

# The Story

## Use Case Description

- The head of the company who wants to see all documents
- The seller who just wants to see the offer and the calculation
- The customer who only should see the offer



## Prerequisites

- ## UI Example

Figure

Description

1. Visibility Settings

CREATE ENVELOPE

Envelope

Test.pdf

Prevent sharing with team members

SETTINGS

Documents

UPLOAD

ADD A TEMPLATE

Test.pdf

RENAME

Test11.pdf

RENAME

Recipients

1

Manual

Gierfinger

Mobile phone (Optional)

LO

🔒

🔒

🔒

2

Manual

Gierfinger

Mobile phone (Optional)

LO

🔒

🔒

🔒

3

Charly

Xyomo

Mobile phone (Optional)

LO

🔒

🔒

🔒

ADD RECIPIENT

ADD SELF

BULK SENDING

DOWNLOAD TEMPLATE FOR BULK SENDING

ADD AUTOMATIC

Send finished documents to all signers and must view recipients

Document Visibility

Message

Subject

Please sign the enclosed envelope

Dear #RecipientFirstName# #RecipientLastName#

#PersonalMessage#

Please sign the envelope #EnvelopeName#

DELETE

SAVE AS

NEXT

After you set the recipients and the documents you see that the document visibility settings appear. There you can decide who should see a document and who should not. The following screenshot shows an overview of these settings:

1

2

3

Documents

UPLOAD

ADD A TEMPLATE

Test.pdf

Test(1).pdf

RENAME

RENAME

Recipients

1

2

3

Manuel

Manuel

Charly

Gierlinger

Gierlinger

Xyzmo

Mobile phone (Optional)

Mobile phone (Optional)

Mobile phone (Optional)

ADD RECIPIENT

ADD SELF

BULK SENDING

DOWNLOAD TEMPLATE FOR BULK SENDING

ADD AUTOMATIC

Send finished documents to all signers and 'must view' recipients

Document Visibility

Manuel Gierlinger

Manuel Gierlinger

Charly Xyzmo

Test.pdf

Test(1).pdf

ON

ON

ON

Message

Subject

Please sign the enclosed envelope

Dear #RecipientFirstName# #RecipientLastName#

DELETE

SAVE AS

NEXT

In this case the first recipient (customer) does not see the calculation, the second recipient (seller) does not see the terms and the third recipient (head of the department) can see all documents.

On the designer page you can see that for example the customer can not see the document. Therefore, it is not possible to place elements for the customer on this page.

The designer:

Figure	Description
<div><div>DESIGNER</div><div><div>Recipients</div><div><div>Manuel Gierlinger</div><div>Manuel Gierlinger</div><div>Charly Xyzmo</div></div></div><div><div>Form fields</div><div><div>Textfield</div><div>Signature</div><div>Radio button</div><div>Checkbox</div><div>Listbox</div><div>Combobox</div><div>Signer Attachment</div><div>Read Confirm</div><div>Link</div></div></div><div><div>Predefined Fields</div><div><div>Email</div><div>Initials</div><div>First name</div><div>Last name</div><div>Full Name</div><div>Date</div><div>Static Text</div></div></div></div> <div><div>Preview</div><div><div>Test.pdf</div><div>Page 1</div></div><div><div>Test(1).pdf</div><div>Page 1</div></div></div> <div><div>BACK</div><div>DELETE</div><div>SAVE AS</div><div>NEXT</div></div>	<div>1. This page is not visible for this recipient</div>

Integration

Steps:

- Upload two to more documents
- Send the envelope

## Upload Document

For this step you have to upload two to more documents for the document visibility.

## Send Envelope

The following lines of code show the configuration of the hidden documents:

```
"VisibilityOptions": [{
  "DocumentNumber": 2,
  "IsHidden": true
}]
```

Please see also a complete configuration here:

Note: This sample includes two recipients, the first recipient who can only view the first document, and the second recipient who can view both documents.

```
{
  "Documents": [{
    "FileId": "3c816859-06da-4223-b5ef-3b52a3af1c77",
    "DocumentNumber": 1
  }, {
    "FileId": "92b37d56-cbe0-448e-9689-28daeeef07f3",
    "DocumentNumber": 2
  }
],
  "Name": "Test",
  "Activities": [{
    "Action": {
      "Sign": {
        "RecipientConfiguration": {
          "ContactInformation": {
            "Email": "johndoe@sample.com",
            "GivenName": "Jane",
            "Surname": "Doe",
            "LanguageCode": "EN"
          },
          "PersonalMessage": "Please sign this document asap!",
          "DisableEmail": false
        },
        "Elements": {
          "SequenceMode": "NoSequenceEnforced",
          "Signatures": [{
            "TaskConfiguration": {
              "OrderDefinition": {
                "OrderIndex": 0
              }
            },
            "ElementId": "ClickToSign one",
            "Required": true,
            "DocumentNumber": 1,
            "DisplayName": "Sign here",
            "AllowedSignatureTypes": {
              "ClickToSign": {}
            },
            "FieldDefinition": {
              "Position": {
                "PageNumber": 1,
                "X": 100,
                "Y": 200
              },
              "Size": {
                "Width": 100,
                "Height": 70
              }
            }
          }
        }
      }
    }
  ]
},
}
```

```

    "SigningGroup": "firstSigner"
  },
  {
    "VisibilityOptions": [{
      "DocumentNumber": 2,
      "IsHidden": true
    }]
  },
  {
    "Action": {
      "Sign": {
        "RecipientConfiguration": {
          "ContactInformation": {
            "Email": "janedoe@sample.com",
            "GivenName": "Jane",
            "Surname": "Doe",
            "LanguageCode": "EN"
          },
          "PersonalMessage": "Please sign this document asap!",
          "DisableEmail": false
        },
        "Elements": {
          "SequenceMode": "NoSequenceEnforced",
          "Signatures": [{
            "TaskConfiguration": {
              "OrderDefinition": {
                "OrderIndex": 1
              }
            },
            "ElementId": "clickToSign two",
            "Required": true,
            "DocumentNumber": 2,
            "DisplayName": "Sign here",
            "AllowedSignatureTypes": {
              "ClickToSign": {}
            },
            "FieldDefinition": {
              "Position": {
                "PageNumber": 1,
                "X": 100,
                "Y": 200
              },
              "Size": {
                "Width": 100,
                "Height": 70
              }
            }
          ]
        }
      },
      "SigningGroup": "secondSigner"
    }
  }
]
}
}

```