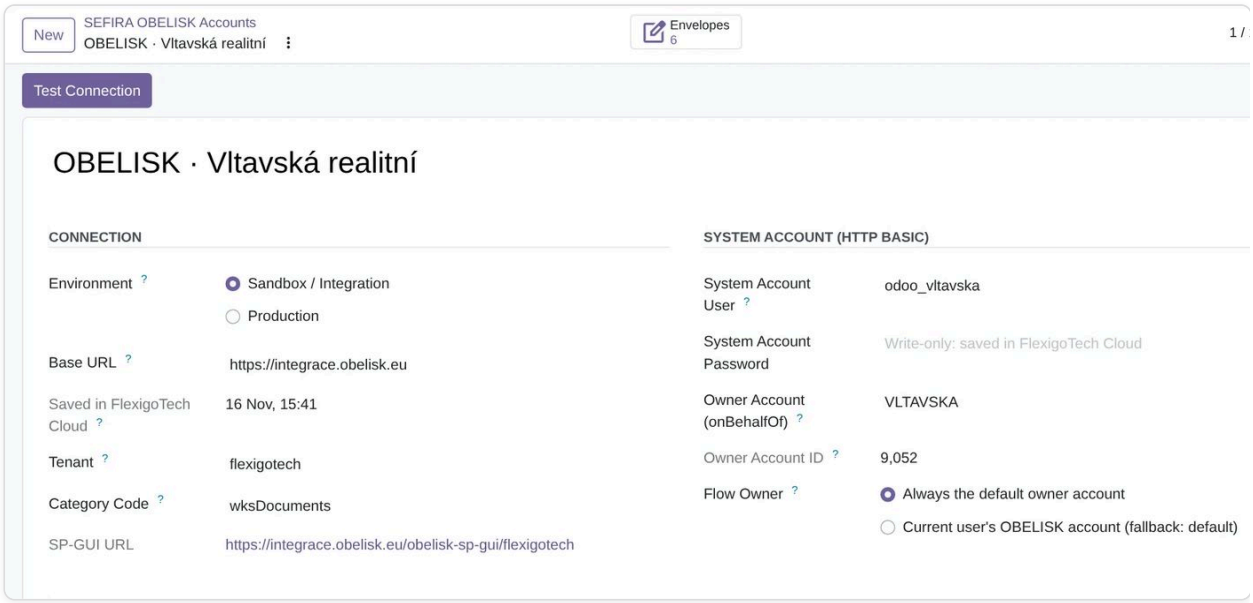
In **Owner Account (onBehalfOf)** enter the name of the portal user account that will own the flows. In **Flow Owner** choose **Always the default owner account** or **Current user's OBELISK account (fallback: default)**; with the second option, each Odoo user sets their own in **OBELISK Account Name**, on their user record or in their preferences.

7 **Accept the consent and save**

In the **FlexigoTech Cloud** group, tick the box that accepts that the credentials are stored there and that calls to SEFIRA OBELISK go through FlexigoTech Cloud. Then save the account: the password goes to FlexigoTech Cloud and is not kept in Odoo.

8 **Click Test Connection**

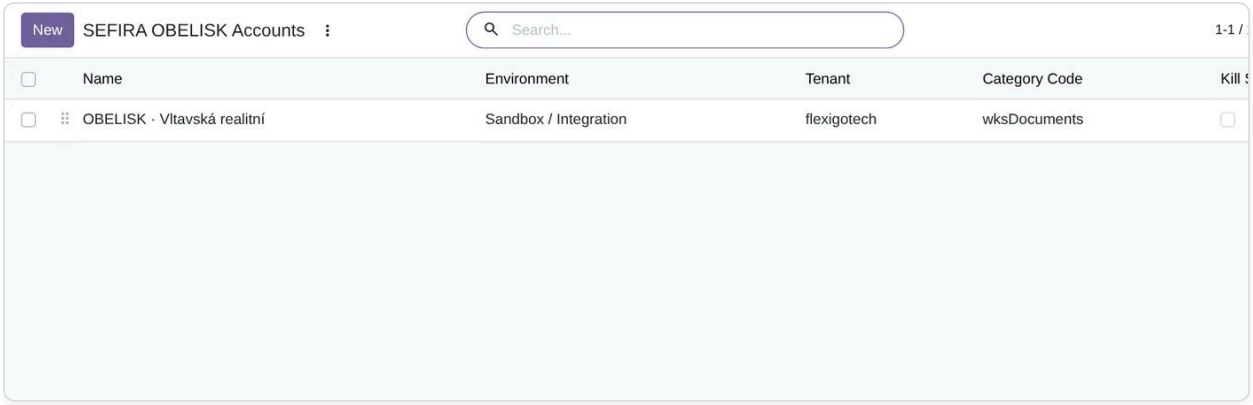
Odoo makes a real call to SEFIRA OBELISK and tells you at which business levels the owner account can sign. The first time, to learn that account's number, it creates an empty draft in OBELISK and deletes it straight away; that number is stored in **Owner Account ID**. If it fails, you see «Connection to OBELISK failed: ...» with the reason.



- **Real Odoo 20 screenshot.** The **OBELISK** account connected, with the **Owner Account ID** already filled in.

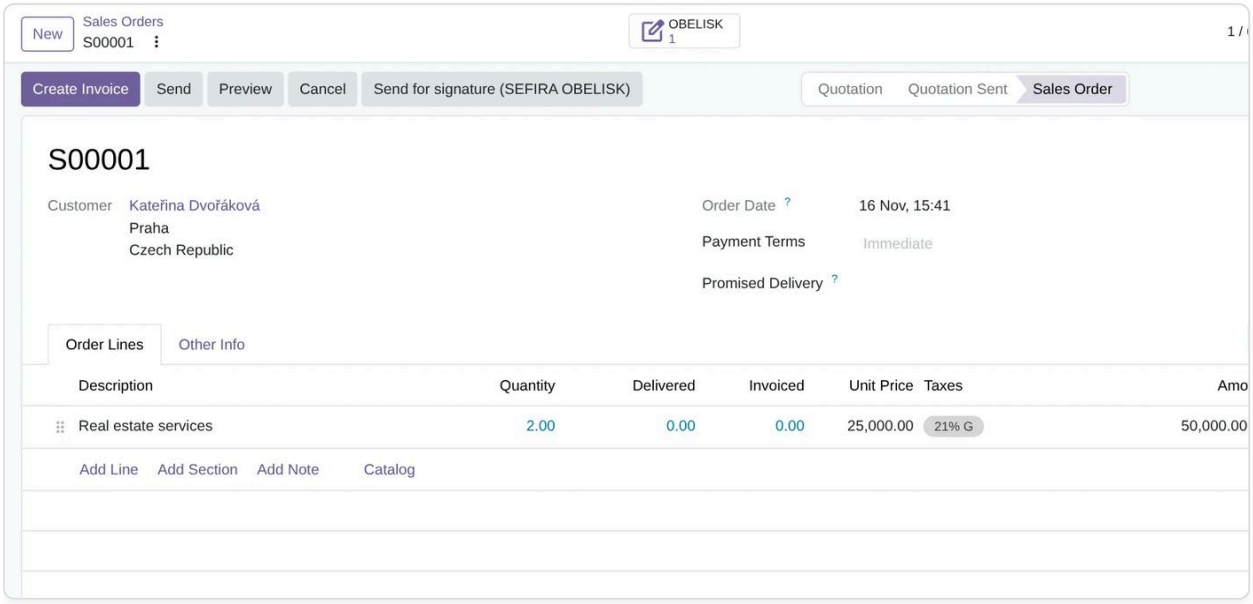
> Only an administrator can set the system account password and accept the consent for FlexigoTech Cloud. Clicking **Test Connection** requires the "SEFIRA OBELISK: Manager" permission. If an administrator withdraws the consent, calls to SEFIRA OBELISK are paused until it is accepted again.

After connecting, envelope status arrives in two ways: through OBELISK notifications (webhooks), if SEFIRA has registered your account's address, and through the scheduled task **SEFIRA OBELISK: poll pending envelopes**, which checks open envelopes every hour. On each envelope, the **Refresh Status** button checks it immediately. Two other tasks cancel expired envelopes every 6 hours and delete notifications older than 90 days every day.



- **Real Odoo 20 screenshot.** The accounts list with **Environment**, **Tenant** and **Category Code** for each one.

7 Sending for signature from quotations, invoices and purchase orders



- **Real Odoo 20 screenshot.** The **Send for signature (SEFIRA OBELISK)** button in the header of a sales order.

The **Send for signature (SEFIRA OBELISK)** button appears on the quotation, the invoice and the purchase order, for users with SEFIRA OBELISK permission (user or **Manager**). On invoices it appears only on customer invoices and customer credit notes. If the account has **Auto-send on Confirmation** switched on, Odoo sends the document automatically when a sales or purchase order is confirmed, or when a customer invoice or customer credit note is posted. If you cancel the document, Odoo withdraws its open envelopes in OBELISK.

The wizard buttons

Send	Creates the signing envelope with the document and the details you entered, and sends it.
Cancel	Closes the wizard without sending anything.

What you fill in

Account	The SEFIRA OBELISK account used for sending.
Subject	The title of the envelope.
Business Level	The level applied to the envelope.
Signing Order	How the signatories take turns.
Signatories	Who signs the document.
Days To Sign	Default 7.
Note for Signers	Note visible to all participants, 1000 characters maximum.

The wizard opens with the document's company account, the document name as the subject, the account's level, days and due date mode, and the document's contact as first signer. It also has the groups **Signature Placement**, **More documents & enclosures** and **Recipients & note**.

Document statuses

- **Not Sent**
- **Awaiting signature**
- **Signed**
- **Declined**
- **Cancelled**
- **Expired**
- **Error**

1. **Open the document**
   Go to the quotation, the invoice or the purchase order.
2. **Click** Send for signature (SEFIRA OBELISK)
   The sending wizard opens.
3. **Fill in the details**
   Check the account, the subject and the business level, and add the signers.
4. **Click** Send
   The envelope is created with the document's PDF.

> You cannot send without signatories («Add at least one signatory.»), without a configured account, with an account from another company, or if the source document no longer exists. If you choose to place the signature at a text anchor, you must enter that text.

What the send checks

When you click **Send**, the wizard checks several things before creating anything. If any is missing, nothing is sent and you see the message.

MESSAGE	WHEN IT APPEARS
"Configure a SEFIRA OBELISK account first (SEFIRA OBELISK app > Configuration)."	No account is configured.
«Add at least one signatory.»	The signers list is empty.
"The source document no longer exists."	The document you were sending from has been deleted.
«... belongs to ...: choose an OBELISK account of that company.»	The document belongs to a different company from the chosen account. This is flagged before the PDF is generated.
«Enter the anchor text the signature should be placed at.»	You choose **At a text anchor in the PDF** and leave **Anchor Text** empty.
«No signatory with an email address could be determined for ....»	When sending with the default values, the document's contact has no email.
«You need the "SEFIRA OBELISK: User" access right to send documents for signature.»	The sender does not have that right.

How the signature is placed

Signer chooses where to sign (default)	No point is fixed: each signer chooses where to sign.
At a text anchor in the PDF	Asks for the **Anchor Text**, which must appear exactly once in the PDF, case-sensitive. The **Anchor Alignment** is also available.
At fixed page coordinates	Asks for **Page**, **Left**, **Bottom**, **Width** and **Height**.

This placement applies only to the first signatory and the main document. For several signatories or several documents, use the **Signature Placements** tab of the envelope (chapter «Placing the signature at the exact spot in the PDF»). If the envelope has no main document or no signatory, you get «Cannot place the signature: the envelope has no main document or no signatory.».

More documents and recipients

Additional PDFs	PDFs signed within the same envelope, up to 10 documents in total.
Enclosures	Files that participants can see but that are not signed.
Link Back to Odoo	Adds a URL attachment pointing to the Odoo record.
Final Recipients	They receive access to the signed documents once the process ends. They must exist as OBELISK accounts, matched by email address.
Tags	Comma-separated, 3 to 15 characters each.
Signer Notification Language	The language of the notices sent to the signer.
Due Date Mode	Default is the flexible mode.

Automatic sending and confirmation

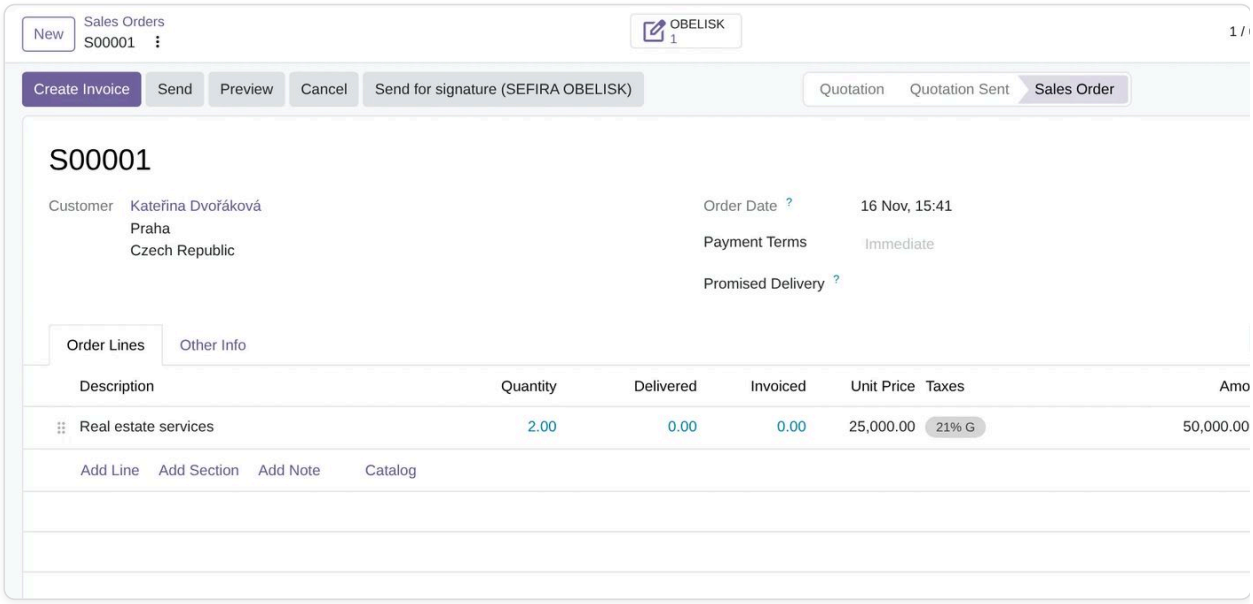
With **Auto-send on Confirmation** switched on in the account, sending starts when a sales or purchase order is confirmed, or when a customer invoice or customer credit note is posted, provided the document does not

already have a live envelope. If it fails, the failure is recorded on the document and does not block the operation. If you cancel the document, Odoo recalls its open envelopes. On a quotation, with **Confirm Sale on Signature** switched on, as it is by default, the signature replaces confirmation: when everyone has signed, the order is confirmed.

End-to-end example

1 Quotation S00001

Quotation S00001 for Kateřina Dvořáková, for a base amount of 50,000.00 Kč plus VAT, has the **Send for signature (SEFIRA OBELISK)** button.



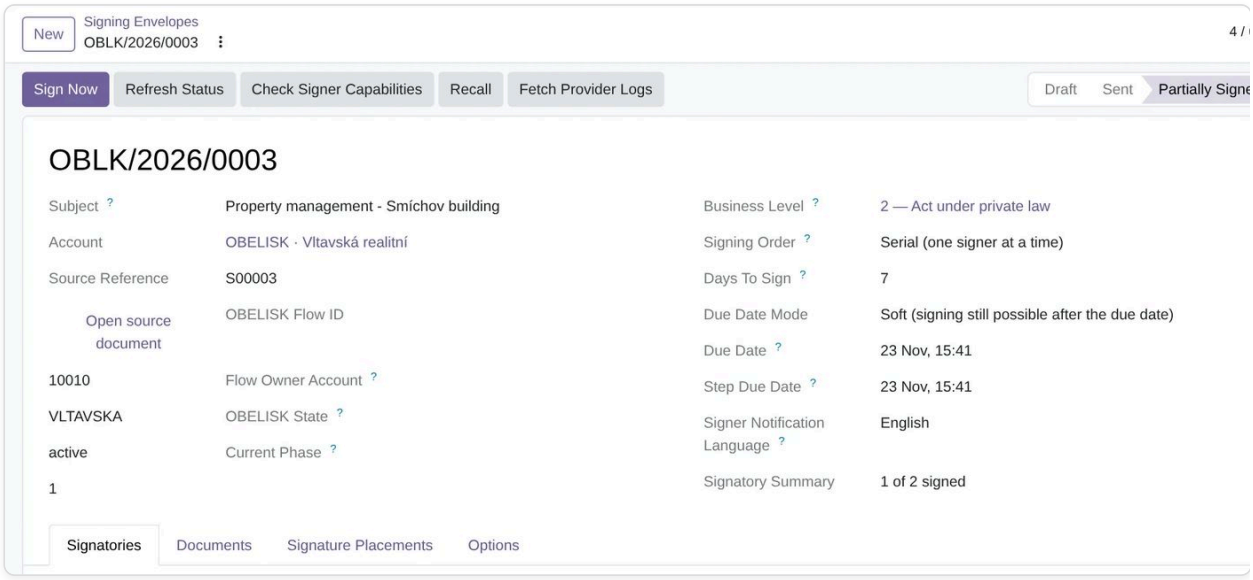
- **Real Odoo 20 screenshot.** Order S00001 with the **Send for signature (SEFIRA OBELISK)** button.

2 The envelope is created

Sending creates the envelope OBLK/2026/0001, with the subject «Lease agreement - Flat 4B, Vinohrady», the business level «Act under private law» and sequential signing order, one signatory at a time.

3 Partly signed

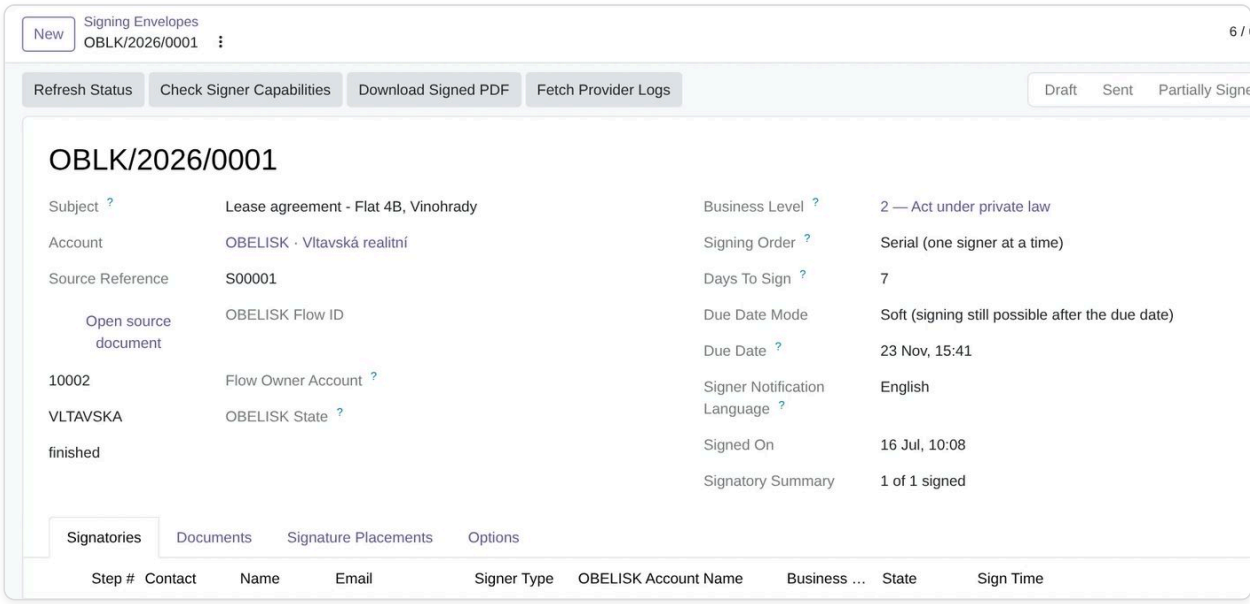
While some signer is still missing, an envelope stays **Partially Signed**, as OBLK/2026/0003 does in the screenshot, where the first of its two signers has already signed. The record shows the source reference of the document.



- **Real Odoo 20 screenshot.** A partly signed envelope, with **Sign Now** and **Refresh Status**.

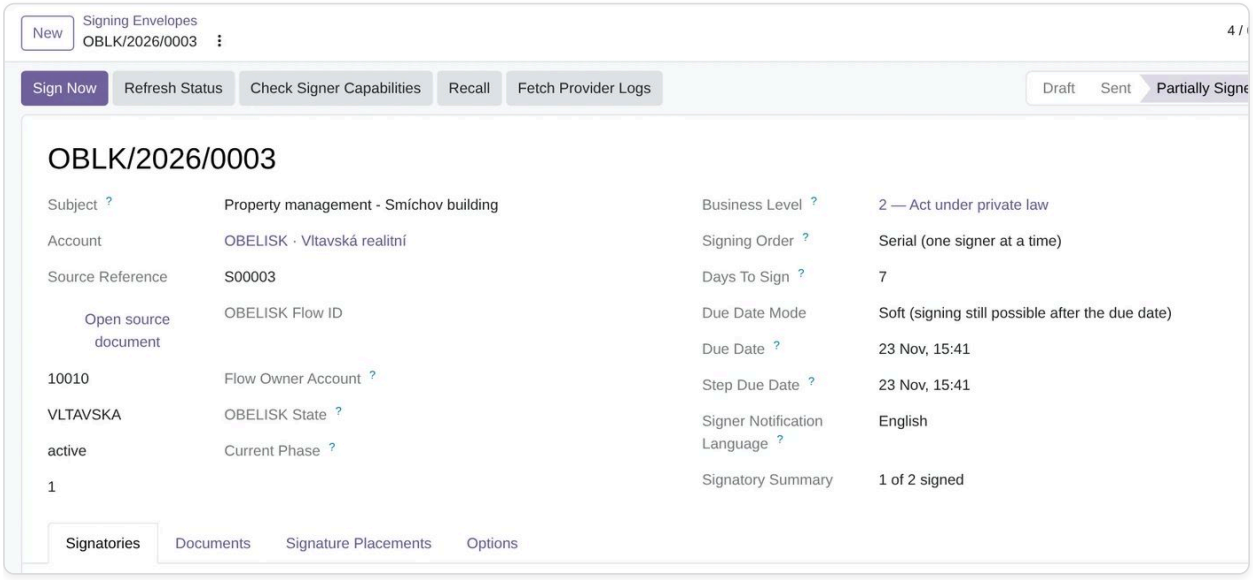
4 Signed

When everyone has signed, the envelope becomes **Signed**, the signed PDF is saved automatically and S00001 becomes a sales order: its history says «Order confirmed automatically: all parties signed via SEFIRA OBELISK.».



- **Real Odoo 20 screenshot.** A signed envelope with **Download Signed PDF**.

8 Signing envelopes in Odoo



- **Real Odoo 20 screenshot.** A partly signed envelope, with the status in the top bar and the action buttons.

Envelopes are under **SEFIRA OBELISK › Signing Envelopes**. The status updates by itself: the scheduled action **SEFIRA OBELISK: poll pending envelopes** checks pending envelopes every hour in case a notice from OBELISK did not arrive. You can also ask for it yourself with the **Refresh Status** button.

Send	Sends the envelope to OBELISK. Visible in **Draft** and **Error**.
Sign Now	Takes you to OBELISK to sign the step that is waiting for the owner account. Only appears when there is such a step.
Refresh Status	Asks OBELISK how the envelope is doing. Visible when the envelope is already sent and is not in **Draft**.
Check Signer Capabilities	Checks which signature types each signer supports. Visible when the envelope is already sent.
Recall	Withdraws the signature request, after asking you to confirm. Visible in **Sent** and **Partially Signed**.
Reactivate	Restarts the flow for those who have not yet signed, after asking you to confirm. Visible in **Declined**, **Recalled** and **Expired**.
Download Signed PDF	Downloads the signed document. Visible in **Signed**.
Fetch Provider Logs	Retrieves the OBELISK logs for diagnosis. Visible when the envelope is already sent, and only for the **Manager** group.

Statuses

Draft	Not yet sent.
Sent	It is in OBELISK and awaiting signatures.
Partially Signed	At least one signer has already signed.
Signed	Everyone has signed.

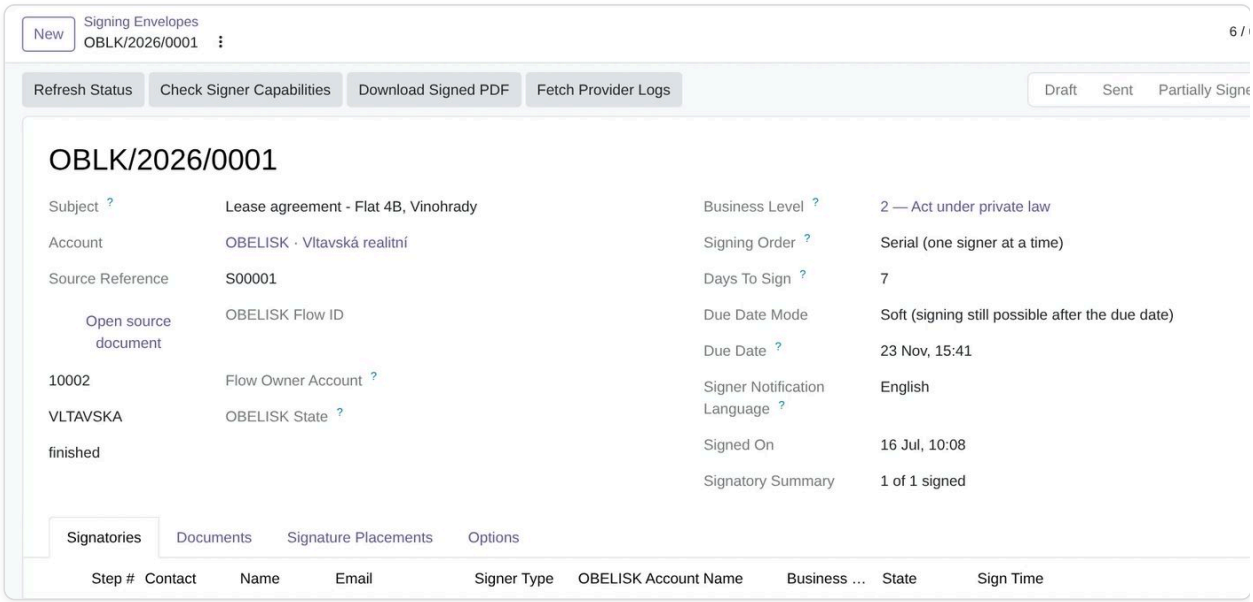
Declined	A signer has declined it.
Recalled	The request has been withdrawn.
Expired	The due date has passed.
Error	Sending has failed.

1 Open the envelope

Go to **SEFIRA OBELISK › Signing Envelopes** and open the one you want to review.

2 Update the status

Click **Refresh Status** if you don't want to wait for the hourly check.



- **Real Odoo 20 screenshot.** An envelope **Signed** with the **Download Signed PDF** button.

3 Download the PDF

With the envelope in **Signed**, click **Download Signed PDF**.

> **Recall** is only available on envelopes in **Sent** or **Partially Signed**, and **Reactivate** only on **Declined**, **Recalled** or **Expired**. The signed PDF does not exist until everyone has signed.

What each status means

Draft	The envelope is prepared in Odoo and has not been sent. It can be edited and sent.
Sent	OBELISK has the envelope and nobody has signed yet.
Partially Signed	At least one step has finished, but signatories are still missing.
Signed	Everyone has signed. Only then is there a signed PDF.
Declined	A signatory has declined it. The rejection text is kept in the **Rejection** tab.
Recalled	The signature request has been recalled.

Expired	The due date has passed. If the due date mode is flexible, the envelope can still be signed, and Odoo only closes it once it is 7 days overdue, after checking with OBELISK first.
Error	Sending has failed. You can send it again.

The **OBELISK State** field is shown separately, as reported by the platform. If OBELISK reopens an envelope that has already finished, Odoo accepts the status change, because OBELISK is the authority.

Rules when sending

Before sending, Odoo checks the envelope and warns you with these messages:

- "Choose an OBELISK account first."
- «Attach the PDF to send for signature.»
- "Add at least one signatory before sending."
- «The subject must be between 3 and 120 characters long.»
- "The note must not exceed 1000 characters."
- "Days to sign must be between 1 and 365."
- «OBELISK envelopes carry at most … documents.» (OBELISK allows up to 10 per envelope)
- "OBELISK can only sign PDF files ('…' is not a PDF)."
- «Tag '…' is invalid: OBELISK tags must be 3 to 15 characters long.»
- «Final recipient '…' needs an email address (used to match their OBELISK account).»

If a PDF or attachment exceeds 16 MB, which is the limit FlexigoTech Cloud accepts in a single call, nothing is sent. A large envelope where each file is within the limit is uploaded document by document.

A parallel group of signatories cannot repeat a signatory: if it does, Odoo warns that this signatory appears twice in the same group and sends nothing.

Recalling and reactivating

Recall only works on envelopes that have been sent or partially signed. If the envelope never reached OBELISK, it is cancelled in Odoo only. If OBELISK cannot recall it, Odoo warns you with «OBELISK could not recall flow …. Refresh and check its state.».

Reactivate only applies to a finished flow in OBELISK where someone has not signed: if everyone has signed, Odoo warns that there is nothing to reactivate. It is only possible while OBELISK still keeps the flow data.

Record fields and tabs

Name	The envelope number. Odoo assigns it on creation.
Subject	The title the signatories see.
Account	The OBELISK account used to send it.
Source Reference	The Odoo document the envelope comes from, with the **Open source document** button.
OBELISK Flow ID	The identifier assigned by OBELISK.

Flow Owner Account	The OBELISK portal account that owns the flow.
Business Level	The signature level required from each signatory.
Signing Order	**Serial (one signer at a time)**, **Parallel (everyone at once)** or **Custom (per-signer step order)**.
Days To Sign and **Due Date**	The period allowed and the date confirmed by OBELISK.
Signatory Summary	How many signatories have signed, out of the total.
Current Phase	The step or steps currently active.

The tabs are **Signatories**, **Documents**, **Signature Placements**, **Options**, **Rejection**, **Provider Log** and **Error**. Under **Options** are **Note & Tags**, **Recipients & Enclosures** and **Trust Services (applied by OBELISK)**. **Signature Placements** are optional: without them, each signatory chooses where to sign.

End-to-end example

From quotation S00003, the document "Property management - Smíchov building" is sent for signature. Odoo creates an envelope with the OBELISK · Vltavská realitní account, the Act under private law level, **Serial (one signer at a time)** order and one week to sign. After sending, **OBELISK Flow ID** is filled with the identifier OBELISK provides. With the envelope in **Partially Signed**, **Signatory Summary** says one of the two has signed, and the **Sign Now** button appears if the step awaited is the one for the flow owner account.

The envelope for the rental contract for flat 4B in Vinohrady is in **Signed** and **OBELISK State** says finished: the **Download Signed PDF** button is now available. The one for the reservation contract for Casa Černošice is in **Declined**, and the **Reactivate** button gets it running again.

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9 Placing the signature at the exact spot in the PDF

Without placements, each signatory chooses where to sign when they open the document in OBELISK. With them, each signature lands at a fixed spot in the PDF and the signatory signs right there.

Where they are defined

In the sending wizard, the **Signature Placement** group sets the first signatory's signature in the main document. For more signatories or more documents, there is the **Signature Placements** tab on the envelope, with one row per signature: the document, the signatory, the type and the position. If a signatory has several rows, OBELISK asks for several signatures in their step.

The four types

TYPE	WHAT IT REQUIRES
New field at coordinates	The page (from 1) and the bottom-left corner of the box, measured from the bottom-left corner of the page, together with its width and height. By default, 180 wide and 60 high.
New field at text anchor	A piece of text that appears only once in the document, from 1 to 120 characters and with the same capitalisation, and where the box goes relative to it: centred by default, or in one of the other eight positions.

TYPE	WHAT IT REQUIRES
Existing PDF field (visible)	The name of a signature field already present in the PDF. The signature is visible in the document.
Existing PDF field (invisible)	The name of a signature field already present in the PDF, for a signature that is not visible on the page.

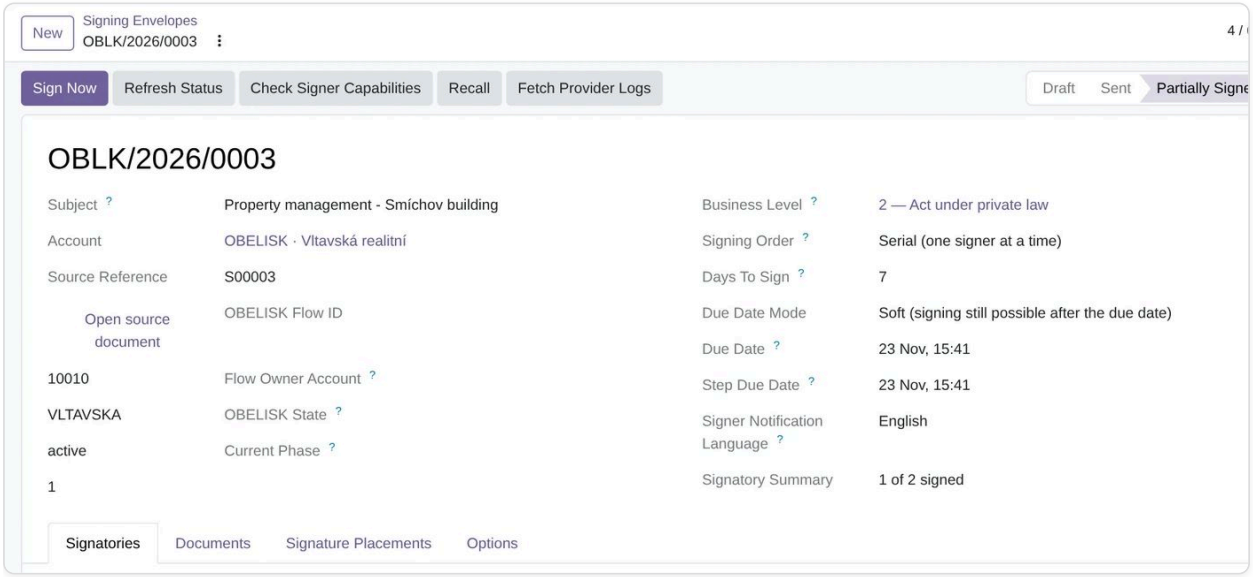
Rules

- Each row points to a document and a signatory in the same envelope.
- For coordinates, the left and bottom values cannot be negative, and the box needs a width and a height.
- The same anchor text cannot serve for two signatures in the same document.
- Fields that OBELISK finds in the PDF appear as rows with the source **Discovered by OBELISK**. They are for reference only: Odoo does not send them back.

> How it was tested: in July 2026, with an earlier version of the connector on Odoo 19, in the integration environment SEFIRA provided. A signature placed by coordinates and another by text anchor ended up exactly in place in the signed PDF, and another was made in a signature field already present in the PDF. The published version has only been tested against the simulator.

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10 Signatories: tracking and online signing



- **Real Odoo 20 screenshot.** Envelope in progress, with the **Sign Now** and **Check Signer Capabilities** buttons.

The signatories are inside the envelope, in **SEFIRA OBELISK › Signing Envelopes**. Their status, signing date, step due date and rejection note come from SEFIRA OBELISK. They are updated by the scheduled task **SEFIRA OBELISK: poll pending envelopes**, which runs every hour, or by the **Refresh Status** button on the envelope.

Envelope buttons

Check Signer Capabilities	Asks SEFIRA OBELISK whether each signatory can sign at the requested level and records it as **Capability Check**. It only reports: the signatory can still configure their profile when signing. Each row also has its own **Check capability**.
Sign Now	Opens the online signing page of SEFIRA OBELISK when the active step is the one for the flow owner account.
Signing link	On each signatory's row, opens their signing page.
Refresh Status	Retrieves each signatory's progress from SEFIRA OBELISK.

Signatory statuses

- **Not Sent**
- **Waiting (queued)**
- **Their Turn**
- **Processing**
- **Error**
- **Signed**
- **Declined**
- **Expired**
- **Inactive**

> If a signatory has no link yet, **Signing link** gives the error «No signing link is available for this signatory right now.». The status of each signatory, their signing date and their rejection note are written only by the synchronisation with SEFIRA OBELISK.

What a signer is

Each signer corresponds to a step in the signing flow in SEFIRA OBELISK. Signers who share the same step number form a parallel group and are invited at the same time. Steps with different numbers run in series: the next one starts once those of the previous step have signed.

Statuses and their meaning

STATUS	MEANING
Not Sent	The envelope has not been sent yet.
Waiting (queued)	It is queued and it is not their turn yet.
Their Turn	It is the signer's active step.
Processing	SEFIRA OBELISK is processing their step.
Error	The step has failed. See **Last Error**.
Signed	They have signed. The signing date and signing method reported by SEFIRA OBELISK are kept.
Declined	They have declined to sign. The rejection note is kept.

STATUS	MEANING
Expired	The deadline for their step has passed.
Inactive	The step is not active.

Types of signer

OBELISK user (find by email)	An existing user of the tenant, located by their email.
OBELISK user (account name)	An existing user of the tenant, located by the exact name of their account.
External signer (email invitation)	They receive an invitation by email. If the phone number is filled in, SEFIRA OBELISK asks them for a code by SMS.
Temporary signer (magic link)	They sign with a single-use, short-lived access link.

Conditions before sending

- Every signatory needs a name: «Every signatory needs a name.»
- Users found by email and external signers need a valid email address: «Signatory '...' needs a valid email address.»
- A signatory identified by account name needs that name: «Signatory '...' needs an OBELISK account name.»
- The phone number of an external signer must be in international format with no spaces, for example +420601111222.
- The step number must be positive.
- An external signer who appears in several steps must have the same phone number in all of them.
- If the tenant does not allow external signers, SEFIRA OBELISK refuses to create their account. Ask SEFIRA to enable them or use an existing user.

What is in the record

Contact and Email	Details of the person signing.
Business Level	Level requested from this signer. If empty, the envelope's level applies.
Third-Person Signer Name	The person who actually signs when the level is third-person.
Notify When Finished	Marks the flow as unread in SEFIRA OBELISK when it finishes.
Notification State	Status of the email that SEFIRA OBELISK sends to an external signer.

Capability check

The result can be **Not checked**, **Can sign at this level** or **Cannot sign at this level yet**. It needs the numeric account identifier, which is saved after the first send or when the external account is created. If it is missing, you get the error «The numeric OBELISK account id of this signer is not known yet. It is captured automatically after the first send (or when the external account is created).».

Resending the invitation

With **Resend notification**, on the signer's row, the invitation is sent again to an external signer while their step is active. If SEFIRA OBELISK already sent another one a few minutes ago, it rejects the resend. Without a step in SEFIRA OBELISK, it warns that the envelope must be sent first.

Example

Envelope OBLK/2026/0003, "Property management - Smíchov building", has sequential signing order, the Act under private law level and one week to sign. The first step belongs to Pavel Horák, who has already signed, and the second to Jana Procházková, whose turn it is now: her row shows **Signing link**. **Refresh Status** pulls in the progress, and **Sign Now**, in the header, opens the online signing of the step for the owner account.

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11 What the signer sees: the Odoo portal

The person signing does not need an internal Odoo user. The signing notice is sent by OBELISK: to an OBELISK user, as their notification; to an external or temporary signer, an email with their personal link. If they also have access to the Odoo portal, they see there what they have to sign.

Pending documents in the portal

- On the portal home page, a card with the text **Documents waiting for your signature** counts the documents that person signs.
- The list shows each document with its status (**Signed** or **Awaiting signature**) and its deadline, and links to the signing page of each one.
- The envelopes **Sent**, **Partially Signed** and **Signed** in which their own contact signs are shown, never those of another person even if they share an email.

Each signer's signing page

Each signer has their own page, with a secret link, which the **Signing link** button in their row opens on the envelope. The page says which document it is and which signing level is requested, and lets them download the document to read it beforehand.

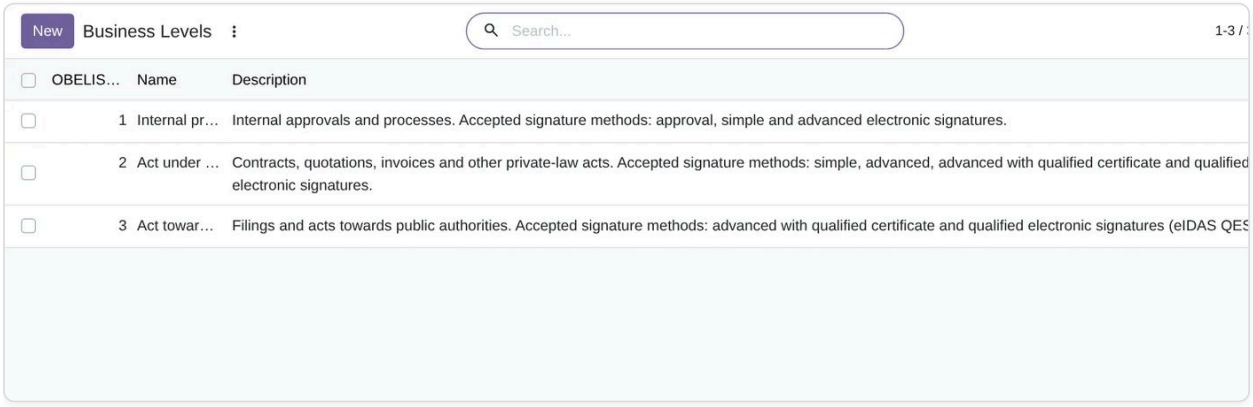
WHO SIGNS	WHAT THEY SEE ON THEIR PAGE
An OBELISK user	A button that takes them to the OBELISK Signing Portal, where they sign with their OBELISK user.
An external or temporary signer	That OBELISK has emailed them their personal link, and that if they cannot find it they should ask for it to be sent again.
Someone whose turn has not come yet	That it is not their turn yet and that they will be notified once the previous signers have signed.
Someone who has already signed	That they have already signed the document.

The sign button on the quote

On the quote page in the portal, if the customer of the quote signs in an open envelope and has not signed yet, a sign button appears, which leads to their signing page. With **Confirm Sale on Signature** switched on, as it is by default, the order is confirmed automatically once everyone has signed.

> How it was tested: the portal was tested with the module's automated tests, against the OBELISK simulator. The end-to-end signing of July 2026 was done directly in the OBELISK portal, without going through this page.

12 Business levels and signature validity



- **Real Odoo 20 screenshot.** List of **Business Levels** with the three levels that the module ships with.

The three levels are already loaded when the module is installed. No scheduled task updates them and there is no button that imports them: the list is the one the module ships with and you edit it yourself, in the row itself. You can add more with **New**. Only the **Manager** group can change it.

Level fields

Name	What the level is called. It is required.
OBELISK Level ID	The number of the level as configured in your OBELISK tenant. It is required and it is the value sent to OBELISK when requesting the signature.
Description	Free text about the level.
Third-Person Signature Level	Checkbox, off by default. It is ticked when SEFIRA has configured the level so that someone without their own OBELISK account can sign, for example a notary who signs on behalf of an in-person client.

Statuses

A business level has no statuses or flow of its own. It is a lookup list that you choose when preparing the sending of an envelope.

> Levels cannot be queried or synchronised from OBELISK: if your tenant has others, they must be entered by hand with the number that corresponds to them in OBELISK.

The three levels the module ships with

ID	NAME	WHAT IS SIGNED	ACCEPTED SIGNING METHODS
1	Internal process	Approvals and internal processes.	Approval, simple and advanced electronic signature.
2	Act under private law	Contracts, quotes, invoices and other private law acts.	Simple, advanced, advanced with qualified certificate and qualified electronic signature.
3	Act towards public authority	Filings and acts before public administrations.	Advanced signature with qualified certificate and qualified electronic signature (eIDAS QES).

Level 3 only accepts advanced signature with qualified certificate and qualified signature. Choose the level according to what your client is signing and check with **Check Signer Capabilities** that each signatory can sign at it. In SEFIRA's integration environment, the test user could sign at levels 1 and 2, not at level 3: level 3 signing has not yet been tested against OBELISK.

Record fields

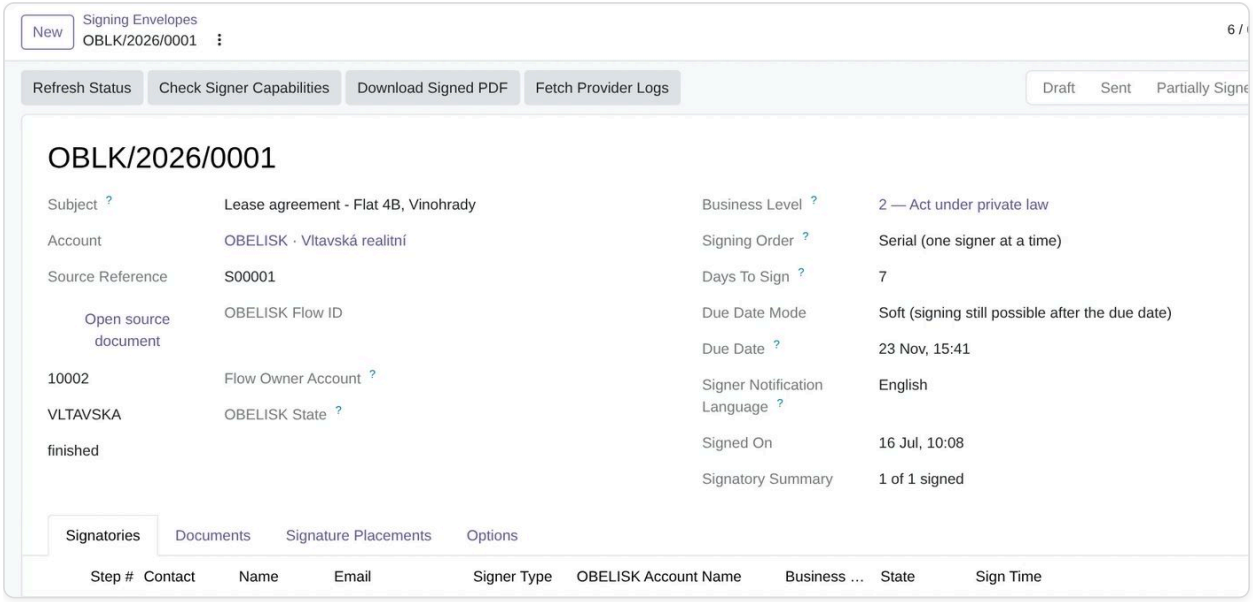
The list of levels is edited in the row itself and has four columns: **OBELISK Level ID**, **Name**, **Description** and **Third-Person Signature Level**. **OBELISK Level ID** and **Name** are mandatory, and the checkbox is off by default.

Rules and conditions

- The **OBELISK Level ID** must be the one from your OBELISK tenant. It is the value sent to OBELISK when requesting the signature, and Odoo does not check it against your tenant.
- Tick **Third-Person Signature Level** only if SEFIRA has configured that level this way in your tenant. With that configuration, the signature is made by a different person under the step's account, with no OBELISK account of their own.
- The module does not import or update levels: what you see in the list is what was installed plus what you have created.

End-to-end example

A real estate agency sends the lease of a flat for signature. It is a contract, so the business level is the second, Act under private law. In the **Signing Envelopes** list, the envelope with the subject "Lease agreement - Flat 4B, Vinohrady" shows that level and reaches the **Signed** state.

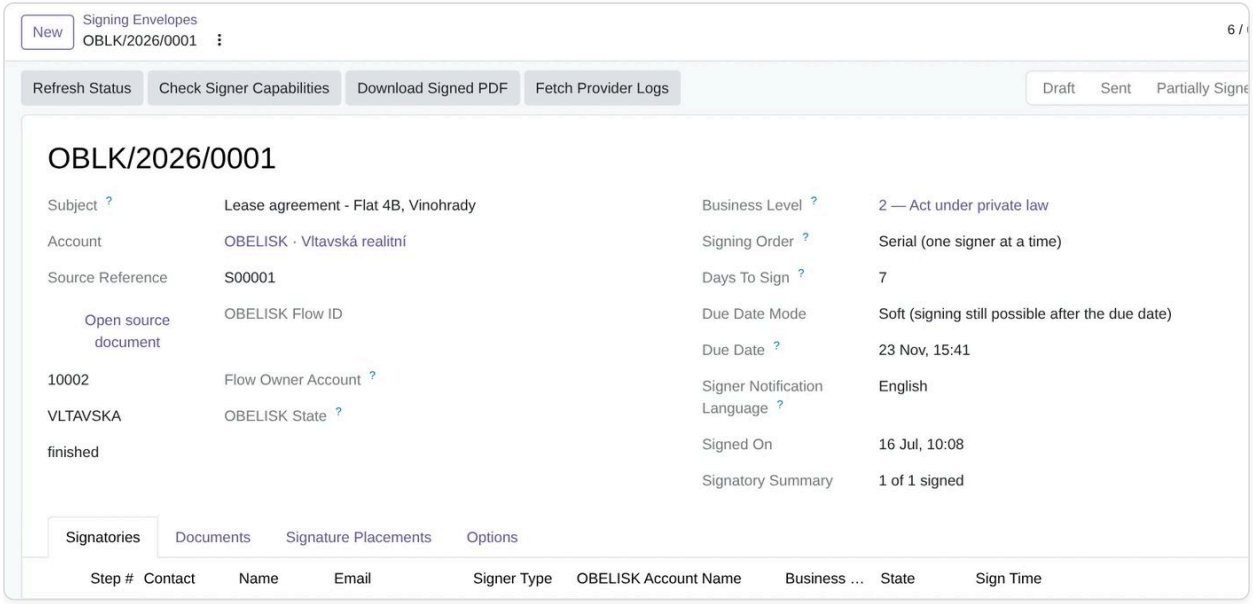


- **Real Odoo 20 screenshot.** Envelope signed with the business level from the levels list.

If it were a filing before public administration instead of a contract, you would use the third level, Act towards public authority.

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13 The signed PDF and traceability in Odoo



- **Real Odoo 20 screenshot.** Signed envelope with the **Download Signed PDF** and **Fetch Provider Logs** buttons.

The envelope status arrives from OBELISK through its notifications, through the scheduled task **SEFIRA OBELISK: poll pending envelopes**, which checks it every hour, and through the **Refresh Status** button. When the flow finishes, Odoo automatically downloads the signed PDF of each document, attaches it to the source document (to the envelope, if the document belongs to another company) and records it in the envelope's history.

Download Signed PDF	Downloads the signed PDF that Odoo has already stored and, if it does not have it yet, requests it from OBELISK. It is only visible when the envelope is **Signed**.

Fetch Provider Logs	It asks OBELISK for the flow logs and saves them in the **Provider Log** tab. It is visible once the envelope has an OBELISK flow ID, and only for the **Manager** group.
Open source document	Opens the record from which the envelope was sent.
Refresh Status	Asks OBELISK how the flow is progressing. It is not visible in draft or without a flow ID.

Envelope states: **Draft**, **Sent**, **Partially Signed**, **Signed**, **Declined**, **Recalled**, **Expired** and **Error**. The signed PDF exists in **Signed**.

1. **Open the signed envelope**
   Go to **SEFIRA OBELISK › Signing Envelopes** and open the envelope in **Signed**.

2. **Press Download Signed PDF**
   You get the signed PDF, which is also kept in the **Signed PDF** field.

3. **To diagnose, press Fetch Provider Logs**
   The records are stored in the **Provider Log** tab.

> The signed PDF only exists once everyone has signed. If OBELISK has not yet returned the document, you will see a warning and will need to try again shortly.

All envelope states

STATE	WHAT IT MEANS
Draft	The envelope has not yet been sent to OBELISK.
Sent	The flow is active in OBELISK and nobody has signed.
Partially Signed	Some signatories have signed, but not all.
Signed	Everyone has signed and the signed PDF is already in Odoo.
Declined	A signatory has declined. The reason is in the **Rejection** tab.
Recalled	The envelope was recalled and the flow is no longer active.
Expired	The deadline passed without completion.
Error	Something failed while sending or synchronising. The details are in the **Error** tab.

The **OBELISK State** field shows the status as reported by the provider, for example finished or rejected. It coexists with the envelope's **State** in Odoo.

Rules and conditions

- **Download Signed PDF** is only visible in **Signed**. If it is requested any other way, you get «The signed PDF only exists once everyone signed.»
- If the PDF has not arrived yet, you get «OBELISK has not returned the signed document yet; try again shortly.»
- **Fetch Provider Logs** requires the envelope to have a flow ID: if it does not, Odoo asks you to send it first.

- **Fetch Provider Logs** is only visible to the **Manager** group.
- If the source document has been deleted, **Open source document** shows "The source document no longer exists."
- The signed PDF is attached to the source document if it belongs to the same company as the envelope; otherwise it stays on the envelope.

Envelope fields and tabs

Main PDF	The document sent for signature.
Signed PDF	The signed version of the main PDF.
Flow Documents	Each document in the flow. If there are additional PDFs, each one receives its own signed file.
Signed On	When signing was completed.
Provider Log	OBELISK records, only when you request them.

The envelope tabs are **Signatories**, **Documents**, **Signature Placements**, **Options**, **Rejection**, **Provider Log** and **Error**.

End-to-end example

Envelope OBLK/2026/0001, with the subject "Lease agreement - Flat 4B, Vinohrady", originated from document S00001. Its **OBELISK State** is finished, so it is in **Signed** and shows **Download Signed PDF**. When pressed, the signed PDF is stored. If something does not add up, **Fetch Provider Logs** brings the records into **Provider Log**. **Open source document** leads to S00001.

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14 Automatic OBELISK notifications (webhooks)

Open **SEFIRA OBELISK › Configuration › Webhook Events**. The **Callback Events** list opens, with one record for each notification received. Events are not created by hand: the connector generates them when OBELISK notifies a change.

Where each piece of data comes from

The data for each event is sent by OBELISK. The scheduled task **SEFIRA OBELISK: clean old callback events** runs daily, is active and deletes events older than 90 days. Two other tasks work with envelopes: **SEFIRA OBELISK: poll pending envelopes** (every hour) and **SEFIRA OBELISK: expire overdue envelopes** (every 6 hours).

What an event shows

Event Uid	Identifier of the notification. It is mandatory.
OBELISK Flow ID	The OBELISK flow the notification refers to.
Event Type	One of these: flowStateChanged, phaseChanged, stepFinished, flowCreated or flowDeleted.

Flow State	The flow state after the event, as sent by OBELISK.
Account	The OBELISK account that received the notification. It is mandatory.
State	How the event's processing is going: **Pending**, **Done** or **Error**.
Error Message	The failure text, if the event ended in **Error**.
Processed On	Date and time when the event was processed.
Payload	The complete content of the notification, in its own group.

States

- **Pending**: the event has arrived and has not yet been processed. It is the state it starts with.
- **Done**: the event has already been processed.
- **Error**: processing has failed. The reason appears in **Error Message**.

> The list is for consultation: there is no need to touch the events. Those older than 90 days are deleted automatically by the daily cleanup task.

Notifications only arrive if SEFIRA has registered the account's **Callback Url** in your tenant, which is in the **Webhook (give the URL to SEFIRA)** group. Without notifications, the hourly task still keeps the envelopes up to date.

> How it was tested: notifications were tested with simulated deliveries that follow OBELISK's webhook specification. In the integration environment, SEFIRA did not manage to register our address, so no real OBELISK notification has yet reached Odoo.

What an event is and where it comes from

When a flow changes in OBELISK, the platform sends a notice and the connector stores it as a webhook event. Each event is linked to an account in **SEFIRA OBELISK › Configuration › Accounts** and carries the flow identifier, the event type and the flow status after the change. They can be checked in **SEFIRA OBELISK › Configuration › Webhook Events**.

How to connect

1. **Copy the account address**
   In the account, the group **Webhook (give the URL to SEFIRA)** shows the **Callback Url**. It has a secret of its own for the account, so do not publish it. **Regenerate callback secret** changes it.
2. **Give it to SEFIRA**
   SEFIRA registers it in your tenant, on the technical account, with the event types you want.
3. **Set the signature or password, if SEFIRA uses them**
   If SEFIRA signs the notices, enter the same secret in **Webhook HMAC Secret**: Odoo rejects a notice that is unsigned or whose signature does not match. If SEFIRA uses a username and password, enter them in that group too.

Event types

EVENT TYPE	WHAT HAPPENS IN OBELISK
flowCreated	A flow has been created.
flowStateChanged	The flow status changes, for example because it finishes or is recalled.
phaseChanged	A phase ends: all the steps running in parallel with the same order have signed.
stepFinished	A specific step has finished successfully.
flowDeleted	A flow has been deleted.

The three event states

Pending	Starting state of every event received.
Done	The event has been processed. **Processed On** records when.
Error	Processing has failed. **Error Message** records why.

What you can and cannot do

- The connector creates the events when OBELISK sends a notice: you do not need to create them by hand.
- The notice only wakes Odoo up: Odoo reads the flow again in OBELISK and brings the envelope up to date with what it reads.
- A repeated notice does not create a new event, and one for a flow that does not belong to any envelope is marked as done without changing anything.
- Odoo tells OBELISK that it has received the notice even if it cannot process it at that moment, so OBELISK does not repeat it endlessly; whatever fails is picked up by the hourly task.
- Each event requires an account and an **Event Uid**. The full content of the notice is in the group **Payload**.

Automatic cleanup

The scheduled task **SEFIRA OBELISK: clean old callback events** runs daily and is active when installed. It deletes events older than 90 days to avoid accumulating data and for data protection reasons. Those events cannot be recovered afterwards, so if you need a particular notice, check its **Payload** first.

An end-to-end example

You have an envelope with flow 10010 in **Partially Signed**. When the second signer signs, OBELISK sends a notice with stepFinished and, when the flow ends, with flowStateChanged. With each notice, the connector stores an event as **Pending**, reads the flow again in OBELISK, updates the envelope and moves the event to **Done**, with the date in **Processed On**. If that reading fails, the event stays in **Error** and the hourly task tries again.

15 The data that goes and comes back

DATA	DIRECTION	WHEN
Documents to sign (the quote, invoice or purchase order PDF, plus any attachments you add)	From Odoo to SEFIRA OBELISK	When you press **Send** on the envelope, or with automatic sending when the source document is confirmed or posted
Envelope definition: subject, business level, signing order, days to sign and due date	From Odoo to SEFIRA OBELISK	When sending the envelope
Signers and their contact details	From Odoo to SEFIRA OBELISK	When sending the envelope
Signature positions in the document	From Odoo to SEFIRA OBELISK	When sending the envelope
Instruction to recall an open envelope, or to delete a draft	From Odoo to SEFIRA OBELISK	When you press **Recall**, or when the source document is cancelled
Reminder to an external signer	From Odoo to SEFIRA OBELISK	When you press **Resend notification**
Status of the envelope and of each signer	From SEFIRA OBELISK to Odoo	Through a SEFIRA OBELISK notice as soon as there is a change, if SEFIRA has registered the account address; with **Refresh Status**; and with the task **SEFIRA OBELISK: poll pending envelopes**, every hour
Signer capabilities	From SEFIRA OBELISK to Odoo	When you press **Check Signer Capabilities**
Signed PDF	From SEFIRA OBELISK to Odoo	Only, when signing is complete; if it was not yet there, with **Download Signed PDF**
Provider logs	From SEFIRA OBELISK to Odoo	When you press **Fetch Provider Logs**

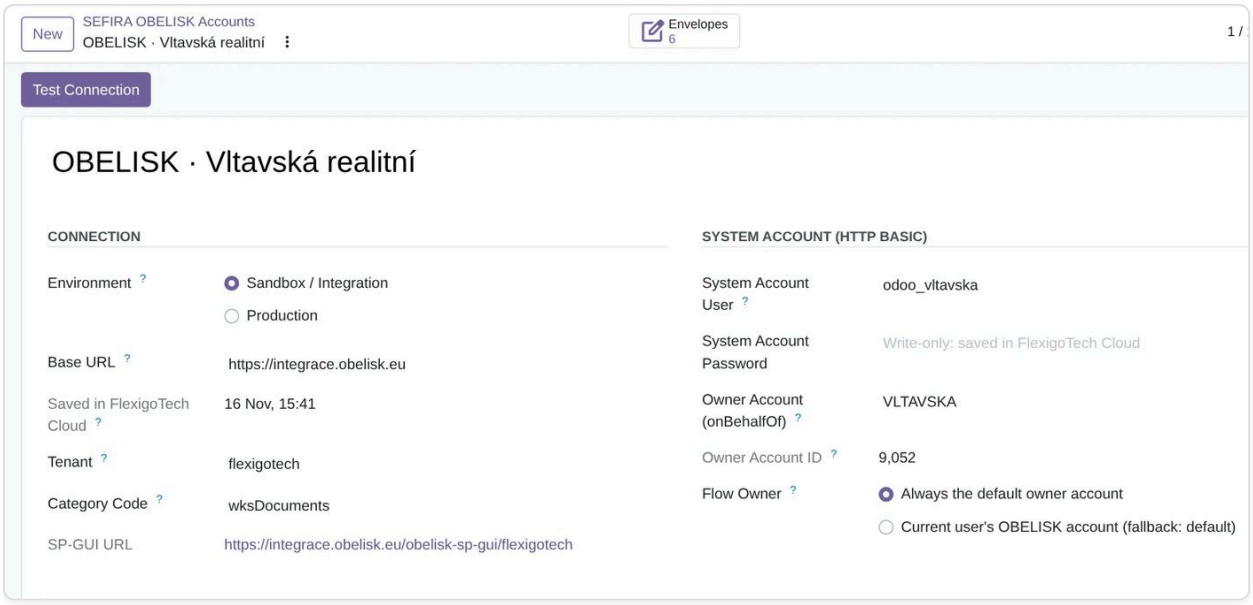
All calls to SEFIRA OBELISK go through FlexigoTech Cloud and require the trial or the subscription. FlexigoTech Cloud stores the system account password for each account encrypted, together with its username and the tenant address, and sends it with each call: the password does not stay in your Odoo. What you send for signing (the PDFs, the signers with their contact details and the flow data) passes through FlexigoTech Cloud on its way to your OBELISK tenant, and FlexigoTech Cloud keeps it only for the time needed to deliver it. The rest of your Odoo does not leave it: the customers, orders and invoices you do not send for signing stay in it.

16 What happens automatically

TASK	FREQUENCY	WHAT IT DOES
SEFIRA OBELISK: poll pending envelopes	Every hour (enabled by default)	Checks the envelopes that are still open in case a SEFIRA OBELISK notice did not arrive, and reprocesses the notices whose status query failed. If FlexigoTech Cloud rejects the calls, it stops or skips the affected account or envelope, without marking any failure in SEFIRA OBELISK.
SEFIRA OBELISK: expire overdue envelopes	Every 6 hours (enabled by default)	Closes in Odoo the envelopes that are more than 7 days past their due date, after checking their real status in SEFIRA OBELISK. SEFIRA OBELISK already expires strict-deadline envelopes and external signers' links on its own.
SEFIRA OBELISK: clean old callback events	Every day (enabled by default)	Deletes the notices received more than 90 days ago, for database cleanup and data protection. You can see them in **SEFIRA OBELISK › Configuration › Webhook Events**.

Frequencies are changed in **Settings › Technical › Scheduled Actions**, with developer mode enabled.

17 Account options and their defaults



- **Real Odoo 20 screenshot.** Account form with the group **Connection** and the button **Test Connection**.

OPTION	WHEN CREATING IT	WHAT IT DOES
Environment	**Sandbox / Integration**	It is only a label: **Sandbox / Integration** or **Production**. OBELISK tenants are told apart by their name.
Flow Owner	**Always the default owner account**	Decides who owns the flows created from Odoo. The other option is **Current user's OBELISK account (fallback: default)**.
Default Business Level	Level 2, **Act under private law**	This is the signing level requested by new envelopes.

OPTION	WHEN CREATING IT	WHAT IT DOES
Default Due Date Mode	**Soft (signing still possible after the due date)**	With soft mode, signing is possible after the due date, except for external signers, whose email link expires. With **Hard (flow expires at the due date)** the flow expires on that date.
Default Signer Language	**English**	Language of the notifications sent to external signers created by the connector. You can choose **Czech**, **English** or **Slovak**.
Days To Sign	7	Days until the flow's due date. It must be between 1 and 365.
External Signers Enabled	Off	Shows whether the tenant allows creating external signer accounts; if not, you need to ask SEFIRA. When on, the signer proposed by Odoo is added as an external signer, with an email invitation.
External Identification Namespace	Empty	If you fill it in, each flow is registered under that namespace. SEFIRA registers it in the tenant: leave it empty until they confirm it.
Activation Policy Code	Empty	Optional processing code applied before signing. Empty uses the category's value.
Final Policy Code	Empty	Optional processing code applied after the last signature (seal, timestamp, trust archive). Empty uses the category's value.
Kill Switch	Off	When on, blocks all outgoing calls to OBELISK from this account.
Auto-send on Confirmation	Off	When on, the document is sent for signature when a sales or purchase order is confirmed, or when a customer invoice or credit note is posted. The document's contact signs in a single step: as an OBELISK user matched by their email or, with **External Signers Enabled**, as an external signer. If sending fails, this is noted on the document.
Confirm Sale on Signature	On	When all parties sign a quotation sent via OBELISK, the sales order is confirmed automatically and, if it came from an opportunity, the opportunity is marked as won.

The account used when you send without choosing another one is selected in **Settings › SEFIRA OBELISK**, under **Default Account**. If there is none, Odoo uses the first active account of the document's company. If an account has the **Kill Switch** switched on, its outbound calls are blocked: when you try to send, Odoo shows the error «Kill switch is active on OBELISK account...».

Manual steps

TAB OR GROUP	BUTTONS
Account header	**Test Connection**
FlexigoTech Cloud	**Check in FlexigoTech Cloud**, **Delete from FlexigoTech Cloud**, **Move credentials to FlexigoTech Cloud** and **Delete them from this database**
Webhook (give the URL to SEFIRA)	**Regenerate callback secret** (system administrators only)
Odoo settings	**Manage accounts**

The other parts of the account

Connection	Saves the **Environment**, the **Base URL** (only **https://<name>.obelisk.eu**), the **Tenant** given by SEFIRA and the **Category Code**, which comes as wksDocuments. It also shows the **SP-GUI URL**.
System Account (HTTP Basic)	Saves the **System Account User**, the **System Account Password**, the **Owner Account (onBehalfOf)** and the **Owner Account ID**, which is filled in automatically.
FlexigoTech Cloud	Every call to OBELISK goes through FlexigoTech Cloud and requires a trial or a subscription.
Webhook (give the URL to SEFIRA)	Shows the **Callback Url** you give to SEFIRA and saves the **Webhook HMAC Secret** and the Basic authentication user and password, if SEFIRA uses them. All three start empty.
Tenant Capabilities	Records whether the tenant supports external signers.
Trust Services (category policies)	Records the activation and final policy codes.
Automation & Safety	Records auto-send, confirmation on signature and the kill switch.

> If you change the **Base URL** or the **System Account User** after saving the credentials, an administrator must re-enter the system account password.

18 Security and personal data

- The password for your SEFIRA OBELISK system account is not stored in your Odoo: it is sent to FlexigoTech Cloud, which stores it encrypted together with the user and your tenant's address. Your Odoo keeps only the user and the **Base URL**. The password is written once and is not shown again.
- Before saving the credentials, an administrator must accept that FlexigoTech Cloud stores them and that calls to OBELISK pass through it. Without consent, nothing is sent and Odoo shows an error.
- If an administrator withdraws consent, calls to OBELISK are paused. The credentials remain in FlexigoTech Cloud until they are deleted with **Delete from FlexigoTech Cloud**. To resume, consent is accepted again on the account.
- If an earlier version of the connector left the password in your database, calls are blocked with a warning. An administrator opens the account, accepts consent and clicks **Move credentials to FlexigoTech Cloud**. After that, the password is removed from Odoo. If you prefer not to move it, the **Delete them from this database** button removes it.
- There are two groups. The user group sends for signature and sees the envelopes. **Manager** also configures accounts, levels and webhook events, tests the connection and views the OBELISK logs. Setting the password, accepting consent and **Regenerate callback secret** are restricted to Odoo administrators.
- Every call to SEFIRA OBELISK goes through FlexigoTech Cloud, which requires a trial or a subscription. It sends the documents to sign, the signing flows, the signers with their contact details, the signature statuses and the signed documents, and FlexigoTech Cloud keeps them only for as long as needed to deliver them.
- FlexigoTech Cloud also receives your company name and the email of the person who accepts, along with the date and version of the accepted text. Nothing else from your Odoo is sent to it.
- When an account is deleted, when its credentials are removed with **Delete from FlexigoTech Cloud**, or when the module is uninstalled, Odoo asks FlexigoTech Cloud to delete them. If the subscription ends, FlexigoTech Cloud deletes them on the date shown in **Check in FlexigoTech Cloud**.

Callback events

Notices that SEFIRA OBELISK sends to your Odoo arrive at a public address with a secret specific to each account, and Odoo checks their signature if you have set the **Webhook HMAC Secret**. **Regenerate callback secret** changes the secret. The scheduled task **SEFIRA OBELISK: clean old callback events** deletes events older than 90 days every day.

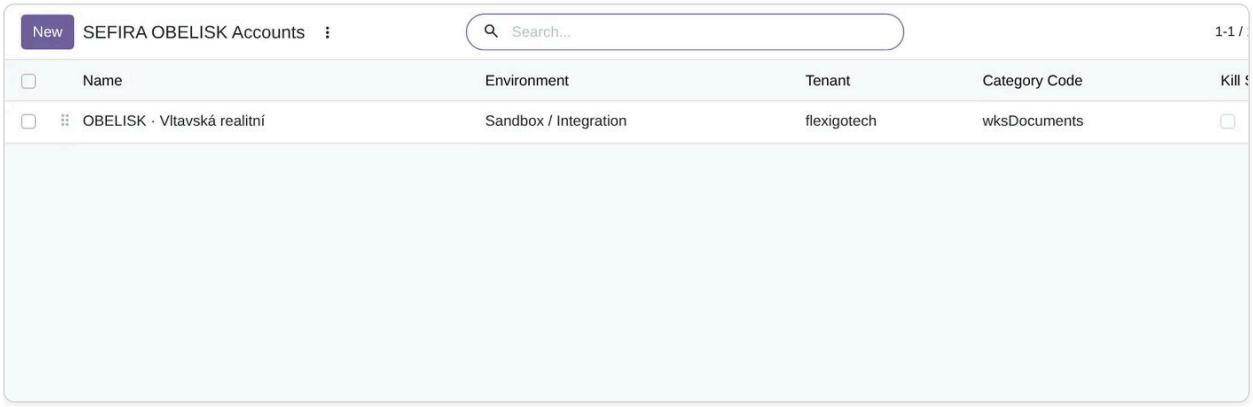
19 Multiple accounts and multiple companies

Each connection to SEFIRA OBELISK is an account, under **SEFIRA OBELISK › Configuration › Accounts**. Each account belongs to a company and has all its options: environment, tenant, credentials, envelope values, auto-send and the kill switch. So a group with several companies can connect each one to its own OBELISK account.

In **Settings › SEFIRA OBELISK**, **Default Account** sets the account used when sending without choosing one. If none is set, or the one set belongs to another company, the connector uses the first active account of the document's company.

The number of accounts depends on your FlexigoTech Cloud plan: with Standard you can have up to 3 and with Pro up to 10. Each connected account counts as one.

An envelope can only be sent with an account from the same company as the source document. If the document belongs to another company, Odoo does not send it and tells you to choose an account of that company, with the message «... belongs to ...: choose an OBELISK account of that company.». The signed PDF and the post-signing step are only applied to the document of the same company as the envelope.



- **Real Odoo 20 screenshot.** The list of SEFIRA OBELISK accounts with their name, environment, tenant and category code.

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20 If something goes wrong

Calls to SEFIRA OBELISK do not go out and nothing has been sent	Each call goes through FlexigoTech Cloud and needs its trial or subscription. Check **Settings › FlexigoTech Cloud** and confirm the connection is still active.
«Connection to OBELISK failed: ...»	Open the account under **SEFIRA OBELISK › Configuration › Accounts** and click **Test Connection**. Check the environment, the base URL, and the system account user and password.
«OBELISK account '...' has no system account credentials saved in FlexigoTech Cloud yet. An administrator enters them on the account. Nothing was sent.»	An administrator opens the account and enters the system account user and password.
«You need the "SEFIRA OBELISK: User" access right to send documents for signature.»	Ask an administrator to give you that access right. Testing a connection needs the «SEFIRA OBELISK: Manager» access right, which appears in this other warning: «You need the "SEFIRA OBELISK: Manager" access right to test an OBELISK connection.»
An envelope is not created	Read the warning shown when sending. It is usually a missing detail: a subject of 3 to 120 characters, a PDF, at least one signer with a name and email, or signing days between 1 and 365.
You want to see what SEFIRA OBELISK replied	Open the envelope and click **Fetch Provider Logs**. With **Refresh Status** you get the status SEFIRA OBELISK currently holds.

If FlexigoTech Cloud rejects a call because there is no subscription, it is treated as a pause and not as a SEFIRA OBELISK failure: no envelope is marked as failed and nothing is retried. Once the subscription is active again, the scheduled task **SEFIRA OBELISK: poll pending envelopes**, which runs hourly, picks up the pending envelopes.

Other warnings you may see

«Kill switch is active on OBELISK account...»: outbound calls are blocked.	Open the account and turn off the kill switch when you want to resume sending.
«OBELISK account '...' has no owner account (onBehalfOf) configured. Set the portal user the system account acts on behalf of.»	Fill in the owner account on the OBELISK account.
«The Base URL of OBELISK account '...' changed after its credentials were saved in FlexigoTech Cloud: an administrator enters the system account password again. Nothing was sent.»	An administrator enters the system account password again.
«OBELISK account '...': an administrator withdrew the consent for FlexigoTech Cloud, so the calls to OBELISK are paused. Accept it again on the account, or delete the credentials from FlexigoTech Cloud. Nothing was sent.»	Accept consent again on the account or delete the credentials from FlexigoTech Cloud.
"OBELISK can only sign PDF attachments."	Attach a PDF file.
«OBELISK envelopes carry at most ... documents.»	Reduce the envelope's documents to the maximum allowed.
«The PDF '...' is larger than the ... MB that FlexigoTech Cloud takes in one call to OBELISK. Nothing was sent.»	Use a smaller PDF.
"Only sent, partially signed or draft envelopes can be recalled."	Check the envelope's status before clicking **Recall**.
«Signatory '...' needs a valid email address.»	Correct the signer's email and send again.
«Configure an OBELISK account first.»	Create an account under **SEFIRA OBELISK › Configuration › Accounts**.

21 Other ways to do it

WAY	WHAT IT INVOLVES
Manually from the SEFIRA OBELISK panel	You download the PDF from Odoo, upload it to the panel, create the flow with its signers, wait for them to sign, and go back to Odoo with the signed PDF to save it where it belongs. You do each step yourself and check each signer's status in the panel.
Odoo alone	Odoo 17, 18, 19 and 20, Community and Enterprise, include no module that talks to SEFIRA OBELISK. With Odoo alone, the connection does not exist.
This connector	From Odoo you send quotations, invoices, purchase orders and any PDF for signature. The connector tracks each signatory and saves the signed PDF, with its eIDAS signature, in Odoo. It needs FlexigoTech Cloud and the system account of your SEFIRA OBELISK environment.

If you already sign with OBELISK by hand, the connector does not bring into Odoo the flows you created outside it: envelopes start with your first send from Odoo. A PDF that does not come from a quotation, an invoice or a purchase order is sent by creating the envelope by hand in **Signing Envelopes**, with **New**: the PDF in **Main PDF**, the signers and **Send**.

22 Plans and pricing

€9

License per Odoo version.

+ FlexigoTech Cloud

STANDARD

€49/month

or €490 a year

- First response within 1 working day
- Up to 3 accounts

PRO

€98/month

or €980 a year

- First response within 4 working hours
- Up to 10 accounts
- Video call if needed

14-day trial, no card **Prices exclude VAT**

The module license is per Odoo version. FlexigoTech Cloud is paid monthly or yearly: with Standard, up to 3 accounts; with Pro, up to 10. The FlexigoTech Cloud trial lasts 14 days, with no card required. Every purchase includes 2 months of support: we help you install it, set it up and get it working, by email and video call.

23 Frequently asked questions

What does the connector do?

It sends quotations, invoices, purchase orders and any PDF from Odoo for signature, follows each signer and saves the signed PDF in Odoo with its eIDAS signature.

Does it work without FlexigoTech Cloud?

No.

Is there a free trial?

The FlexigoTech Cloud trial lasts 14 days, with no card required. If you do not subscribe when the trial ends, the service stops and nothing is charged.

Has it been tested against OBELISK?

In July 2026, an earlier version for Odoo 19 signed end to end in SEFIRA's integration environment. The published version, which goes through FlexigoTech Cloud, has only been tested against a simulator built from the OBELISK integration manual. The chapter "The connector in figures" explains what was tested and what was not.

Does it work on Odoo Online?

No. Odoo Online does not allow installing third-party modules. Odoo.sh or your own server will do.

Which Odoo versions does it work with?

The module is published for Odoo 17, 18, 19 and 20.

Does it need Odoo Enterprise?

No. What it requires (Mail, Portal, Sales, Invoicing, Purchase and the FlexigoTech Cloud module) is available in Community.

Which documents can I send for signature?

Quotations and sales orders, customer invoices and credit notes, and purchase orders, from their button. A standalone PDF, by creating the envelope by hand in **Signing Envelopes**.

Who sees the send for signature button?

Users with SEFIRA OBELISK permission, User or **Manager**.

Do I have to download the PDF and upload it to another website?

No. You send the document from its own screen in Odoo and the signed PDF returns to Odoo automatically.

Can I send several quotations at once?

Yes. In the quotations list, select them and use **Send for signature (SEFIRA OBELISK)** from the actions menu. Each one goes out with its customer as signer and the account's values.

How many accounts does each plan allow?

Up to 3 with the Standard plan and up to 10 with Pro.

How much does it cost?

Standard costs €49 per month or €490 per year, and Pro €98 per month or €980 per year, excluding VAT. The module costs €9 per Odoo version.

What is the difference in support between plans?

With Standard, first response within 1 working day. With Pro, within 4 working hours, with a video call if needed.

Can I connect several companies?

Yes. Each account belongs to one company, so each company connects with its own OBELISK account.

What do I need in SEFIRA OBELISK before starting?

A tenant provisioned by SEFIRA, the category code, the username and password of the system account, and the name of a real portal user account that will own the flows.

Who can connect the account?

An Odoo administrator: only they enter the system account password and accept the consent for FlexigoTech Cloud.

Where are the system account credentials stored?

The password, encrypted, in FlexigoTech Cloud. The username and tenant address stay in your Odoo, and the password is never shown again.

Are my customers, orders and invoices sent to FlexigoTech Cloud?

Only what you send for signature: the PDF and the signers' details pass through FlexigoTech Cloud on the way to OBELISK, which keeps them only as long as needed to deliver them. The rest stays in your Odoo.

How often is the status of an envelope updated?

Immediately, if SEFIRA has registered the notifications for your account. There is also a scheduled task that checks pending envelopes every hour, and in the envelope the **Refresh Status** button checks them whenever you want.

When do overdue envelopes expire?

OBELISK expires those with a strict deadline. For the rest, Odoo closes them once they are more than 7 days past their due date, after checking with OBELISK, with a task that runs every 6 hours.

How often are old notifications cleaned up?

Every day, callback events older than 90 days are deleted.

Can I change how often the tasks run?

Yes, in **Settings › Technical › Scheduled Actions**, with developer mode enabled.

Can several documents go in one envelope?

Yes, up to 10 documents per envelope, all in PDF.

Can I sign in order or in parallel?

Yes. With **Signing Order** you choose **Serial (one signer at a time)**, **Parallel (everyone at once)** or **Custom (per-signer step order)**. Signers with the same step number are invited at the same time.

Can I choose where the signature goes in the PDF?

Yes: at fixed coordinates, next to a text in the PDF, or in a signature field already in the PDF. Without placement, each signer chooses where to sign.

Can someone without an OBELISK account sign?

Yes, as an external signer with an email invitation, or as a temporary signer, if SEFIRA enables it for your tenant. They were not enabled in the integration environment, so those two types have not yet been tested against OBELISK.

Can my customers see in the Odoo portal what they have to sign?

Yes, if they have portal access: they see their pending documents, each with its signing page, and on the quotation, a button to sign.

What signature levels does the module include?

Three: internal process, private law act and act before public administration. You can add more manually.

Can I recall an envelope already sent?

Yes, with **Recall**, while it is in **Sent** or **Partially Signed**. If you cancel the source document, Odoo recalls it automatically.

What happens if a signer declines?

The envelope moves to **Declined**, the reason is recorded in the **Rejection** tab, and you can restart it with **Reactivate**.

When can I download the signed PDF?

When everyone has signed and the envelope is **Signed**. Odoo has already saved it automatically; **Download Signed PDF** gives it to you.

What happens if the subscription lapses?

Calls to OBELISK stop and no envelope is marked as erroneous; your envelopes and signed PDFs stay in Odoo. If you subscribe again, the hourly task resumes the pending envelopes. If FlexigoTech Cloud has deleted the credentials, an administrator re-enters them on the account.

What happens to what I already had in Odoo before installing it?

Your documents stay where they are and you can send them for signature from that point on. Flows you created in OBELISK outside Odoo are not imported.

Can I buy just the module without FlexigoTech Cloud?

No. Without FlexigoTech Cloud the module does not communicate with SEFIRA OBELISK.

24 Glossary

SEFIRA OBELISK	The electronic signature platform the connector connects to. Your company works with its own tenant within it.
Tenant	Your company's space within SEFIRA OBELISK. Its name identifies your connection and is configured by SEFIRA.
Account	Each connection to SEFIRA OBELISK in Odoo. They are managed in **SEFIRA OBELISK › Configuration › Accounts**.
System account	The user with which the connector identifies itself to SEFIRA OBELISK. Its password is stored encrypted in FlexigoTech Cloud and does not stay in your Odoo.
Owner account	The SEFIRA OBELISK portal user account on whose behalf the system account creates the flows. It is filled in on the Odoo account.
Category code	A detail of your tenant configured by SEFIRA and requested when connecting the account. By default, wksDocuments.
Environment	Account label: **Sandbox / Integration** or **Production**.
Kill switch	An account option that, when switched on, blocks outgoing calls to SEFIRA OBELISK.
Default account	The account used when sending without choosing one. It is set in **Settings › SEFIRA OBELISK**, in the **SEFIRA OBELISK Connector** block.
Flow	The signing process of a document in SEFIRA OBELISK. Each flow has an identifier shown on the envelope as **OBELISK Flow ID**.
Envelope	The Odoo record representing a send for signature. You see them in the **Signing Envelopes** list.
Signer	Each person who must sign. Corresponds to a step of the flow.
Step	Each signing turn within a flow. Signers with the same step number sign in parallel; those with different numbers sign one after another.
Business level	The signature level requested from signers. The module includes three, which you see in **Business Levels**.
eIDAS signature	The electronic signature under the European eIDAS regulation. SEFIRA OBELISK applies it to the PDF in PAdES format.
Callback	The notification SEFIRA OBELISK sends to your Odoo when something changes in a flow. Each notification is recorded as an event in **Callback Events**.
Anchor text	Text that appears only once in the PDF and is used to place the signature next to it.
End recipients	Persons who receive access to the signed documents once the process ends. They must exist as OBELISK accounts.
FlexigoTech Cloud	The online service through which every call to SEFIRA OBELISK passes. It needs your trial or your subscription.

25 Checklist and contact

- [ ] You have a SEFIRA OBELISK tenant provisioned by SEFIRA, with the category code and the system account.
- [ ] You have the name of a real user from that tenant's portal to use as the owner account.
- [ ] Your Odoo is version 17, 18, 19 or 20, on Odoo.sh or on your own server, and not on Odoo Online.
- [ ] The Sales, Invoicing and Purchase apps and the connector module are installed.
- [ ] An administrator has activated the FlexigoTech Cloud trial or subscription in **Settings › FlexigoTech Cloud**.
- [ ] You have created the account in **SEFIRA OBELISK › Configuration › Accounts** and clicked **Test Connection** without any error.
- [ ] You have given SEFIRA the account's **Callback Url** so it can register the notices.
- [ ] You have checked the **Business Levels** and they match those of your tenant.
- [ ] You have set the **Default Account** in **Settings › SEFIRA OBELISK**.
- [ ] You have sent a test quotation with **Send for signature (SEFIRA OBELISK)** and the envelope appears in **Signing Envelopes**.
- [ ] Once signed, the envelope reaches **Signed** and **Download Signed PDF** gives you the PDF.

If you would like us to set it up with you, get in touch. With the Pro plan, if needed, we can go through it by video call.

Email

To install it, set it up or for any question.
comercial@flexigotech.com

On the web

The connector page, with the guide and the prices.
flexigotech.com/en/sefira-connector-odoo.html

On Odoo Apps

The module page on the Odoo store.
apps.odoo.com

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