

Example Admin Configuration Guide Template: Legacy Plugin Setting to API Equivalents

This guide is a reusable template. Use it to show how settings from a legacy plugin map to their equivalents, if any exist, in a new API-based integration. Use this template when a product retires a plugin or SDK-based integration in favor of an API, and administrators need a clear, side-by-side reference for the result of each current setting.

Replace the bracketed placeholders, such as [Product Name] and [Setting Name], with your own product and setting names. Keep the overall structure, including the section groupings, tables, and the two final reference sections, because it gives administrators a predictable place to look up any setting.

The template assumes three possible outcomes for any given legacy setting:

- **Configured in the new system:** The setting has a direct or near-direct equivalent, usually in a new admin console or settings UI.
- **No longer needed:** The underlying behavior is now automatic, default, or otherwise irrelevant in the new architecture.
- **Not currently supported:** The new API or integration has no equivalent yet. State this explicitly so administrators do not discover it by trial and error.

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System Configuration

Admin Settings

{Image 1 placeholder: screenshot of the legacy plugin’s Admin Settings panel}

Plugin Setting	API Equivalent
Enable Automatic Updates on Save	Configure this setting in New Console > Integration > Sync Settings . The plugin combined create and update events. The API separates these events, and a webhook triggers the sync.
Enable Automatic Updates on Open	Configure this setting in Sync Settings . The behavior differs slightly: the plugin checked for updates when a record was opened, but the API pushes updates whenever a supported field changes upstream.
Only for Records in	

[Folder/Category]	Available in Sync Settings .
Stop When Status Is [Value]	Available in Sync Settings .
Stop When Field Is Set	Available in Sync Settings . Specify a field ID that halts further updates once populated.
Enable '[Legacy Menu Item]' Menu Item	Does not apply to the API. This setting controlled visibility of a plugin-only UI element.
Show Debug Panel with Custom Fields	Applies only to the legacy input form. No web-based equivalent is planned.

Note: This guide lists additional Admin Settings that need further research or that have no current API equivalent in Not Supported or Not Available in the API.

Company Settings

{Image 2 placeholder: screenshot of the legacy Company/Organization Settings page}

Plugin Setting	API Equivalent or Notes
Web Service URL, Company Token	Does not apply to API usage. The API handles authentication differently.
Use Fallback Date When [X] Is Unavailable	Does not apply. The system uses the canonical date automatically.
Enable [Legacy Feature] Request and Show Status Icons	Applies to the legacy desktop client UI only. The web client does not support this setting.
Export Users	The plugin exported by role. The API equivalent is available in the Users and Roles table. Use the options menu to export to CSV.
Portal and Workspace Settings	Opens a dedicated settings dialog. See these subsections next.
Set Test Users	Does not apply. The plugin used this setting only for performance testing.

Company Settings: General Options

Plugin Setting	API Equivalent or Notes
Require Consent Before [Document Type A]	No longer relevant. The new workflow typically collects consent earlier.
Require Consent Before [Document Type B]	Same reasoning as the previous row.
Allow Selecting Contacts for 'Send Files'	The new delivery flow combines request and send actions and restricts recipients to a fixed set of roles.
Enable 'Auto-Assign' Override for Unassigned Files	The new Import API resolves this, combined with barcode or metadata matching.
Enable [Feature] Only for [Channel]	This is now a channel setting under Sync Settings.

These settings from this page have no API equivalent. For details, see [Not Supported or Not Available in the API](#):

- Your Workspace Name.
- Require All Parties to Have Emails Before [Action].
- Require All Parties to Have Unique Emails.
- Allow Users to Choose Between [Legacy Channel] and [New Channel].
- Prompt User to Sign if Sent With Signature Points.
- Disable [Feature] for All Records.
- Enable “Help > Save Logs” Menu Item.

Company Settings: Tracking

Note: Some settings in this section need customer testing of the new integration to confirm whether parity is still needed.

Plugin Setting	API Equivalent or Notes
Presumed-Received Date Settings (Calendar Day variants)	Requires further research. The product team recommends the standard regulatory calendar-day value as the default for most customers.
Force-Clear Presumed-Received Date	Might be added as an API setting if downstream coverage proves inadequate.
Add Tracking When [Document] Is Sent via Request	Might be added as an API setting if downstream coverage proves inadequate.
Show ‘Manual Fulfillment’ Button	Now appears under Record Details > Fulfillment . A backend flag controls it dynamically.
Use ‘[Prefix]’ for Generated Documents	The API does not support this setting.
Force-Clear Received Date on Legacy Document Type	Likely unnecessary. Most customers no longer use the legacy document type.
Enable [Third-Party] Integration	The team has no plans for parity.

These settings from this page have no API equivalent. For details, see [Not Supported or Not Available in the API](#):

- Show “Tracking Details” Button.
- Highlight Excluded Tracking Records in Red.
- Replace Status Columns With Viewed or Signed Status.
- Use Custom Type Instead of ‘Other’.

Sync and Data Settings

{Image 3 placeholder: screenshot of the legacy Auto-Link/Automatic Updates panel}

Webhook-based sync now handles most of this functionality, such as updates pulled from the source system into the product.

Plugin Setting	API Equivalent or Notes
Enable Auto-Link on Save	Records sync automatically on save.

Only Auto-Link Records in [Folder]	Available on the Sync Settings page.
Stop Auto-Link When Status Is [Value]	Available on the Sync Settings page.
Stop Auto-Link When Field Is Set	Available on the Sync Settings page.
[Custom Push Fields]	Now self-service. See Additional Fields under New in the API .

These settings from this page have no API equivalent. For details, see [Not Supported or Not Available in the API](#):

- Enable Auto-Link on Open.
- Only Auto-Link Records Matching [Legacy Field] = [Value].
- Bypass These Users.
- Auto-Link for Specific Users.
- Auto-Link for Specific Roles.

Document and File Handling Settings

{Image 4 placeholder: screenshot of the legacy Document Handling settings}

Setting	Needed for API?	Notes
Unassigned or Default Folder	Unknown	—
PDF or Image Format	No	The API always uses a single standard format.
Add Documents for Status [X]	Unknown	—
Always Add to Document	Unknown	—
Allow Creating New Document Types	Unknown	—
Enable Highlighting	No	The web client does not augment the legacy UI this way.

Rejected documents: Document rejection now happens within the core product. A backend flag (`[example_flag_name]`) enables this behavior.

Auto-import: Administrators configure auto-import behavior on a dedicated **Document Import Settings** page. See [New in the API](#).

Known exceptions:

- The plugin imported both a source document and its associated derived records. The API currently imports only the source document, not the derived records.
- When an administrator enables a specific downstream setting, the system automatically hides a related configuration option.

Legacy Batch or Scheduled Jobs

The API-based sync feature fully replaces the legacy batch or scheduled-job processor. Administrators now configure sync on the **Sync Settings** page of the web console. They no longer need a background job scheduler.

UI Configuration

Notification Settings

{Image 5 placeholder: screenshot of the legacy Notify Roles/Recipients page}

The new system surfaces a predefined, entitlement-based list of recipients, such as:

- Primary Contact.
- Secondary Contact.
- Internal Owner or Assignee.
- Reviewer Role.
- External Partner Role A.
- External Partner Role B.

Optional Configuration

Not Supported or Not Available in the API

The API does not support the settings in this table. In some cases, the new architecture no longer needs the setting, for example, because of webhook-based, instance-level sync. In other cases, the system cannot replicate the setting because the setting depended on plugin-specific or desktop-client-specific behavior.

Setting	Section	Why the System Does Not Support This Setting
Disable Updates for Users Without Full Edit Access	Admin Settings	Sync settings apply at the company level, not the role level, due to instance-based webhook restrictions. <i>(Confirm before publishing.)</i>
Enable Updates via Field Trigger	Admin Settings	No longer needed. Webhooks now sync everything on save.
Disable Open-Triggered Updates for Specific Users	Admin Settings	The plugin offered no per-user granularity. Webhooks operate at the instance level.
[Legacy Mailbox Feature]	Mailbox Settings	Plugin-only feature. Auto-import replaces it.
Set Record Creator to [Role] Instead of Current User	Mailbox Settings	The creator field becomes read-only when the API creates records.
Disable Calculations During Import	Mailbox Settings	The core product now manages calculations and business rules automatically on import.
Recalculate Before Save	Mailbox Settings	The API cannot control this action at save time. The plugin previously enabled it

		via the SDK.
Mailbox User and Manager Access	Mailbox Settings	Plugin-only feature. Auto-import replaces it.
Disable Final Update on Open for New Companies	Mailbox Settings (Internal)	This setting served as a race-condition fail-safe specific to the plugin. The API does not need it.
Enable Auto-Link on Open	Sync Settings	Webhooks sync only on save or on an upstream push. There is no “on open” event.
Only Auto-Link Matching [Legacy Field]	Sync Settings	Sync Settings does not currently expose this option. The team has not made a final decision.
Bypass These Users	Sync Settings	Not currently exposed. The system currently accepts webhook updates from all users.
Auto-Link for Specific Users and Roles	Sync Settings	Not currently exposed in Sync Settings.
All Eligibility Display Settings (labels, auto-prompt)	Company Settings	Not supported by the new delivery component. Eligibility selection now appears inline in the host UI.
Highlight Excluded Records in Red	Tracking Settings	The API cannot replicate this UI-only feature specific to the legacy client.
Show ‘Tracking Details’ Button	Tracking Settings	The button only opened a legacy history window.
Replace Status Columns With Viewed or Signed Status	Tracking Settings	Not supported by the API.
PDF or Image Format	Document Settings	The API always uses a single standard format.
Enable Highlighting	Document Settings	The web client does not augment the UI this way.
Show Debug Panel with Custom Fields	Admin Settings	Applies only to the legacy input form. No web-form equivalent is planned.
Enable ‘[Legacy Menu Item]’	Admin Settings	This setting controlled visibility of a plugin-only menu item. This setting only

Enable “Help > Save Logs”	Company Settings	zipped plugin logs into an archive. The API does not need it.
Your Workspace Name	Company Settings	Not needed. The delivery component fixes the new product name.
Enable [Feature] Only for [Channel]	Company Settings	Channel selection in Sync Settings now handles this behavior.
Require All Parties to Have Emails Before [Action]	Company Settings	Not configurable. By default, the system requires emails to create an account.
Require All Parties to Have Unique Emails	Company Settings	Not configurable in the API model.
Allow Users to Choose Between Channels	Company Settings	Not configurable. The delivery component governs this choice automatically.
Disable Closing Packages for All Records	Company Settings	No equivalent setting exists in the API or delivery model.
Use ‘[Prefix]’ for Generated Documents	Tracking Settings	The team has no plans for parity.
Use Custom Type Instead of ‘Other’	Tracking Settings	The team has no plans for parity. The delivery component does not allow this configuration.
Enable [Third-Party] Integration	Tracking Settings	The team has no plans for parity.
Prompt User to Sign With Signature Points	Company Settings	The delivery component runs as an embedded frame and cannot redirect to an external signing flow.
Set Test Users	Company Settings	The plugin used this setting only for performance testing.

New in the API (Not Part of the Plugin or SDK)

This section lists new concepts or settings introduced by the API integration that did not exist in the plugin or SDK.

New Item	Location	Description
Separate “Inbound” and “Outbound” Sync Tabs	Company Settings > Integration > Sync Settings	The plugin combined create, update, and pull logic into single settings. The API splits sync direction into two independently configurable tabs.

Webhook-Based Sync	Sync Settings	Replaces the plugin's save-triggered polling model. The source system notifies the product of changes via webhook.
"Additional Fields" Self-Service Setting	Sync Settings > Updates	Administrators can enter field IDs directly to add custom push fields. The plugin required engineering support for this task.
Channel Selection for Sync and Creation	Company Settings > Portal Settings	Lets companies define channels, for example, wholesale or third-party channels, for which the system syncs or creates records. The plugin does not include this option.
"[Renamed Legacy Trigger] Setting"	Sync Settings > Updates	A renamed, self-service version of a legacy field-trigger rule. <i>(Note target release date, if known.)</i>
Record Template Rules Card (planned)	Integration Settings	A planned feature. It lets administrators define rules that assign templates or folders based on record field values. It will replace legacy mailbox access settings.
Document Import Settings Page	document_import_settings	A dedicated self-service page that configures auto-import behavior. This page replaces the plugin's import settings panel.
[example_flag_name] Flag	Document Handling > Rejected Documents	Enables document rejection handling directly within the core product.
Record GUID as Primary Identifier	All API communication	The API identifies records by GUID instead of a legacy record number. This change removes prior restrictions tied to unnumbered records.

Notes for Template Authors

- Keep every legacy setting in exactly one place: either a “configured here” row, a “no longer needed” row, or the Not Supported table. Never omit a setting silently.
- Use consistent wording for outcomes, such as “Not supported via API at this time” compared with “Does not apply,” so administrators can scan quickly and tell the difference between “maybe later” and “never.”
- Flag anything uncertain explicitly, for example, “This reason requires confirmation” or “Check with your support representative.” Do not assume the final behavior.
- If a feature is planned but not yet released, name the setting, its future location, and, if known, an expected timeframe.