

## Partner API Guide

|              |                               |
|--------------|-------------------------------|
| Prepared By: | John Jackson                  |
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| Version:     | 1.20 Release                  |

## Introduction

This API allows the creation, reading, updating or deletion of partners. The request is made by making a HTTP POST of an XML message containing an access key, request type and other elements.

## The Request

To use this API, an access key is required. Provide the key in a 'key' element within the request. Access keys can be created in 'Settings > Access Keys'.

For each request, a 'request' element must also be given containing either 'create', 'read', 'update' or 'delete'. More details of how to make each request type are given further on in this guide.

If the main service is accessed at the address 'domain.example.com', then a POST request should be made to the corresponding API URL:

**<https://domain.example.com/api/APIPartner.php>**

An XML message should be sent as the POST data:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <key>Yrg32FoiRdSriLYEbLrzSvFmurBGsPiz</key>
  <request>create</request>
  ...
</data>
```

## The Response

The server will respond with XML data. The response will always contain 'Code' (error code) and 'Message' (response message) elements. If there are several messages, there may be multiple 'Message' elements. If successful, other response elements will also be returned.

A successful response may look like this:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<result>
  <code>0</code>
  <message>OK</message>
  ...
</result>
```

## Create

```
<request>create</request>
```

### Parameters

Required parameters are highlighted in bold. If other parameters are not supplied, default values will be used.

|                      |  |
|----------------------|--|
| siteid               | The default site ID to use for this partner.   |
| <b>company</b>       | <b>Partner's company name.</b>   |
| description          | Additional description for partner.  |
| reference            | Internal reference code/number for this partner.   |
| customerphone        | Customer enquiry phone number.   |
| customeremail        | Customer enquiry email address.  |
| customeropeninghours | Customer opening hours.  |
| title                | Partner's title: <ul style="list-style-type: none"> <li>• Mr.</li> <li>• Mrs.</li> <li>• Ms.</li> <li>• Miss</li> <li>• Dr.</li> <li>• Rev.</li> </ul> This is required if other parts of the name are supplied. |
| firstname            | Partner's first name. This is required if other parts of the name are supplied.  |
| lastname             | Partner's last name. This is required if other parts of the name are supplied.   |
| phone                | Phone number.  |
| transferphone        | Phone number for transferring leads.   |
| mobile               | Mobile phone number.   |
| fax                  | Fax number.  |
| email                | Email address.   |
| address              | Address line 1.  |
| address2             | Address line 2.  |
| address3             | Address line 3.  |
| towncity             | Town or city.  |
| postcode             | Postcode   |
| fsanumber            | FSA authorisation number.  |
| notes                | Notes  |
| password             | Password   |
| passwordconfirm      | Password confirmation (must match password).   |

|                                      |  |
|--------------------------------------|--|
| emaildeliveryenabled                 | Email delivery enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                 |
| emaildeliveryaddress                 | Email delivery email address(es). Comma separate multiple addresses.   |
| emaildeliverycustom                  | Use custom template for email delivery:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul> |
| emaildeliverysubject                 | Custom email delivery template subject line.   |
| emaildeliverytemplate                | Custom email delivery template body.   |
| emailfollowupsubject                 | Custom email follow-up template subject line.  |
| emailfollowuptemplate                | Custom email follow-up template body.  |
| internetdeliveryenabled              | Internet delivery enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>              |
| internetdeliveryrequestmethod        | Internet delivery request method:<br><ul style="list-style-type: none"> <li>• post</li> <li>• get</li> </ul>     |
| internetdeliverycontenttype          | Internet delivery content type:<br><ul style="list-style-type: none"> <li>• xml</li> <li>• form</li> </ul>       |
| internetdeliveryurl                  | Internet delivery URL.   |
| internetdeliverytemplate             | Internet delivery template.  |
| internetfollowupurl                  | Internet delivery follow-up URL.   |
| internetfollowuptemplate             | Internet delivery follow-up template.  |
| internetdeliverytagresultdescription | Internet delivery result description XML element.  |
| internetdeliverytagresultref         | Internet delivery return reference XML element.  |
| deliverschedule                      | Delivery schedule enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>              |
| deliverscheduleday1                  | Deliver on Mondays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                     |
| deliverscheduleday1start             | Monday delivery start time. e.g. '09:00'.  |
| deliverscheduleday1end               | Monday delivery end time. e.g. '17:00'.  |
| deliverscheduleday2                  | Deliver on Tuesdays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                    |
| deliverscheduleday2start             | Tuesday delivery start time. e.g. '09:00'.   |
| deliverscheduleday2end               | Tuesday delivery end time. e.g. '17:00'.   |
| deliverscheduleday3                  | Deliver on Wednesdays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                  |
| deliverscheduleday3start             | Wednesday delivery start time. e.g. '09:00'.   |
| deliverscheduleday3end               | Wednesday delivery end time. e.g. '17:00'.   |

|                           |   |
|---------------------------|---|
| deliveryscheduleday4      | Deliver on Thursdays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                       |
| deliveryscheduleday4start | Thursday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday4end   | Thursday delivery end time. e.g. '17:00'.   |
| deliveryscheduleday5      | Deliver on Fridays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>   |
| deliveryscheduleday5start | Friday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday5end   | Friday delivery end time. e.g. '17:00'.   |
| deliveryscheduleday6      | Deliver on Saturdays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                       |
| deliveryscheduleday6start | Saturday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday6end   | Saturday delivery end time. e.g. '17:00'.   |
| deliveryscheduleday7      | Deliver on Sundays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>   |
| deliveryscheduleday7start | Sunday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday7end   | Sunday delivery end time. e.g. '17:00'.   |
| creditlimit               | Credit limit.   |
| dailylimit                | Daily lead delivery limit.  |
| monthlylimit              | Monthly lead delivery limit.  |
| leadtextalerts            | Enable text message alerts on being referred a lead: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>        |
| fundstextalerts           | Enable text message alerts when funds are running low: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>      |
| fundsthreshold            | Low funds threshold.  |
| referralpartner           | Leads will be referred to partner: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                          |
| introducer                | Leads will be introduced by partner: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                        |
| accesslevel               | Portal access level: <ul style="list-style-type: none"> <li>• Standard</li> <li>• SearchOnly</li> <li>• SearchExcluded</li> </ul> |
| manuallyacceptleads       | Require leads to be manually accepted after referral: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>       |
| updatestatus              | Allow referral partners to update the status of leads: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>      |
| online                    | Online status: <ul style="list-style-type: none"> <li>• Online</li> <li>• Offline</li> </ul>                                      |

|           |   |
|-----------|---|
| sendemail | Send a welcome email to the new partner: <ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul> |
|-----------|---|

## Response

|    |                            |
|----|----------------------------|
| id | The ID of the new partner. |
|----|----------------------------|

## Error Codes

|   |   |
|---|---|
| 0 | No errors   |
| 1 | Validation or authentication error                        |
| 2 | XML format error or no XML provided                       |
| 3 | The email address is already allocated to another account |
| 4 | The account's user limit has been reached                 |

## Read

```
<request>read</request>
```

### Parameters

Required parameters are highlighted in bold.

|           |                                       |
|-----------|---------------------------------------|
| <b>id</b> | <b>The ID of the partner to read.</b> |
|-----------|---------------------------------------|

### Response

|                      |  |
|----------------------|--|
| id                   | The ID of the partner.   |
| siteid               | The default site ID to use for this partner.   |
| company              | Partner's company name.  |
| description          | Additional description for partner.  |
| reference            | Internal reference code/number for this partner.   |
| customerphone        | Customer enquiry phone number.   |
| customeremail        | Customer enquiry email address.  |
| customeropeninghours | Customer opening hours.  |
| title                | Partner's title: <ul style="list-style-type: none"> <li>• Mr.</li> <li>• Mrs.</li> <li>• Ms.</li> <li>• Miss</li> <li>• Dr.</li> <li>• Rev.</li> </ul> |
| firstname            | Partner's first name.  |
| lastname             | Partner's last name.   |
| phone                | Phone number.  |
| transferphone        | Phone number for transferring leads.   |
| mobile               | Mobile phone number.   |
| fax                  | Fax number.  |
| email                | Email address.   |
| address              | Address line 1.  |
| address2             | Address line 2.  |
| address3             | Address line 3.  |
| towncity             | Town or city.  |
| postcode             | Postcode   |
| fsanumber            | FSA authorisation number.  |
| notes                | Notes  |

|                                      |  |
|--------------------------------------|--|
| emaildeliveryenabled                 | Email delivery enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                 |
| emaildeliveryaddress                 | Email delivery email address(es). Comma separate multiple addresses.   |
| emaildeliverycustom                  | Use custom template for email delivery:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul> |
| emaildeliverysubject                 | Custom email delivery template subject line.   |
| emaildeliverytemplate                | Custom email delivery template body.   |
| emailfollowupsubject                 | Custom email follow-up template subject line.  |
| emailfollowuptemplate                | Custom email follow-up template body.  |
| internetdeliveryenabled              | Internet delivery enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>              |
| internetdeliveryrequestmethod        | Internet delivery request method:<br><ul style="list-style-type: none"> <li>• post</li> <li>• get</li> </ul>     |
| internetdeliverycontenttype          | Internet delivery content type:<br><ul style="list-style-type: none"> <li>• xml</li> <li>• form</li> </ul>       |
| internetdeliveryurl                  | Internet delivery URL.   |
| internetdeliverytemplate             | Internet delivery template.  |
| internetfollowupurl                  | Internet delivery follow-up URL.   |
| internetfollowuptemplate             | Internet delivery follow-up template.  |
| internetdeliverytagresultdescription | Internet delivery result description XML element.  |
| internetdeliverytagresultref         | Internet delivery return reference XML element.  |
| deliverschedule                      | Delivery schedule enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>              |
| deliverscheduleday1                  | Deliver on Mondays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                     |
| deliverscheduleday1start             | Monday delivery start time. e.g. '09:00'.  |
| deliverscheduleday1end               | Monday delivery end time. e.g. '17:00'.  |
| deliverscheduleday2                  | Deliver on Tuesdays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                    |
| deliverscheduleday2start             | Tuesday delivery start time. e.g. '09:00'.   |
| deliverscheduleday2end               | Tuesday delivery end time. e.g. '17:00'.   |
| deliverscheduleday3                  | Deliver on Wednesdays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                  |
| deliverscheduleday3start             | Wednesday delivery start time. e.g. '09:00'.   |
| deliverscheduleday3end               | Wednesday delivery end time. e.g. '17:00'.   |

|                           |  |
|---------------------------|--|
| deliveryscheduleday4      | Deliver on Thursdays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                  |
| deliveryscheduleday4start | Thursday delivery start time. e.g. '09:00'.  |
| deliveryscheduleday4end   | Thursday delivery end time. e.g. '17:00'.  |
| deliveryscheduleday5      | Deliver on Fridays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                    |
| deliveryscheduleday5start | Friday delivery start time. e.g. '09:00'.  |
| deliveryscheduleday5end   | Friday delivery end time. e.g. '17:00'.  |
| deliveryscheduleday6      | Deliver on Saturdays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                  |
| deliveryscheduleday6start | Saturday delivery start time. e.g. '09:00'.  |
| deliveryscheduleday6end   | Saturday delivery end time. e.g. '17:00'.  |
| deliveryscheduleday7      | Deliver on Sundays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                    |
| deliveryscheduleday7start | Sunday delivery start time. e.g. '09:00'.  |
| deliveryscheduleday7end   | Sunday delivery end time. e.g. '17:00'.  |
| balance                   | Current balance.   |
| creditlimit               | Credit limit.  |
| dailylimit                | Daily lead delivery limit.   |
| monthlylimit              | Monthly lead delivery limit.   |
| deliveredtoday            | Number of leads delivered today.   |
| deliveredthismonth        | Number of leads delivered this month.  |
| deliveredlastmonth        | Number of leads delivered last month.  |
| averagetoday              | Average amount paid per lead today.  |
| averagethismonth          | Average amount paid per lead this month.   |
| averagelastmonth          | Average amount paid per lead last month.   |
| leadtextalerts            | Enable text message alerts on being referred a lead: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>   |
| fundstextalerts           | Enable text message alerts when funds are running low: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul> |
| fundsthreshold            | Low funds threshold.   |
| referralpartner           | Leads will be referred to partner: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                     |
| introducer                | Leads will be introduced by partner: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                   |

|                     |   |
|---------------------|---|
| accesslevel         | Portal access level: <ul style="list-style-type: none"> <li>• Standard</li> <li>• SearchOnly</li> <li>• SearchExcluded</li> </ul> |
| manuallyacceptleads | Require leads to be manually accepted after referral: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>       |
| updatestatus        | Allow referral partners to update the status of leads: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>      |
| active              | Partner status: <ul style="list-style-type: none"> <li>• Active</li> <li>• Pending</li> <li>• Inactive</li> </ul>                 |
| online              | Online status: <ul style="list-style-type: none"> <li>• Online</li> <li>• Offline</li> </ul>                                      |
| created             | The date and time that the partner was created. e.g. '2011-01-01 12:00:00'.   |

## Error Codes

|   |                                     |
|---|-------------------------------------|
| 0 | No errors                           |
| 1 | Validation or authentication error  |
| 2 | XML format error or no XML provided |

## Update

```
<request>update</request>
```

### Parameters

Required parameters are highlighted in bold.

| <b>id</b>            | <b>The ID of the partner to update.</b>  |
|----------------------|--|
| siteid               | The default site ID to use for this partner.   |
| company              | Partner's company name.  |
| description          | Additional description for partner.  |
| reference            | Internal reference code/number for this partner.   |
| customerphone        | Customer enquiry phone number.   |
| customeremail        | Customer enquiry email address.  |
| customeropeninghours | Customer opening hours.  |
| title                | Partner's title: <ul style="list-style-type: none"> <li>• Mr.</li> <li>• Mrs.</li> <li>• Ms.</li> <li>• Miss</li> <li>• Dr.</li> <li>• Rev.</li> </ul> This is required if other parts of the name are supplied. |
| firstname            | Partner's first name. This is required if other parts of the name are supplied.  |
| lastname             | Partner's last name. This is required if other parts of the name are supplied.   |
| phone                | Phone number.  |
| transferphone        | Phone number for transferring leads.   |
| mobile               | Mobile phone number.   |
| fax                  | Fax number.  |
| email                | Email address.   |
| address              | Address line 1.  |
| address2             | Address line 2.  |
| address3             | Address line 3.  |
| towncity             | Town or city.  |
| postcode             | Postcode   |
| fsanumber            | FSA authorisation number.  |
| notes                | Notes  |
| password             | Password   |
| passwordconfirm      | Password confirmation (must match password).   |

|                                      |  |
|--------------------------------------|--|
| emaildeliveryenabled                 | Email delivery enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                 |
| emaildeliveryaddress                 | Email delivery email address(es). Comma separate multiple addresses.   |
| emaildeliverycustom                  | Use custom template for email delivery:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul> |
| emaildeliverysubject                 | Custom email delivery template subject line.   |
| emaildeliverytemplate                | Custom email delivery template body.   |
| emailfollowupsubject                 | Custom email follow-up template subject line.  |
| emailfollowuptemplate                | Custom email follow-up template body.  |
| internetdeliveryenabled              | Internet delivery enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>              |
| internetdeliveryrequestmethod        | Internet delivery request method:<br><ul style="list-style-type: none"> <li>• post</li> <li>• get</li> </ul>     |
| internetdeliverycontenttype          | Internet delivery content type:<br><ul style="list-style-type: none"> <li>• xml</li> <li>• form</li> </ul>       |
| internetdeliveryurl                  | Internet delivery URL.   |
| internetdeliverytemplate             | Internet delivery template.  |
| internetfollowupurl                  | Internet delivery follow-up URL.   |
| internetfollowuptemplate             | Internet delivery follow-up template.  |
| internetdeliverytagresultdescription | Internet delivery result description XML element.  |
| internetdeliverytagresultref         | Internet delivery return reference XML element.  |
| deliverschedule                      | Delivery schedule enabled:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>              |
| deliverscheduleday1                  | Deliver on Mondays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                     |
| deliverscheduleday1start             | Monday delivery start time. e.g. '09:00'.  |
| deliverscheduleday1end               | Monday delivery end time. e.g. '17:00'.  |
| deliverscheduleday2                  | Deliver on Tuesdays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                    |
| deliverscheduleday2start             | Tuesday delivery start time. e.g. '09:00'.   |
| deliverscheduleday2end               | Tuesday delivery end time. e.g. '17:00'.   |
| deliverscheduleday3                  | Deliver on Wednesdays:<br><ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                  |
| deliverscheduleday3start             | Wednesday delivery start time. e.g. '09:00'.   |
| deliverscheduleday3end               | Wednesday delivery end time. e.g. '17:00'.   |

|                           |   |
|---------------------------|---|
| deliveryscheduleday4      | Deliver on Thursdays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                       |
| deliveryscheduleday4start | Thursday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday4end   | Thursday delivery end time. e.g. '17:00'.   |
| deliveryscheduleday5      | Deliver on Fridays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>   |
| deliveryscheduleday5start | Friday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday5end   | Friday delivery end time. e.g. '17:00'.   |
| deliveryscheduleday6      | Deliver on Saturdays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                                       |
| deliveryscheduleday6start | Saturday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday6end   | Saturday delivery end time. e.g. '17:00'.   |
| deliveryscheduleday7      | Deliver on Sundays: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>   |
| deliveryscheduleday7start | Sunday delivery start time. e.g. '09:00'.   |
| deliveryscheduleday7end   | Sunday delivery end time. e.g. '17:00'.   |
| creditlimit               | Credit limit.   |
| dailylimit                | Daily lead delivery limit.  |
| monthlylimit              | Monthly lead delivery limit.  |
| leadtextalerts            | Enable text message alerts on being referred a lead: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>        |
| fundstextalerts           | Enable text message alerts when funds are running low: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>      |
| fundsthreshold            | Low funds threshold.  |
| referralpartner           | Leads will be referred to partner: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                          |
| introducer                | Leads will be introduced by partner: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>                        |
| accesslevel               | Portal access level: <ul style="list-style-type: none"> <li>• Standard</li> <li>• SearchOnly</li> <li>• SearchExcluded</li> </ul> |
| manuallyacceptleads       | Require leads to be manually accepted after referral: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>       |
| updatestatus              | Allow referral partners to update the status of leads: <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>      |
| active                    | Partner status: <ul style="list-style-type: none"> <li>• Active</li> <li>• Pending</li> <li>• Inactive</li> </ul>                 |

|        |   |
|--------|---|
| online | Online status: <ul style="list-style-type: none"><li>• Online</li><li>• Offline</li></ul> |
|--------|---|

## Response

|    |                        |
|----|------------------------|
| id | The ID of the partner. |
|----|------------------------|

## Error Codes

|   |   |
|---|---|
| 0 | No errors   |
| 1 | Validation or authentication error                        |
| 2 | XML format error or no XML provided                       |
| 3 | The email address is already allocated to another account |
| 4 | The account's user limit has been reached                 |

## Delete

```
<request>delete</request>
```

### Parameters

Required parameters are highlighted in bold.

|    |   |
|----|---|
| id | <b>The ID of the partner to delete.</b> |
|----|---|

### Response

|    |                        |
|----|------------------------|
| id | The ID of the partner. |
|----|------------------------|

### Error Codes

|   |                                     |
|---|-------------------------------------|
| 0 | No errors                           |
| 1 | Validation or authentication error  |
| 2 | XML format error or no XML provided |