Case 1 **(Path A in Zap)**

1. When we are passing the correct **Client Name**, **Client Phone**, **Client Email, Template Number** and **Template name** with **File** which Exists in the system.
2. The Zap will find out the **ClientId** and **TemplateID** itself and used the same for creating the tasks.

**ZAP URL End Point:** [**https://hooks.zapier.com/hooks/catch/9433766/op08ll6**](https://hooks.zapier.com/hooks/catch/9433766/op08ll6)

|  |  |
| --- | --- |
| **Parameter Name** | **Parameter Value** |
| ClientName | **Client’s name** |
| ClientEmails | [test@test.com](mailto:barak@rnbsolutions.net) |
| ClientPhones | **0547777777** |
| TaskSubject | **Client Id And Templet Id Found.** |
| Language | **1** |
| LanguageMarked | **He** |
| TemplateId | **Calculated** |
| ClientId | **Calculated / Created** |
| IsSendOnCreation | **TRUE** |
| ForceIdIssueDateUpload | **FALSE** |
| ForceIdUpload | **FALSE** |
| ForceSecretCode | **FALSE** |
| ForceVideoUpload | **FALSE** |
| SignaturePositions | **Calculated** |
| File | **Selected File** |
| templateNumber | **82375** |
| templateName | **Test Template** |

# **Code Examples**

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| **C# Code for calling** |
| **var client = new RestClient("https://hooks.zapier.com/hooks/catch/9433766/op08ll6");**  **client.Timeout = -1;**  **var request = new RestRequest(Method.POST);**  **request.AddFile("Form", "/C:/Users/abhinav.kashyap/Desktop/Tax 2020/LIC Abhinav Kashyap total .pdf");**  **request.AddParameter("ClientName", "ברק בדיקה 2סיין");**  **request.AddParameter("ClientEmails", "barak@rnbsolutions.net");**  **request.AddParameter("ClientPhones", "0547909700");**  **request.AddParameter("Language", "1");**  **request.AddParameter("LanguageMarked", "he");**  **request.AddParameter("TaskSubject", "Create Task When ClientID, TemplateID and File Found ");**  **request.AddParameter("IsSendOnCreation", "True");**  **request.AddParameter("TemplateNumber", "002");**  **request.AddParameter("TemplateName", "Test Template 2");**  **IRestResponse response = client.Execute(request);**  **Console.WriteLine(response.Content);** |

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| **JQuery Code for calling** |
| **var form = new FormData();**  **form.append("Form", fileInput.files[0], "/C:/Users/abhinav.kashyap/Desktop/Tax 2020/LIC Abhinav Kashyap total .pdf");**  **form.append("ClientName", "client’s name");**  **form.append("ClientEmails",** [**test@test.com**](mailto:test@test.com)**);**  **form.append("ClientPhones", "0547777777");**  **form.append("Language", "1");**  **form.append("LanguageMarked", "he");**  **form.append("TaskSubject", "Create Task When ClientID, TemplateID and File Found ");**  **form.append("IsSendOnCreation", "True");**  **form.append("TemplateNumber", "002");**  **form.append("TemplateName", "Test Template 2");**  **var settings = {**  **"url": "https://hooks.zapier.com/hooks/catch/9433766/op08ll6",**  **"method": "POST",**  **"timeout": 0,**  **"processData": false,**  **"mimeType": "multipart/form-data",**  **"contentType": false,**  **"data": form**  **};**  **$.ajax(settings).done(function (response) {**  **console.log(response);**  **});** |

Case 2 **(Path B in Zap)**

1. When we are passing the correct **Client Name**, **Client Phone**, **Client Email** which is already exists with file content.
2. But wrong **Template Number** and **Template name**.
3. The Zap will find out the **ClientId** but unable to find **TemplateID** itself.
4. The Zap Uses the **SignaturePositionsModel** array in the request to create task.

**Note : SignaturePositionsModel is required filed in this case otherwise the task will not get created.**

|  |  |
| --- | --- |
| **Parameter Name** | **Parameter Value** |
| ClientName | **ברק בדיקה 2סיין** |
| ClientEmails | test@test.com |
| ClientPhones | **0547777777** |
| TaskSubject | **Client Id And Templet Id Found.** |
| Language | **1** |
| LanguageMarked | **He** |
| TemplateId | **Calculated** |
| ClientId | **Calculated Automatically** |
| IsSendOnCreation | **TRUE** |
| ForceIdIssueDateUpload | **FALSE** |
| ForceIdUpload | **FALSE** |
| ForceSecretCode | **FALSE** |
| ForceVideoUpload | **FALSE** |
| SignaturePositions | **Its array of Signature position Model** |
| File | **Selected File** |
| templateNumber | **Empty or 1234 (Not Exist at 2 Sign Application)** |
| templateName | **Empty or Abcd (Not Exist at 2 Sign application)** |
| SignaturesConstValues | **1-1|1-2|2-4** |

**Format of passing values in the SignatureConstValues parameter**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Page Number** | **-** | **Signature Position** | **|** | **Page Number** | **-** | **Signature Position** |
| **1** | **-** | **2** | **|** | **1** | **-** | **3** |

**1-2** means Page number one and top center

**1-2 | 2-3** means there are two signature positions

* Page number one Top center
* Page number two Top right

|  |  |
| --- | --- |
| **Signature Positions** | |
| **Value** | **Position Names** |
| 1 | Top Left |
| 2 | Top Center |
| 3 | Top Right |
| 4 | Middle Left |
| 5 | Middle Center |
| 6 | Middle Right |
| 7 | Bottom Left |
| 8 | Bottom Center |
| 9 | Bottom Right |

ZAP URL End Point: [**https://hooks.zapier.com/hooks/catch/9433766/op08ll6**](https://hooks.zapier.com/hooks/catch/9433766/op08ll6)

# **Code Examples**

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| **C# Code for calling** |
| **var client = new RestClient("https://hooks.zapier.com/hooks/catch/9433766/op08ll6/");**  **client.Timeout = -1;**  **var request = new RestRequest(Method.POST);**  **request.AddFile("Form", "/C:/Users/abhinav.kashyap/Downloads/Abhinav Resume.pdf");**  **request.AddParameter("ClientName", "client’s name”);**  **request.AddParameter("ClientEmails", "test@test.com");**  **request.AddParameter("ClientPhones", "0547777777");**  **request.AddParameter("Language", "1");**  **request.AddParameter("LanguageMarked", "he");**  **request.AddParameter("TaskBundleGuid", "38844B3C-AC45-48CB-A830-CA4FDA26ED68");**  **request.AddParameter("TaskSubject", "Create task when Client ID Found and Templete ID Not found");**  **request.AddParameter("IsSendOnCreation", "True");**  **request.AddParameter("TemplateNumber", "1234");**  **request.AddParameter("TemplateName", "abcd");**  **request.AddParameter("NotifySecondaryMails", "true");**  **request.AddParameter("SecondaryMails", "secmail@test.com");**  **request.AddParameter("SendConfirmEmailAfterSign", "true");**  **request.AddParameter("SignaturesConstValues", "1-2 |1-3");**  **IRestResponse response = client.Execute(request);**  **Console.WriteLine(response.Content);** |

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| **JQuery Code for calling** |
| **var form = new FormData();**  **form.append("Form", fileInput.files[0], "/C:/Users/abhinav.kashyap/Downloads/Abhinav Resume.pdf");**  **form.append("ClientName", "client’s name");**  **form.append("ClientEmails", "test@test.com");**  **form.append("ClientPhones", "0547777777");**  **form.append("Language", "1");**  **form.append("LanguageMarked", "he");**  **form.append("TaskBundleGuid", "38844B3C-AC45-48CB-A830-CA4FDA26ED68");**  **form.append("TaskSubject", "Create task when Client ID Found and Templete ID Not found");**  **form.append("IsSendOnCreation", "True");**  **form.append("TemplateNumber", "1234");**  **form.append("TemplateName", "abcd");**  **form.append("NotifySecondaryMails", "true");**  **form.append("SecondaryMails", "secmail@test.com");**  **form.append("SendConfirmEmailAfterSign", "true");**  **form.append("SignaturesConstValues", "1-2 |1-3");**  **var settings = {**  **"url": "https://hooks.zapier.com/hooks/catch/9433766/op08ll6/",**  **"method": "POST",**  **"timeout": 0,**  **"processData": false,**  **"mimeType": "multipart/form-data",**  **"contentType": false,**  **"data": form**  **};**  **$.ajax(settings).done(function (response) {**  **console.log(response);**  **});** |

Case 3 **(Path C in Zap )**

When we are passing the New Client **Name**, **Client Phone**, **Client Email which is not present in 2 Sign system** but Correct **Template Number** and **Template name** with **File**. The Zap will create the client with **ClientId** and use that client id for creation of task.

|  |  |
| --- | --- |
| **Parameter Name** | **Parameter Value** |
| ClientName | **Client’s name** |
| ClientEmails | test@test.com |
| ClientPhones | **0547777777** |
| TaskSubject | **Client Id And Templet Id Found.** |
| Language | **1** |
| LanguageMarked | **He** |
| TemplateId | **Calculated** |
| ClientId | **Calculated Automatically** |
| IsSendOnCreation | **TRUE** |
| ForceIdIssueDateUpload | **FALSE** |
| ForceIdUpload | **FALSE** |
| ForceSecretCode | **FALSE** |
| ForceVideoUpload | **FALSE** |
| SignaturePositions | **Calculated** |
| File | **Selected File** |
| templateNumber | **82375** |
| templateName | **Test Template** |

**ZAP URL End Point:** [**https://hooks.zapier.com/hooks/catch/9433766/op08ll6**](https://hooks.zapier.com/hooks/catch/9433766/op08ll6)

# **Code Examples**

|  |
| --- |
| **C# Code for calling** |
| **var client = new RestClient("https://hooks.zapier.com/hooks/catch/9433766/op08ll6");**  **client.Timeout = -1;**  **var request = new RestRequest(Method.POST);**  **request.AddFile("Form", "/C:/Users/abhinav.kashyap/Downloads/Abhinav Resume.pdf");**  **request.AddParameter("ClientName", "Client’s name");**  **request.AddParameter("ClientEmails", "test@test.com ");**  **request.AddParameter("ClientPhones", "0547777777");**  **request.AddParameter("Language", "1");**  **request.AddParameter("LanguageMarked", "he");**  **request.AddParameter("TaskBundleGuid", "38844B3C-AC45-48CB-A830-CA4FDA26ED68");**  **request.AddParameter("TaskSubject", "Create Task With File Upload ");**  **request.AddParameter("IsSendOnCreation", "True");**  **request.AddParameter("TemplateNumber", "002");**  **request.AddParameter("TemplateName", "Test Template 2");**  **IRestResponse response = client.Execute(request);**  **Console.WriteLine(response.Content);** |

|  |
| --- |
| **JQuery Code for calling** |
| **var form = new FormData();**  **form.append("Form", fileInput.files[0], "/C:/Users/abhinav.kashyap/Downloads/Abhinav Resume.pdf");**  **form.append("ClientName", "Client’s name");**  **form.append("ClientEmails", "test@test.com");**  **form.append("ClientPhones", "0547777777");**  **form.append("Language", "1");**  **form.append("LanguageMarked", "he");**  **form.append("TaskBundleGuid", "38844B3C-AC45-48CB-A830-CA4FDA26ED68");**  **form.append("TaskSubject", "Create Task With File Upload ");**  **form.append("IsSendOnCreation", "True");**  **form.append("TemplateNumber", "002");**  **form.append("TemplateName", "Test Template 2");**  **var settings = {**  **"url": "https://hooks.zapier.com/hooks/catch/9433766/op08ll6",**  **"method": "POST",**  **"timeout": 0,**  **"processData": false,**  **"mimeType": "multipart/form-data",**  **"contentType": false,**  **"data": form**  **};**  **$.ajax(settings).done(function (response) {**  **console.log(response);**  **});** |