

The Story

Use Case Description

1. Create a template
2. Use the template

Figure	Description
The screenshot displays the 'TEMPLATES' section of the eSign AnyWhere application. On the left sidebar, the 'TEMPLATES' menu item is highlighted with a red circle and the number 1. The main content area shows '0 TEMPLATES' and a message 'The template list is empty'. A red button labeled 'Create your first template' is highlighted with a red circle and the number 2. The interface also includes a search bar and a 'Sort by: Recent Activity' dropdown menu.	1. You can create a new template in this section 2. Click this button to create the first template

[illegible]

You can either define a recipient for the template like it is shown in the figure above, or you can define placeholder. Note: If you define placeholders for your template you have to override them if you use the template.

Here you can find a figure of a template with two placeholders:

EDIT TEMPLATE

Template

Template

☐ Prevent sharing with team members

☐ Is available to all organization users

SETTINGS

Documents

UPLOAD

Drag & Drop files here

Recipients

1 Placeholder Name

2 Placeholder Name

ADD RECIPIENT ADD SELF ADD PLACEHOLDER BULK SENDING DOWNLOAD TEMPLATE FOR BULK SENDING ADD AUTOMATIC

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

Message

DELETE UPDATE NEXT

There you can configure all settings for the template. After the configurations you can update the template which is shown in the next screenshot:

Figure	Description
SEND ENVELOPE Summary Template Name test Recipients Allow Recipient Delegation ☒ Messages To: null Subject: Please sign the enclosed envelope Dear Notification Settings Envelope expiration RELATIVE ABSOLUTE Days 28 Hours 0 Minutes 0 RESET TO DEFAULT Envelope will expire on 11/12/2023 11:05 Send automatic reminders ☒ Send a reminder to signers after receipt (in days) 5 Continue to send reminders every day(s) 3 Warn signers before request expires (in days) 3 General Settings Use qualified timestamp server for all recipients ☒ Prevent editing of form fields after envelope is finished ☒ < BACK DELETE UPDATE	1. Update and save the template

After saving the template you can now use the Id of the template and work with the API. If you open the template you can see the template in the URL:

e. g.: <https://demo.esignanywhere.net/Templates/Detail/##TemplateID##>

It is also possible to retrieve the templateId with the following api call:

<https://demo.esignanywhere.net/api/v6/template/find>

Within this call you can search for the following:

```
{
  "SearchText": "string",
  "RecipientEmail": "string"
}
```

As response you will get the templateId and the name of the template.

Integration



Note: If you have defined placeholders for the template you want to use with the API, you have to override the email address of the placeholders.

To get the email addresses of the placeholders you need the get envelope API call (envelope/###templateId##). In the response in the section steps you can find the email address of the placeholder.

Please see the following configuration:

```
{
  "Id": "aa78a404-1234-1234-1234-8138065dc8a0",
  "EnvelopeStatus": "Template",
  "Name": "test",
  "Activities": [
    {
      "Id": "eaa13eaf-1234-1234-1234-8fbdb950f6a1",
      "Status": "Pending",
      "Action": {
        "Sign": {
          "ContactInformation": {
            "Email": "placeholderemail",
            "GivenName": "_PlaceholderFirstName",
            "Surname": "_PlaceholderLastName",
            "LanguageCode": "EN"
          }
        }
      }
    },
    {
      "Id": "9bf06031-1234-1234-1234-d58314c8f7aa",
      "Status": "Pending",
      "Action": {
        "Sign": {
          "ContactInformation": {
            "Email": "placeholderemail",
            "GivenName": "_PlaceholderFirstName",
            "Surname": "_PlaceholderLastName",
            "LanguageCode": "EN"
          }
        }
      }
    }
  ]
}
```

Create draft from template

Just add the templateId in the following api call (<https://demo.esignanywhere.net/api/v6/template/createdraft>). You can find a configuration in the next section. After finishing the api call you will get a draftId.

```
{
  "TemplateId": "aa78a404-1234-1234-bd8b-8138065dc8a0"
}
```

As response you get the draftId. For more information about drafts please have a look at: [Draft Story](#)

Get template configuration

With the following api call (<https://demo.esignanywhere.net/api/v6/template/{templateId}/configuration>) you get the complete configuration of the template. Please see the next sample:

```
{
```

```

"MetaData": "string",
"AddDocumentTimestamp": true,
"ShareWithTeam": true,
"LockFormFieldsOnFinish": true,
"SendFinishedDocumentsToAllSignersAndMustView": true,
"Activities": [
  {
    "Id": "string",
    "Action": {
      "SendCopy": {
        "RecipientConfiguration": {
          "PersonalMessage": "string"
        },
        "CopyingGroup": 0
      },
      "Sign": {
        "RecipientConfiguration": {
          "PersonalMessage": "string",
          "AuthenticationConfiguration": {
            "AccessCode": {
              "Code": "string"
            },
            "SmsOneTimePassword": {
              "PhoneNumber": "string"
            },
            "SwedishBankId": {
              "PersonalNumber": "string",
              "AllowAnyPersonalNumber": true
            },
            "OAuthAuthentications": [
              {
                "ProviderName": "string",
                "Validations": [
                  {
                    "FieldReferenceId": "string",
                    "ExpectedValue": "string"
                  }
                ]
              }
            ],
            "SamlAuthentications": [
              {
                "ProviderName": "string",
                "Validations": [
                  {
                    "FieldReferenceId": "string",
                    "ExpectedValue": "string"
                  }
                ]
              }
            ]
          },
          "SendEmails": true,
          "AllowAccessAfterFinish": true,
          "IncludedEmailAppLinks": {
            "Android": true,
            "iOS": true,
            "Windows": true
          },
          "AllowDelegation": true,
          "RequireViewContentBeforeFormFilling": true
        },
        "FinishActionConfiguration": {
          "SignAnywhereViewer": {
            "RedirectUri": "string"
          },
          "SignificantClientSignatureCaptureForIos": {
            "RemoveDocumentFromRecentDocumentList": true,
            "CallClientActionOnlyAfterSuccessfulSync": true,
            "CloseApp": true,
            "RedirectUri": "string"
          }
        }
      }
    }
  ]
}

```

```

},
"SignificantClientSignatureCaptureForAndroid": {
  "RemoveDocumentFromRecentDocumentList": true,
  "CallClientActionOnlyAfterSuccessfulSync": true,
  "CloseApp": true,
  "RedirectUri": "string"
},
"SignificantClientSignatureCaptureForWindows": {
  "RemoveDocumentFromRecentDocumentList": true,
  "CallClientActionOnlyAfterSuccessfulSync": true,
  "CloseApp": true,
  "RedirectUri": "string"
},
"KioskSdk": {
  "RedirectUri": "string"
}
},
"SignatureDataConfiguration": {
  "DisposableCertificate": {
    "DocumentIssuingCountry": "string",
    "IdentificationIssuingCountry": "string",
    "IdentificationType": "None",
    "PhoneNumber": "string",
    "DocumentType": "IdentityCard",
    "DocumentIssuedBy": "string",
    "DocumentIssuedOn": "2023-04-18",
    "DocumentExpiryDate": "2023-04-18",
    "SerialNumber": "string",
    "DocumentNumber": "string"
  },
  "RemoteCertificate": {
    "UserId": "string",
    "DeviceId": "string"
  },
  "SwissComOnDemand": {
    "PhoneNumber": "string",
    "CommonName": "string",
    "Country": "string",
    "Locality": "string",
    "OrganizationUnit": "string",
    "Organization": "string",
    "SerialNumber": "string",
    "StateOrProvince": "string",
    "Pseudonym": "string"
  },
  "SmsOneTimePassword": {
    "PhoneNumber": "string"
  },
  "ATrustCertificate": {
    "PhoneNumber": "string"
  },
  "SwedishBankId": {
    "PersonalNumber": "string",
    "AllowAnyPersonalNumber": true
  },
  "SignaturePluginData": [
    {
      "PluginId": "string",
      "Fields": [
        {
          "Key": "string",
          "Value": "string"
        }
      ]
    }
  ]
},
"BatchConfiguration": {
  "Mode": "Basic",
  "RequireScrollingOverAllSignaturesBeforeSigning": true
},

```

```

    "SigningGroup": 0
  },
  "View": {
    "RecipientConfiguration": {
      "PersonalMessage": "string",
      "AuthenticationConfiguration": {
        "AccessCode": {
          "Code": "string"
        },
        "SmsOneTimePassword": {
          "PhoneNumber": "string"
        },
        "SwedishBankId": {
          "PersonalNumber": "string",
          "AllowAnyPersonalNumber": true
        },
        "OAuthAuthentications": [
          {
            "ProviderName": "string",
            "Validations": [
              {
                "FieldReferenceId": "string",
                "ExpectedValue": "string"
              }
            ]
          }
        ],
        "SamlAuthentications": [
          {
            "ProviderName": "string",
            "Validations": [
              {
                "FieldReferenceId": "string",
                "ExpectedValue": "string"
              }
            ]
          }
        ],
        "SendEmails": true,
        "AllowAccessAfterFinish": true
      },
      "ViewingGroup": 0
    },
    "SignAsP7M": {
      "RecipientConfiguration": {
        "PersonalMessage": "string",
        "AuthenticationConfiguration": {
          "AccessCode": {
            "Code": "string"
          },
          "SmsOneTimePassword": {
            "PhoneNumber": "string"
          },
          "SwedishBankId": {
            "PersonalNumber": "string",
            "AllowAnyPersonalNumber": true
          },
          "OAuthAuthentications": [
            {
              "ProviderName": "string",
              "Validations": [
                {
                  "FieldReferenceId": "string",
                  "ExpectedValue": "string"
                }
              ]
            }
          ],
          "SamlAuthentications": [
            {

```

```

    "ProviderName": "string",
    "Validations": [
      {
        "FieldReferenceId": "string",
        "ExpectedValue": "string"
      }
    ]
  },
  "SendEmails": true,
  "AllowAccessAfterFinish": true,
  "IncludedEmailAppLinks": {
    "Android": true,
    "iOS": true,
    "Windows": true
  },
  "AllowDelegation": true,
  "RequireViewContentBeforeFormFilling": true
},
"SignatureMethods": {
  "LocalCertificate": true,
  "DisposableCertificate": {
    "DocumentIssuingCountry": "string",
    "IdentificationIssuingCountry": "string",
    "IdentificationType": "None",
    "PhoneNumber": "string",
    "DocumentType": "IdentityCard",
    "DocumentIssuedBy": "string",
    "DocumentIssuedOn": "2023-04-18",
    "DocumentExpiryDate": "2023-04-18",
    "SerialNumber": "string",
    "DocumentNumber": "string"
  },
  "RemoteCertificate": {
    "UserId": "string",
    "DeviceId": "string"
  },
  "SignaturePluginData": [
    {
      "PluginId": "string",
      "Fields": [
        {
          "Key": "string",
          "Value": "string"
        }
      ]
    }
  ]
},
"SignAsP7MGroup": 0
},
"SignBulk": {
  "RecipientConfigurations": [
    {
      "RecipientConfiguration": {
        "PersonalMessage": "string",
        "AuthenticationConfiguration": {
          "AccessCode": {
            "Code": "string"
          },
          "SmsOneTimePassword": {
            "PhoneNumber": "string"
          },
          "SwedishBankId": {
            "PersonalNumber": "string",
            "AllowAnyPersonalNumber": true
          },
          "OAuthAuthentications": [
            {
              "ProviderName": "string",

```

```

        "Validations": [
            {
                "FieldReferenceId": "string",
                "ExpectedValue": "string"
            }
        ]
    },
    "SamlAuthentications": [
        {
            "ProviderName": "string",
            "Validations": [
                {
                    "FieldReferenceId": "string",
                    "ExpectedValue": "string"
                }
            ]
        }
    ]
},
"SendEmails": true,
"AllowAccessAfterFinish": true,
"IncludedEmailAppLinks": {
    "Android": true,
    "iOS": true,
    "Windows": true
},
"AllowDelegation": true,
"RequireViewContentBeforeFormFilling": true
},
"SignatureDataConfiguration": {
    "DisposableCertificate": {
        "DocumentIssuingCountry": "string",
        "IdentificationIssuingCountry": "string",
        "IdentificationType": "None",
        "PhoneNumber": "string",
        "DocumentType": "IdentityCard",
        "DocumentIssuedBy": "string",
        "DocumentIssuedOn": "2023-04-18",
        "DocumentExpiryDate": "2023-04-18",
        "SerialNumber": "string",
        "DocumentNumber": "string"
    },
    "RemoteCertificate": {
        "UserId": "string",
        "DeviceId": "string"
    },
    "SwissComOnDemand": {
        "PhoneNumber": "string",
        "CommonName": "string",
        "Country": "string",
        "Locality": "string",
        "OrganizationUnit": "string",
        "Organization": "string",
        "SerialNumber": "string",
        "StateOrProvince": "string",
        "Pseudonym": "string"
    },
    "SmsOneTimePassword": {
        "PhoneNumber": "string"
    },
    "ATrustCertificate": {
        "PhoneNumber": "string"
    },
    "SwedishBankId": {
        "PersonalNumber": "string",
        "AllowAnyPersonalNumber": true
    },
    "SignaturePluginData": [
        {
            "PluginId": "string",

```

```

        "Fields": [
            {
                "Key": "string",
                "Value": "string"
            }
        ]
    }
}
],
"FinishActionConfiguration": {
    "SignAnywhereViewer": {
        "RedirectUri": "string"
    },
    "SignificantClientSignatureCaptureForIos": {
        "RemoveDocumentFromRecentDocumentList": true,
        "CallClientActionOnlyAfterSuccessfulSync": true,
        "CloseApp": true,
        "RedirectUri": "string"
    },
    "SignificantClientSignatureCaptureForAndroid": {
        "RemoveDocumentFromRecentDocumentList": true,
        "CallClientActionOnlyAfterSuccessfulSync": true,
        "CloseApp": true,
        "RedirectUri": "string"
    },
    "SignificantClientSignatureCaptureForWindows": {
        "RemoveDocumentFromRecentDocumentList": true,
        "CallClientActionOnlyAfterSuccessfulSync": true,
        "CloseApp": true,
        "RedirectUri": "string"
    },
    "KioskSdk": {
        "RedirectUri": "string"
    }
},
"BatchConfiguration": {
    "Mode": "Basic",
    "RequireScrollingOverAllSignaturesBeforeSigning": true
}
},
"VisibilityOptions": [
    {
        "DocumentNumber": 0,
        "IsHidden": true
    }
]
},
"EmailConfiguration": {
    "Subject": "string",
    "Message": "string",
    "SenderDisplayName": "string"
},
"ReminderConfiguration": {
    "Enabled": true,
    "FirstReminderInDays": 0,
    "ReminderResendIntervalInDays": 0,
    "BeforeExpirationInDays": 0
},
"ExpirationConfiguration": {
    "ExpirationInSeconds": 0,
    "ExpirationDate": "2023-04-18T08:26:01.208Z"
},
"CallbackConfiguration": {
    "CallbackUrl": "string",
    "StatusUpdateCallbackUrl": "string",
    "AfterSendCallbackUrl": "string",
    "ActivityActionCallbackConfiguration": {

```

```

    "Url": "string",
    "ActionCallbackSelection": {
      "ConfirmTransactionCode": true,
      "AgreementAccepted": true,
      "AgreementRejected": true,
      "PrepareAuthenticationSuccess": true,
      "AuthenticationFailed": true,
      "AuthenticationSuccess": true,
      "AuditTrailRequested": true,
      "AuditTrailXmlRequested": true,
      "CalledPage": true,
      "DocumentDownloaded": true,
      "FlattenedDocumentDownloaded": true,
      "AddedAnnotation": true,
      "AddedAttachment": true,
      "AppendedDocument": true,
      "FormsFilled": true,
      "ConfirmReading": true,
      "SendTransactionCode": true,
      "PrepareSignWorkstepDocument": true,
      "SignWorkstepDocument": true,
      "UndoAction": true,
      "WorkstepCreated": true,
      "WorkstepFinished": true,
      "WorkstepRejected": true,
      "DisablePolicyAndValidityChecks": true,
      "EnablePolicyAndValidityChecks": true,
      "AppendFileToWorkstep": true,
      "AppendTasksToWorkstep": true,
      "SetOptionalDocumentState": true,
      "PreparePayloadForBatch": true
    }
  },
  "AgreementConfiguration": {
    "Translations": [
      {
        "LanguageCode": "AF",
        "Text": "string",
        "Header": "string",
        "IsDefault": true
      }
    ]
  },
  "AgentRedirectConfiguration": {
    "Policy": "Workflow",
    "Allow": true,
    "IFrameAllowList": [
      "string"
    ]
  },
  "RedirectConfiguration": {
    "AfterSendRedirectUrl": "string",
    "BeforeSendRedirectUrl": "string"
  },
  "DefaultSignatureTypeConfiguration": {
    "ClickToSign": {
      "IsDefault": true
    },
    "DrawToSign": {
      "IsDefault": true
    },
    "TypeToSign": {
      "IsDefault": true
    },
    "LocalCertificate": {
      "IsDefault": true
    },
    "DisposableCertificate": {
      "IsDefault": true
    }
  },

```

```
"Biometric": {  
  "IsDefault": true  
},  
"RemoteCertificate": {  
  "IsDefault": true  
},  
"OneTimePassword": {  
  "IsDefault": true  
}  
}  
}
```