eSignatures Integration for ERPNext (Quotation)

Overview

This application integrates eSignatures with ERPNext to enable electronic signing of Quotations.
It allows users to send Quotations for signature, track signing status, and update records automatically.

Features

- Send ERPNext Quotations for electronic signature
- Dynamic template selection from eSignatures account
- Flexible placeholder mapping for any template design
- Automatic email with Quotation PDF and signing link
- Webhook-based status update after signing
- Signed PDF URL and signature date stored on Quotation
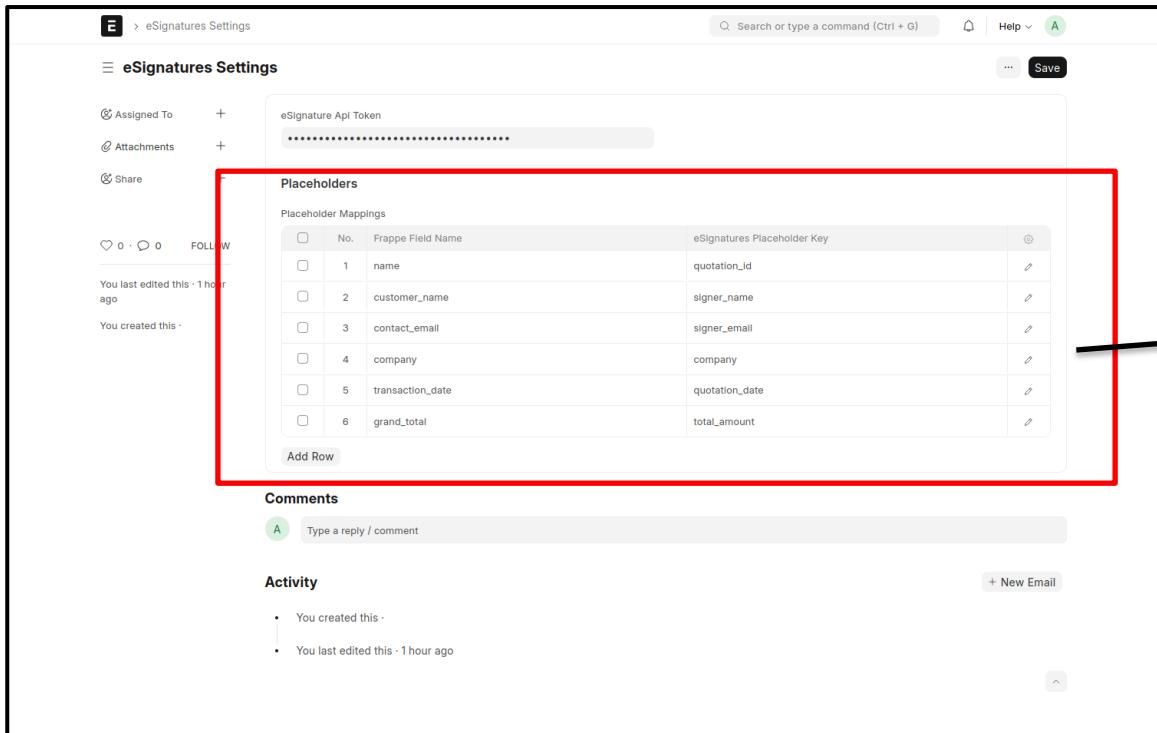- Notifications for internal users

Installation

a) Get the app:
   bench get-app esign <repository-url>
b) Install on site:
   bench --site your-site-name install-app esign
c) Run migration:
   bench migrate

Configuration

a) Go to:

   ERPNext → eSignatures → eSignatures Settings

   ▪ eSignature API Token

Example
Placeholders

   ▪ Paste your API token from eSignatures dashboard.
     If no token is added, the app remains inactive

eSignatures Settings Doctype:

b) Placeholder Mappings
Map ERPNext Quotation fields to placeholders used in your eSignatures template.

Template Setup (eSignatures)

- Create a template in your eSignatures account
- Add text placeholders matching your mappings
- Save the template

Usage – Sending Quotation for Signature

a) Open a Quotation (Draft)
b) Select eSignature Template
c) Click 'Send for Signature'
d) Customer receives:
  - Quotation PDF
  - Signing link via email

Send for Signature Button

After Signing

Once the customer signs:
- Webhook updates the Quotation
- Signed PDF URL is saved
- Signature date is recorded
- Document marked as signed
- Notification sent to users

Signed Quotation

Webhook Configuration

- Set webhook URL in eSignatures dashboard:
  https://your-domain.com/api/method/esign.api.esignature_webhook
- This is required for automatic status updates.
  Webhook Configuration

Roles & Notifications

Role: e-signature
Users with this role receive notifications and emails when a Quotation is signed.

Troubleshooting

Templates not loading:
• Check API token in settings

Button not visible:
• Quotation must be Draft and unsigned

Signed PDF not updating:
• Verify webhook URL

Security

• API token stored securely as Password field
• Webhook verified using HMAC SHA256
• No unnecessary data stored