DealBuilder

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

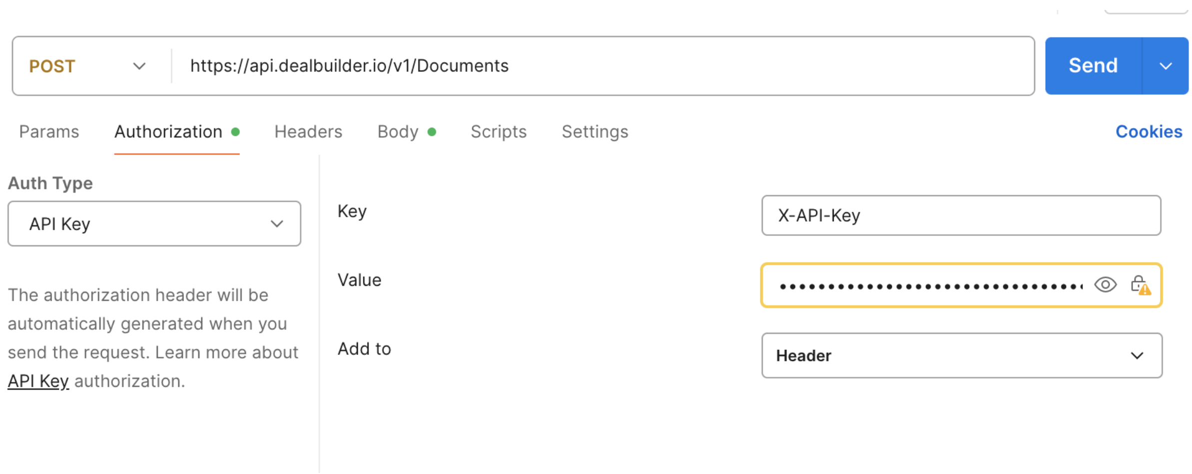
🔐 Step 2: Generate Your API Key

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.



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

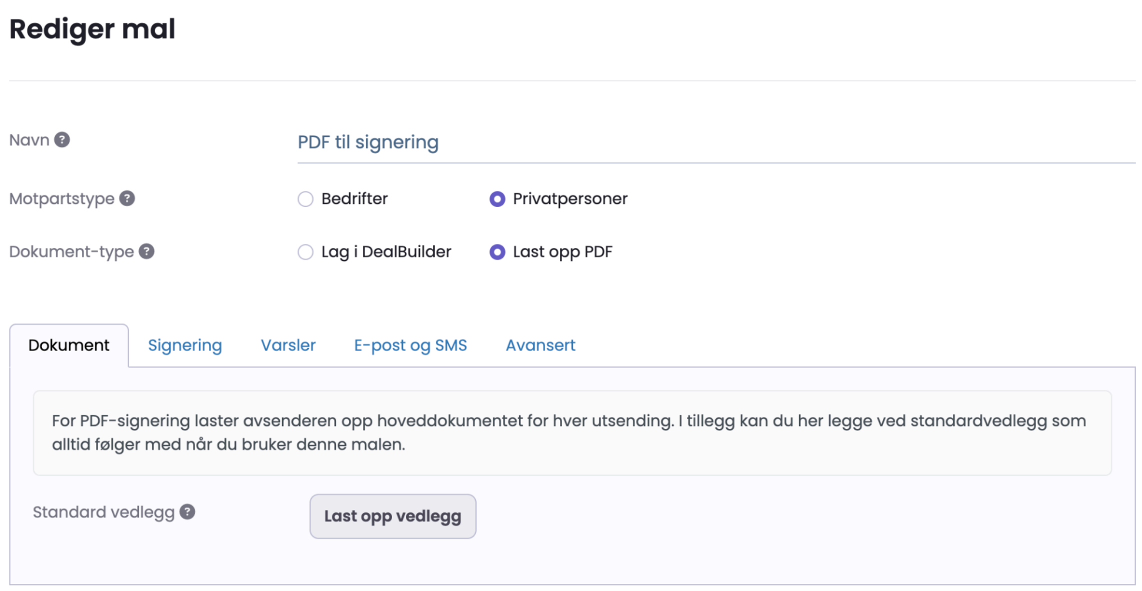
The DealBuilder API uses document templates (“maler”) defined in the UI to generate documents.

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:



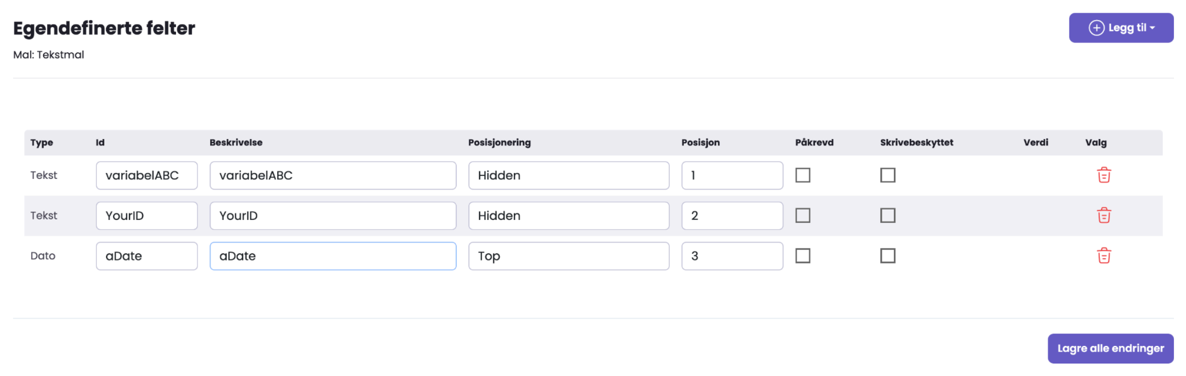
You can also customize:

- 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

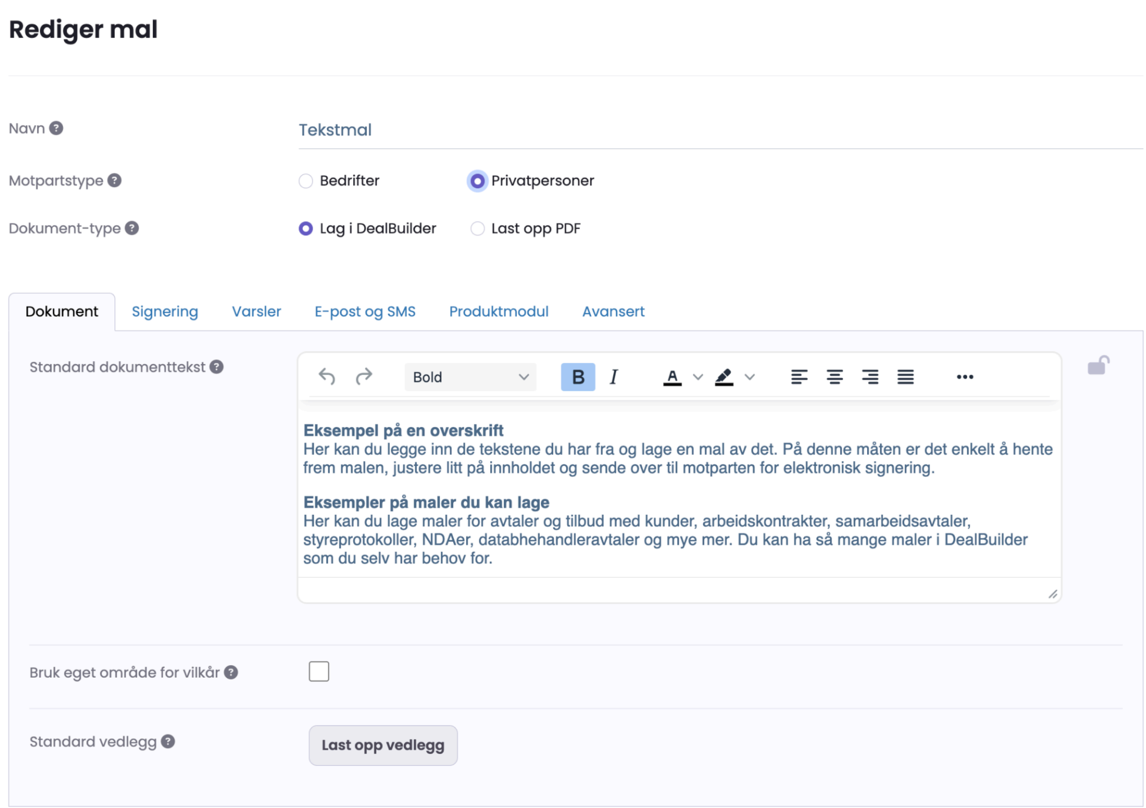
Type	Id	Beskrivelse	Posisjonering	Posisjon	Påkrevd	Skrivebeskyttet	Verdi	Valg
Tekst	variabelABC	variabelABC	Hidden	1	☐	☐		
Tekst	YourID	YourID	Hidden	2	☐	☐		
Dato	aDate	aDate	Top	3	☐	☐		

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



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

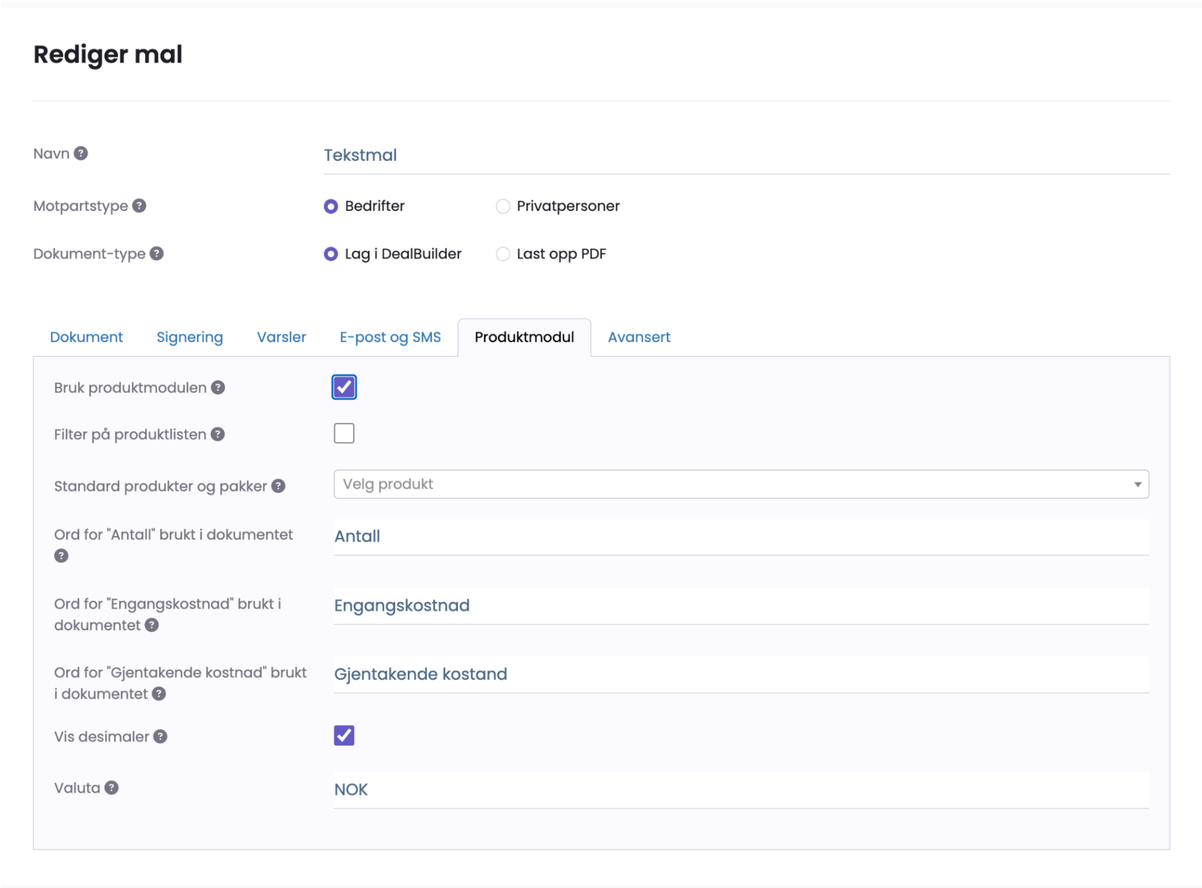
- Define when recipients and internal users get email/SMS notifications
- Customize reminders

📧 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



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

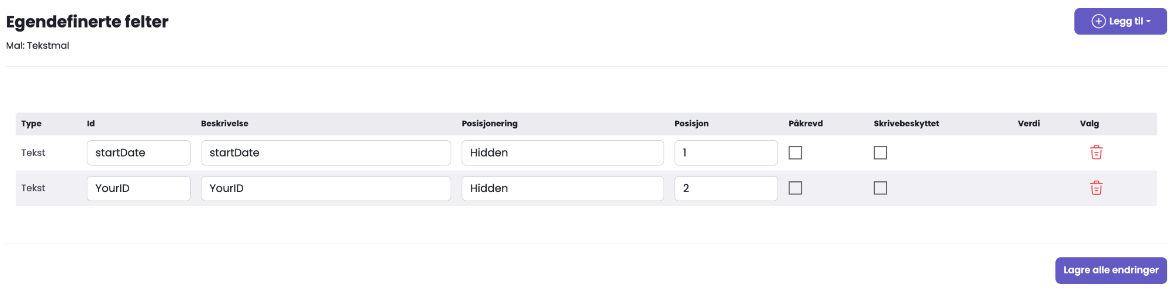
These can be:

- 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:

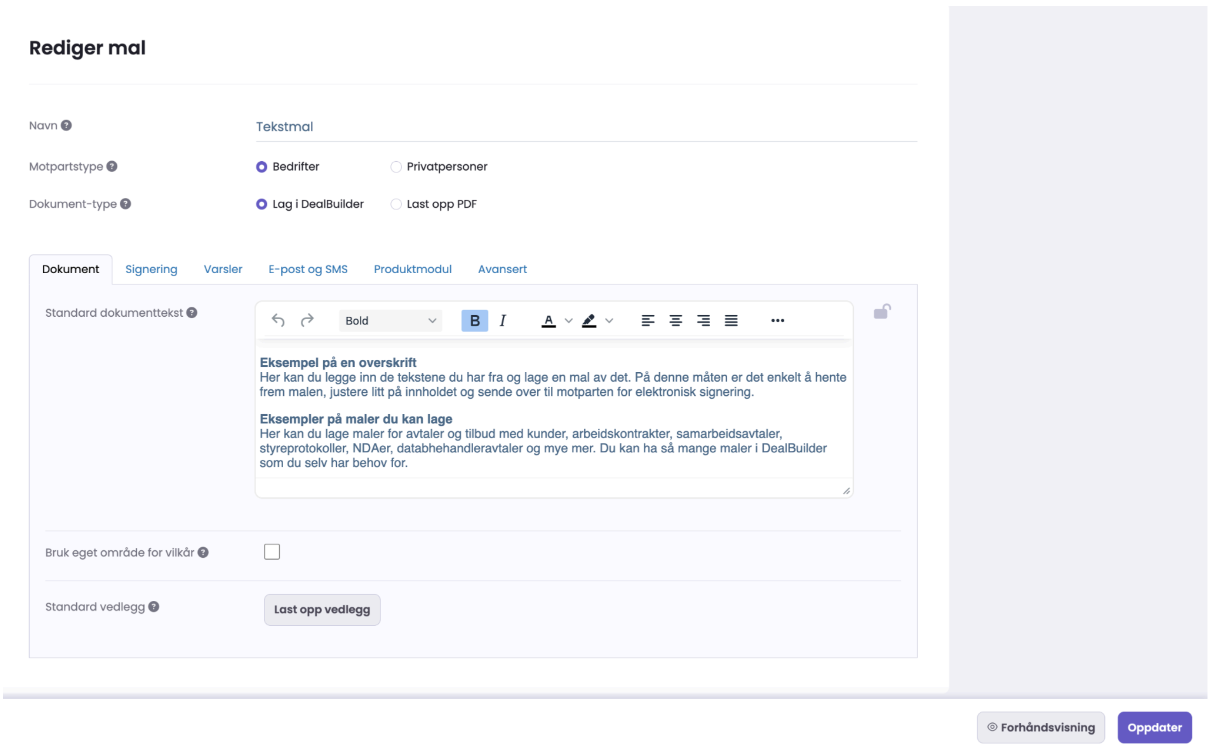
```
{cf_startDate}
```

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.



👁️ 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.



🧪 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)

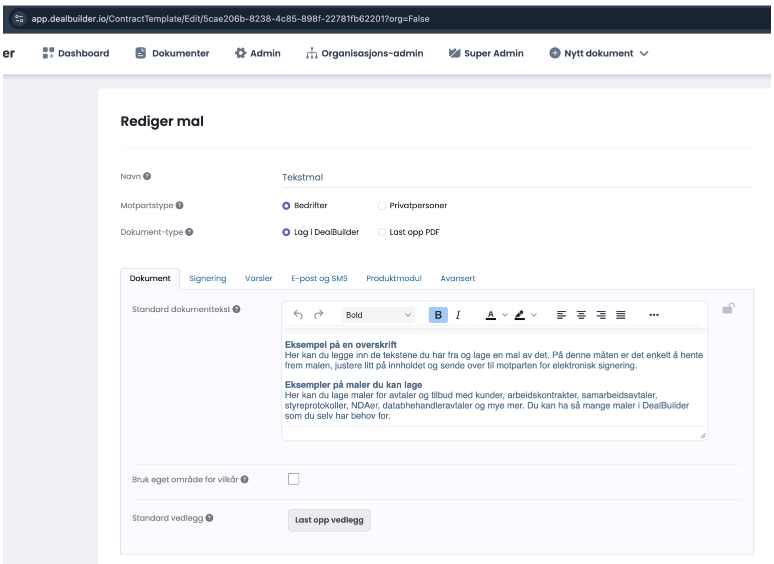
🆔 Finding IDs for API Use

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

Here's where to find them:

📄 Templates:

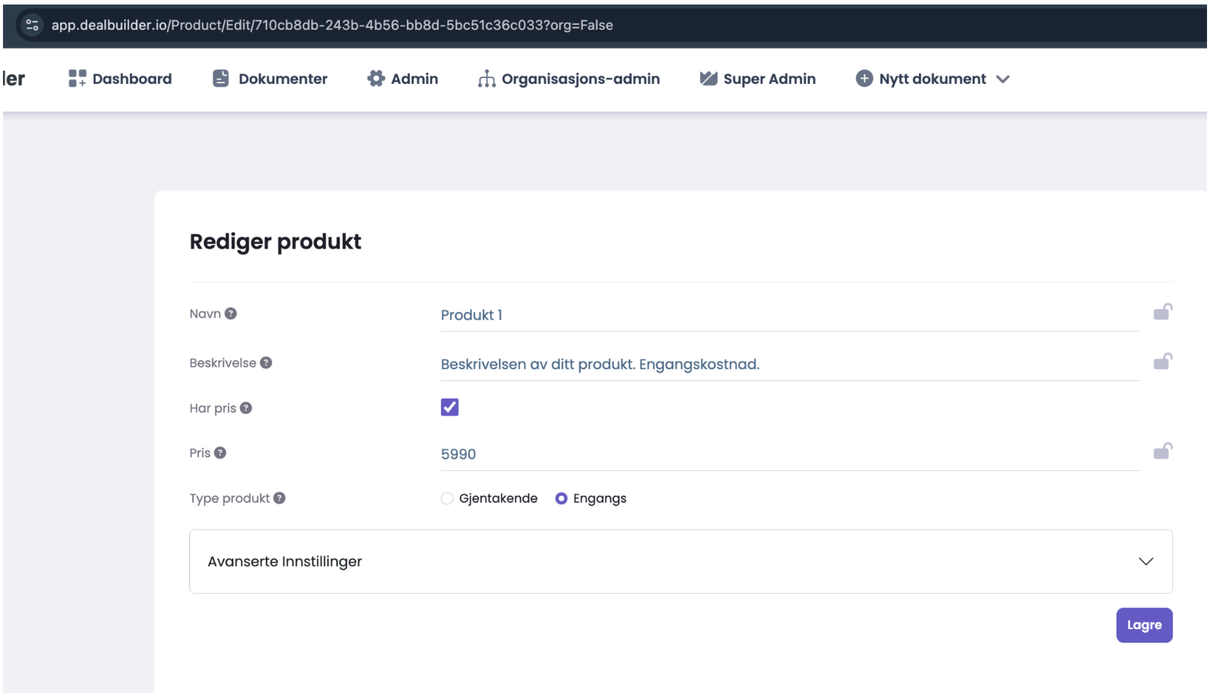
Go to Admin > Templates > Edit Template
Look at the URL – the template ID is included



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

🛒 Products:

Go to Admin > Products > Edit Product
Look at the URL to find the product ID



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

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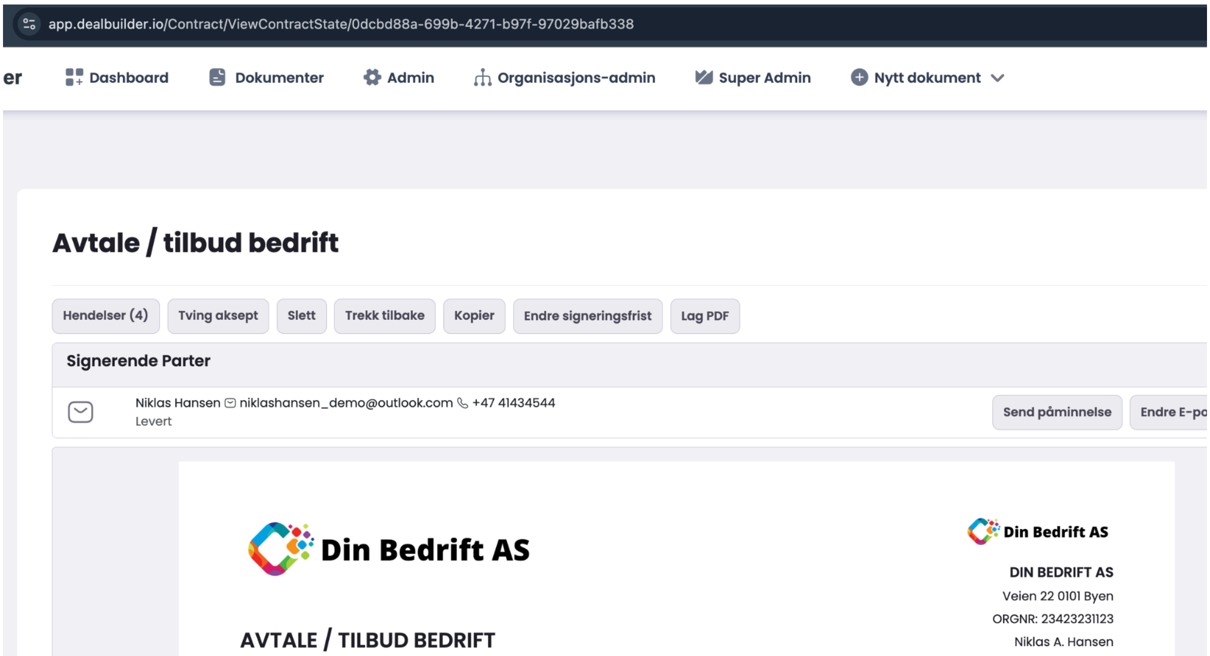
📑 Documents:

Go to Documents > Drafts / Sent / Signed
Click the purple “Details” icon
Look at the URL for the document ID



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

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🧪 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

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📡 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 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_IR7Xy4TPtkp9fmoLvlQm-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

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🤝 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!