

Expert Pro Partner API Documentation

The Expert Pro Partner API provides a powerful platform for managing mortgage applications, clients, and referrers. With this API, your business can streamline the process of retrieving information about agents and creating new mortgage applications, clients, and referrers, all through a secure and efficient API.

The API has been designed to be user-friendly and intuitive, making it easy for your team to quickly retrieve information about agents and create new entities with a few simple API calls. The API uses standard RESTful architecture and HTTP methods to ensure that the API is both secure and scalable.

Request Schema and Endpoint

The link to the API schema documentation is: <https://app.swaggerhub.com/apis-docs/FilogixExpertPro/partner-api/1.1.0#/>

See API Schema documentation for more details about each endpoint.

HTTP Method	Endpoint URL	Description
GET	<code>/ {username} /client/board</code>	List of boards the agent access to
GET	<code>/ {username} /client/referrer</code>	List of referrers the agent has access to
POST	<code>/ {username} /client/profile</code>	Create a Client Profile on a Specified Board
POST	<code>/ {username} /client/referrer</code>	Create a Client Referrer
POST	<code>/ {username} /client/application</code>	Create a Client Application

These Endpoint URLs have a Base URL that depends on the environment, see Environment section below.

Required Headers

You'll need to set the `x-auth-token` and `Content-Type` headers for every request and include your account username as a URL parameter.

To use the API these HTTP headers **must** be set for every request.

Header	Value	Example
<code>x-auth-token</code>	Your account Authorization Token (<i>please contact Filogix to obtain</i>)	<code>eyJhbGciOiJIUzI1NiIsInR5cC...</code> <code>zeFSIM</code>
<code>Content-Type</code>	<code>application/json</code>	-

Required URL parameters

Parameter	Value	Example
<code>{username}</code>	Your account Username (<i>please contact Filogix to obtain - this is not your email address</i>)	<code>f592dfd4-15b1-4093-b2ab-159d0ad12289</code>

Environments

The base URL for the API depends on the environment, with different URLs for UAT and production environments.

Environment	Base URL	Portal URL
UAT	<code>https://external- uat.api.expertpro.filogix.com/v1/partner/</code>	<a href="https://expertpro-
uat.filogix.com/#/login">https://expertpro- uat.filogix.com/#/login
Production	<code>https://external.api.expertpro.filogix.com/v1/partner/</code>	https://expertpro.filogix.com/#/logi

Quick start steps

Note: Details might vary slightly based on your interface of choice.

1. In the “Select Request Method” dropdown, choose the method (GET, POST, etc.) that corresponds to the endpoint you want to call.
2. In the “Enter Request URL” field, enter the Base URL for the environment you’re using, followed by the endpoint URL from the table. Replace “{username}” with your account username.
3. In the Headers tab, add the required headers by clicking the “Add a Key” button and entering “x-auth-token” as the key and your account authorization token as the value. Add another header with “Content-Type” as the key and “application/json” as the value.
4. If you’re making a POST request, you will also need to add the payload in the Body tab. Choose “raw” and “JSON” as the format, and then enter the data in JSON format as described in the example cURL.
5. For creating a client application associated with a specific referrer, set the “referrer-id” top level key with the string value of the Referrer ID you want to use. To create a client profile in a board, set the “boardId” top level key with the string value of the Board ID you want to use.
6. Click the “Send” button to send the request and view the response

Using referrers

When creating a client application, you can associate it with a specific referrer by including the referrer-id in the request. You can find the referrer ID by using the API’s `GET /{username}/client/referrer` endpoint.

To [create a Client Application](#) associated to a specific referrer you must set the `"referrer-id"` top level key with a `string` value of the Referrer ID that you want to use.

The Referrer ID can be retrieved from the API `GET /{username}/client/referrer` endpoint or from the portal URL of the [Referrers screen](#).

For example, in `https://expertpro.filogix.com/8yp486ulm#/referrers/99322` the referrer ID is `99322`

Using boards

Similarly, when creating a client profile, you can specify the board by including the boardId in the request. The board ID can be retrieved from the API's `GET /{username}/client/board` endpoint or by checking the portal URL of the Board Screen.

To [create a Client Profile](#) in a board you must set the `"boardId"` top level key with a `string` value of the Board ID that you want to use.

The Board ID can be retrieved from the API `GET /{username}/client/board` endpoint or from the portal URL of any client profile in the board.

For example, in `https://expertpro.filogix.com/8yp486ulm#/board/7420/profile/294445` the board ID is `7420`

Example cURL

The API documentation includes an example cURL command to create a client application with a referrer and to fetch a list of referrers.

Create Client Application with referrer

```
curl --request POST \  
  --url https://external.api.expertpro.filogix.com/v1/partner/{username}/client/application \  
  --header 'Content-Type: application/json' \  
  --header 'x-auth-token: eyJhb...01zeFSIM' \  
  --data '{  
    "main-applicant": {  
      "personal-details": {  
        "alt-phone-number": "(111) 111-1111",  
        "date-of-birth": "1984-06-05",  
        "email": "test.application@example.com",  
        "first-name": "John",  
        "first-time-home-buyer": false,  
        "language-preference": "english",  
        "last-name": "Smith",  
        "marital-status": "common-law",  
        "middle-name": "Doe",  
        "num-children": "0",  
        "phone-number": "(222) 222-2222",  
        "salutation": "mr.",  
        "own": "live-with-parents"  
      }  
    },  
    "deal-type": "approval",  
    "deal-purpose": "refinance",  
    "referrer-id": "99322"  
  }'
```

Fetch list of referrers

```
curl --request GET \  
  --url https://external.api.expertpro.filogix.com/v1/partner/{username}/client/referrer \  
  --header 'Content-Type: application/json' \  
  --header 'x-auth-token: eyJhbGci...eFSIM'
```