E-Signature Request Track

User Guide · Odoo 18.0 & 19.0

BYOK e-signature orchestration: DocuSign/Dropbox-Sign request tracking, reminders, status board

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1. Overview

E-Signature Request Tracker (BYOK) ==========

Orchestrate electronic signature requests through your own DocuSign or Dropbox Sign account (Bring Your Own Key). Odoo's native Sign module is an Enterprise feature and the various provider integrations are scattered. This module gives you one tracking layer on top of the e-signature provider you already pay for.

Features -------- * Provider connection records storing your own API credentials (BYOK). * Signature requests with multiple signers, ordered/parallel routing. * Status board (draft, sent, partially signed, completed, declined, voided, expired) with kanban progression and aging. * Automatic reminder cron that nudges pending signers based on a configurable cadence and stop-after limit. * Expiry handling and a void/cancel flow. * Audit trail of every status transition and reminder sent.

Compliance ---------- Designed with eIDAS / UK eIDAS advanced electronic signature workflows in mind. The provider you connect performs the legally binding signing; this module tracks and orchestrates the requests.

2. Installation

Open Apps, click Update Apps List, search for “E-Signature Request Track” (technical name **gb_e_signature_request_tracker**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- E-Signatures
- Requests
- Configuration
- Provider Connections

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
esign.event	E-Signature Audit Event
esign.provider	E-Signature Provider Connection (BYOK)
esign.signer	E-Signature Signer
esign.request	E-Signature Request
esign.reminder.wizard	Send Signature Reminder Wizard

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.

4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.