

# Everything you need to know about the Dropbox Sign API



 **Dropbox** Sign API



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## The business benefits of embedding an eSignature API into your website, app, or workflow

Not only do your customers crave an easy, digital process to complete their documentation—your business needs to embrace digital workflows like eSignatures to compete in the age of digital transformation.

At the same time, those workflows must remain compliant, secure, and legally binding. After all, what's the point of a digitized signature if it isn't binding?

The simplest and most cost-effective way to keep (or achieve!) a high level of security and legality is to find the right eSignature partner who can offer you the functionality and user experience you need with the safety measures to back it up.

Intrigued? Here are the biggest benefits you'll enjoy when you make the smart choice to integrate an eSignature API into your website, app, or workflow:

# A huge improvement in user experience that flawlessly represents your brand

An eSignature API embeds signing functionality into your system right where the customer interaction takes place (e.g., signing a liability release on a gym website or signing your driver application right from the Uber app). Signers don't have to navigate to a separate eSignature website or page. Top that off with white labeling that maintains your brand presence (things like colors and logos) and everybody enjoys a delightful signature experience.

## Resource savings

Companies that choose to integrate APIs benefit by saving the time and engineering hours that would have been required to build the same functionality. Dropbox Sign API, for example, carries an average integration time of 2.5 days. Compare that to the months (and years) of development and security resources it would take to create and maintain an eSignature solution independently.

Additionally, compare the time spent completing a digital signature (minutes) to the time and resources wasted manually filling out, printing, scanning, emailing, and perhaps even correcting a document (days or more) and it becomes a no-brainer.

## Compliance management

The best eSignature APIs come equipped with the proper compliance measures to protect sensitive data and ensure that signed documents are legally binding. Things like SOC II, HIPAA, and GDPR compliance are core to a leading eSignature solution. This out-of-the-box compliance is a huge plus for companies that require safe and secure transactions. FinTech companies, for instance, will often use compliant APIs so that they don't have to go through the time-consuming, costly, and risky compliance process manually.

## Innovation

eSignature APIs are created by entire teams that are dedicated to making the API the best it can be. Their singular job is to invest their time and well-honed skills into creating new features, improvements, and optimizations. Companies that then choose to embed these APIs get 100 percent of the benefit from this continual improvement. In fact, [we've got a list of recent improvements to Dropbox Sign API](#) to help you visualize the evolution of a quality API.







## Maintenance

If something wonky happens with an API, dedicated teams will launch into “fix” mode so you don’t have to. From small performance improvements to large-scale bug fixes, the best API teams ensure maximum uptime, which means customers get a solution that works 99.99 percent of the time on a 24/7/365 basis.

## Flexibility

The best APIs give customers a large degree of flexibility in how they are implemented. This allows your development team to create the ideal experience for users instead of forcing you to rely on a vendor’s one-size-fits-all experience. This flexibility means a much better experience for whoever needs to sign your documents.

## Focus

Companies that leverage best-in-class eSignature APIs are better able to focus on evolving their core offerings and serving their customers—instead of focusing on building and maintaining an in-house eSignature tool.

## Common eSignature API Use Cases

By now, you've probably noted a few ways your organization could benefit from integrating an eSignature API. But how and when will you actually use it? We've outlined a mix of basic and advanced use cases to help you think through your own process and identify areas where you could really use an eSignature.

### API: HR and onboarding

As employees, contractors, or agents join companies, there are dozens of documents which require their signature. Authorizations, offer letters, direct deposit sheets, and NDAs all need to be completed and signed before any work can begin.

## Signups and applications

You might need to ask for several signatures on liability releases, waivers, and other forms when a user signs up for a service or applies for a membership.

## Procurement and sales

When agreeing to purchase goods or services either as an individual or as a business, a signature is often required. These signatures may take place in Point of Sale systems, B2B procurement systems, invoicing tools, or software agreements.

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## Taxes, insurance, and loans

The financial services industry is highly complex. Professionals in this space know how long a loan application, a set of corporate taxes, or an insurance application can take to complete—especially when they require multiple signatures by multiple parties in multiple locations.

## Real estate

Real estate documents almost always require signatures—and a lot of them. There are many forms required when leasing, buying, or managing a property. Everything from lease agreements to HOA resolutions require a signature from home buyers, homeowners, and real estate agents.

## Legal agreements

Last but not least are general legal agreements. Whether for court proceedings, civil cases, estate planning, or other situations; legal firms must have a way to capture legally binding digital signatures from a number of parties—often in different geographical areas.



## Do You Need an API or an App?

It's only natural to wonder if you really need an API or if you can simply handle your documents via a no-code eSignature tool. Choosing the best solution depends on your company's needs and your desired level of integration.

For teams that want a non-embedded experience or who don't want to deal with any coding, our standalone product [Dropbox Sign](#) is a great option. For teams of 10 or more, we offer a secure and scalable [enterprise eSignature platform](#). We're also making a splash with our new [Salesforce integration](#), which is the only tool currently on the market that allows users to prepare, edit, and send documents for signature without leaving their Salesforce instance.

However, if you need a customizable eSignature collector that embeds seamlessly into your workflow, [Dropbox Sign API](#) is your best bet.



As an API-first company, Dropbox Sign prioritizes developing and supporting our API unlike anyone else in the industry. We focus on making our API easy to implement, hassle free, feature rich, and fully customizable. We want our customers to use and enjoy all those great benefits we mentioned earlier like compliance management, hands-off maintenance, flawless white labeling, and more.

If you're still not sure whether to choose an app or an API, here's a quick chart to help you figure out which solution is the best fit for your business:

**Volume:** What volume of documents do you expect to need signed

**Signature experience:** Do you want to embed the eSignature experience on your website?

**Branding:** Do you want to brand or white label the eSignature experience?

**Flexibility:** Does your workflow contain complexity or nuance?

**Development resources:** Do you have software development resources to get up and running

**Setup time:** How long do you have to set up your account?

### Dropbox Sign

Low/Medium

Non-embedded eSignatures only

Branding only

Nope

Doesn't require development resources

Several minutes

### Dropbox Sign API

Medium/High

Embedded and non-embedded eSignatures

Branding and white labeling

Yes

Requires development resources

Several days

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## Building an API vs. buying an API



We work, and have worked, with a lot of companies that have pondered the “build or buy” dilemma when it comes to an eSignature API. What we can tell you is that most of them eventually figured out that it was a better investment in both the short- and long-term to outsource the development and maintenance to an eSignature professional like Dropbox Sign.

While a home-grown system may seem better at a glance; the cost of building, improving, and maintaining an in-house system becomes prohibitive when you take into account the lifetime of the tool.

Consider the initial and ongoing time it’ll take your team to...

- Develop a back and front end to capture an electronic signature
- Adhere to the various domestic and international eSignature laws and regulations including SOC II, HIPAA, eIDAS, etc.
- Build and maintain functionality such as signature options, bulk send, font and color options, template links, and more
- Add and maintain integrations to other systems like Salesforce, Google, and Oracle
- Set up and maintain support for internet browsers, mobile devices, form factors, and hardware sizes

In general, unless you have a bored development team and an extremely rare use case for eSignatures, buying an eSignature API will always be more cost effective and result in a better experience for users and admins.

## How to compare eSignature APIs

There is a litany of eSignature solutions on the market—all of which you don't have the time (nor the desire) to compare.

When it comes to finding the perfect solution for your unique business needs, we suggest comparing the top three or four industry leaders.

These companies likely have been through tens if not hundreds of thousands of eSignature implementations and have a well-structured product that will grant maximum reliability, features, security, and stability. These are some of our favorite tools for comparing eSignature API platforms:

### Product trials

The best eSignature API competitors offer free trials or test access to their API so prospects can get a feel for their products. Take advantage of these benefits as they can give a good indication as to how your paid experience might go.

# G2 crowd

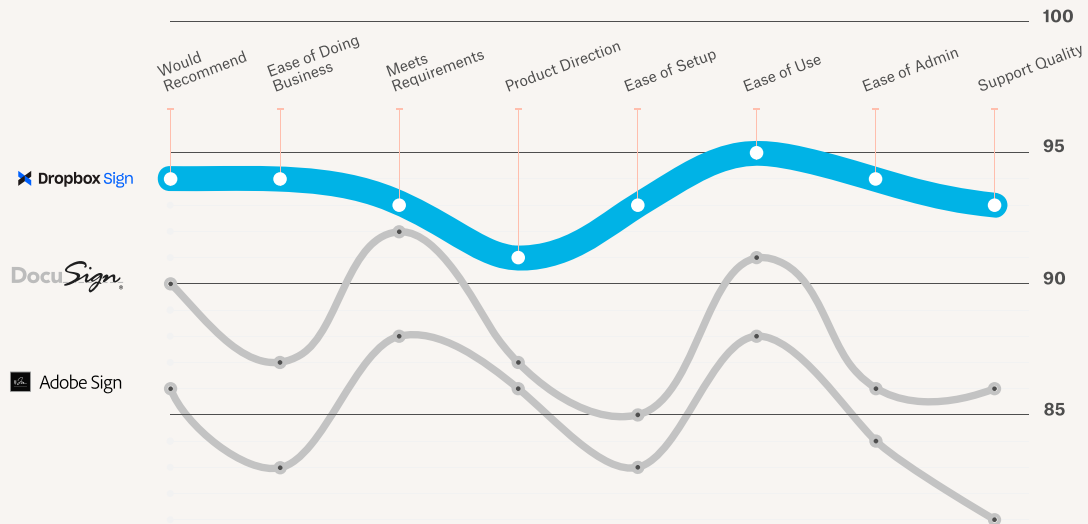
A great place to start your comparison is G2 Crowd, where you can find user reviews, analyst ratings, and key differentiators for a variety of software solutions.

In fact, when prospects ask “Why should I pick Dropbox Sign?” we often point them in the direction of G2 Crowd because of their thorough analysis of the eSignature space and their impartial reviews of all key players.

G2 Crowd's Implementation Index for eSignature, which we included some screenshots of below, is a report based entirely on user feedback, reviews, and ratings for major eSignature companies.

As you'll see, among the top 24 eSignature vendors indexed in the report, Dropbox Sign is highly ranked—scoring better than established eSignature players in major categories like ease of setup, implementation time, satisfaction, and average user adoption.

## G2 Crowd eSignature Rankings





## Sizing up the competition

	Dropbox Sign	DocuSign	Adobe Sign	PandaDocs
<b>Ease of Setup</b>	93%	85%	83%	86%
<b>Implementation Time</b>	.5 mo	1.3 mo	1.1 mo	.8 mo
<b>Avg. User Adoption</b>	86%	70%	68%	85%
<b>Implementation Method</b>				
Led by in-house team	99%	90%	92%	98%
Led by Vendor PS	1%	7%	7%	0%
Led by 3rd Party	0%	3%	2%	2%



# HelloSign is Best in Industry for Ease of Setup, Time to Integrate, and User Adoption

Overall Ratings

220 Ratings



4.8 / 5 stars

## IMPLEMENTATION SCORE

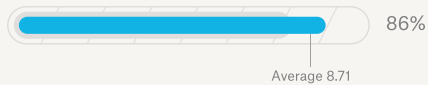


## IMPLEMENTATION DATA

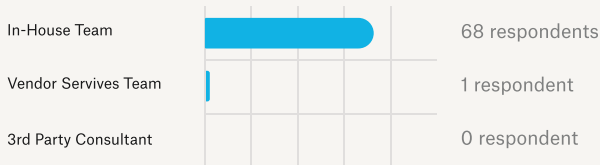
### Ease of Setup



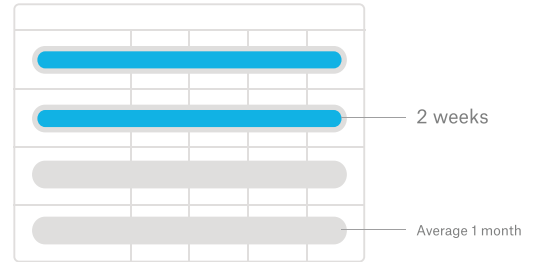
### Average User Adoption



## IMPLEMENTATION METHOD



## MONTHS TO GO LIVE\*



\* Based on G2 Crowd respondents. The total average for HelloSign Customers to go live is 2.5 days

\* Based on total number of G2 Crowd HelloSign respondents.



# Aragon research

Aragon's 2018 report on digital transaction management evaluates an exclusive group of 16 DTM providers based on their strategy, performance, and reach in the market. The leaders on this index are acting upon proven, comprehensive strategies that align with industry direction and market demand.

As you'll see below, Dropbox Sign is happy to have been identified as one of Aragon's DTM leaders because of our commitment to innovating eSignatures, our explosive growth in the market, and our advanced API technology.



Contender

Leader



Specialist

Innovator



## Key features of the Dropbox Sign API

While Dropbox Sign API has a robust list of features (which you can view [here](#)), in this section we're highlighting the features our customers have told us are the reasons they decided to choose our API.

### Embedded signing

Embedded signing is the ability to have someone sign a document right on your website or in your app. When guiding signers through a workflow, a blissfully simple and straightforward process is crucial to minimize drop offs and maximize completions.

A great example of this is signing up for a gym membership online. Users are a lot less likely to chicken out if they're prompted to sign the liability waiver and other agreements without ever having to open another window or find an attachment in their inbox.

## Embedded requesting

Kind of like a relative to embedded signing, embedded requesting enables our customers to extend the power of requesting a signature to their end users.

An example of this would be ADP giving their customer (the Director of HR at Company XYZ) the ability to send an employee a document for signature right through ADP's system. When the signature request comes from a name and a provider they trust, it's a lot less likely you'll see employees sending important work attachments right to their spam and trash folders.

## Embedded templates

Embedded templates put the power of template creation in the hands of your customer and allow you to provide a more flexible and customized solution.

Let's use our ADP example again. In addition to allowing users to send documents for signature, ADP also wants to let their users upload templates for documents they frequently use (e.g. a standard corporate NDA). With embedded templates from Dropbox Sign API, ADP can give their customers yet another level of control and customization in the signature sending and signing



## Premium branding

The holy grail of flexibility and customization, premium branding allows a customer to fully brand all aspects of the signature experience down to the colors and logos. It actually removes all mention of Dropbox Sign, allowing our customers' brands to shine and creating a consistent experience for their end users.

## Enterprise features

We find that many of our larger or more established customers often look for a common set of features that give senders and signers increased flexibility to cater to even the most unique use cases.

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These are some of our most widely-used enterprise features.

### Bulk send

Bulk send allows you to send a single document to a large audience in one fell swoop. Before bulk send, you could easily spend a month or more sending and getting everyone to sign and return an important document like an updated stock agreement.



## Signer reassignment

Imagine a large deal for Deloitte falling through just because the lead partner isn't available to sign. In large organizations, there are often multiple people who have the power of signature. With signer reassignment, any partner can easily, digitally reassign the power of signature to another person to get documents signed and deals closed efficiently.

### Signer attachments

Signer attachments are perfect for when signers need to upload a document to an agreement. A great example of this is employment verification where a new hire needs to provide a copy of their passport or driver's license. Instead of eSigning and then trying to remember which papers to bring in on their first day, the new hire can complete the entire process digitally so they can get to productivity quickly and HR can get back to work.

# Dropbox Sign API Proof Points and Case Studies



## **BROKER MINT**

Brokermint increased sales conversion rate by 23% after integrating DropboxSign API



## **KIN**

KinHR used DropboxSign API to build a totally seamless onboarding platform



## **EQ**UITYZEN

DropboxSign API helped decrease document turnaround time from 48 hours to 11 minutes at EquityZen



## **LoftSmart**

LoftSmart created a paperless real estate marketplace with DropboxSign API



## **FrontFundr** Invest in the future

DropboxSign API decreased FrontFundr's financial document processing time by 75%

# Integration Checklist for Dropbox Sign API

Once you've determined you want to use an eSignature API, it's simple to get up and running with Dropbox Sign API—even if you're currently using another product or service for your eSignatures.

This checklist will help you set up your Dropbox Sign account quickly and seamlessly.

## PHASE I: Secure engineering resources

Ensure that your company has the necessary API development resources to support you through design, implementation, and launch (the average Dropbox Sign API deployment is just 2.5 days!). For those who don't have engineering resources in-house, third-party development companies are a great option for implementing our API.

## PHASE II: Design

Scope out your signing (and/or requesting) workflow from start to finish. Things to ask yourself include:

- Will documents be generated in an iFrame on your site or on dropboxsign.com?
- Will the signing take place on your site or on dropboxsign.com?
- How branded do you want the customer experience?  
(Choose between white labeled with your brand in the forefront or the standard Dropbox Sign-branded interface.)
- How will requests be generated?
- What features would you like your signers or users to access?
- How will you be retrieving data from signed documents?
- How would you like to store completed documents?
- What kind of post-signing access to those documents will you provide signers?
- What goals will determine the success of your integrations?

Then get familiar with our API resources:

- [API Documentation](#)
- [Official SDKs](#)



## PHASE III: Build

- Integrate Dropbox Sign API feature and workflow that you decided upon during Phase II.
- If you're using templates, create the templates that will be used in your integration.
- Prepare for properly handling callbacks and retrieving the PDFs and data from your signature requests.
- Consider creating a second API app to be used for your test or developer environment.

## PHASE IV: App approval

- Embedded flows require a 30-minute app approval with a Dropbox Sign API Support Engineer. We will review your integration to ensure it's working properly and that your integration meets signer verification guidelines.
- After passing your app approval, you will be able to use embedded flows in Production. (This will require a paid subscription).
- Launch! Your app is now ready to be used in Production and you can start sending documents for signature!

## PHASE V: Monitor, iterate, and improve

- Monitor adoption and usage amongst your user base to ensure your process is working.
- Measure the success of your integrations against the goals set during the design phase.
- Collect feedback from your users to improve your process and find ideas to expand upon functionality.

We recommend reviewing each phase with the current admin or project leader for eSignatures at your company. If you have additional questions you can [always contact our API team](#) or look through our [technical documentation](#) and [API Help Center](#).



## Resources for Developers

Developers want to leverage Dropbox Sign workflow tools in a broad range of environments and with a wide degree of options. They want to be able to remove restrictions that don't seem necessary so that the API's behavior can be as natural as possible within the confines of whatever system they happen to be working within.

As an API-focused company, the Dropbox Sign team has made great strides to meet developers where they are. We've also worked hard to give our developers tools to save their end users from tedious, repetitive processes and avoid reinventing the wheel wherever possible.

Here are the tools you or your developers can use to best explore and test Dropbox Sign API.

## Documentation

<https://app.hellosign.com/api/documentation>

## API dashboard

[Why Every API Needs a Dashboard](#)

[Getting Started with the Dropbox Sign API Dashboard](#)

ProTip: The best companies have dedicated API support teams staffed by software engineers to help with setup, implementation, and best practices. Make sure your vendor of choice has the technical support capabilities to take care of your team during and after implementation.

## Official Dropbox Sign libraries

Dropbox Sign [Python SDK](#)

Dropbox Sign [Java SDK](#)

Dropbox Sign [Ruby SDK](#)

Dropbox Sign [NodeJS SDK](#)

Dropbox Sign [PHP SDK](#)

Dropbox Sign [C#.NET SDK](#)

## Test account

It's possible to access Dropbox Sign API in test mode using the boolean parameter "test\_mode". Signature requests created in test mode are not legally binding and are watermarked as such.

## Restricted endpoints

The following API endpoints require a paid plan but are always accessible in test mode:

- [signature\\_request/send](#)
- [signature\\_request/send\\_with\\_template](#)  
(previously [send\\_with\\_reusable\\_form](#))
- [signature\\_request/bulk\\_send\\_with\\_template](#)
- [signature\\_request/create\\_embedded](#)
- [signature\\_request/create\\_embedded\\_with\\_template](#)  
(previously [create\\_embedded\\_with\\_reusable\\_form](#))



## About Dropbox Sign

The Dropbox Sign digital workflow platform—which includes [eSignature](#), [digital workflow](#), and [electronic fax solutions](#)— helps over 80,000 companies and millions of people do business faster every day.

We help our customers close deals faster, onboard new hires with ease, complete documents without error, and much, much more.

[Contact the developer-led Dropbox Sign API team today](#) to see what Dropbox Sign API's smart, integrated eSignature system can do for your business.