

## Create a Signing Session Invite with Fields

<https://campus.barracuda.com/doc/41113463/>

This article describes how to use the evaluation API environment to create a document, create an invitation to sign that document, and provide a signing link to the document invite.

The instructions in this article use the Evaluation API infrastructure only. None of the information or records created here are guaranteed available for more than 48 hours. No SignNow accounts or data are available in the Evaluation infrastructure. Contact your account manager for access to the SignNow production API.

This tutorial assumes some familiarity with REST API calls, the unix/linux command line tool 'curl' or similar tools that create https requests, and the JSON data format.

Use the steps in this article when using the SignNow API to build embedded signing sessions directly into your web or mobile applications. Create a single recipient account that you can reuse for every signing event; multiple recipient accounts are unnecessary.

You can cancel and resend invites if an email address or document changes via API calls or directly in the web interface.

### PART 1: One-Time Setup

Part 1 describes a one-time setup process; you need complete these steps only once.

#### Step 1. Obtain Valid Client Application Details

To obtain access to the Eval API environment, go to <https://university.signnow.com/api/> and complete the form. You will receive a `ClientID` and `ClientSecret`, as well as `ENCODED_CLIENT_CREDENTIALS`, which will provide access to the Eval API environment.

For Production access and pricing information, contact SignNow in one of the following ways:

- 800-231-2050
- Request a call back at <https://university.signnow.com/contactus/>

- Email us at [signnowpremium@barracuda.com](mailto:signnowpremium@barracuda.com)

**Step 2. Create Sender Account**

1. Go to <https://eval.signnow.com/signup>
2. Sign up for a new account, and make note of your email address and password, to use in place of USER\_1\_EMAIL and USER\_1\_PASSWORD below.

**Step 3. Get Access Token for First User**

```
curl -H 'Authorization: Basic ENCODED_CLIENT_CREDENTIALS' --data  
'username=USER_1_EMAIL&password=USER_1_PASSWORD&grant_type=password'  
https://api-eval.signnow.com/oauth2/token
```

Make a note of the access token you receive: ( USER\_1\_ACCESS\_TOKEN )

**Step 4. Create a Signer Account**

Only one account is needed as it will be re-used for every signing event. Go to:  
<https://eval.signnow.com/signup>

Sign up for a new account and make a note of your email address and password which are in the form USER\_2\_EMAIL and USER\_2\_PASSWORD below. Be sure to verify the email.

**Step 5. Get the Signer Account Access Token**

```
curl -H 'Authorization: Basic ENCODED_CLIENT_CREDENTIALS' --data  
'username=USER_2_EMAIL&password=USER_2_PASSWORD&grant_type=password'  
https://api-eval.signnow.com/oauth2/token
```

Make a note of the access token you receive: ( USER\_2\_ACCESS\_TOKEN )

**Step 6. Edit Signer Account Name**

Edit the first and last name of the signer account, and turn off reusable signatures. This appears in the document signing process for your users. We suggest "Guest Signer". Make the following PUT call to accomplish this:

```
curl -H 'Authorization: Bearer USER_2_ACCESS_TOKEN' --data  
'{"first_name":"Guest","last_name":"Signer"}'  
https://api-eval.signnow.com/user
```

Turn off reusable signatures:

```
curl -X PUT -H 'Authorization: Bearer USER_2_ACCESS_TOKEN' --data
```

```
'{"active":1}' https://api-eval.signnow.com/user/setting/no_user_signature_return
```

## Part 2: Repeatable Process for Every Document

The steps in Part 2 describe how to upload new documents and generate a unique signing link for those documents.

### Step 1. Create Document as First User

There are three methods:

**Method 1:** Use a template that has been previously created in your account. To do this go to <https://eval.signnow.com/login>, log in with your credentials for this account, upload a document, and turn it into a template as shown here: <https://university.signnow.com/web-help/#creating-template>. Add one role to the template, name the role "Buyer" and place signature, text, and other fields as needed on this template. Get the `template_id ( USER_1_TEMPLATE_ID )` as described here: <https://university.signnow.com/web-help/#creating-template>. Then, to create a document from the template, use this CURL call:

```
curl -H 'Authorization: Bearer USER_1_ACCESS_TOKEN'
https://api-eval.signnow.com/template/USER_1_TEMPLATE_ID/copy
```

This will return a document ID.

**Method 2:** Upload a document with text tags on it. Click [here to download an example](#).

For more information, see [How to Generate Text Tags on a Document](#).

Use the following curl call to upload the document. This will auto-convert text tags to fields:

```
curl -H 'Authorization: Bearer USER_1_ACCESS_TOKEN' -F 'file=@FILE_NAME'
https://api-eval.signnow.com/document
```

This will return a document ID.

**Method 3:** Upload a plain document and then put fields on it using the API.

```
curl -H 'Authorization: Bearer USER_1_ACCESS_TOKEN' -F 'file=@FILE_NAME'
```

```
https://api-eval.signnow.com/document
```

This returns the document ID, then do a PUT to place fields on the document; adjust the x,y coordinates to place the signature field where needed:

```
curl -X PUT -H 'Authorization: Bearer ACCESS_TOKEN' --data  
'{"fields":[{"x":305,"y":18,"width":122,"height":34,"page_number":0,"role  
":"Buyer","required":true,"type":"signature"}]}'  
https://api-eval.signnow.com/document/DOCUMENT_ID
```

#### Step 2. Create Invite to Sign Uploaded Document

Make a POST `/document//invite` call, with `email=disable` to suppress the delivery of an email invite:

```
curl -H 'Authorization: Bearer ACCESS_TOKEN' --data  
'{"to":[{"email":"USER_2_EMAIL","role":"Buyer","order":1,  
"role_id":""}], "from":"USER_1_EMAIL","cc":[],"subject":"Please  
Sign","message":"Please Sign"}'  
https://api-eval.signnow.com/document/DOCUMENT_ID/invite?email=disable
```

#### Step 3. Generate Restricted Scope Access Token for Signing Link

For `document_id`, use the document ID generated in the preceding section.

Get an `access_token` with a scope specific to that document by making a POST `/oauth2/token` request for `USER_2`:

```
curl -H 'Authorization: Basic ENCODED_CLIENT_CREDENTIALS' --data  
'username=USER_2_EMAIL&password=USER_2_PASSWORD&grant_type=password&scope  
=signer_limited_scope_token document/DOCUMENT_ID'  
https://api-eval.signnow.com/oauth2/token
```

This returns `USER_2_RESTRICTED_ACCESS_TOKEN`

#### Step 4. Generate Full Signing Link

The base URL for the link is: <https://eval.signnow.com/dispatch?route=assign>

The link requires the query parameters: `document_id` and `access_token`

```
https://eval.signnow.com/dispatch?route=fieldinvite&document_id=DOCUMENT_  
ID&access_token=USER_2_RESTRICTED_ACCESS_TOKEN
```

**The signing link accepts optional query parameters**

redirect\_uri

theme

disable\_email

To use a neutral theme, send the user to a simple thank you page after they have successfully completed the signing session, suppress the sending of the signed document via email, and add this item to the query string:

```
redirect_uri=%2Fdocument-saved-  
successfully&theme=neutral&disable_email=true
```

The full link will then be:

```
https://eval.signnow.com/dispatch?route=fieldinvite&document_id=DOCUMENT_  
ID&access_token=USER_2_RESTRICTED_ACCESS_TOKEN&redirect_uri=%2Fdocument-  
saved-successfully&theme=neutral&disable_email=true
```

**Alternative Signing Link**

This signing link automatically provides a mobile app signing link for iOS and Android device users:

```
https://eval.signnow.com/app/session/DOCUMENT_ID?access_token=USER_1_REST  
RICTED_ACCESS_TOKEN
```

**Optional Parameters**

```
redirect_uri=%2Fdocument-saved-successfully
```

If a user is signing from a mobile device, add the following to direct the user to the mobile web (if the user is on a desktop system, they are automatically directed to desktop signing):  
mobileweb=mobileweb\_only

To allow users to sign using the mobileweb signature panel, add:

```
&use_signature_panel=1
```

**Full URL**

Example full URL including mobileweb and signature panel parameters:

```
https://eval.signnow.com/app/session/d9a500741e0ffd412d3b06e35dec4d14d7fa40b2?access_token=fec20321cc3f2a69b052bc475d1824df898322cac51062b3528e8deb971dc4b&mobileweb=mobileweb_only&use_signature_panel=1
```

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