Multiple Signers scenario with hiding of some documents from some signers - Example showing Document Visibility

The Story

The seller wants to send the contract to the customer and at the same time he/she wants to send the calculations of the offer to the head of the company. Therefore, the seller uses document visibility to hide for example the calculations for the customer. Thus, the head of the company receives all documents including the calculation. The customer, however, only sees the contract. Instead of hiding a calculation from the customer, a similar scenario is e.g. to hide the SEPA payment form filled by signer A from signer B.

Use Case Description

This case is an everyday sales situation. In this case three people are involved:

- 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

Therefor, the document visibility must be set.

Please also see the developer mode for this tutorial here: Visit the developer mode.

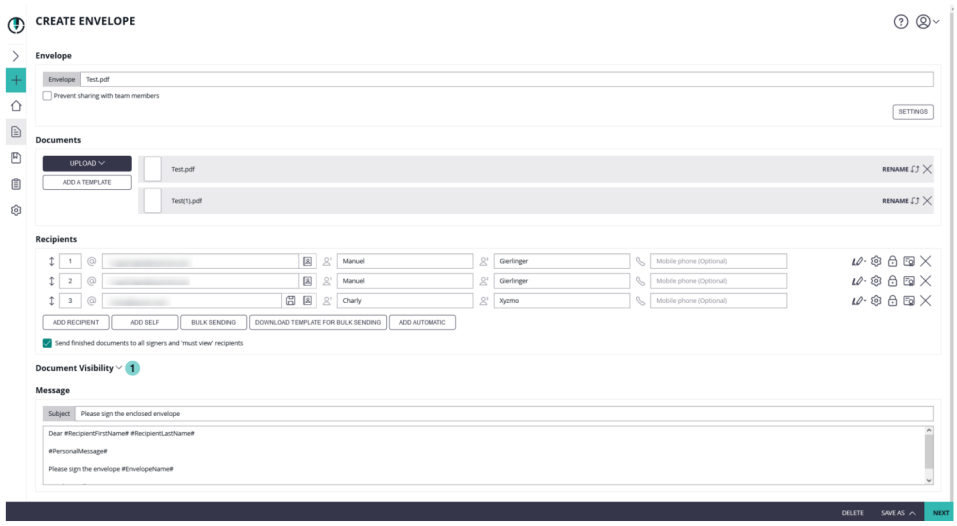
> You have to upload at least two documents and you have to add two recipients at a minimum to see the document visibility.

Prerequisites

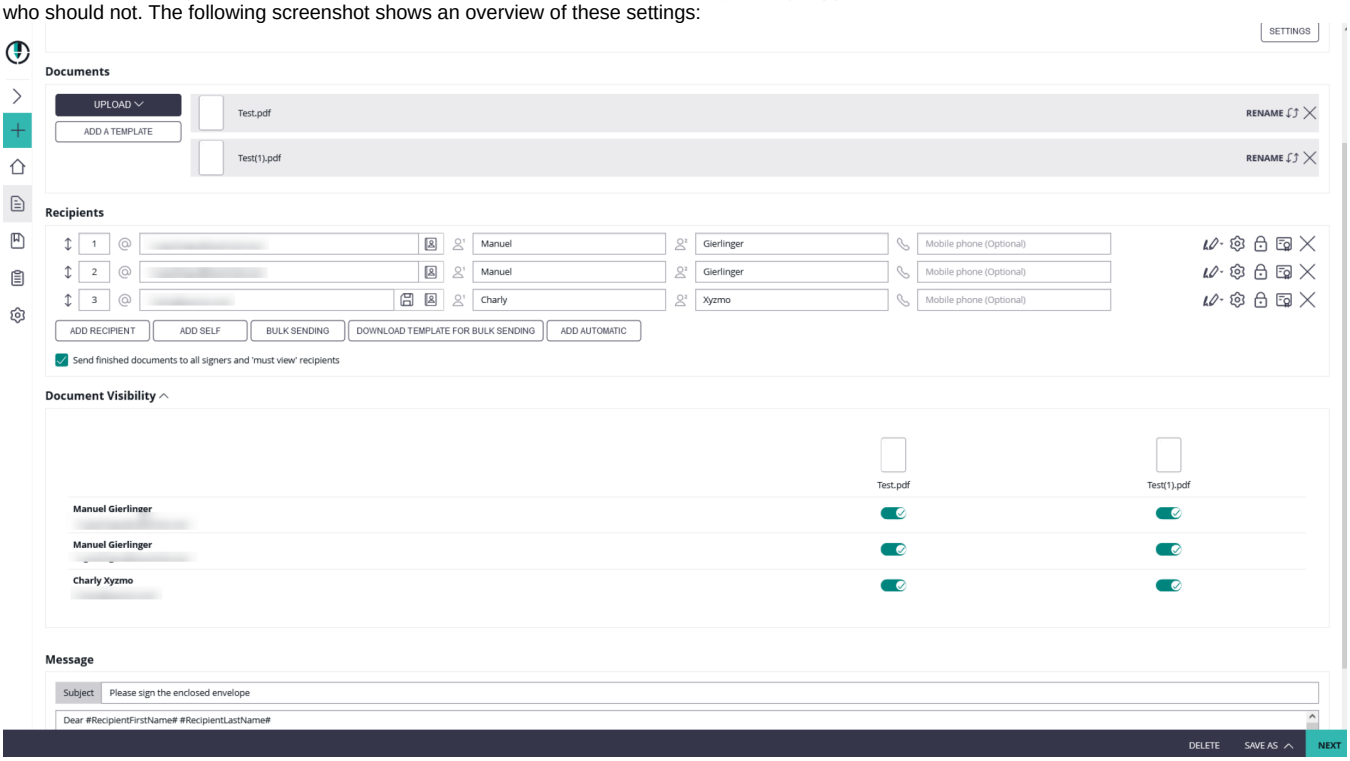
- Feature Flag "DocumentVisibility" must be enabled for the organization.
- Min 2 (or more) documents
- Min 2 (or more) recipients

UI Example

The following screenshot shows a sample configuration with three recipients and three documents:

Figure	Description
	1. Visibility Settings

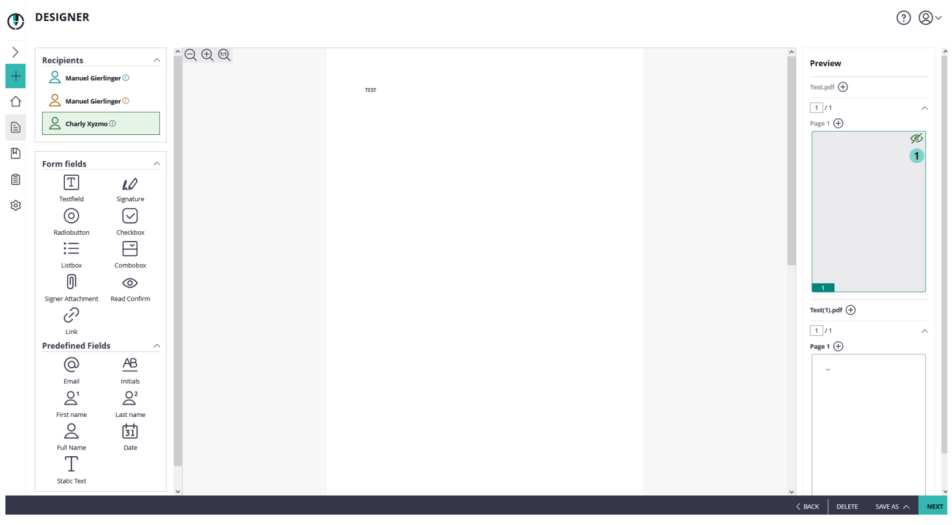
After you set the recipients and the documents you see that the document visibility settings appear. There you can decide who should see a document and who should not. The following screenshot shows an overview of these settings:



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. Therefor, it is not possible to place elements for the customer on this page.

The designer:

Figure	Description
	1. This page is not visible for this recipient

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"
                }
            }
        }
    ]
}
```