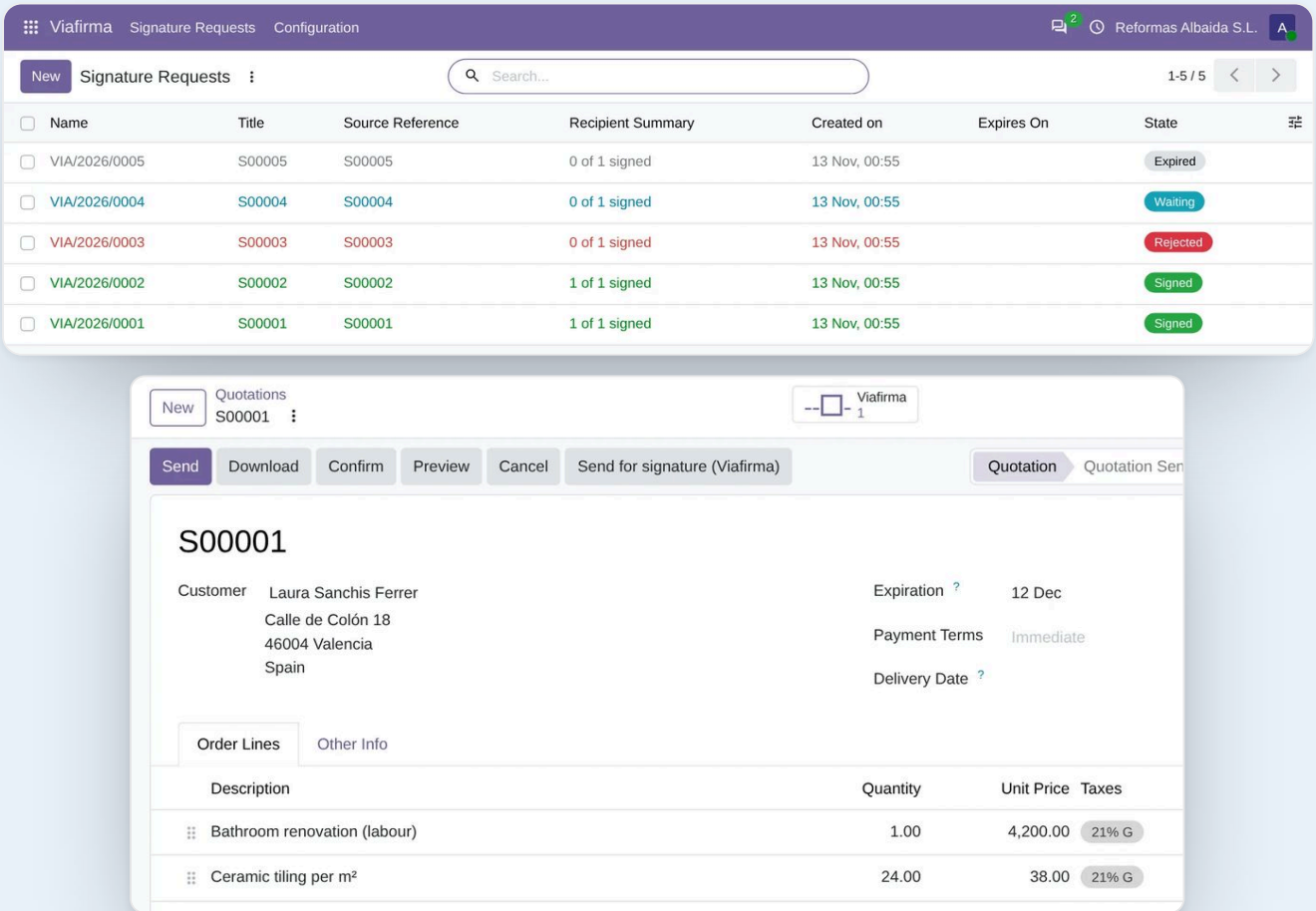
USER MANUAL · E-SIGNATURE

Viafirma connector for Odoo

For those who already have the connector: install it, activate it, connect it, set it up and use it, step by step.

Module version 20.0.1.2.2 | Odoo 20 screenshots | Edition of 14-11-2026



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

Contents

On the right, the page where each section starts. Menu and button names are those of Odoo in English.

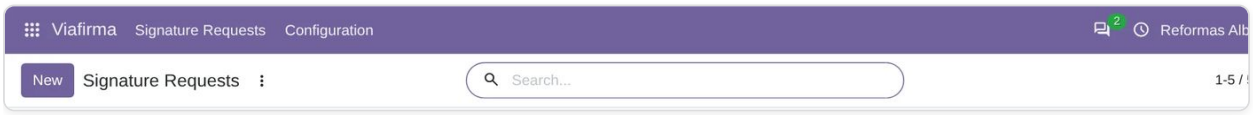
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This manual describes version 20.0.1.2.2 of the module (Odoo branch 20.0, commit 59a89acdb). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to Viafirma. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

1 What it is and where to find it

The connector adds the Viafirma app to Odoo. From any quote, invoice, purchase order or PDF you send the document for signature with Viafirma Documents, track its status and receive the signed PDF and its audit trail in Odoo.



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

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

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

2 Before you start

This is what you need before installing. The connector is the Odoo part: you contract your Viafirma account yourself.

- A Viafirma Documents account and its **Group Code**, which appears 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).
- So that your company can sign without anyone present (server signing), the ID of your certificate held in custody at Viafirma.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your own server, not on Odoo Online, with a public address: Viafirma notifies that address when a signature changes. Works on Community and Enterprise.
- An Odoo administrator: accepts the FlexigoTech Cloud data list and the passing of your credentials through the cloud.

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

3 Installation

The module is installed like any third-party Odoo module. An administrator is required.

How to get it

From its Odoo Apps page (**https://apps.odoo.com/apps/modules/20.0/flexigobe_viafirma_connector**) or from the connector's page on flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module page lists it under «Community Apps Dependencies» and its price already includes it; it is also free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same modules path and Odoo installs `flexigotech_cloud` at the same time.

On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigobe_viafirma_connector` and `flexigotech_cloud` into the branch of your project, in your modules folder, and push.

2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.

3. **Install the app**
   In **Apps**, click **Update Apps List** (with developer mode), search for «Viafirma» and click **Activate**.

On your own server

1. **Copy the folders**
   Place `flexigobe_viafirma_connector` and `flexigotech_cloud` in a folder that is on the `addons_path` of your Odoo.

2. **Restart Odoo**
   So that it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for «Viafirma» and click **Activate**.

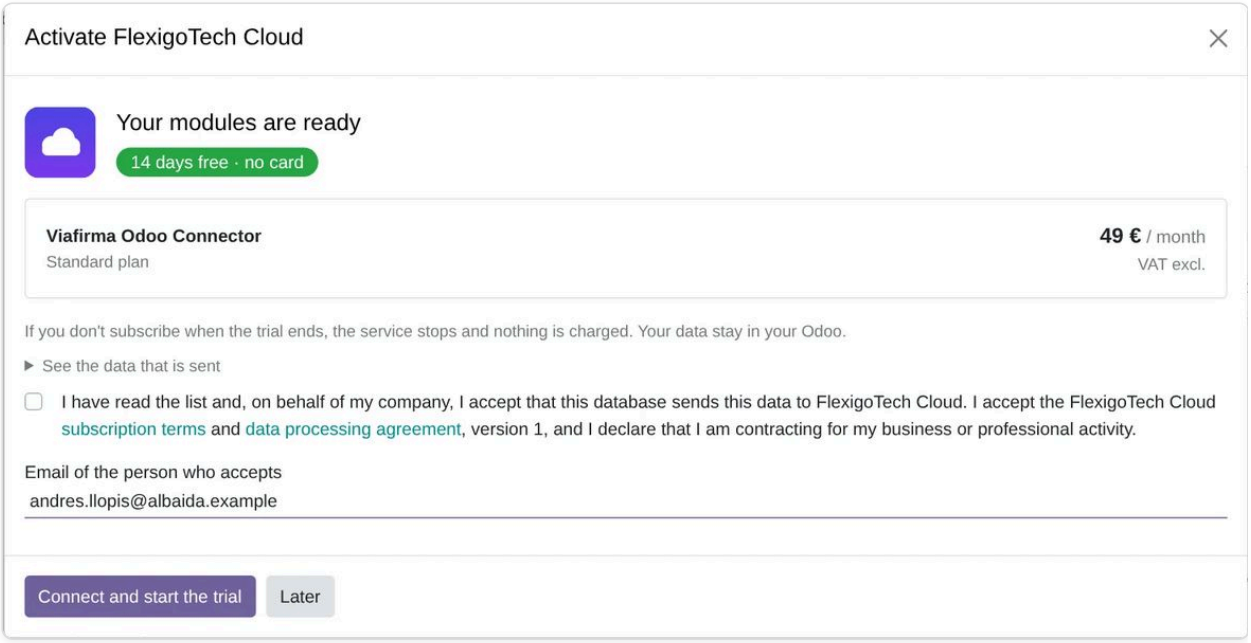
> When you install it, Odoo also installs the apps the module depends on: Sales, Invoicing and Purchases. If you already use them, nothing you have changes.

4 Activate FlexigoTech Cloud: the 14-day trial

Every call to the Viafirma API goes through FlexigoTech Cloud: your password or secret goes to the cloud once, encrypted, and the cloud uses it on every call. The PDFs upload and download directly between your Odoo and Viafirma. Until the database is connected and the module has a trial or subscription, the connector does not talk to Viafirma.

1 **Click Activate in the bar above**

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 data list, tick the box and enter your email.

2 **Accept and enter your email**

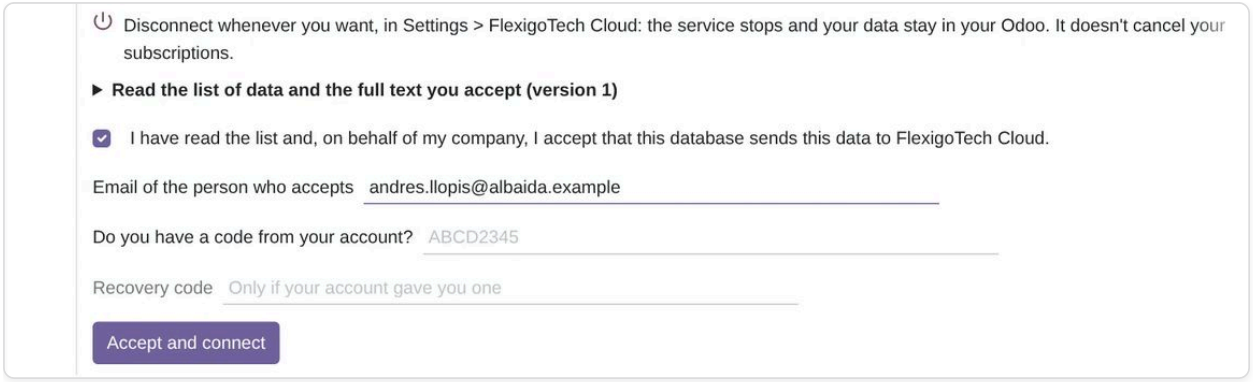
Tick «I have read the list and, on behalf of my company…» (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

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

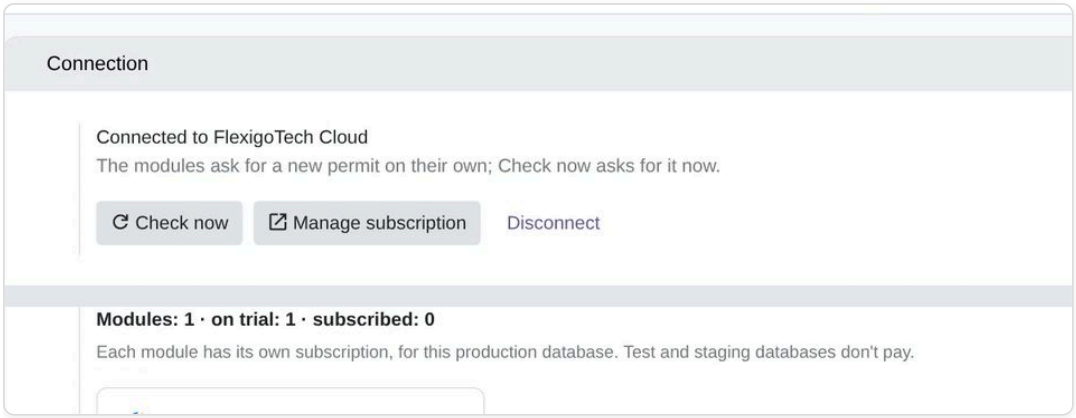
The same, from Settings

In **Settings › FlexigoTech Cloud** is 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**, etc. 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.

PLAN	PRICE	INCLUDES
Standard	€49 a month or €490 a year	Support response within 1 working day, up to 3 accounts
Pro	€98 a month or €980 a year	Response within 4 working hours, up to 10 accounts and video call if needed

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** asks for permission right away (otherwise the module renews it by itself every 6 hours).

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

5 Connect your account

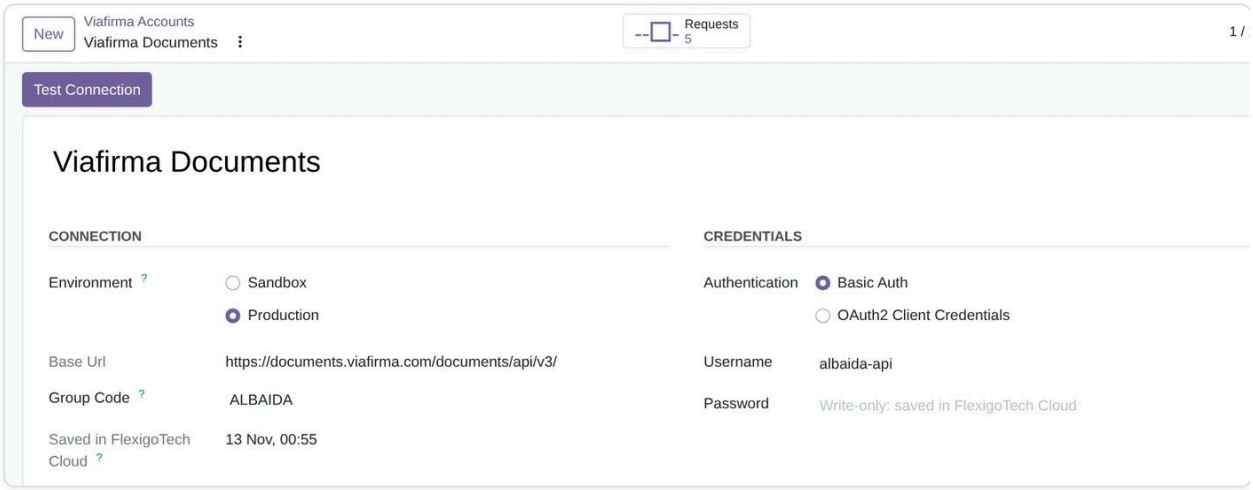
Each Viafirma account is an account in **Configuration › Accounts**, inside the Viafirma app.

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

2. **Choose the environment**
   Environment is 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 your **Password** or your **Client ID** and your **Client Secret**.

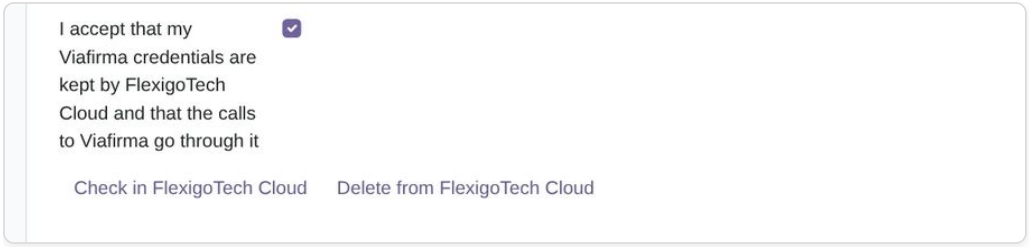
4. **Accept and save**
   Tick the box accepting that FlexigoTech Cloud stores your credentials and that calls to Viafirma pass through it, and save. The password or secret goes to the cloud and Odoo only keeps the username or client ID.



- **Real Odoo 20 screenshot.** The connected account: the environment, group code and 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 appear empty because Odoo does not hold them. If you change the username or client ID, enter the password or secret again.



- **Real Odoo 20 screenshot.** The account's FlexigoTech Cloud box and its two buttons.

Only an Odoo administrator can tick the box. If you clear it, the calls stop and the credentials remain in the cloud until you click **Delete from FlexigoTech Cloud**.

The account, field by field

Environment and **Base Url**	Sandbox or production, and the Viafirma API address that follows from it.
Group Code	Your account's group in Viafirma. It goes in 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 that Viafirma notifies, with the account's secret.
Sent (30 days) and **Signed (30 days)**	What has been sent and what has been signed over the last month.
Kill Switch	Immediately stops all of the account's calls to Viafirma.

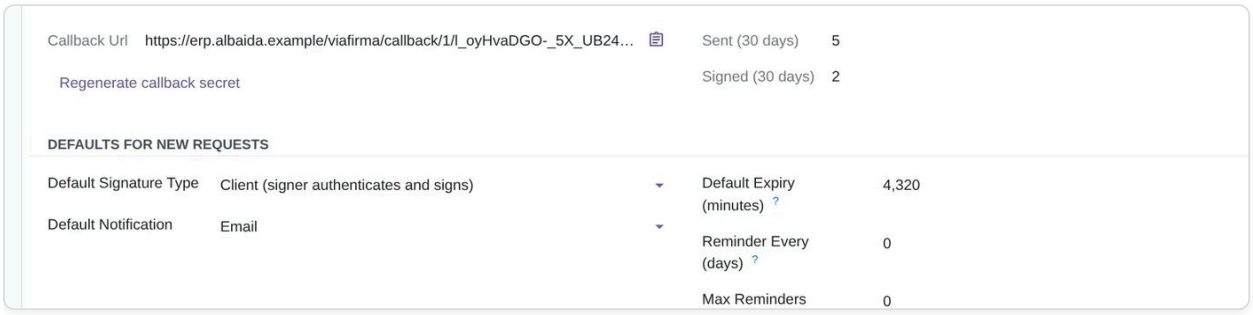
If you were already using an earlier version

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 its consent, and removes them from Odoo.
Delete them from this database	Deletes them from Odoo without sending them anywhere. Afterwards, enter the credentials again.

6 The values for each request

Further down the account are the values each new request takes. They come as follows:



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

VALUE	WHEN THE ACCOUNT IS CREATED	WHAT IT DOES
Default Signature Type	Client	The person signs: they receive the notification 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 server signing.
Request Email Subject, **Request Email Body** and **Request SMS Body**	Empty	Your notification texts; if empty, Viafirma's.
Auto-send on Confirmation	Off	Sends for signature automatically 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 text of the SMS. They help the signer recognise your company and know what they are signing. If left empty, Viafirma uses its own.

The connector settings

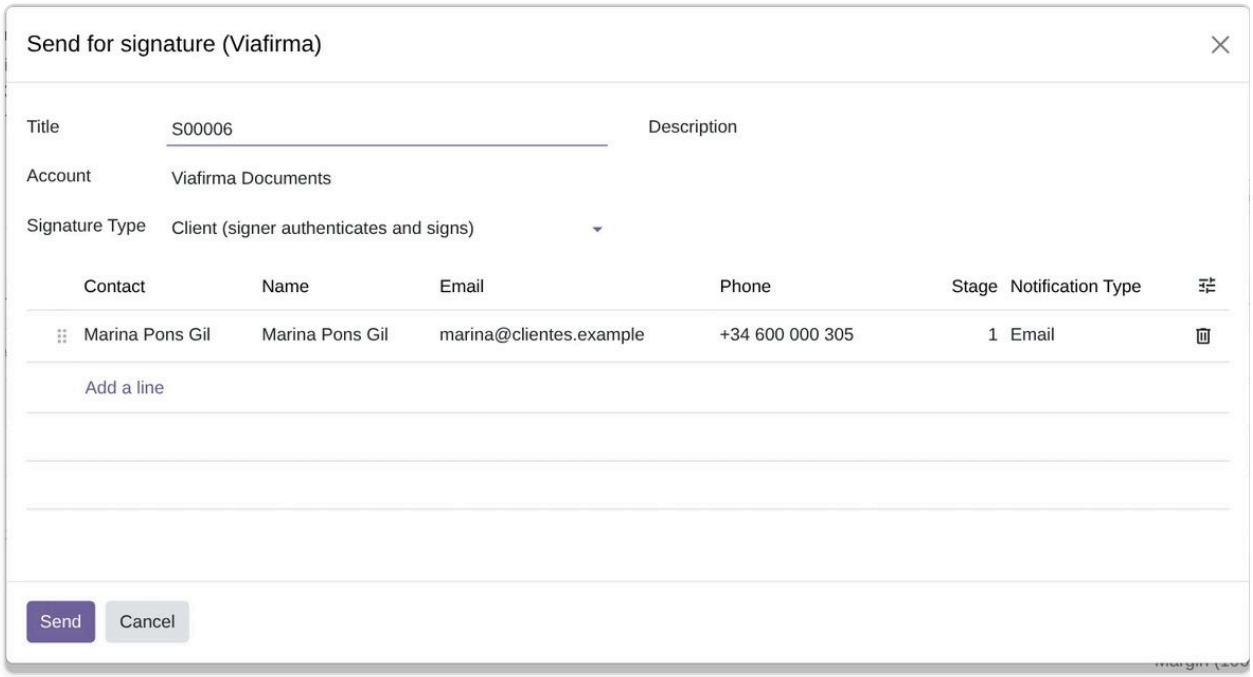
In **Settings**, the Viafirma section has two more things: the **Default Viafirma Account**, which the wizard and automatic sending use when there are several, and how long Odoo waits for Viafirma on the calls it makes directly (**Viafirma Request Timeout (s)**: 30 seconds unless you change it). The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

7 Send a document for signature

From the document, using the **Send for signature (Viafirma)** button.

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 client or supplier on the document 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 one with their **Name**, their **Email** or their **Phone**, their **Stage** and how they are notified. Signers sign in stage order: stage 1 first, then stage 2.

4. **Click Send**
   Odoo generates 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 client signing, at least one signer, and each one with a name.
- A valid email if they are notified by email, and a phone number if they are notified by SMS. The phone number must include its prefix: +34600111222.
- For server signing, no signers and a certificate.
- That Odoo has its public address set, so that Viafirma can send notifications.

8 Client signing and server signing

The **Signature Type** decides who signs.

Client (signer authenticates and signs)	A person signs. Viafirma sends them the notification, they identify themselves and sign. There can be several signers, by 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.

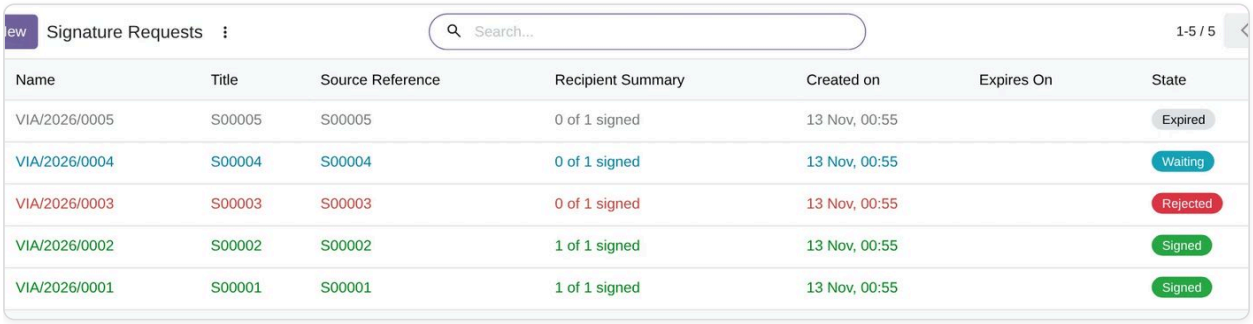
For server signing you also choose the **Signature Format**:

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

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

9 The request and its statuses

Signature Requests stores each submission. Each request carries the status given by Viafirma.

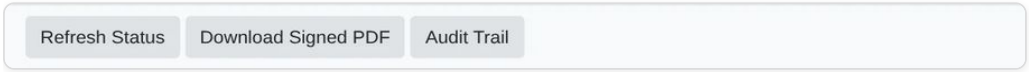


- **Real Odoo 20 screenshot.** The requests: expired, waiting, rejected and signed.

STATUS	WHAT IT MEANS
Draft	Not yet sent.
Received	Viafirma has it.
Waiting	Waiting for the signers.

STATUS	WHAT IT MEANS
Waiting Client Signature	A signer is due to sign.
Waiting Check	Signed and pending a review in Viafirma. The signed 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 an old notification arrives late, it does not change a request that is already further along.



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

Refresh Status	Asks Viafirma right away.
Resend Notification	Notifies again the signers who have not yet signed.
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**	Both files are downloaded from Viafirma.

Which buttons appear in each state

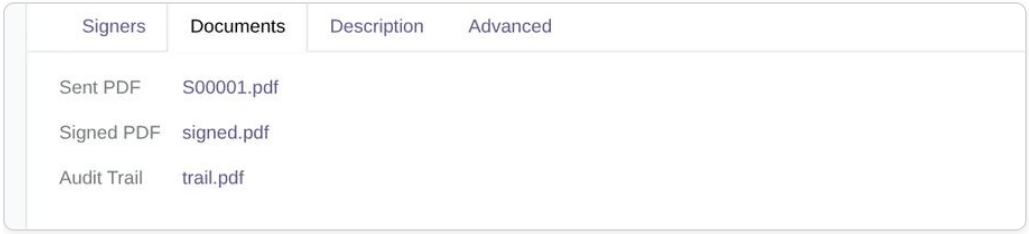
BUTTON	APPEARS WHEN THE REQUEST IS
Send	**Draft** or **Error**.
Refresh Status, **Resend Notification**, **Extend Period** and **Reject**	Sent and not finished: neither **Signed**, nor **Rejected**, nor **Expired**, nor **Error**.
Download Signed PDF and **Audit Trail**	**Signed** or **Waiting Check**.

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

10 The signed document

When the request reaches **Signed**, the connector does the rest on its own.

- It downloads the signed PDF and the audit trail from Viafirma.
- It saves them as attachments on the quotation, invoice or order the request came from (if it came from an attachment, on the request itself).
- It 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 PDF sent, 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 a 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 both automatically, so there is no need to log in to Viafirma to find 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 rather than duplicated.

Where you find them afterwards

- On the quotation, invoice or order itself: both PDFs are among its attachments, and its history reads "All signers have completed" the request in Viafirma.
- On the request: the **Documents** tab holds the **Sent PDF**, the **Signed PDF** and the **Audit Trail**, and its history notes "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.

11 Automatic and bulk sending

So you don't have to press the button on each document.

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 ahead 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**, choose **Send for signature (Viafirma)**: each one goes to its customer using the account's values. The same applies to PDF attachments.

When it triggers

DOCUMENT	GOES OUT FOR SIGNING 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, using their Odoo email and phone and the account's notice. If the contact has no email, nothing is sent and the document notes it.

How bulk sending works internally

Each marked document goes out to its customer using the default account's values. When it finishes, Odoo reports how many requests were sent and which ones failed and why. If FlexigoTech Cloud is paused midway, what was already sent stays in Viafirma and the rest waits.

12 How the status is kept up to date

By two routes: Viafirma's notification, right away, and a check every 15 minutes.

Each request carries the **Callback Url** of its account. Viafirma sends a notification there each time it changes, and the status is updated right away. The notifications go straight to your Odoo, without passing through FlexigoTech Cloud, and the URL includes a secret: without it, Odoo does not accept the notification.

Viafirma does not repeat a notification that fails. That is why the task **Viafirma: poll pending signature requests** 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 each notification received. The task **Viafirma: clean old callback events** deletes, every day, those older than 90 days.

13 What happens automatically

The connector's scheduled tasks, with their frequency when installed:

TASK	FREQUENCY	WHAT IT DOES
Viafirma: poll pending signature requests	15 minutes	Updates the requests that have not finished and downloads what has been signed.
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.

14 If something goes wrong

What usually happens and where to look.

No trial or subscription	Calls to Viafirma are stopped: nothing is marked as failed and nothing is deleted. Automatic sending leaves the request as a draft. It resumes on renewal.
Kill Switch enabled	The account does not call Viafirma. Turn it off on the account.
"Viafirma can only sign PDF files"	The attachment is not a PDF.
A signer without an email address or phone number	Add one, or change how they are notified.
The server signature is not going out	The certificate ID is missing from the request or the account, or the request includes signers.

The status does not change	Click **Refresh Status**. If it still does not change, check **Configuration › Callback Events** and make sure your Odoo instance can be reached from the internet.
It cannot be extended or rejected	This is only possible with requests that have been sent and are not yet completed.

A FlexigoTech Cloud outage does not delete anything or disconnect the account: when the service comes back, everything is where you left it.

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15 Support

Get in touch for installation, configuration or any questions. On the Standard plan we reply within 1 working day; on the Pro plan, within 4 working hours, and if needed we can go through it on a video call. Tell us your Odoo version, the module version and, if there is an error, its full text.

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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