Summary Page

The summary page provides a summary of the resulting envelope (before sending) and allows to double check different parameters. In addition, it allows to set some envelope-level parameters e.g. about e-mail notifications.

Overview	Description

	1. Summary contains information about:
	   a. Envelope name
	   b. Recipients
	      i. By clicking on the different recipients the recipient related messages will be displayed below
	   c. Messages
	   d. Documents
	2. Notification Settings
	Define the settings for the notifications (relative or absolute) expiration and also the notifications for the continuing reminders and the reminder before expiration.
	
	(i) Please note: There is a minimum and a maximum value for the expiration setting:
	
	   • Minimum value: 10 min (cannot be changed through settings)
	   • Maximum value: default - 28 days (can be changed in the global.xml configuration - `maxEnvelopeValidityInDays`)
	
	If the entered value is below the minimum or above the maximum, a warning will be displayed
	
	3. General Settings
	   a. Use qualified timestamp
	   b. Prevent editing form fields after envelope is finished
	4. Wizard Navigation Bar

Wizard Navigation Bar

The navigation control of the wizard, with following buttons while on the Summary Page:

- Arrow-Back, navigates to the designer page
- Discard, which deletes (after confirmation dialog) the draft
- Save-As
    - Template, allowing to create a new Template based on the data configured for the Draft
    - Draft, persisting the changes made on the draft and returning back to the Envelope Filter View.
- Sign-Button, visible and accessible only when the first signer of an envelope is the sender
- Developer Mode
- Send Envelope or (Next-) Button

Developer Mode ("DEV")

The DEV button is visible for users having the role "Developer" or any other role with the specific permission assigned. The functionality is intended to help integrators doing tests with their API integration. The provided data structures have to be used carefully; as the resulting data structure is very detailled and often contains values which are default values. We recommend to review all data returned carefully before using them in an integration scenario. Those values not set by intention should typically not be set via API, to ensure that system settings are considered when changing them.

The Developer Mode will return JSON structures typically fitting to the newest API versions offered by the product. Older API versions' data models are by intention not provided.

The Developer Mode may show, in some situations after an update, that the utility is not available for an envelope. This happens when internal data structures changed. In this case, recreate for investigation with that utility a new envelope on the version where you want to observe its integration parameters.

In product versions starting with 22.50, the tool is capable of creating REST API v6 JSONs only. If the tool is invoked on an envelope (draft) that was created using v5 API, the following error will be shown because it cannot be executed on a v5-created envelope: "The envelope is not compatible".

> ⓘ **Hint for customers using APIs prior to API v6**
>
> Customers using API versions prior to API v6 may use a release before 22.50 to extract the old JSON. The API v4 and v5 models are very comparable.
> Until April 2023, https://demo-lts.esignanywhere.net is offering a 21.76 release with the old developer mode. After demo-lts was updated to 22.76, the 21.76 release will still be published at https://demo-22lts.esignanywhere.net until April 2024.

Send-Envelope (or Next-) Button

Typically, the Summary Page represents the final page of the Create Envelope Wizard. In this case, a "Send Envelope" button starts an Envelope based on the information shown in the draft editor before.

The "Send Envelope" button is replaced with a Next-Button in case a "Before Draft Send Redirect URI" was configured in Settings - Organization. In these scenarios, additional custom pages can be added to the Create Envelope Wizard. Such custom pages can be used for various scenarios:

- Extra validation of the envelope configuration, to ensure company policy compliance
- Collect extra information for callback handler implementations, such as storign the sender-user of an envelope ID or retrieving "user token" authentication via OAuth Code Grant flow
- Custom tagging pages for a document management system (DMS) integration
- etc.

An example using this functionality to add custom tagging pages for a document management system (DMS) integration is described in Document Tagging Scenario - Example showing how to collect metadata for DMS archiving