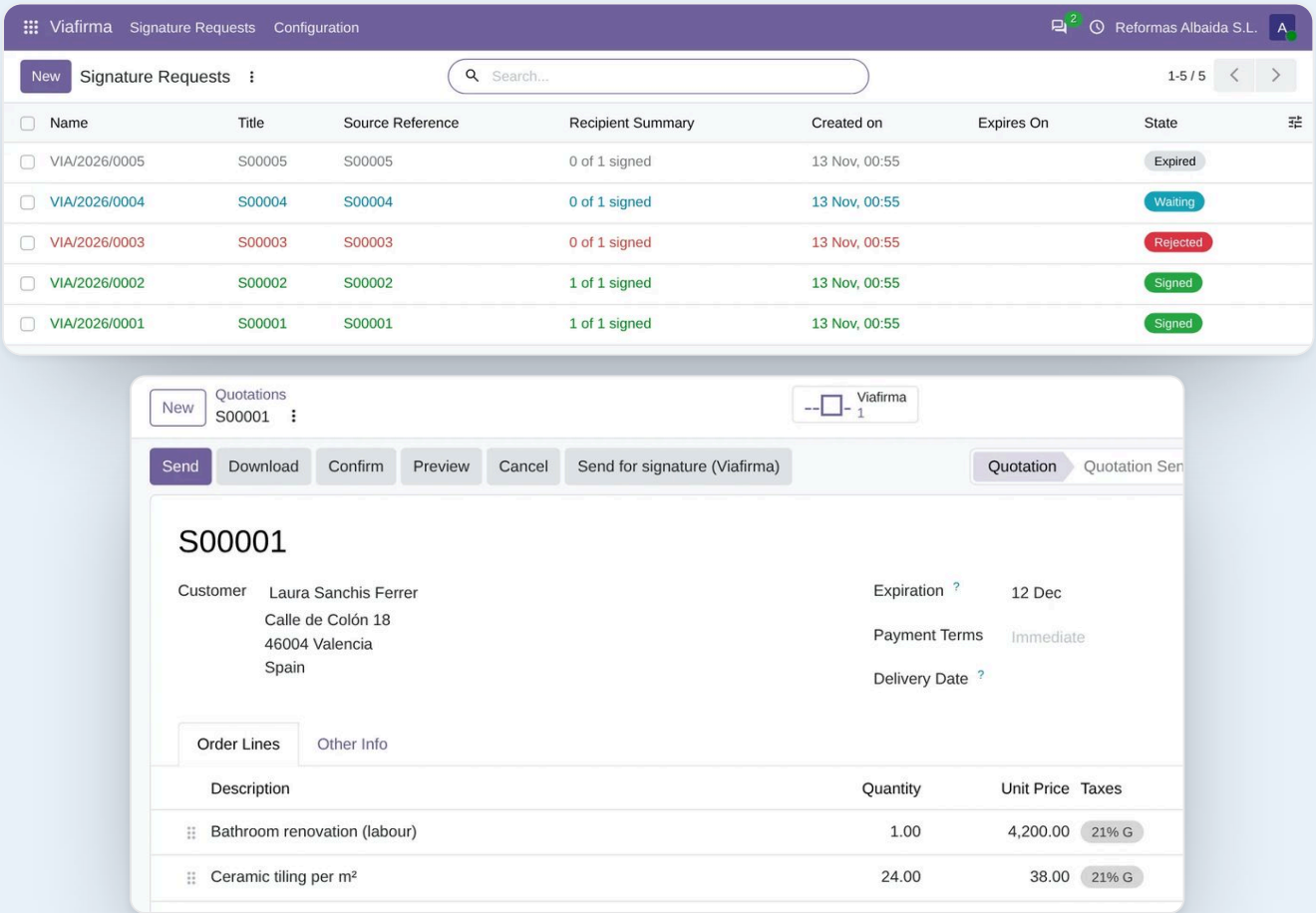
CONNECTOR GUIDE · E-SIGNATURE

Viafirma connector for Odoo

Send quotations, invoices, purchase orders and any PDF to sign with Viafirma from Odoo, and get the signed copy back on the same record.

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



Real Odoo 20 screenshot. Your signature requests in Odoo and, in front, a quote with its button to send it for signature with Viafirma.

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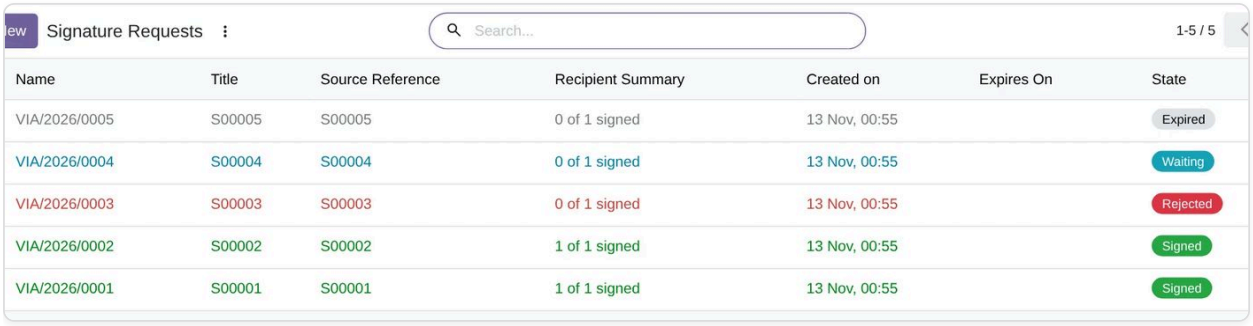
This guide describes version 20.0.1.2.2 of the module (Odoo branch 20.0, commit 59a89acdb). Everything in it comes from its published code, the platform's official documentation or real screenshots.

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

1 Who it is for and what it solves

The connector is for anyone who signs documents with Viafirma and runs their business in Odoo: quotes, invoices and purchases. Without it, every signature is a back-and-forth: download the PDF from Odoo, upload it to the Viafirma panel, add the signers, wait, download the signed copy and attach it again in Odoo, and remember to check who has signed.

With the connector, the **Send for signature (Viafirma)** button sits on the quote, the invoice or the purchase order itself. The customer or supplier is already listed as a signer. Odoo tracks the status of the signature and, once everyone has signed, saves the signed PDF and the Viafirma audit trail on the same document.



Real Odoo 20 screenshot. The signature requests within Odoo, each with its status.

What changes day to day

- You send for signature from the document, without downloading or uploading anything.
- The status of each signature is in Odoo: who is missing, whether it was rejected or whether it expired.
- The signed PDF and its audit trail are attached to the document they came from.
- A confirmed quote, a posted invoice or a confirmed purchase can go out for signature automatically.

What changes for your customer

Your customer receives the Viafirma notice by email, by SMS or by both, with your wording if you have written it, and signs from that link, on Viafirma. They do not need a user in your Odoo. If they already have a portal user, they see their pending signature documents there.

What is usually signed

DOCUMENT	WHERE FROM	WHO SIGNS
A quote the customer accepts	The quote, in **Sales**	The quote's customer.
Agreement to an invoice	The invoice, in **Invoicing**	The invoice's customer.
An order to a supplier	The order, in **Purchases**	The order's supplier.
A contract, a mandate or an annex	The attached PDF, on any record	Whoever you add in the wizard.
A document that two people sign in turn	Any of the above	Two signers, in stages 1 and 2.
An invoice or a certificate stamped by your company	Any of the above	Your certificate, with server-side signing.

When it is not for you

- If you do not have a Viafirma account: the connector uses yours, it does not create one.
- If you need to sign formats other than PDF: Viafirma, from here, only signs PDF.
- If your Odoo is Odoo Online: it does not allow installing third-party modules. You need Odoo.sh or your own server.

CONNECTOR GUIDE · VIAFIRMA

2 The connector in figures

4
Odoo versions: 17, 18, 19 and 20

4
PAdES signature formats: B, T, LT and LTA

15
minutes between checks; with Viafirma's notice, immediately

5,031
lines of code (Odoo Apps, 13-11-2026)

170+
automated tests passing on Odoo 20 (29-10-2026)

14
days of FlexigoTech Cloud trial, no card required

It works on Odoo Community and Enterprise: it uses Sales, Invoicing and Purchases. Viafirma has not yet given us a test environment: the connector has been tested against a simulator built from Viafirma's official API documentation, the same one used by its automated tests. Testing against the real Viafirma will wait until that environment is available.

CONNECTOR GUIDE · VIAFIRMA

3 Where you see it in your Odoo

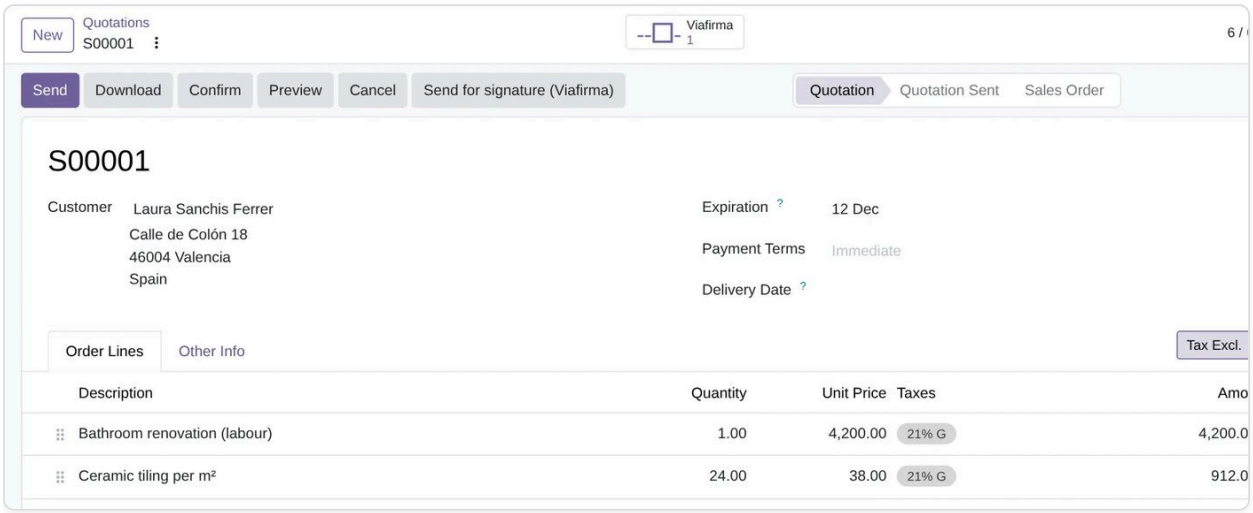


- **Real Odoo 20 screenshot.** The Viafirma app bar, with the list of signature requests open.

Signature Requests	Each document sent for signature, with its status, its signers and its documents.
Configuration › Accounts	Your Viafirma accounts. Only connector administrators can see them.
Configuration › Callback Events	Each notice received from Viafirma, with its result.

Outside the app, the **Send for signature (Viafirma)** button appears on quotes and orders in **Sales**, on invoices in **Invoicing** and on purchase orders in **Purchases**. On PDF attachments it is in the actions menu. And a signer with a portal user sees their documents in **Signatures**.

IN	WHERE THE BUTTON IS
Sales	At the top of each quote or order, and under **Action** in its list to send several.
Invoicing	At the top of each invoice.
Purchases	At the top of each purchase order.
PDF attachments	Under **Action**, in the attachments list and on the attachment itself.



- **Real Odoo 20 screenshot.** A quote with its **Send for signature (Viafirma)** button and, at the top, its requests.

On each document that can go out for signature, a button at the top shows how many requests it has and opens their list. The **Viafirma Status** field summarises the latest one: **Not sent**, **Awaiting signature**, **Signed**, **Rejected**, **Error** or **Expired**.

CONNECTOR GUIDE · VIAFIRMA

4 What you need before you start

- A Viafirma Documents account and its **Group Code**, the one shown in the Viafirma control panel, under Groups.
- The API credentials for that account: username and password (Basic Auth) or a client ID and its secret (OAuth2).
- For your company to sign without anyone present (server-side signing), the ID of your certificate held in Viafirma.
- Odoo 17, 18, 19 or 20, on Odoo.sh or your own server, not on Odoo Online, with a public address: Viafirma notifies that address when a signature changes. It works on Community and Enterprise.
- An Odoo administrator: accepts the data list of FlexigoTech Cloud and the passing of your credentials through the cloud.

> The connector does not create your Viafirma account or its credentials: Viafirma provides them.

It is installed like any third-party Odoo module, on Odoo.sh or your own server. Odoo installs `flexigotech_cloud`, the connection to FlexigoTech Cloud, together with Sales, Invoicing and Purchases if you did not already have them.

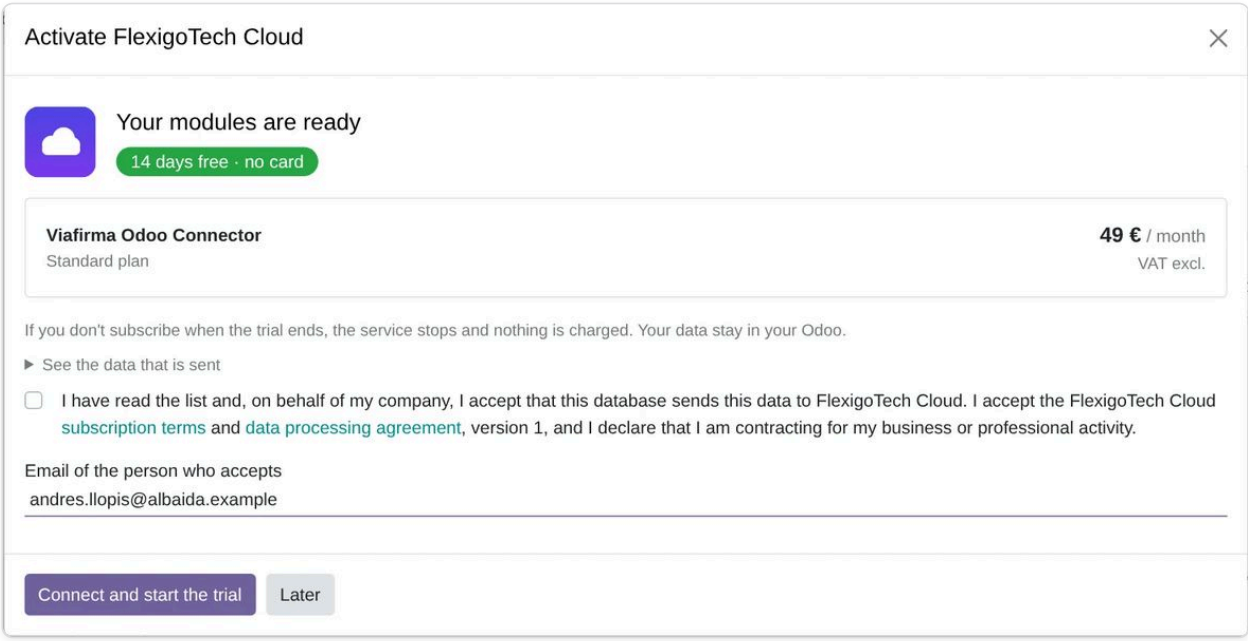
The address of your Odoo

Each request tells Viafirma which address of your Odoo to notify. That address comes from Odoo's web.base.url parameter: if it is not set, the connector does not send and says so, because the notices would have nowhere to go. If your Odoo is not reachable from the internet, the notices do not arrive, but the check every 15 minutes still brings each request up to date: it just takes a little longer.

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 days free, no card required.



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

2 **Accept and enter your email**

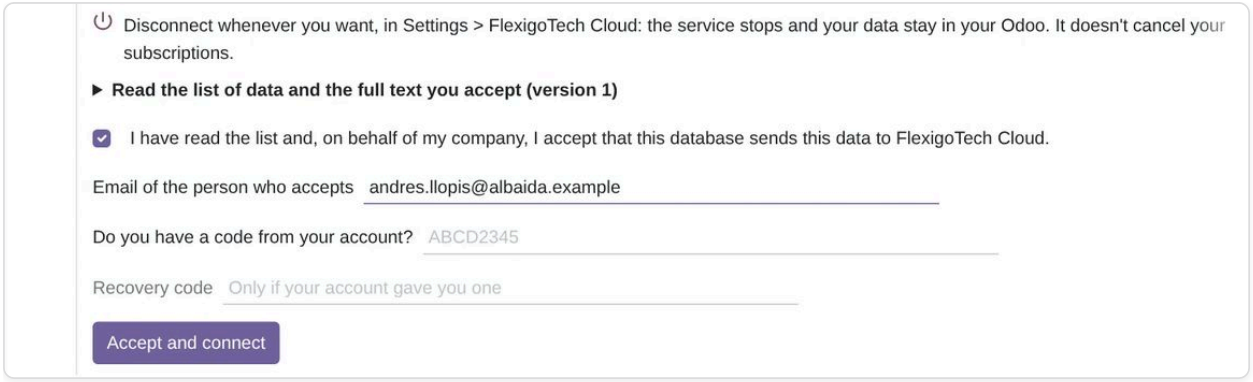
Tick "I have read the list and, on behalf of my company..." (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

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

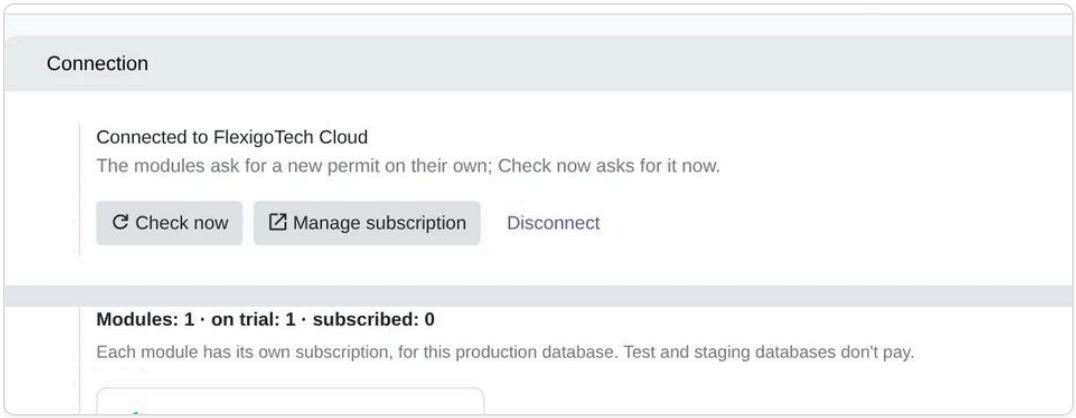
The same, from Settings

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 box ticked, 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 straight away (otherwise the module renews it automatically every 6 hours).

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

CONNECTOR GUIDE · VIAFIRMA

6 Connecting your account step by step

1. **Open Accounts and click New**
   An empty account opens.

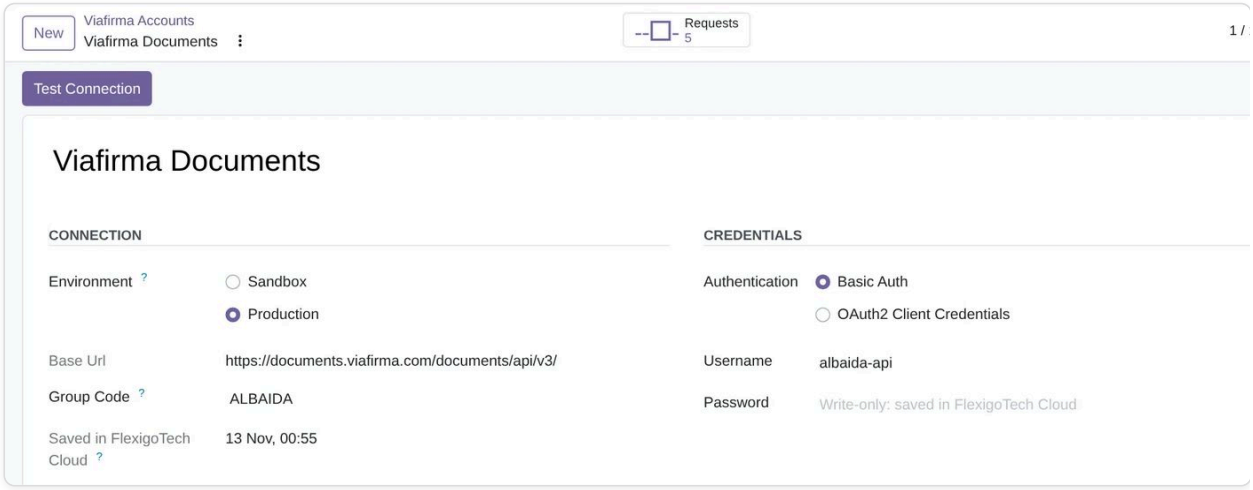
2. **Choose the environment**
   Environment comes set to **Sandbox**. To sign for real, set **Production**. The **Base Url** changes automatically.

3. **Enter your group code and your credentials**

The **Group Code** and, depending on the **Authentication**, your **Username** and **Password**, or your **Client ID** and **Client Secret**.

4 Accept and save

Tick the box accepting that FlexigoTech Cloud stores your credentials and that calls to Viafirma go through it, then save. The password or secret goes to the cloud, and Odoo only keeps the username or client ID.

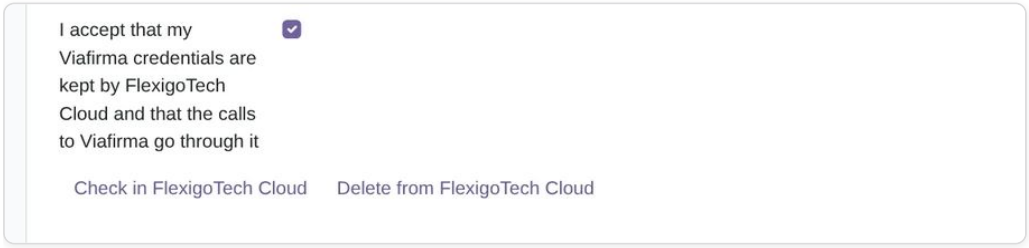


- **Real Odoo 20 screenshot.** The connected account: the environment, the group code and the credentials, now in FlexigoTech Cloud.

5 Check

Saved in FlexigoTech Cloud shows the date. **Check in FlexigoTech Cloud** asks the cloud whether it holds them. **Test Connection** checks that Viafirma responds.

> The password and secret are write-only: after saving, their fields come out empty because Odoo does not keep them. If you change the username or the client ID, enter the password or the secret again.



- **Real Odoo 20 screenshot.** The FlexigoTech Cloud checkbox for the account and its two buttons.

Only an Odoo administrator can tick the checkbox. If it is unticked, the calls stop and the credentials stay in the cloud until you press **Delete from FlexigoTech Cloud**.

The account, field by field

Environment and **Base Url**	Sandbox or production, and the Viafirma API address that comes from it.
Group Code	Your account's group in Viafirma. It goes with every request.
Authentication	Username and password (Basic Auth) or OAuth2 (Client Credentials).
Username or **Client ID**	The visible part of your credentials. It stays in Odoo.

Password or **Client Secret**	The secret part. Write-only: it goes to FlexigoTech Cloud.
Saved in FlexigoTech Cloud	When they were last saved in the cloud. If empty, the account cannot make calls.
Callback Url	The address of your Odoo to which Viafirma sends notifications, with the account's secret.
Sent (30 days) and **Signed (30 days)**	What has been sent and what has been signed in the last month.
Kill Switch	Immediately stops all of the account's calls to Viafirma.

If you were already using an earlier version

Earlier versions stored the credentials in Odoo. After updating, the account shows **Credentials Saved by an Earlier Version** and its calls wait, without sending or deleting anything, until an administrator chooses:

Move credentials to FlexigoTech Cloud	Sends them to the cloud, with consent, and removes them from Odoo.
Delete them from this database	Deletes them from Odoo without sending them anywhere. Afterwards, enter the credentials again.

Sandbox or production

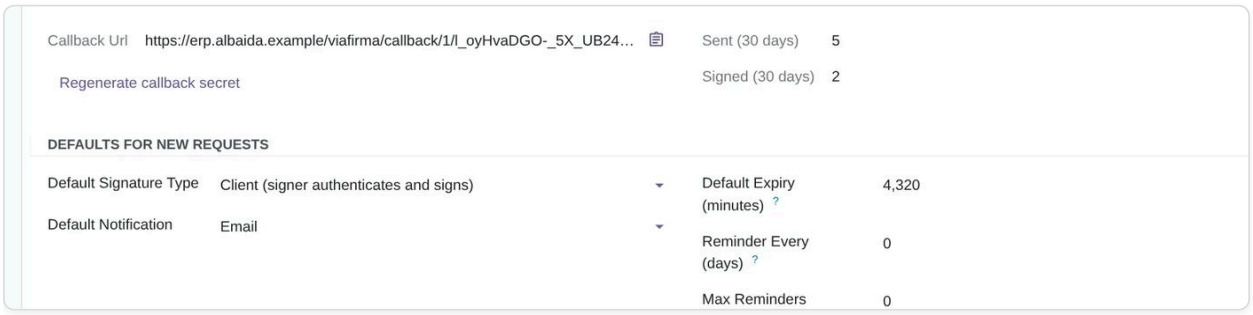
[[ENVIRONMENT]]	[[BASE URL]]	WHAT IT IS FOR
Sandbox	sandbox.viafirma.com/documents/api/v3/	Testing without valid signatures, if Viafirma gives you access.
Production	documents.viafirma.com/documents/api/v3/	Real signatures.

Each environment and each way of signing in (username and password or OAuth2) is a separate entry in FlexigoTech Cloud. If you change the environment or the authentication of an account, enter its credentials again: they are saved for the new combination.

What each button checks

Test Connection	That Viafirma responds to your Odoo. It does not use your credentials, so it does not tell you whether they are correct.
Check in FlexigoTech Cloud	That the cloud has the credentials for this account saved.
The first send	This is the real test of the credentials: if they fail, the request will say so.

7 The values for each request



- **Real Odoo 20 screenshot.** The callbacks, the figures for the last 30 days and the values of new requests.

VALUE	WHEN CREATING THE ACCOUNT	WHAT IT DOES
Default Signature Type	Client	The person signs: they receive the notice and sign in Viafirma.
Default Signature Format	PAdES-B	The format of the server signature.
Default Notification	Email	How each signer is notified: email, SMS, both, or none.
Default Expiry (minutes)	4,320 (3 days)	How long they have to sign.
Default Certificate ID	Empty	The certificate for the server signature.
Request Email Subject, **Request Email Body** and **Request SMS Body**	Empty	Your texts for the notice; if empty, Viafirma's own are used.
Auto-send on Confirmation	Off	Sends for signature only when the document is confirmed or posted.
Kill Switch	Off	For all of this account's calls to Viafirma.

Your notice texts

In the **Messages** section of the account you can write the subject and body of the email the signer receives and the SMS text. They help the signer recognise your company and know what they are signing. If left empty, Viafirma sends its own.

The connector settings

In **Settings**, the Viafirma section has two more things: the **Default Viafirma Account**, the one used by the wizard and by automatic sending when there are several, and how long Odoo waits for Viafirma on the calls it makes directly (**Viafirma Request Timeout (s)**: 30 seconds unless you change it). The **Manage accounts** link leads to the accounts.

The send wizard takes from the account the signature type, the format, the certificate and how the first signer is notified. Each request also carries the account's expiry and its email and SMS texts: if you leave them empty, Viafirma uses its own.

> The expiry counts from the moment of sending. With the 4,320 minutes of a new account, the signer has 3 days; if they need more, use **Extend Period** on the request.

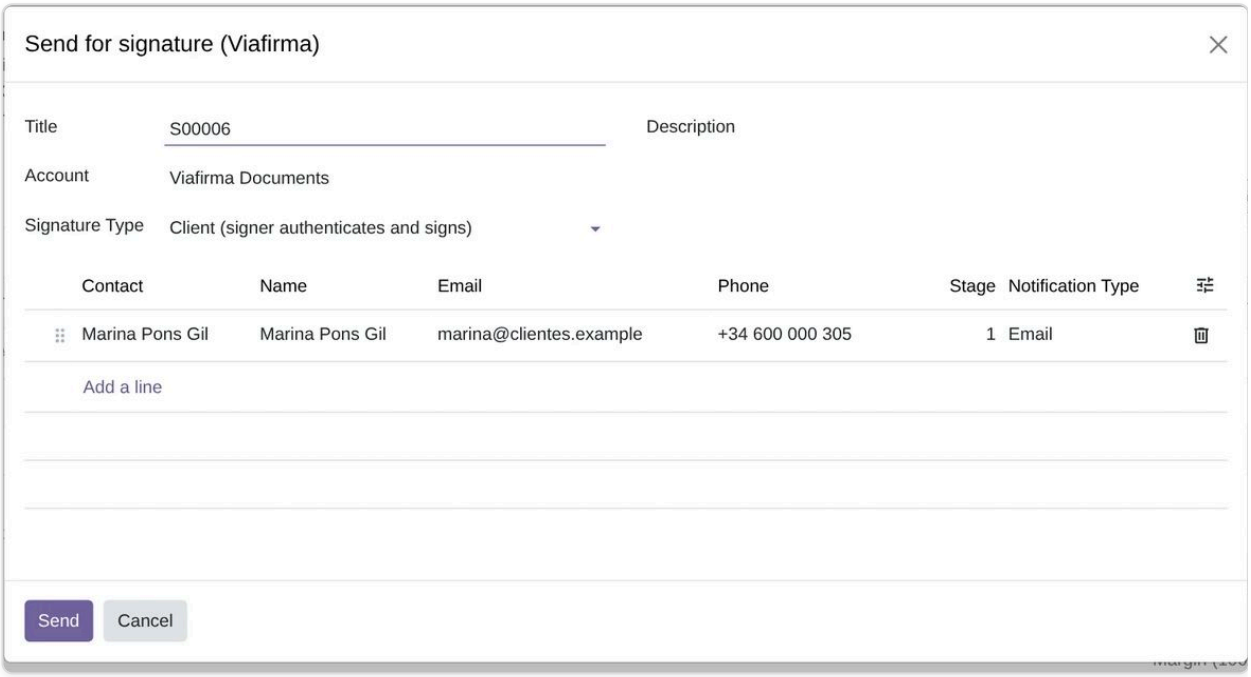
8 Sending a document step by step

1. **Open the quotation, invoice or order**

   At the top is **Send for signature (Viafirma)**.

2. **Check the wizard**

   The **Title** comes with the document number. Choose the **Account** and the **Signature Type**. The document's customer or supplier is already set as the first signer.



- **Real Odoo 20 screenshot.** The wizard: the title, the account, the signature type and the signers.

3. **Add signers if needed**

   Each with their **Name**, their **Email** or their **Phone**, their **Stage** and how they are notified. They sign in stage order: first stage 1, then stage 2.

4. **Press Send**

   Odoo makes the PDF of the document, saves it as an attachment and uploads it to Viafirma. The request is created, and Viafirma notifies the signers.

What it checks before sending

- That there is a PDF: Viafirma only signs PDFs.
- For a client signature, at least one signer, and each with a name.
- A valid email if they are notified by email, and a phone if they are notified by SMS. The phone with its prefix: +34600111222.

- For a server signature, no signers and a certificate.
- That Odoo has its public address set, so Viafirma can send notifications.

An example

A renovation company prepares quotation S00006 in Odoo for Marina Pons Gil. It presses **Send for signature (Viafirma)**: the wizard shows the title S00006, the Viafirma Documents account, the client signature and Marina as signer, with her email, her phone and notification by email. It presses **Send**.

Odoo makes the PDF of the quotation, saves it as an attachment, uploads it to Viafirma and creates the request. Viafirma emails Marina. When she signs, Viafirma notifies Odoo: the request moves to **Signed** and the signed PDF and the audit trail appear as attachments on the quotation.

What happens when you press Send

1. **Odoo makes the PDF**
   With the document's report, and saves it as its own attachment: **Sent PDF**.
2. **Asks Viafirma where to upload it**
   Viafirma gives a link that is valid for a while, for the account's group.
3. **Uploads the PDF**
   Directly from your Odoo to Viafirma, using that link.
4. **Creates the request**
   With the title, the expiry, the signers, your texts and the callback URL. Viafirma replies with its codes and notifies the signers.

If Viafirma replies with an error, Odoo shows it with Viafirma's text ("Viafirma error: ...") and nothing is left half done. With automatic sending, if FlexigoTech Cloud is paused, the request stays in **Draft** and the document notes it in its history: when the service returns, send it with **Send** from the request.

Before the first real send

- If Viafirma gives you access to its sandbox, create an account in that environment and send a quote to your own email.
- Check that Viafirma's notice reaches your Odoo: the request updates by itself, without pressing **Refresh Status**.
- Review the texts of the account notice, as they are the first thing your client will see.
- Then, the **Production** account and the first send to a client.

The PDF that gets sent

DOCUMENT	PDF TO BE SIGNED
Quotation or sales order	The Odoo quotation or order report.
Invoice	The Odoo invoice PDF.
Purchase order	The Odoo purchase order report.

DOCUMENT	PDF TO BE SIGNED
Attachment	The attachment itself, if it is a PDF.

9 Signers, stages and notices

In client signing, a request has one or more signers. Each has the following details:

Contact	The Odoo contact. Selecting it fills in their name, email and phone.
Name	Required. This is the name Viafirma uses to address them.
Email and **Phone**	Depending on how they are notified. The phone number includes the country prefix: +34600111222.
Stage	The signing order. Signers in stage 1 sign first; those in stage 2 sign afterwards.
Notify Via	Email, SMS, both, or no notice.

NOTICE	WHAT IT NEEDS
Email	A valid email.
Email + SMS	Email and phone.
SMS	Phone.
None	Nothing: the notice is not sent by Viafirma.



- **Real Odoo 20 screenshot.** The **Signers** tab of a request, showing each signer and their status in Viafirma.

The status of each signer

In the **Signers** tab, each one shows the status given by Viafirma: **Waiting**, **Pending** or **Received**. **Received** means they have already signed, and the portal shows it as **Signed**. The whole request does not move to **Signed** until all signers have signed.

An example with two signers

A works contract in PDF is signed by the client and then by the company's manager. In the wizard, the client is in stage 1 and the manager in stage 2. Viafirma notifies the client first; once they sign, it notifies the manager. When she signs, the request moves to **Signed** and the PDF with both signatures and its audit trail is kept in the record.

Sending a reminder

Resend Notification, on the request, notifies again the signers who have not yet signed. It cannot be used on a request that is already finished: Viafirma rejects it and Odoo reports this.

> When you sign from the wizard, the first signer is the client of the quotation or invoice, or the vendor of the purchase order. If you want someone else at that company to sign, change it before sending.

CONNECTOR GUIDE · VIAFIRMA

10 Client signing and server signing

Client (signer authenticates and signs)	A person signs. Viafirma sends them the notice, they identify themselves and sign. There can be several signers, in stages.
Server / Unattended (signed with a custodied certificate)	Your company signs, with nobody present, using the certificate you have custodied in Viafirma. It has no signers.

For server signing you also choose the **Signature Format**:

FORMAT	WHAT IT ADDS
PAdES-B (baseline)	The signature, nothing more.
PAdES-T (+ timestamp)	A timestamp: a third party certifies the date of the signature.
PAdES-LT (+ long-term validation)	What is needed to validate the signature years later.
PAdES-LTA (+ archival timestamp)	An archival timestamp, to keep it over the long term.

> The format only matters in server signing. In client signing, the signature is made by Viafirma with the method the signer uses.

What each one needs

SIGNING	NEEDS	DOES NOT NEED
Client	At least one signer, with a name and an email or phone depending on the notice.	Certificate.
Server	The ID of your certificate custodied in Viafirma, on the request or in the account.	Signers.

When to use each

IF YOU WANT TO...	USE
Have your client accept a quotation	Client signing, with the client as signer.
Have two people sign in order	Client signing, with two signers in stages 1 and 2.
Seal an invoice or document yourself with nobody present	Server signing, with your custodied certificate.
Have the signing date certified by a third party	Server signing with PAdES-T, LT or LTA.

The certificate for server signing is custodied in Viafirma: Odoo only sends its ID. Set it in the account (**Default Certificate ID**) or in the wizard.

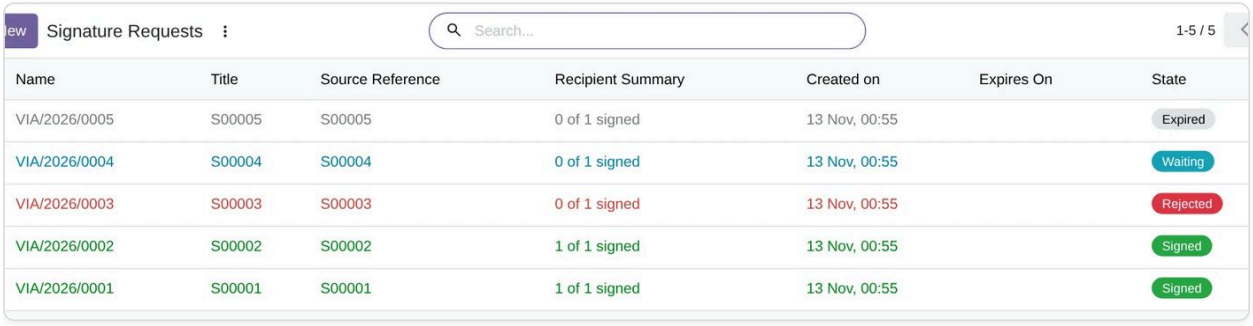
An example of server signing

A company wants every invoice sealed with its certificate, without anyone having to sign it by hand. In the account it sets the server signing type, the PAdES-T format and the ID of its certificate custodied in Viafirma. From the invoice, **Send for signature (Viafirma)** already goes out with those values and without signers. Viafirma signs it with the certificate and a timestamp, and the signed PDF returns to the invoice with its audit trail.

> With automatic sending switched on and server signing in the account, the request goes out without signers and with the account's certificate, as in the wizard.

CONNECTOR GUIDE · VIAFIRMA

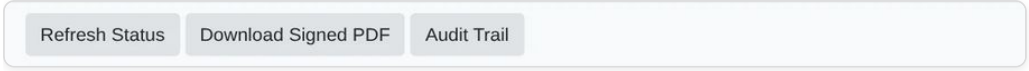
11 The request and its statuses



- **Real Odoo 20 screenshot.** Requests: expired, waiting, rejected and signed.

STATUS	WHAT IT MEANS
Draft	Not yet sent.
Received	Viafirma has it.
Waiting	Waiting for the signers.
Waiting Client Signature	A signer is due to sign.
Waiting Check	Signed and pending a review in Viafirma. The PDF can already be downloaded.
Signed	Everyone has signed.
Rejected	A signer or you rejected it.
Expired	The deadline passed without signing.
Error	Viafirma reported an error. The message says which one.

A status never goes backwards: if a late, outdated notice arrives, it does not change a request that has already moved further along.



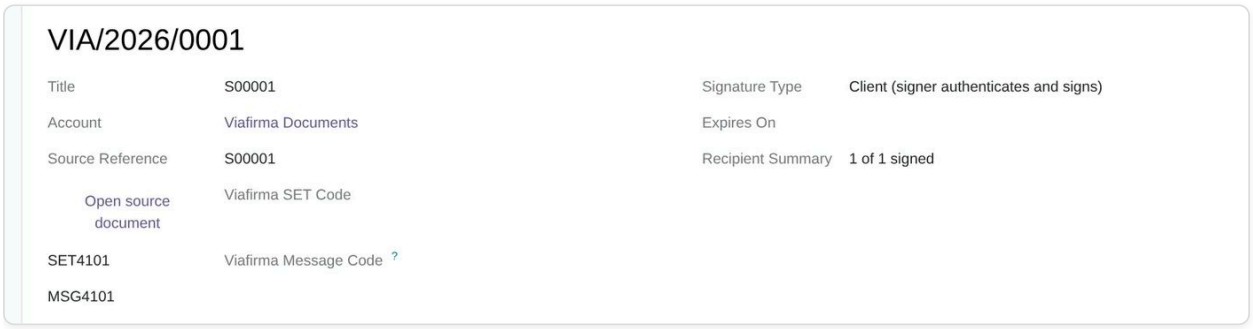
- **Real Odoo 20 screenshot.** The buttons of a signed request.

Refresh Status	Asks Viafirma right away.
Resend Notification	Notifies again the signers who have not signed yet.
Extend Period	Gives more days to sign, from 1 to 365.
Reject	Cancels the request in Viafirma, with a comment.
Download Signed PDF and **Audit Trail**	Downloads the two files from Viafirma.

Which buttons appear in each status

BUTTON	APPEARS WHEN THE REQUEST IS
Send	**Draft** or **Error**.
Refresh Status, **Resend Notification**, **Extend Period** and **Reject**	Sent and not finished: not **Signed**, not **Rejected**, not **Expired**, not **Error**.
Download Signed PDF and **Audit Trail**	**Signed** or **Waiting Check**.

Extend Period asks for the number of days added from today, between 1 and 365 (30 by default). **Reject** asks for a comment, which goes to Viafirma; if you write none, it says "Rejected from Odoo". A request that is **Expired** or **Rejected** no longer changes: to sign that document again, send it again from the document.

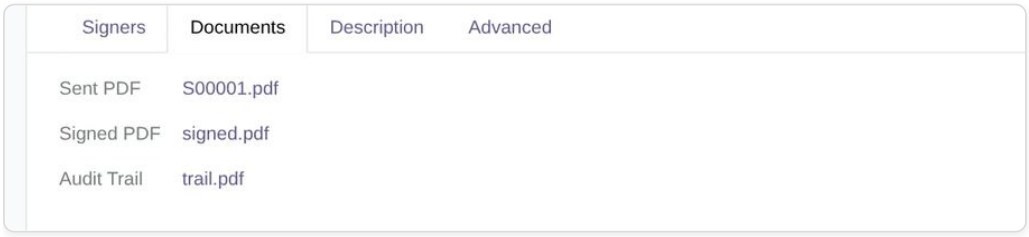


- **Real Odoo 20 screenshot.** A signed request: the title, the account, the source document and the Viafirma codes.

Each request also stores the codes by which Viafirma knows it: the **Viafirma SET Code** and the **Viafirma Message Code**. These are what Viafirma's support asks for if something needs checking. **Open source document** takes you back to the quotation, invoice or order.

12 The signed document and the audit trail

- Downloads the signed PDF and the audit trail from Viafirma.
- Saves them as attachments of the quotation, invoice or order the request came from (if it came from an attachment, on the request itself).
- Leaves a note on the document: all signers completed the request with Viafirma.
- The document shows at the top how many requests it has and its **Viafirma Status**.



- **Real Odoo 20 screenshot.** The **Documents** tab of a signed request: the sent PDF, the signed one and the audit trail.

With **Waiting Check** the signed PDF can already be downloaded; the audit trail arrives with **Signed**.

What the audit trail is

It is the PDF in which Viafirma records how the document was signed: who, when and with what evidence. Together with the signed PDF, it is what you keep in case someone disputes the signature. The connector downloads them automatically, so there is no need to log into Viafirma to look for them.

If you want to download them again, from the request: **Download Signed PDF** and **Audit Trail**. If they were already there, the attachment is updated instead of duplicated.

Where you find them later

- On the quotation, invoice or order itself: both PDFs are among its attachments, and its history says "All signers have completed" the request in Viafirma.
- On the request: the **Documents** tab has the **Sent PDF**, the **Signed PDF** and the **Audit Trail**, and its history reads "Signed document stored." and "Audit trail stored.".
- From the document, the button at the top with the number of requests takes you to all of its requests.

The attachments are Odoo's: you can view, download and export them like any other, even without a subscription.

13 Automatic sending, multiple and from attachments

On confirmation

With **Auto-send on Confirmation** enabled on the account, confirming a sales order, posting an invoice or confirming a purchase order sends it for signature automatically, to the customer or supplier, using the

account's values. It is not sent if that document already has an open request. If something fails, the confirmation still goes through and the document notes it in its history.

On cancellation

If you cancel the document, its open requests are rejected in Viafirma with the comment "Source document was cancelled".

Several at once

In the quotations list, tick the ones you want and, under **Action**, **Send for signature (Viafirma)**: each one goes to its customer with the account's values. The same works with PDF attachments.

When it triggers

DOCUMENT	IS SENT FOR SIGNATURE WHEN…	IS REJECTED IN VIAFIRMA WHEN…
Sales order	It is confirmed	It is cancelled
Invoice	It is posted	It is cancelled
Purchase order	It is confirmed	It is cancelled

The customer or supplier on the document signs, with their Odoo email and phone and the account's notice. If the contact has no email, it is not sent and the document notes it.

How the multiple send works internally

Each marked document goes to its customer with the default account values. When it finishes, Odoo says how many requests it sent and which ones failed and why. If FlexigoTech Cloud is paused halfway through, whatever was already sent stays in Viafirma and the rest waits.

From an attachment

Any PDF attachment in Odoo can be sent for signature: from the attachments list or on the attachment itself, **Action** and **Send for signature (Viafirma)**. If it is not a PDF, the connector says so and sends nothing. The signed version of an attachment is saved on its request.

> Automatic sending never gets in the way of your work: if Viafirma fails or the service is unavailable, the order is still confirmed and the document notes it in its history.

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14 The signer's portal

If the signer has a portal user in your Odoo (a customer who already sees their quotations and invoices there), their page has one more section: **Signatures**, with the documents pending their signature.

COLUMN	WHAT IT SHOWS
Document	The title of the request: the number of the quotation or invoice.

COLUMN	WHAT IT SHOWS
Status	**Signed** or **Awaiting signature**.
Expires	Until when they can sign.

The portal does not sign: signing is done in Viafirma, from the link in the notice. The portal shows what they have pending.

Each signer sees only their own: the portal looks them up by their contact, never by email, which the signer can change themselves.

Requests in **Draft**, **Rejected**, **Expired** or **Error** do not appear: only what is genuinely pending or already signed.

CONNECTOR GUIDE · VIAFIRMA

15 How the status is kept up to date

Each request carries the **Callback Url** of its account. Viafirma posts there every time it changes and the status is updated immediately. The notices go straight to your Odoo, without going through FlexigoTech Cloud, and the URL carries a secret: without it, Odoo does not accept the notice.

Viafirma does not repeat a notice that fails. That is why the **Viafirma: poll pending signature requests** task checks every 15 minutes for those that have not finished: 50 on each run, starting with those that have gone longest without changing.

Configuration › Callback Events stores every notice received. The **Viafirma: clean old callback events** task deletes, each day, those older than 90 days.

Event Uid	The identifier of the notice. A repeated notice carries the same one and is not counted twice.
Viafirma SET Code	The request it refers to.
Status	**Pending** while not resolved, **Done** once it has changed the request, or **Error**.
Payload	What Viafirma sent, exactly as it was.
Processed On and **Error Message**	When it was resolved and, if it failed, why.

If Viafirma reports an error

The request moves to **Error** and its **Error** tab reads "Viafirma reported an error while processing the request" or the text Viafirma sent. A request in **Error** can be **Send** again.

Details of the notice

- Viafirma sends the notice as a form or as JSON; the connector understands both.
- If the same notice arrives twice, it counts only once: each event is recorded with its identifier.
- A notice with a secret that is not the account's receives a "not found" and changes nothing.
- If a notice arrives while the database has no FlexigoTech Cloud service, it stays pending and the polling task resolves it when the service returns.

- **Regenerate callback secret** changes the URL. New requests carry the new one; those already sent keep the old one.
- Viafirma also sends an authorisation header with the same secret. If it does not match, Odoo logs it in the server log; what decides is the secret in the URL.

Notices older than 90 days are deleted automatically. If you need to keep them for more or less time, the system parameter flexigobe_viafirma_connector.event_retention_days changes those days.

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16 The data that goes out and comes back

What goes out to Viafirma

DATA	WHERE IT COMES FROM
The PDF	The document's report or the attachment.
The title and the description	The wizard.
The group code	The account.
The expiry	The account: minutes since sending.
The signers	Name, email, phone, stage and how they are notified.
The signature type	Client or server; for server, the format and the certificate ID.
The notification texts	The email subject and body and the account's SMS text, if you set them.
The callback URL	The account, with its secret.

What goes back to Odoo

- The status of the request and of each signer.
- The signed PDF and the audit trail, as attachments.
- The Viafirma codes of the request.

What goes through FlexigoTech Cloud and what does not

WHAT	WHERE IT GOES
Your password or your Viafirma secret	Once, to FlexigoTech Cloud, which stores it encrypted. Your Odoo only keeps the username or the client ID.
API calls: creating the request with its signers, checking its status, rejecting, resending, extending	Through FlexigoTech Cloud, which signs them with your credentials and passes them on to Viafirma.
The links for uploading the PDF and downloading the signed one	Through FlexigoTech Cloud: Viafirma issues them for a limited time.
The PDF to be signed, the signed PDF and the audit trail	Directly between your Odoo and Viafirma, using those links. They do not pass through FlexigoTech Cloud.

WHAT	WHERE IT GOES
Viafirma notifications and the connection test	Directly between Viafirma and your Odoo.

FlexigoTech Cloud passes each call through and keeps nothing of what it carries beyond what is needed to deliver it. Your credentials do stay in the cloud, encrypted, until you delete them or uninstall the connector.

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17 Security and permissions

Who does what

PERMISSION	CAN
Connector User	Send documents for signature and track their status.
Connector Manager	In addition, create and configure Viafirma accounts.
Odoo administrator	In addition, accept the pass-through to FlexigoTech Cloud and enter the credentials.

A salesperson without connector permissions can still see and confirm their quotations, and automatic sending works just the same.

The credentials

- The password and the secret are write-only: they go to the cloud on saving and Odoo does not keep them. Odoo stores the username or the client ID.
- Without an administrator's tick, nothing is sent.
- **Delete from FlexigoTech Cloud** deletes them from the cloud. Uninstalling the connector does too.

What each one stores

WHERE	WHAT IT STORES
Your Odoo	The username or client ID, the group code, each request with its signers, the PDFs as attachments and the Viafirma notifications from the last 90 days.
FlexigoTech Cloud	Your password or Viafirma secret, encrypted.
Viafirma	Your requests and their documents, as under your contract with Viafirma.

The calls

- **Kill Switch** stops all calls for an account immediately.
- The connector does not follow Viafirma redirects: a response that points to another address is rejected.
- Viafirma notifications are only accepted with the account's secret in the URL.

18 Several companies and several accounts

Each Viafirma account belongs to one Odoo company, and so do its requests. A user only sees the accounts and requests of the companies they work in.



- **Real Odoo 20 screenshot. Viafirma Accounts**: one row per account, with its company.

The wizard and automatic sending use the default account: the one you choose in **Settings**, in the Viafirma section (**Default Viafirma Account**), if it belongs to the document's company; otherwise, the first active account for that company. In the wizard you can choose another.

The FlexigoTech Cloud Standard plan allows up to 3 accounts and Pro up to 10. A sandbox account and a production account count as two.

A request, its signers and its notifications belong to the company of its account. Nobody can move a signer or a request to an account of a company they do not work in: Odoo checks this on the target company too.

19 What happens automatically

TASK	FREQUENCY	WHAT IT DOES
Viafirma: poll pending signature requests	15 minutes	Brings up to date the requests that have not finished and downloads the signed ones.
Viafirma: clean old callback events	1 day	Deletes Viafirma notifications older than 90 days.

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

An ordinary day

TIME	WHAT HAPPENS
9:00	You confirm order S00007. With automatic sending on, it goes out to the customer for signature.
9:01	Viafirma notifies: the request is waiting for the signer.
12:30	The customer signs. The notification arrives, the request moves to **Signed**, and the signed PDF and audit trail are attached to the order.
16:00	A notification for another request is lost along the way.
16:15	The 15-minute check asks Viafirma and brings that request up to date.

20 If something goes wrong

No trial or subscription	Calls to Viafirma stop: nothing is marked as failed and nothing is deleted. Automatic sending leaves the request as a draft. It resumes when you renew.
Kill Switch switched on	The account does not call Viafirma. Switch it off on the account.
"Viafirma can only sign PDF files"	The attachment is not a PDF.
A signer with no email or phone	Enter one, or change how they are notified.
The server signature does not go out	The certificate ID is missing from the request or the account, or the request has signers.
The status does not change	Press **Refresh Status**. If it still does not change, check **Configuration › Callback Events** and that your Odoo can be reached from the internet.
Cannot extend or reject	This is only possible for sent requests that have not yet finished.

A FlexigoTech Cloud outage deletes nothing and does not disconnect the account: when the service returns, everything carries on where it left off.

Other messages you may see

Configure a Viafirma account first	There is no account for the document's company.
The source document no longer exists	The quotation or invoice was deleted after the wizard was opened.
This request was never sent	The document is in **Draft**: there is nothing to resend.
Viafirma responds, but with an unexpected response	**Test Connection** reached Viafirma, but the response was not the one expected. Check the **Environment**.
Credentials to move	An account from an earlier version stored its credentials in Odoo. An administrator moves them to the cloud with **Move credentials to FlexigoTech Cloud**.
Add at least one signer	The client signature needs signers. If you want your company to sign, switch to the server signature.
Each signer needs a name	Enter the name of the missing signer.
Days must be between 1 and 365	When extending the period, enter a number of days for that stage.
Already in a final state	The reminder for a completed request cannot be resent: Viafirma rejects it.
Could not determine who to send it to	The document has no contact with an email address to sign with. Add the email to the contact or choose the signer in the wizard.

21 Other ways of doing it and what it does not do

METHOD	WHAT IT INVOLVES
Manually, from the Viafirma panel	Download the PDF from Odoo, upload it, add the signers and, once finished, attach the signed copy again. Fine for a few signatures a month.
Paper and scanner	Print, sign, scan and someone attaches it in Odoo. No electronic audit trail.
Odoo Sign	Odoo's signing app, Enterprise only. It signs with Odoo, not with Viafirma.
This connector	Viafirma signatures from the Odoo document, with their status and the signed file saved on the same record.

What it does not do

- It does not create your Viafirma account or give you its credentials.
- It does not sign: Viafirma signs. Odoo sends and receives.
- It does not sign formats other than PDF.
- It does not include what Viafirma charges you per signature: that goes in your contract with Viafirma.
- It has not yet been tested against the real Viafirma: its test environment is still pending.
- It does not work on Odoo Online, which does not allow installing third-party modules.

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, and the 14-day trial does not require a card. With Standard, up to 3 Viafirma accounts; with Pro, up to 10. Without a trial or subscription, calls to Viafirma stop and everything already signed remains in your Odoo.

What is included and what is not

- Includes the connection to Viafirma through FlexigoTech Cloud, module updates and support within your plan's response time: 1 business day with Standard and 4 business hours with Pro, with a video call if needed.
- Help with setup and error fixing is always available to whoever buys the module, with or without a subscription.
- Does not include adapting the module to your needs, migrating your database to another Odoo version, setting it up for you, or Viafirma signatures, which you contract with Viafirma.

23 Frequently asked questions

What documents can I send for signature?

Quotations and sales orders, invoices, purchase orders and any PDF attachment.

Where is the signed document kept?

As an attachment on the quotation, invoice or order, with the audit trail.

Do I have to log in to Viafirma?

To sign, the signer uses the Viafirma link. To send and track the signature, no: everything is in Odoo.

Can several people sign?

Yes, each in their own stage: they sign in order.

How is the signer notified?

By email, by SMS, by both, or without notification.

How often is the status updated?

Immediately with the Viafirma notification, and every 15 minutes with the polling check.

What if the Viafirma notification is lost?

The 15-minute check asks about requests that are not yet finished.

Can my company sign on its own?

Yes, with the server signature and your certificate held in custody at Viafirma.

Does it include a timestamp?

With the server signature, using PAdES-T, LT or LTA.

How long do they have to sign?

The account's period: 3 days if you do not change it. **Extend Period** gives more.

Can I cancel a signature?

Yes, with **Reject**, as long as it has not finished.

What happens if I cancel the quotation?

Its open requests are rejected in Viafirma.

Can it be sent for signature automatically?

Yes, with **Auto-send on Confirmation** on the account.

Can I send several at once?

Yes, from the quotations list or the attachments list.

Does it sign other formats?

No, PDF only.

Can the client see it in the portal?

Yes, if they have a portal user: under **Signatures**, with its status.

Do I need Viafirma's test environment?

No. You can start in production; the sandbox is for testing.

Does OAuth2 work?

Yes: the account supports username and password or OAuth2.

Are my credentials stored in Odoo?

The password and secret are not: they are encrypted and sent to FlexigoTech Cloud. Odoo stores the username or client ID.

Do my PDFs go through FlexigoTech Cloud?

No. They are uploaded and downloaded directly between your Odoo and Viafirma.

Does it work without FlexigoTech Cloud?

No. Without a trial or subscription, calls to Viafirma stop, and what has been signed stays in Odoo.

Do I need Odoo Enterprise?

No. It uses Sales, Invoicing and Purchase from Odoo Community.

Does it work on Odoo Online?

No: Odoo Online does not allow installing third-party modules. It does work on Odoo.sh and on your own server.

Can I have several Viafirma accounts?

Yes: up to 3 with the Standard plan and up to 10 with the Pro plan.

And across several companies?

Yes: each account belongs to one company, and each user sees the ones they have access to.

Has it been tested with the real Viafirma?

Not yet: against a simulator built from their official documentation. Viafirma has not yet provided us with its test environment.

Who pays for Viafirma signatures?

You, under your Viafirma contract. FlexigoTech does not charge per signature.

Can I remind someone who has not signed yet?

Yes, with **Resend Notification** on the request.

Can I send the same document twice?

Yes, from the wizard: each send is a new request. Automatic sending does not send another one if a request is already open.

Can I change the title the signer sees?

Yes, in the wizard. It comes with the document number.

What do I do with an expired request?

It no longer changes. Send the document again from it, with a longer period if needed.

Can I have sandbox and production at the same time?

Yes, as two accounts. They count as two in your plan.

What happens if I uninstall the connector?

Your credentials are deleted from FlexigoTech Cloud. What has been signed stays in Odoo, attached to its documents.

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24 Glossary

Signature request	A submission to Viafirma: one PDF, its signers and its status.
SET	A request is what Viafirma calls a signing request. Its code is in the request.
Signer	The person who has to sign, with their stage and their reminder.
Stage	The signing order: signers at stage 1 sign before those at stage 2.
Client signature	A person signs from the link Viafirma sends them.
Server signature	Your company signs with its custodied certificate, with nobody present.
Custodied certificate	Your certificate stored in Viafirma, which signs on behalf of your company.
PAdES	The signature format for PDFs: B, T (timestamp), LT (long-term) and LTA (archive).
Timestamp	The date of the signature, certified by a third party.
Audit trail	The PDF in which Viafirma records who signed, when and with what evidence.
Callback	The notification Viafirma sends to your Odoo when a request changes.
Group code	The group for your Viafirma account; it appears in its control panel.
Sandbox	Viafirma's test environment: signatures made here are not valid.
Emergency stop	The switch that stops all calls for an account.
Pause	What the connector does without a test or a subscription: it does not call Viafirma and does not mark anything as failed.

Message code	The document's code within the request. You use it to download the signed file and the audit trail.
Upload link	The address Viafirma gives you, valid for a short time, to which your Odoo uploads the PDF.
Pending review	The signer has finished, but an approval in Viafirma is still missing. The signed PDF can already be downloaded.

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25 Checklist and contact

- [ ] Your Viafirma Documents account and its group code.
- [ ] The credentials for its API: username and password, or OAuth2.
- [ ] If you are going to sign as a company: the ID of your custodied certificate.
- [ ] Odoo 17, 18, 19 or 20 on Odoo.sh or on your own server, with its public address.
- [ ] The module installed and the FlexigoTech Cloud trial started.
- [ ] The account created in the **Production** environment, with an administrator's consent.
- [ ] **Saved in FlexigoTech Cloud** with a date and **Test Connection** showing green.
- [ ] The expiry and the reminder texts reviewed in the account.
- [ ] If you want it: **Auto-send on Confirmation** switched on.
- [ ] The first quotation sent and, once signed, its signed PDF on the quotation.

If you'd like us to set it up with you, get in touch. On 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/viafirma-connector-odoo.html

On Odoo Apps

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

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