



RPAG Platform API

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Overview

This documentation lists and explains the APIs and data available for external users to export and consume from RPAG PMP Application

Authentication

The RPAG Platform API uses a “Resource Owner Password Credentials Grant” from the OAuth 2.0 specification for authentication and authorization. OAuth is an open standard which provides client applications with secure authorization to server resources. The OAuth2 token is provided upon valid request along with a refresh token and token expiry (in seconds). The token must be provided with the API calls for authentication and data access purposes.

Required parameters:

- Client ID - The client ID is an identifier that represents the client application accessing a server resource. This is like a person’s username but is at the integration partner level. This is the same for all API calls by a partner
- Client Secret - Client Secret is like a password and should be treated as such. It is used to authenticate a client application at the partner level.
- RPAG username – The username for a valid RPAG application user. This identifies the client firm they are part of and what data they have access to.
- RPAG password - The credentials for the user. This should be discarded after initial use as the Refresh token detailed below can be used in its stead.

Response:

- Access Token
- Refresh token
- Expires In Seconds

Authorization Process - Using User Credentials

In order to obtain an access token, an authentication request must be made to below RPAG API. When successful, the server will respond with a JSON response containing the access token.

API Details

Method: POST

URL: /PMPPRichUI.Services/api/Account/authorize

Headers:(Mandatory)

- content-type: “application/json”

Parameters:

- clientID
- clientSecret
- userName
- password

Response – JSON response containing the access token, refresh token and expiry in seconds

- The refresh token returned in the response is valid for 24 hours and can be used to generate a new access token after the access token expires
- When the refresh token is used to acquire a new access token, the call returns both an access

token (valid for 10 minutes) and a brand new refresh token (valid for 24 hours). You must store and use the new refresh token going forward as the original refresh token will expire when the new one is generated.

Authorization Process - Using Refresh Token:

The lifetime of an access token is limited. The expiration time will be indicated in the response from the RPAG authorize API. Along with the expiration time, the response will contain a refresh token. Refresh tokens are credentials which could be used to retrieve a new access token, instead of storing & reusing the user's username/password.

API Details

Method: POST

URL: /PMPRichUI.Services/api/Account/RefreshToken

Headers:(Mandatory)

- content-type: "application/json"

Parameters:

- refreshToken

Response – JSON response containing the access token, refresh token and expiry in seconds

- The refresh token returned in the response is valid for 14 days and can be used to generate a new access token after the access token expires
- When the refresh token is used to acquire a new access token, the call returns both an access token (valid for 10 minutes) and a brand-new refresh token (valid for 14 days). You must store and use the new refresh token going forward as the original refresh token will expire when the new one is generated.

API List

List of API's available under RPAG Platform

1. Client/Plan CRM Data

Client/Plan CRM Data

Description

An API that will allow users to export certain data points of all clients and plans accessible by the user from RPAG (only for clients, plans they have access to). The result of the API will be in JSON Format.

API Details

Method: GET

URL: <https://azure-rpagqaf.nfp.com/PMPRichUI.Services/api/clientplancrmapi/GetClientPlanCRMData>

Headers:(Mandatory)

Token: <value copied from authentication process above>

content-type: "application/json"

Response JSON Structure

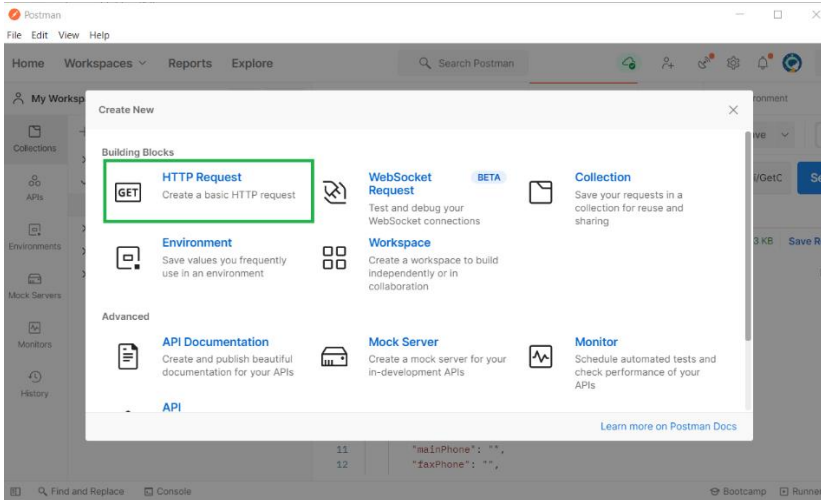
List of Clients (active only) with below details

- Client Id
- CRM Account ID
- Client Name
- Primary Address
- NAICS
- Phone
- Fax
- Service Level
- Client Type
- Referral Source
- All Contacts
 - Client Contact Client Id
 - User Entity Id
 - Contact Name
 - Contact Title
 - Contact Email
 - Contact Phone Number

- List of Plans (active only) under current client with below details
 - Plan Id
 - Plan Detail Client Id
 - Plan Name
 - Plan CRM ID
 - Plan Type
 - Contract Number
 - Total Assets
 - Asset as of Date
 - Fiduciary Status
 - Provider
 - TPA
 - TIN
 - Compensation Estimated Total
 - List of active advisor compensation
 - Compensation Type
 - Compensation Amount

Testing API Data

1. Download Postman from: <https://www.postman.com/downloads/>
2. Open Postman application
3. Open File -> New and select "HTTP Request" in the list



4. Select Method Type
5. Enter API URL in URL input box.
6. Add headers under header section
7. Press the Send button.
8. The API will return the appropriate data as a JSON response.

