

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.

The screenshot shows the ERPNext Quotation page for a document titled "SAL-QTN-2025-00001". The page includes a sidebar with options like "Assigned To", "Attachments", "Tags", and "Share". A message box says "This document has been signed.". The main content area displays quotation details such as "Quotation To" (Customer), "Date" (25-12-2025), "Order Type" (Sales), "Customer" (Seeeeemaaaabbb), "Valid Till" (25-01-2026), "Signature Date" (25-12-2025), and "eSignature Template" (Test). It also shows a "Signed PDF URL" which is a complex AWS S3 URL. There are checkboxes for "Signature Sent" and "Document Signed", both of which are checked. The bottom of the page has a "Currency and Price List" section.

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

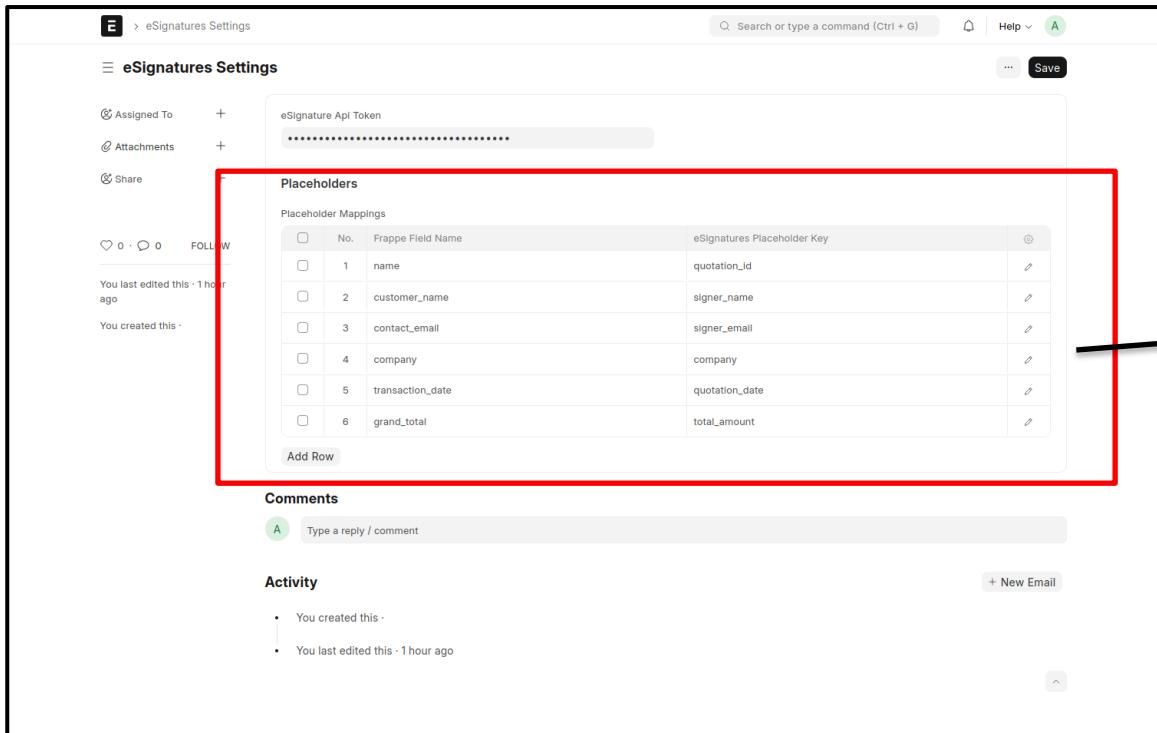
- a) Get the app:
bench get-app esign <repository-url>
- b) Install on site:
bench --site your-site-name install-app esign
- c) Run migration:
bench migrate

Configuration

- a) Go to:

ERPNext → eSignatures → eSignatures Settings

- eSignature API Token



The screenshot shows the 'eSignatures Settings' page in the ERPNext application. At the top, there are sections for 'Assigned To' and 'Attachments'. Below these, a 'Share' section indicates 0 shares and 0 follows. A note says 'You last edited this · 1 hour ago' and 'You created this ·'. The main area has tabs for 'Placeholder' (which is selected and highlighted with a red box), 'Comments', and 'Activity'. The 'Placeholder' tab contains a 'Placeholder Mappings' table with the following data:

No.	Frappe Field Name	eSignatures Placeholder Key
1	name	quotation_id
2	customer_name	signer_name
3	contact_email	signer_email
4	company	company
5	transaction_date	quotation_date
6	grand_total	total_amount

An 'Add Row' button is at the bottom of this table. To the right of the table, an arrow points to a callout box labeled '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

The screenshot shows a software interface for managing quotations. A red box highlights a confirmation message: "This document has been signed." An arrow points from this message to a box labeled "Signed Document".

Quotation Details:

- Quotation To:** Customer
- Date:** 25-12-2025
- Order Type:** Sales
- Customer:** Seeeeemaaaabbb
- Valid Till:** 25-01-2026
- Signature Date:** 25-12-2025
- eSignature Template:** Test
- Signed PDF URL:** https://esignatures-production-us-east-1.s3.amazonaws.com/contract_records/2025/141c9efe-abb6-4f0b-a7e9-463d657f6f64/d998c4bd-c9e4-4f0d-8a53-25b6c77035d6/20251225-Test%20-%20Seeeeemaaaabbb.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIAQCASMUJFRMRV4LM4%2F20251225%2Fus-east-1%2Fs3%2Faws4_request&X-Amz-Date=20251225T145309Z&X-Amz-Expires=259200X-Amz-SignedHeaders=host&X-Amz-Signature=95c67c455996fc7ce64ebba0a5b7230663041af3184bab251a431f223753f094

Currency and Price List: (link)

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

The screenshot shows the "Settings" page in the eSignatures dashboard. It displays two configuration fields:

- Your support email address (Reply-to for integrations): `seemabasghar64@gmail.com`
- Your default API webhook endpoint: `https://fcb952e17fa2.ngrok-free.app/api/method/esign.api.esignature_webhook`

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