

Getting Started with the DealBuilder API

A practical guide to setting up templates, connecting your system, creating documents and handling signed results.

Step 1: Access your account

Sign in at <https://app.dealbuilder.io>. You need a DealBuilder account with access to the relevant organisation.

Step 2: Create an API key

In DealBuilder, open **Admin > API Keys**, create an API key and copy it securely. Send it in the **x-api-key** request header. Do not use Bearer authentication.

x-api-key: YOUR_API_KEY

API base URL: <https://api.dealbuilder.io>

Swagger UI: <https://api.dealbuilder.io/swagger/index.html>

OpenAPI JSON: <https://api.dealbuilder.io/swagger/v1/swagger.json>

The JSON specification can also be provided to AI coding tools to help implement requests against the documented API.

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: Configure a document template

Go to **Admin > Templates**. Create a template or use an existing one. A template controls signing settings, deadlines, recipient notifications, language and other defaults.

For **PDF signing**, choose a template configured for uploading PDFs. For **DealBuilder-generated documents**, use a template containing your document text and optional attachments.

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

Custom fields per template

Open **Admin > Templates > [Your Template] > Custom Fields**. Add fields for visible values or hidden metadata, such as a customer ID or external case reference.

A field with ID **startDate** can be inserted into template text using:

```
{cf_startDate}
```

Pass the value when creating the document using the applicable request schema. Custom fields are defined separately for each template.

Egendefinerte felter

Mal: Tekstmål

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: Build a full document template (optional)

In **Admin > Templates**, configure reusable document text, terms, standard PDF attachments, signing methods and deadlines. Under notifications and email/SMS settings, choose how recipients are contacted.

Rediger mal

Navn ⓘ

Tekstmål

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

Products (optional)

Enable the product module if the document includes items, prices or packages. Products can be managed under **Admin > Products** and supplied when creating documents through the API.

Rediger mal

Navn ⓘ

Tekstmål

Motpartstype ⓘ

☒ Bedrifter ☐ Privatpersoner

Dokument-type ⓘ

☒ Lag i DealBuilder ☐ Last opp PDF

Dokument

Signering

Varsler

E-post og SMS

Produktmodul

Avansert

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 kostnad

Vis desimaler ⓘ

☒

Valuta ⓘ

NOK

3

Step 5: Test your template and find IDs

Before integrating, create and sign a test document in DealBuilder. This helps verify your template, notifications, signing method and webhook data.

You can find IDs in the browser URL when opening the corresponding item:

- **Template ID:** Admin > Templates > Edit Template
- **Product ID:** Admin > Products > Edit Product
- **Document ID:** Documents > Drafts / Sent / Signed > Details

The top screenshot shows the 'Rediger mal' (Edit Template) page in the DealBuilder application. The page has a dark header with the URL 'app.dealbuilder.io/ContractTemplate/Edit/2066-8238-4c85-898f-227811b6d220?org=false'. The navigation bar includes 'Dashboard', 'Dokumenter', 'Admin', 'Organisasjons-admin', 'Super Admin', and 'Nytt dokument'. The main content area is titled 'Rediger mal' and contains fields for 'Navn' (Name), 'Molpartstype' (Counterparty type), 'Dokument-type' (Document type), and 'Standard dokumenttekst' (Standard document text). The 'Standard dokumenttekst' field is a rich text editor with a toolbar and a preview of the document text. Below the text editor is a checkbox for 'Bruk eget område for vilkår' (Use own area for terms) and a 'Standard vedlegg' (Standard attachment) section with a 'Løst opp vedlegg' (Detach attachment) button.

The bottom screenshot shows the 'Rediger produkt' (Edit Product) page in the DealBuilder application. The page has a dark header with the URL 'app.dealbuilder.io/Product/Edit/710cb8db-243b-4b56-bb8d-5bc51c36c033?org=false'. The navigation bar is the same as the top screenshot. The main content area is titled 'Rediger produkt' and contains fields for 'Navn' (Name), 'Beskrivelse' (Description), 'Har pris' (Has price), 'Pris' (Price), and 'Type produkt' (Product type). The 'Har pris' field has a checkbox that is checked. The 'Pris' field has a value of '5990'. The 'Type produkt' field has two radio buttons: 'Gjentakende' (Recurring) and 'Engangs' (One-time), with 'Engangs' selected. Below these fields is a dropdown menu for 'Avanserte innstillinger' (Advanced settings) and a 'Lagre' (Save) button.

Finding a document ID

Open the document details page and copy the document GUID from the URL.

 app.dealbuilder.io/Contract/ViewContractState/0dcdbd88a-699b-4271-b97f-97029bafb338

er

 Dashboard

 Dokumenter

 Admin

 Organisasjons-admin

 Super Admin

 Nytt dokument 

Avtale / tilbud bedrift

Hendelser (4)

Tving aksept

Slett

Trekk tilbake

Kopier

Endre signeringsfrist

Lag PDF

Signerende Parter

 Niklas Hansen  niklashansen_demo@outlook.com  +47 41434544

Levert

Send påminnelse

Endre E-po

**Din Bedrift AS**

AVTALE / TILBUD BEDRIFT

**Din Bedrift AS**
DIN BEDRIFT AS
Veien 22 0101 Byen
ORGNR: 23423231123
Niklas A. Hansen

Step 6: Explore and test the API

Open <https://api.dealbuilder.io/swagger/index.html>. Use **Authorize** to authenticate, expand an endpoint and inspect its request fields, response types and schemas. Use **Try it out** to test.

DealBuilder API  
/swagger/v1/swagger.json
API for DealBuilder application

Authorize 

Documents

POST

/v1/Documents

Creates a new document





GET

/v1/Documents

Lists all documents with optional filtering and sorting





GET

/v1/Documents/{id}

Retrieves a document by its ID, including its event history.





PATCH

/v1/Documents/{id}

Partially updates an existing document





POST

/v1/Documents/{id}/send

Sends a document that was stored as a draft. Only documents with draft status can be sent.





POST

/v1/Documents/{id}/send-reminder

Sends a reminder for a document to a specific party





Products

PUT

/v1/Products/{id}

Updates an existing product by DealBuilder ID or External ID, or creates one if it doesn't exist.





PATCH

/v1/Products/{id}

Partially updates an existing product by DealBuilder ID or External ID. Only the provided fields will be updated.





GET

/v1/Products/{id}

Retrieves a product by its ID





GET

/v1/Products

Lists all products with optional filtering





Upload

POST

/v1/uploads





Step 7: Work with documents, products and files

Use the following documented endpoints. All paths below are relative to **https://api.dealbuilder.io**.

Documents

- **POST /v1/Documents** - Create a document from a configured template, including a PDF-signing workflow.
- **GET /v1/Documents** - List documents with filtering, search, pagination and sorting.
- **GET /v1/Documents/{id}** - Retrieve a document by ID, including event history.
- **PATCH /v1/Documents/{id}** - Partially update a document.
- **POST /v1/Documents/{id}/send** - Send a document that was created and saved as a draft.
- **POST /v1/Documents/{id}/send-reminder** - Send a reminder to a specific party.

Products

- **GET /v1/Products** - List products with optional filtering.
- **GET /v1/Products/{id}** - Retrieve a product.
- **PUT /v1/Products/{id}** - Create or update using a DealBuilder or external ID.
- **PATCH /v1/Products/{id}** - Update selected product fields.

Files

- **POST /v1/uploads** - Upload a PDF or attachment and receive a file URL for document creation.

For request bodies and required fields, expand the endpoint in Swagger and refer to the current schemas, including **CreateDocumentRequest** and **DocumentCustomFieldValueDto**.

Document creation flow

1. Configure a template. **2.** Upload a PDF if needed. **3.** Create the document with POST /v1/Documents. **4.** If saved as a draft, send it using POST /v1/Documents/{id}/send. **5.** Use webhooks to react to signing events.

Searching, filtering and sorting documents

Use **GET /v1/Documents** with these exact query parameter names:

- **CreatedAfter / CreatedBefore** - Filter by document creation time.
- **UpdatedAfter** - Filter by last update time (UTC).
- **AcceptedAfter / AcceptedBefore** - Filter by document acceptance/signing completion date.
- **Status** - Draft, Sent, Revoked, Accepted or PendingApproval.
- **DocumentNumber** - Exact document number; accepted documents only.
- **Search** - Case-insensitive text search across title, party name, company name, email and organisation number; also document number for accepted documents.
- **Page / PageSize** - Pagination; PageSize = -1 requests all, with a maximum of 1,000 returned items.
- **SortBy** - CreatedDate or AcceptedDate. AcceptedDate requires a query returning accepted documents only.
- **SortDirection** - Asc or Desc.

Example (replace dates and values as appropriate):

```
GET /v1/Documents?Status=Accepted&AcceptedAfter=2026-10-01T00:00:00Z
```

```
&Search=Example&SortBy=AcceptedDate&SortDirection=Desc
```

The screenshot shows a web interface for the **GET /v1/Documents** API endpoint. The title bar indicates it lists all documents with optional filtering and sorting. A "Try it out" button is in the top right. The main area is titled "Parameters" and contains a table of query parameters. Each row includes the parameter name, its data type and query format, a description, and an input field.

Name	Description
CreatedAfter string(\$date-time) (query)	Filter documents created after this date CreatedAfter
CreatedBefore string(\$date-time) (query)	Filter documents created before this date CreatedBefore
UpdatedAfter string(\$date-time) (query)	Filter documents last updated on or after this date and time (UTC). UpdatedAfter
AcceptedAfter string(\$date-time) (query)	Filter documents accepted on or after this date. AcceptedAfter
AcceptedBefore string(\$date-time) (query)	Filter documents accepted on or before this date. AcceptedBefore
Status string (query)	Filter documents by status Available values : Draft, Sent, Revoked, Accepted, PendingApproval --
DocumentNumber integer(\$int64) (query)	Exact document number. Matches accepted documents only. DocumentNumber
Search string (query)	Free-text search on title and party name, company name, email, and organisation number. Accepted documents also match document number. Case-insensitive substring. Combines with the other filters. Search
Page integer(\$int32) (query)	Page number (1-based) Page
PageSize integer(\$int32) (query)	Number of items per page. Set to -1 for all items. Max number of items returned is 1000 PageSize
SortBy string (query)	Sort by createdDate or acceptedDate. Omit for the default order: newest created date. With no status filter, pending documents are returned first, then accepted documents, and this sorts within each group. acceptedDate requires a query that returns accepted documents only. Available values : CreatedDate, AcceptedDate --
SortDirection string (query)	asc or desc. Defaults to desc. When SortBy is omitted, applies to createdDate. Available values : Asc, Desc --

Step 8: Set up webhooks

Go to **Admin > Webhooks > Add Webhook**. Enter a name, your receiving URL, an error-notification email and the event you want to receive. Use <https://webhook.site> to inspect a test payload.

Use **Run Test** after saving. Your account must contain data relevant to the chosen event. For a completed-document test, first sign a test document.

Available events

- **Document Sent** - A document is sent.
- **Document Opened** - A recipient opens the document.
- **Document Signed** - Each individual signatory signs; one event per signatory.
- **Document Completed** - All required signatories have signed and the final signed PDF is ready.
- **Document Completed (One webhook per order line)** - One event per order line on completion.
- **Document Expired** - The signing deadline expires.
- **Document Signing Deadline Changed** - The signing deadline changes.
- **New Document Pending Approval** - A document awaits internal approval.
- **Document Revoked** - A document is revoked.

Important: Use **Document Completed** when your integration needs the final signed document. **Document Signed** can occur before all signatories have finished.

Delivery and payloads

If **Retry on failure** is enabled, DealBuilder retries after 10 minutes, then at increasing intervals, for up to 10 days. Inspect the actual payload using a test webhook and refer to <https://app.dealbuilder.io/webhookdocs> for payload documentation.

Step 9: Optional integration capabilities

Organisation hierarchies

DealBuilder supports unlimited levels of organisations and companies. API keys and webhooks can be configured centrally for a hierarchy, useful for enterprise groups, multiple business units and integration partners.

Embedded signing

Signing links can be retrieved through the integration and presented in your own application. For workflows where your system handles notifications, automatic delivery of the completed signed document to signatories can be disabled per template.

BankID identity information

BankID signing provides the signatory's **name and date of birth** by default. For specifically approved customers, the signatory's **personal identification number (SSN / national identity number)** can also be made available through the integration. This requires separate approval and activation.

Next steps

1. Create an API key. 2. Configure a template. 3. Inspect the API in Swagger. 4. Create and sign a test document. 5. Test the **Document Completed** webhook. 6. Implement your production workflow.

Support: support@dealbuilder.io

API documentation: <https://api.dealbuilder.io/swagger/index.html>

OpenAPI JSON: <https://api.dealbuilder.io/swagger/v1/swagger.json>