

Getting Started with the DealBuilder API

Welcome!

The DealBuilder API lets you automate the creation, management, and signing of documents directly from your own system. This guide walks you through everything you need to know to get started – from setting up templates to sending documents and handling webhooks.

Step 1: Access Your DealBuilder Account

To use the API, you first need a DealBuilder account.

Log in at: <https://app.dealbuilder.io>

Step 2: Generate Your API Key

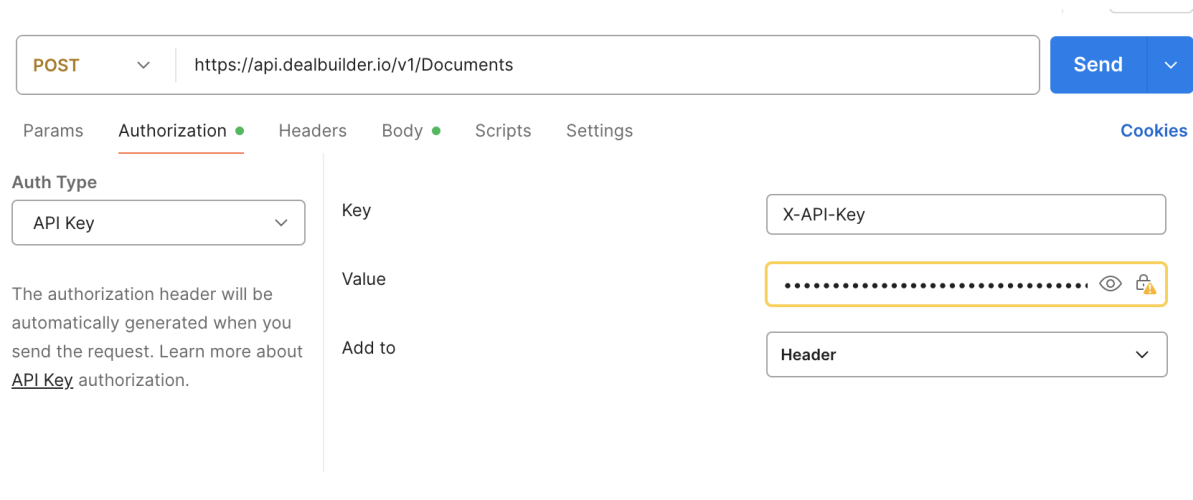
All API requests require authentication using an API key.

How to create an API key:

1. Log in to <https://app.dealbuilder.io>
2. Go to Admin > API Keys
3. Click Create API Key and copy it securely

Include this key in all API requests using the **x-api-key** header.

No OAuth or bearer tokens are needed.



POST ▼ | <https://api.dealbuilder.io/v1/Documents> Send ▼

Params Authorization Headers Body Scripts Settings Cookies

Auth Type
API Key ▼

The authorization header will be automatically generated when you send the request. Learn more about [API Key](#) authorization.

Key
X-API-Key

Value
..... 👁 🔒

Add to
Header ▼

Step 3: Set Up Templates (Before You Start Integrating)

The DealBuilder API uses document templates (“maler”) defined in the UI to generate documents.

Before integrating, you should define the setup you want to use:

👉 Go to:

Admin > Templates > Create New Template

If you only want to send PDFs for signing, configure a minimal template with the following settings:

Rediger mal

Navn ?

PDF til signering

Motpartstype ?

☐ Bedrifter

☒ Privatpersoner

Dokument-type ?

☐ Lag i DealBuilder

☒ Last opp PDF

Dokument

Signering

Varsler

E-post og SMS

Avansert

For PDF-signering laster avsenderen opp hoveddokumentet for hver utsending. I tillegg kan du her legge ved standardvedlegg som alltid følger med når du bruker denne malen.

Standard vedlegg ?

Last opp vedlegg

You can also customize:

- Signing: Default signing method and signing due date
- Notifications: Who receives email/SMS notifications and reminders
- Email/SMS Content: Customize messages sent with each document
- Advanced: Select language for recipients etc.

Custom Fields per Template

To define custom fields for a template, go to:
Admin > Templates > [Your Template] > Custom Fields

You can create fields to store hidden metadata (e.g. internal IDs), or visible fields that will appear in the document.

Egendefinerte felter

Mal: Tekstmal

 Legg til 

Type	Id	Beskrivelse	Posisjonering	Posisjon	Påkrevd	Skrivebeskyttet	Verdi	Valg
Tekst	variabelABC	variabelABC	Hidden	1	☐	☐		
Tekst	YourID	YourID	Hidden	2	☐	☐		
Dato	aDate	aDate	Top	3	☐	☐		

Lagre alle endringer

Step 4: Create Document Templates with Full Content (Optional)

You can set up full document templates with reusable text, terms, and attachments.

Go to:

Admin > Templates > Create Template

Rediger mal

Navn ?

Tekstmal

Motpartstype ?

☐ Bedrifter ☒ Privatpersoner

Dokument-type ?

☒ Lag i DealBuilder ☐ Last opp PDF

Dokument

Signering

Varsler

E-post og SMS

Produktmodul

Avansert

Standard dokumenttekst ?

← → Bold

B *I* A       

Eksempel på en overskrift

Her kan du legge inn de tekstene du har fra og lage en mal av det. På denne måten er det enkelt å hente frem malen, justere litt på innholdet og sende over til motparten for elektronisk signering.

Eksempler på maler du kan lage

Her kan du lage maler for avtaler og tilbud med kunder, arbeidskontrakter, samarbeidsavtaler, styreprotokoller, NDAer, databehandleravtaler og mye mer. Du kan ha så mange maler i DealBuilder som du selv har behov for.

Bruk eget område for vilkår ?

☐

Standard vedlegg ?

Last opp vedlegg

This lets you configure:

Document Section

- Standard document body text (e.g. agreement, offer/quote text, employee agreement text etc.)
- Toggle for separate “Terms and Conditions” section
- Default PDF attachments (e.g. general terms, brochures, etc.)

Signing

- Default signing method (BankID, etc.)
- Signing due date

Notifications

- Define when recipients and internal users get email/SMS notifications
- Customize reminders

Email and SMS

- Define default content for messages sent out via this template

Product Module (Optional)

- Enable/disable the product module
- Use products from your DealBuilder product library (Admin > Products)
- Filter which products are available in this template
- Define default products/packages that are pre-filled

Rediger mal

Navn 	Tekstmal
Motpartstype 	☒ Bedrifter ☐ Privatpersoner
Dokument-type 	☒ Lag i DealBuilder ☐ Last opp PDF

DokumentSigneringVarslerE-post og SMSProduktmodulAvansert

Bruk produktmodulen 

☒

Filter på produktlisten 

☐

Standard produkter og pakker 

Velg produkt

Ord for "Antall" brukt i dokumentet 

Antall

Ord for "Engangskostnad" brukt i dokumentet 

Engangskostnad

Ord for "Gjentakende kostnad" brukt i dokumentet 

Gjentakende kostand

Vis desimaler 

☒

Valuta 

NOK

You can also:

- Customize labels (e.g. "Quantity", "One-time fee", "Recurring cost")
- Show/hide decimals
- Set currency (e.g. NOK, EUR, USD, SEK etc.)

Advanced

- Set recipient language
 - Upload document logo (show in the upper left corner of the document)
 - Choose how name/address fields are shown
 - Define the label used for the counterparty (e.g. "Customer", "Employee")
-

Variables and Merge Fields

DealBuilder templates support merge fields using custom fields.

Custom Fields:

You define them under Admin > Templates > [Your Template] > Custom Fields

These can be:

- Shown in the document (at the top, under product module, etc.)
- Hidden (used as metadata)

Example:

If you define a custom field with ID `startDate`, you can use it in your document text as:

None

```
{cf_startDate}
```

You'll set the value for each field when creating a document via UI or API.
This lets you dynamically fill out templates during integration.

Egendefinerte felter

Mail: Tekstmål

Legg til

Type	Id	Beskrivelse	Posisjonering	Posisjon	Påkrevd	Skrivebeskyttet	Verdi	Valg
Tekst	startDate	startDate	Hidden	1	☐	☐		
Tekst	YourID	YourID	Hidden	2	☐	☐		

Lagre alle endringer

Previewing Template Changes

At any time, you can click the Preview button inside the template editor to see how your setup will look to recipients.

Rediger mal

Navn

Tekstmål

Motpartstype

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☒ Lag i DealBuilder ☐ Last opp PDF

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Bruk eget område for vilkår

☐

Standard vedlegg

Last opp vedlegg

Forhåndsvisning

Oppdater

Recommendation Before Integrating

We recommend that you:

- Create a few documents and send them for signing using the DealBuilder UI
- Sign a test document to experience the full flow
- This will help you understand the template behavior and generate data needed for testing (e.g. webhook payloads)

Finding IDs for API Use

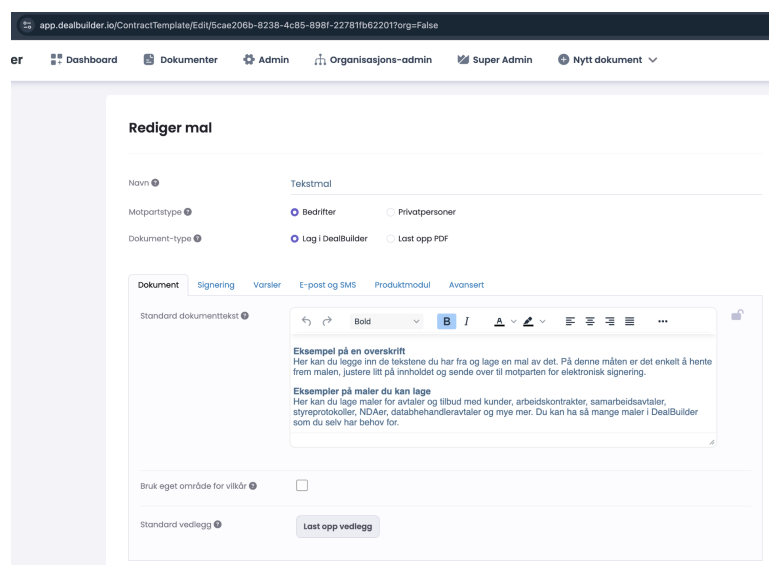
You will often need template, product, or document IDs when using the API.

Here's where to find them:

Templates:

Go to Admin > Templates > Edit Template

Look at the URL – the template ID is included

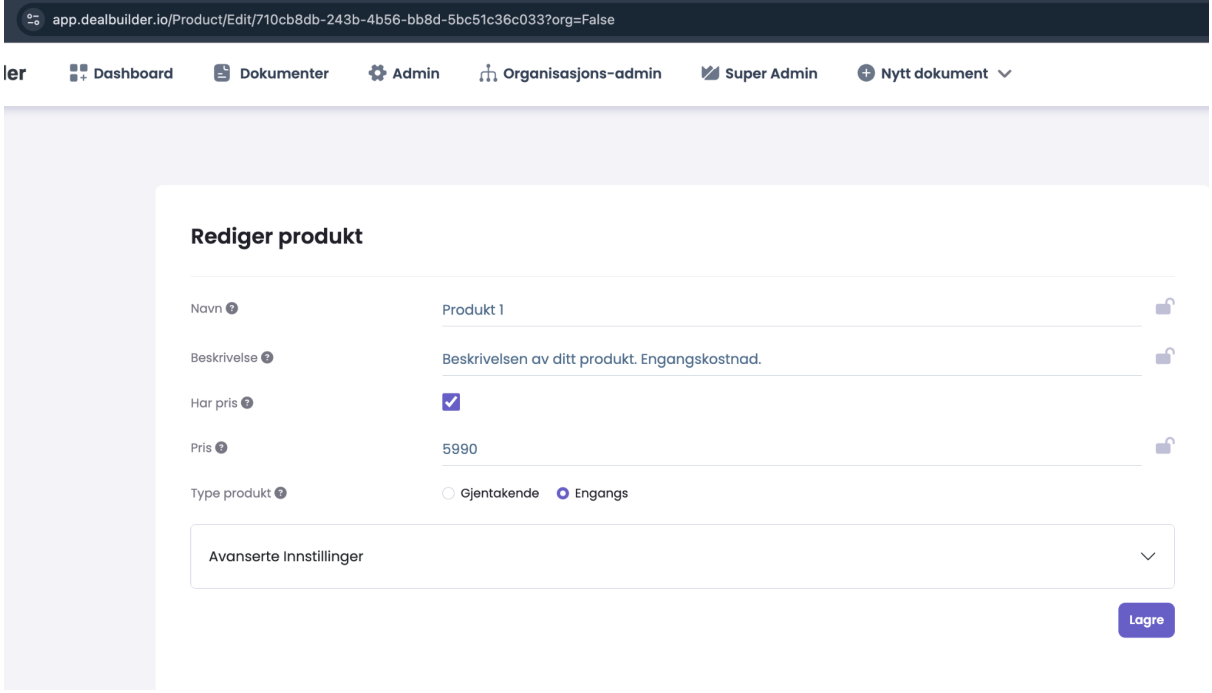


i.e.: 5cae206b-8238-4c85-898f-22781fb62201

Products:

Go to Admin > Products > Edit Product

Look at the URL to find the product ID



app.dealbuilder.io/Product/Edit/710cb8db-243b-4b56-bb8d-5bc51c36c033?org=False

ler Dashboard Dokumenter Admin Organisasjons-admin Super Admin Nytt dokument

Rediger produkt

Navn	Produkt 1	🔒
Beskrivelse	Beskrivelsen av ditt produkt. Engangskostnad.	🔒
Har pris	☒	
Pris	5990	🔒
Type produkt	☐ Gjentakende ☒ Engangs	

Avanserte Innstillinger

Lagre

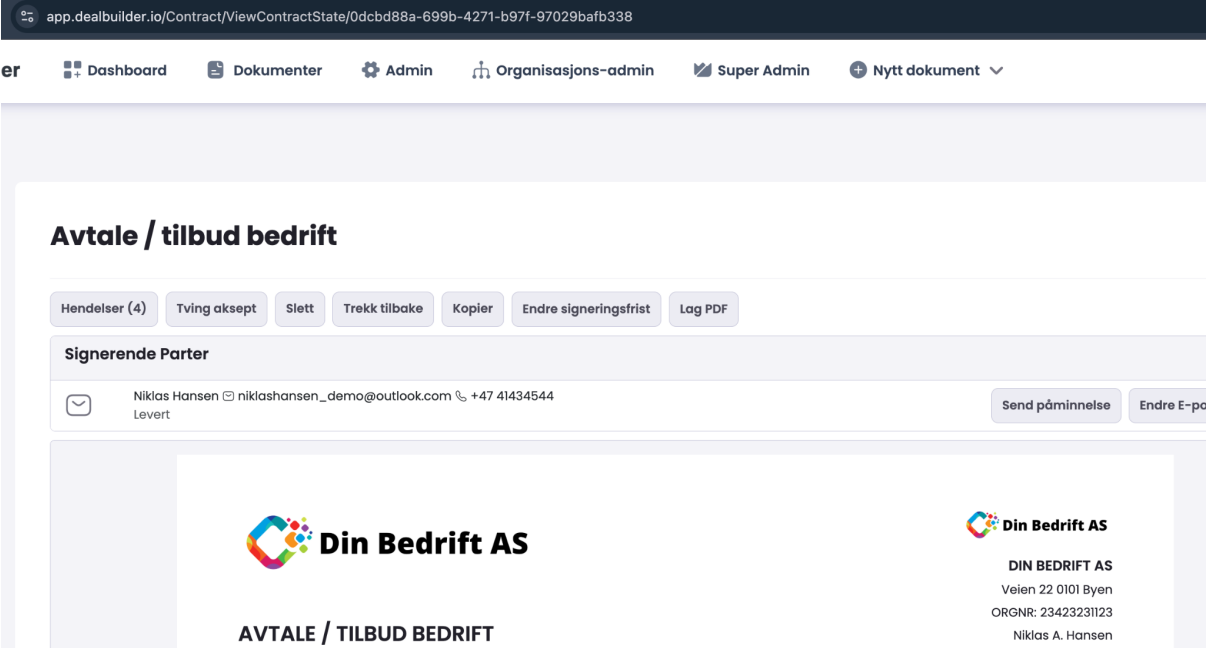
i.e.: 710cb8db-243b-4b56-bb8d-5bc51c36c033

Documents:

Go to Documents > Drafts / Sent / Signed

Click the purple “Details” icon

Look at the URL for the document ID



The screenshot shows the DealBuilder web application interface. The browser address bar displays the URL: `app.dealbuilder.io/Contract/ViewContractState/0dcbd88a-699b-4271-b97f-97029bafb338`. The application header includes a navigation menu with items: Dashboard, Dokumenter, Admin, Organisasjons-admin, Super Admin, and Nytt dokument. The main content area is titled 'Avtale / tilbud bedrift' and contains several action buttons: Hendelser (4), Tving aksept, Slett, Trekk tilbake, Kopier, Endre signeringsfrist, and Lag PDF. Below these buttons is a section for 'Signerende Parter' (Signing Parties), which lists Niklas Hansen with contact information (email: niklashansen_demo@outlook.com, phone: +47 41434544) and a status of 'Levert'. To the right of this list are buttons for 'Send påminnelse' and 'Endre E-po'. The main body of the document features the logo for 'Din Bedrift AS' and the title 'AVTALE / TILBUD BEDRIFT'. On the right side, there is a sidebar with the company name 'Din Bedrift AS', address 'Veien 22 0101 Byen', ORGNR: 23423231123, and the name 'Niklas A. Hansen'.

i.e.: 0dcbd88a-699b-4271-b97f-97029bafb338

API Base URLs

- App environment: <https://app.dealbuilder.io>
- API base URL: <https://api.dealbuilder.io>
- API documentation (Swagger): <https://api.dealbuilder.io/swagger/index.html>

Development Tools

- Swagger UI – Explore endpoints and schema definitions
 - Postman – Test requests and payloads
 - Your own development environment or CI/CD pipelines
-

Key API Endpoints

Products

- `GET /products` – List all products
- `POST /products` – Create new product
- `GET /products/{productId}` – Get product details
- `PUT /products/{productId}` – Update product (supports external ID)

Documents

- `GET /documents` – List documents (supports filtering)
- `POST /documents` – Create document
- `GET /documents/{documentId}` – Get document details

File Uploads

- `POST /uploads` – Upload PDF/attachment
- Returns a file URL that can be linked to documents

Webhook Integration

Webhooks let your system receive data from DealBuilder when specific events occur (e.g. a document is signed).

How to set up a webhook:

1. Go to Admin > Webhooks
2. Click Add Webhook
3. Fill in:
 - Name (e.g. “DealBuilder to CRM”)
 - URL – where the webhook should send data to
 - Error email – for failed attempts
 - Event – choose when the webhook should trigger

 *Tip: Use [webhook.site](https://www.webhook.site) to test and inspect incoming data*

You can also view this document to see how the webhook payload is structured (in this case for the “Document signed” event):

https://docs.google.com/document/d/1tguzjCzpw8vGWmkU_IR7Xy4TPtkp9fmoLvIQm-hZrmU/edit?usp=sharing

Testing the Webhook

Once the webhook is saved, you can run a test.

Note: To test successfully, your account must have real data for the selected event (e.g. an active sent out document, a signed document etc.)

Example:

- If testing “Document signed”, make sure at least one document has been signed
- DealBuilder will use the latest signed document for the test

👉 *Tip: Send or sign a document first, then run the test (depending on the event you want to test, sent, signed etc.)*

🔔 Available Webhook Events

- Document sent – Triggered when a document is sent
 - Document opened – When recipient opens the document
 - Document signed – When the document is signed (full data included)
 - Signing due date expired – Document was not signed in time
 - Document sent for internal approval – Before it goes to external signing
 - Document signed (per order line) – One webhook per product line item
-

🤝 Need Help?

If you need help or want support setting up your integration, contact us at:

✉ support@dealbuilder.io

🎯 Next Steps

1. Log in to <https://app.dealbuilder.io>
2. Create your templates setup, and/or product setup
3. Generate your API key
4. Explore the [Swagger docs](#)
5. Start testing and integrating!