Getting Started with the Total Expert API

Total Expert

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Welcome

Welcome to the Total Expert Developer Portal, we're excited to have you as an integration partner! Within this document you'll find an overview of the process to get your integration certified by Total Expert along with some details around our most commonly used endpoints.

Testing and Review Process

Once you have been given access to the Developer Portal, you'll also be given credentials to what we call our "CT Environment" which is an API testing environment. This environment is stripped down, and its main purpose is to allow our partners to test and validate their API calls before moving to a production environment.

CT Environment Limitations

- There is no UI to log in to. Validation of data must be done through the API
- Journeys cannot be created, edited, or executed in the CT environment due to the lack of a user interface.

Moving to Production

Once we've worked with you to validate your API calls and data access within our CT environment, we will issue you production level API credentials (which will show up in the developer portal) and move you to our production environment with one of our mutual clients to begin testing with one of their test users to ensure that the integration goals have been met.

Rolling out to More Customers

After validation in CT and Production we can work together to make sure we have all of the documentation, marketing materials, and best practices captured for your new integration to make sure that our mutual customers are set up for success.

Rate Limiting

Our production environment has a rate limit of 1000 requests per minute, and 2 token requests per hour. Our rate limiting is based on source IP address and not based on client. If the rate limit is exceeded, you will receive an HTTP 429 response.

Authentication

The Total Expert API uses OAuth 2.0 to authorize and authenticate requests to the API. To use the API to access the system you must first obtain an access token using the '/token' POST endpoint. You can obtain a token by supplying client credentials or an authorization code Once you have the token for your client you will use it in the Authorization header of subsequent requests.

Token Expiration

Once you have retrieved a token, that token is valid for 1 hour. Best practice is to cache that token for future requests since we rate limit the token endpoint to 2 requests per hour.
Total Expert also supports a refresh token which is valid for up to 2 weeks. More details on our refresh token can be found in the Total Expert API documentation.

Authorization Code Authentication

While Total Expert supports both Client Credential and Authorization Code access to our API, we recommend using a typical user-level OAuth flow to retrieve an Authorization Code. With this set up, you'll only need one set of API credentials to manage integrations for multiple customers withing Total Expert who are integrating with your platform.

You'll notice when looking at our documentation that a lot of the objects can be interacted with "As Admin" or "As User". When using the user level OAuth flow, you'll be making calls "As User".

Details on this flow can be found in this document and more information can be found in our API documentation.

Client Credentials

When authenticating use Client Credentials, you will be provided a set of credentials for each Total Expert customer (organization) looking to integrate with your platform. All of these credentials will be listed and available to you through the Developer Portal.

You'll notice when looking at our documentation that a lot of the objects can be interacted with "As Admin" or "As User". When using client credentials, you'll be making calls "As Admin".

More details on this process can be found in our API documentation.

Frequently Used API Endpoints

The three most commonly used API endpoints by our integration partners are Contacts, Surveys, and Insights. Below you will find a high-level description of each of them along with details on when to use them.

Contacts

Contacts in the Total Expert platform represent an individual who could be a customer or prospect. Each contact has a set of standard fields that can be set through the API along with some additional details. If your integration requires a set of fields that does not exist within the contact object today either custom fields or our surveys endpoint can be used to associate those fields with a contact. Details on when to use each are outlined in the custom fields and surveys section of this document.

Contact Ownership

Each contact within Total Expert is owned by a specific user. If interacting with the API as a user, no ownership specification is required when interacting with the API. If interacting with the API as an administrator, an owner will need to be specified.
Owners can be identified by using their Total Expert user id, their email address, their Total Expert username, or an external id associated with the user. More details on the call and formatting can be found within the Total Expert API documentation.

Contact Deduplication & Minimum Fields

Contacts being submitted to Total Expert go through a deduplication process to help reduce the number of duplicate contacts added to the system. Deduplication is done on a per-user basis and not organization wide.

Details on our deduplication process and the minimum number of fields required for creating a contact can be found in our deduplication documentation in the Developer Portal.

Contact Groups

Contact groups are a way to organize contacts within Total Expert. Our customers often create groups like "Prospects", "Active Customers", and "Agents" to help them market appropriately to each group.

Each customer can have their own set of groups as well as what we call "Required Groups" which you must include when creating contacts via the API. It's a good idea to talk with customers to make sure you have accounted for any variations they might prefer when using groups within Total Expert.

For full documentation on Contact Groups, please visit our API documentation.

Custom Fields

Total Expert is able to create custom fields for customers to use in their implementations today. As of today, custom fields can be viewed in the UI by customers but can't be edited. We are continuing to roll out this feature to make our data sets more flexible and will update this document when they are.

In general, we only recommend using custom fields when building an integration feature for a specific customer. Since they currently have to be created by Total Expert, rolling an integration out that makes extensive use of custom fields can lead to delays in implementation and setup.

For full documentation on Custom Fields, please visit our API documentation.

Surveys

Surveys are a flexible data structure that allow integrations to store additional details around a contact that aren't supported by the standard contact field set. For example, if a contact was interested in a refinance opportunity and supplied information about their property location, value, and existing mortgage, etc., you could store this information in a survey response and tie it to that contact.

Advantages of using the surveys endpoint

There are a few advantages to using the surveys endpoint:

- Multiple survey structures can be created for an organization for different purposes. You can have one for refinance, auto loan interest, or any other data you wish to collect from your contacts.
- A contact can submit multiple surveys and new submissions will show up in the survey response area in the UI rather than overwriting old data. This makes it easy to keep track of different interactions with the contact.

- Contact survey responses can be used to trigger marketing automation and can also be used as different conditions within the journey.

General Flow

To submit survey responses to the API, you first need to create the survey. The survey is structured as a set of questions and potential answers with their field types.

When creating the survey via the API, the API will return a survey ID in its response. Once you have that ID, you can retrieve the IDs of the questions from the API for use when creating a survey response.

Now that you have the IDs of the questions, you can create survey responses for that specific organization when data is being sent to Total Expert from your platform. One important thing to note is that if you are sending along standard contact data with a survey, that will have to be sent first in a separate request so that you can obtain the Total Expert contact ID that you want to associate the survey with.

Full details on creating surveys and survey responses can be found here in our API documentation.

Insights

With the Total Expert Insights API, you can provide insights from events occurring within your platform which can be leveraged to drive marketing automation in Total Expert. For example, a user downloading your mobile app could trigger an insight via our API called "Mobile App Downloaded" which would then trigger marketing automation that sends an email about all the features within the mobile app.

Advantages of Insights

- Insights can be used to trigger a marketing automation flow within Total Expert.
- Insights can be used to create a custom Focused View of contacts within Total Expert.

Insight Structure

To begin using insights through the API, you will need to coordinate with our team to create new insight types specific to your integration. Once these insight types are created, they can be used to create insights associated with any contact within TE (that you have access to).

Our standard naming convention for insight types is to prefix them with the integration partner’s name. For Example: “Lending Software: Loan application submitted”.

When submitting an insight for a contact you are able to provide a description within the insight that will show up within Total Expert. That area is freeform text and will not be formatted within Total Expert but is available to provide additional context around an insight.

For full documentation on Insights, please visit our API Documentation.