



Embark API Documentation
May 2019



Introduction

The purpose of this document is to assist analysts and developers in the use of the Embark API for integration within their own Customer Management System.

Embark uses a **Token Authenticated RESTful API**. Tokens are obtained by logging in to the API with a provided user.

The Embark API provides all functionality available in the Embark Admin dashboard. This document is based on the reader having an understanding of:

- Web services using REST architecture
- JSON data format
- Basic database principles

Each integration will have a unique API Endpoint which is referred as `{{endpoint}}` throughout this document.

Authorisation Tokens

All API endpoints marked as requires authentication require the following headers to be sent with each request.

```
--header 'token: {{token}}'
```

The authorisation token is obtained from [ref 1.0 – Login](#).

Tokens expire if another login is performed for the same user, is used from an alternative IP Address or has been active for 24hrs.

Login (ref1.0)

This endpoint must be called at the start of any integration process in order to obtain an authorisation token which is to be used in all future requests.

URL

https://{{endpoint}}/users/login

Methods

POST

Parameters

Parameter	Type	Value	Required
username	String	{{your integration username}}	
password	String	{{your integration password}}	

Example Request

```
Curl -request POST \  
  --url 'https://{{endpoint}}/users/login' \  
  --header 'Content-Type: application/json' \  
  --data '{  
    username: {{username}},  
    password: {{password}}  
  } '
```

Success Response

HTTP Code : 200

```
{  
  user_id: {{user_id}},  
  token: {{token}}  
}
```

Error Response

HTTP Code : 400 BAD REQUEST

```
{  
  error: "Something went wrong..",  
  fields: [  
    [  
      "Incorrect username or password..."  
    ]  
  ],  
  field_errors: [  
    [  
      "Incorrect username or password..."  
    ]  
  ]  
}
```

Reference Data (requires authentication)

This endpoint provides lists of lookup data used within the Embark Platform and referred to in the data sets returned throughout the API.

URL

<https://{{endpoint}}/settings/ref-types/>

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/settings/ref-types/' \  
  --header 'Content-Type: application/json' \  
  --header 'token: {{token}}' \  
}
```

Success Response

HTTP Code : 200

```
[  
  {  
    "domain_id": "Ump2bU1WaTk5Q3MrTzBxcE9sQmVDZz09",  
    "domain": "ASSETS",  
    "codes":  
    [  
      {  
        "id": "RjJvQzRpU3ZPMWdRR2tjaVpYNitGZz09",  
        "code": "ASSETS.HOME_WHERE_YOU_LIVE",  
        "description": "ASSETS.HOME_WHERE_YOU_LIVE",  
        "icon": null,  
        "requires_additional": "1"  
      },  
      ...  
    ]  
  },  
  ...  
]
```

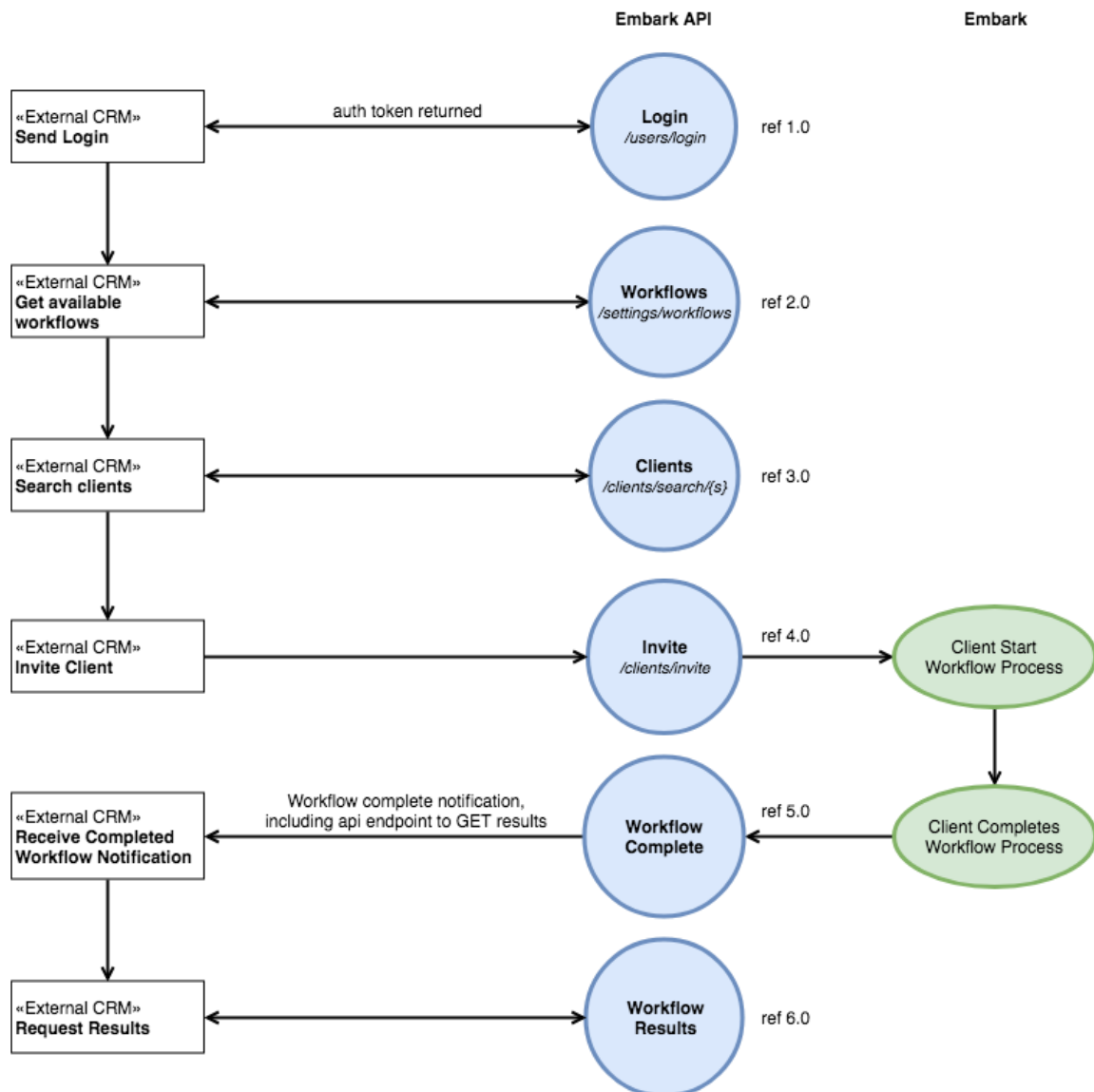
Error Response

HTTP Code : 401 UNATHOURIZED

```
{  
  error: "This action needs a valid token!"  
}
```

Customer Workflow

Add a new customer / add workflow to existing customer



Process Flow

The above diagram depicts the required API flow in order to invite a new or existing client to complete a specific workflow in the Embark Platform.

ref2.0 Workflows (requires authentication)

Obtain a list of available workflows for this installation of Embark.

URL

<https://{{endpoint}}/settings/workflows>

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/settings/workflows' \  
  --header 'Content-Type: application/json \  
  --header 'token: {{token}}''
```

Success Response

HTTP Code : 200

An array of available workflows is returned.

```
[  
  {  
    workflowReference: "financial-statement",  
    active: 1,  
    title: "Your Budget",  
    additionalTitle: "Edit personal details and budget",  
    description: "",  
    confirmation: null,  
    thankyou: null,  
    emailTemplateId: null,  
    icon: "balance",  
    workflowRoute: null,  
    callbackApi: null,  
    resultsApi: "/clients/{client_id}/financial-  
statement/{client_workflow_id}",  
    resultsRepo: "app.repository.client_financial_statement",  
    id: "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",  
    emailTemplate: null,  
    steps: [  
      {  
        id: "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",  
        task_name: "My Details"  
      },  
      {  
        id: "eFdtS0NVUnlLM3B0Q0ZsVWZCa1VKdz09",  
        task_name: "My Situation"  
      },  
      {  
        id: "T1fZMUZYRXQrU040T0U5dWQwdVpqZz09",  
        task_name: "Credit Search"  
      }  
    ]  
  }  
]
```

```
    },  
    ...  
  ]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{  
  error: "This action needs a valid token!"  
}
```

ref3.0 Client Search (requires authentication)

Search for an existing client within this Embark installation. Search is available by client reference, username and name.

URL

<https://{{endpoint}}/clients/search/{{search term}}>

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients/search/bloggs \  
  --header 'Content-Type: application/json \  
  --header 'token: {{token}}''
```

Success Response

HTTP Code : 200

An array of matched clients is returned.

```
[  
  {  
    id: "WGh6cGtZnN14NXMyaEpoUT09",  
    user_id: "eU8xVGhrR2tESX4ydnVDz09",  
    client_reference: null,  
    personal_details_id: "eU8xVGhrR2mNsTm4ydnVDz09",  
    username: "bloggs@fakeemail.com",  
    privacy_policy: null,  
    marketing: null,  
    last_login": "19/09/2018 15:39:14",  
    date_created": "19/09/2018 15:20:06",
```

```
product_ref_data_id: null,
product: null,
brand_id: "bHhzSnA0TFdXkJiQk5kUT09",
brand_name: "embark",
is_vulnerable: "0",
vulnerability: null,
send_chase: "1",
active: "Active",
personal_details: {
  id: "eU8xVGhrR2tESsTm4ydnVDZz09",
  title_ref_data_id: null,
  title: null,
  firstname: "Fake",
  surname: "Bloggs",
  dob: "19/09/2018",
  call_time_ref_data_id: null,
  call_time: null,
  marital_ref_data_id: null,
  marital: null,
  help_for_ref_data_id: null,
  help_for: null,
  partner_client_id: null,
  client_authority: []
},
status: null,
active_id: "1",
client_authority: []
},
...
]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```

ref4.0 Invite Client (requires authentication)

Invite a new or an existing client to complete a selected workflow.

URL

<https://{{endpoint}}/clients/invite>

Methods

POST

Parameters

Parameter	Type	Value	Required
client_id	String	{{client id form client search OR null for a new client}}	
username	String	{{mobile number or email address}}	
title_ref_data_id	String	{{lookup id for the clients title}}	
firstname	String	{{client firstname}}	
surname	String	{{client surname}}	
client_reference	String	{{your client reference}}	
dob	Date (DD/MM/YYYY)	{{clients date of birth}}	
completed_by	String	either ADMIN or CLIENT	
workflow_id	String	{{id of the selected workflow}}	

Example Request

```
Curl -request POST \  
--url 'https://{{endpoint}}/users/login' \  
--header 'Content-Type: application/json' \  
--header 'token: {{token}}' \  
--data '{  
  client_id: null,  
  username: null,  
  title_ref_data_id: null,  
  firstname: null,  
  surname: null,  
  client_reference: '',  
  dob: null,  
  completed_by: 'CLIENT',  
  workflow_id: null  
}'
```

Success Response

HTTP Code : 200

```
{  
  brand_fullname: "Embark UAT"  
  brand_id: "bHhzSnA0TFdXYxMkJiQk5kUT09"  
  brand_name: "embark"  
  client_id: "NkZ1TGF6S2VX2hLSWNGTU1NQT09"  
  client_workflow_id: "b2h3VVg4altc25YVkvVTUT09"  
  date_created: "2018-11-09 12:04:24"  
  id: "VWxRKzdhbznZWWNKbnExVkpudz09"  
  last_login: null  
  marketing: null  
  operator_id: null  
}
```

```
personal_details: {
  call_time: null
  call_time_ref_data_id: null
  dob: "1900-01-01"
  firstname: "Joe"
  id: "THVwN0xtcVwUUxqU2pZZVJZQT09"
  marital: null
  marital_ref_data_id: null
  surname: "Bloggs"
  title: "TITLE.MR"
  title_ref_data_id: "NkZ1TGF6S2VXhLSWNGTU1NQT09"
},
privacy_policy: null
roles: [
  {
    role: "client",
    role_level: "1"
  }
]
status: "0"
username: {{username}}
```

Error Response

HTTP Code : 400 BAD REQUEST

```
{
  error: "Something went wrong..",
  fields: [
    [
      "username" : "This username already exists"
    ]
  ],
  field_errors: [
    [
      "username" : "This username already exists"
    ]
  ]
}
```

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```

ref5.0 Workflow Complete

When a workflow is completed by the client a POST notification can be sent from the Embark platform to an API Endpoint of your choosing. This endpoint needs to be specified during the configuration stage of the Embark Platform.

The POST to the chosen endpoint will contain a JSON request body as shown below. It will include an Embark Endpoint to call back to in order to obtain the workflow data.

Custom **HEADERS** and custom **REQUEST BODY** values can be sent with the callback as required by the integrated system.

```
{
  results_api: https://{{endpoint}}/{{workflow results endpoint}}
}
```

ref6.0 Workflow Results (requires authentication)

Each workflow has a relevant API Endpoint on the Embark platform to provide the collected results.

Results are formed from one or more of the following standard blocks of data.

Methods

GET

Success Response

HTTP Code : 200

Response can be formed of one or more of the following blocks of data:

Client Details:

```
"client":
[
  {
    "id": "M0ZDMTVxcnlTaXN6MjFuTlBrZz09",
    "user_id": "Z3RadXVTY2xFaWxkamdBslpRUT09",
    "client_reference": "001",
    "personal_details_id": "Y29JVJLY0NtZkRZL3FRR2dBZz09",
    "username": "bloggs@paylinksolutions.co.uk",
    "privacy_policy": null,
    "marketing": null,
    "last_login": "09\11\2018 12:50:44",
    "date_created": "16\10\2018 08:45:15",
    "product_ref_data_id": "NnB3SmRCS2pNUTUyc2NnZqZz09",
    "product": "PRODUCT_TYPE.LOAN",
    "brand_id": "bHhzSnA0TlGMUYxMkJiQk5kUT09",
    "brand_name": "embark",
    "is_vulnerable": "0",
    "vulnerability": null,
    "send_chase": "1",
    "status": "0",
```

```

"addresses": [{
  "id": "WEh1YXhmUjd0FzazdoaVVDdz09",
  "address_id": "WEh1YXhmUjFZaTBwd0oaVVDdz09",
  "add1": "9",
  "add2": "Road",
  "town": "Town",
  "postcode": "1e563pt",
  "county_ref_data_id": null,
  "county": null,
  "country_ref_data_id": null,
  "country": null,
  "postal": "1",
  "residing": "1",
  "date_from": null,
  "date_to": null,
  "partner_residing": null,
  "months": null
}],
"phones": [{
  "id": "UD1Jc3NoMvbGlkQngrRV1ZUT09",
  "phone_id": "Yjc5UzZOMmNZUGJHNYtptXUT09",
  "phone_number": "078545360000",
  "phone_ref_data_id": "d2JpUCsLzVhaDRmRHR1SXF3UT09",
  "country_code": null,
  "phone_type": "PHONE_TYPE.MOBILE"
}],
"personal_details": {
  "id": "Y29Jalc4YVJLY0NtZkRdBz09",
  "title_ref_data_id": "NkZ1TGF6S2VXYk1Yd2h1NQT09",
  "title": "TITLE.MR",
  "firstname": "Joe",
  "surname": "Bloggs",
  "dob": "20\08\1986",
  "call_time_ref_data_id": "TjNPbjNmUTNsWVQK1Y4QU1qZz09",
  "call_time": "CALL_TIME.MORNING",
  "marital_ref_data_id": "M1FsSXN5SitsSQX1J1UHJQQT09",
  "marital": "MARITAL_STATUS_REF.MARRIED",
  "help_for_ref_data_id": "bDVqNS83TWRuhqRHhuZCtNz09",
  "help_for": "HELP_FOR.MYSELF",
  "partner_client_id": null,
  "client_authority": null
},
"client_authority": null
}
]

```

Assets:

```

assets: [
  {
    asset_ref_data_id: "RjJvQzRpU3ZPtjaVpYNitGZz09"
    asset_type: "ASSETS.HOME_WHERE_YOU_LIVE"
    charging_order: null
    estimated_value: "160000.00"
    id: "TVpLMWV3Rk3MUZvTUJJa3Z3QT09"
    outstanding_balance: "155000.00"
    secured_loan: null
    who: "WHO.MYSELF"
    who_ref_data_id: "d1ZIUKVGTH11HgwbG9qc0t0UT09"
  },

```

...
]

Budget:

```
"budget": {
  "id": "ZzAxN1VKZFJmM1hVODdVcHVMdz09",
  "budget_date": "2018-10-18T13:00:53Z",
  "current": "1",
  "total_income": "4000.00",
  "total_expenditure": "2489.95",
  "adults_in_household": "2",
  "children_in_household": "1",
  "under16s_in_household": "1",
  "vehicles": "0",
  "budget":
  [
    {
      "budget_group_id": "bHhzSnA0TFdMUyXmKJiQk5kUT09",
      "group_type": "income",
      "group_name": "BUDGET_GROUPS.INCOME.NAME",
      "group_reference": "BUDGET_GROUPS.INCOME.NAME",
      "group_description": "BUDGET_GROUPS.INCOME.DESC",
      "group_order": "1",
      "parent_group_id": null,
      "icon": "#expenditure",
      "budget_criteria": null,
      "groups":
      [
        {
          "budget_sub_group_id":
          "VUVTBkc1Nkg3Mit3bHgZL2hTeSttZz09",
          "group_type": "income",
          "group_name": "BUDGET_GROUPS.EARNINGS.NAME",
          "group_reference": "BUDGET_GROUPS.EARNINGS.NAME_SUB",
          "group_description": null,
          "group_order": "1",
          "parent_group_id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
          "icon": null,
          "budget_criteria": null,
          "items": [{
            "id": "K3RCd3JBN1duYkJJNws4cndNMUxaZz09",
            "budget_item_id":
            "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
            "item_name": "BUDGETS.SALARY.NAME",
            "budget_item_name": null,
            "requires_additional": "0",
            "hint_tip": "BUDGETS.SALARY.DESCRPTION",
            "amount": "4000.00",
            "calculated_amount": null,
            "modified_amount": "4000.00",
            "budget_frequency_id":
            "cmRtUW9rZTdIeVhiVW40MGxBbXJEQT09",
            "budget_frequency": "MONTHLY",
            "in_arrears": "N",
            "arrears_amount": null,
            "arrears_payment_amount": null,
            "modified_arrears_amount": null,
            "budget_note": null,
            "repayment_agreed": null,
```

```

        "repayment_frequency_id": null,
        "repayment_frequency": null,
        "source_ref_data_id":
"VTNvbWtLeDMvbElqeTBoR045NmFBZz09",
        "source": "Client Disclosure",
        "payments": "0",
        "mandatory": "false",
        "hidden": "0",
        "allow_delete": "0",
        "show_arrears": "0",
        "budget_criteria": null
    },
    ...
  }],
  "group_total": 82.5
},
...
],
"surplus": 1510.05
}

```

Debt Management / My Situation:

```

"debt_management": {
  "id": "c3NURm9ESW9OQ3BhOXB0OE9KZDdIQOT09",
  "marital_ref_data_id": "M1FsSXN5SitsSQXp5S1IwT1J1UHJQQOT09",
  "marital_status": "MARITAL_STATUS_REF.MARRIED",
  "currently_in_ref_data_id": null,
  "currently_in": null,
  "currently_in_provider": null,
  "where_in_uk_ref_data_id": null,
  "where_in_uk": null,
  "adults_in_household": "2",
  "children_in_household": "1",
  "under16s_in_household": "1",
  "housing_ref_data_id": "YWN1bWdqQVdrWTlCTjRWR2gweUhZQT09",
  "housing_details": null,
  "housing_status": "HOUSING_STATUS.MORTGAGE",
  "self_employed": null,
  "additional_properties": null,
  "vehicles": "0",
  "vehicle_hire_purchase": null,
  "contacted_by": [{
    "id": null,
    "contact_ref_data_id": "M2hsMUTPRG9GcEFKYUJjNzY5a3o1dz09",
    "contact": "Debt Collection Agency ",
    "checked": "0"
  }, {
    "id": null,
    "contact_ref_data_id": "VWY5Q0NmS05qWFpnYW9MODc2QzZCUT09",
    "contact": "A Bailiff",
    "checked": "0"
  }, {
    "id": null,
    "contact_ref_data_id": "cVv1bnB0cnN6MHFSeVpNaVEzbWRIQT09",
    "contact": "Legal ",
    "checked": "0"
  }
]
}

```

```

    }, {
      "id": null,
      "contact_ref_data_id": "cmgwVXRzSkpaOWJ3bDlWVFBXZ2RiUT09",
      "contact": "Other",
      "checked": "0"
    }
  ]
}

```

Workflow Details:

```

"workflow": {
  "id": "QlozamhHN3NBMzdRRitFT21dZ0N1zz09",
  "client_id": "M0ZDMTVxcnlyRGZTaXN6MjFuTlBrZz09",
  "client_reference": "001",
  "workflow_id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
  "start_date": "2018-10-18 12:47:39",
  "completed_date": "2018-10-18 02:02:48",
  "invite_email_id": null,
  "visible_by": "CLIENT",
  "is_locked": "0",
  "latest_step": [],
  "workflow": {
    "id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
    "workflow_reference": "financial-statement",
    "active": "1",
    "title": "WORKFLOW_YOUR_BUDGET.TITLE",
    "description": "WORKFLOW_YOUR_BUDGET.ADMIN_DESCRIPTION",
    "confirmation": null,
    "thankyou": null,
    "icon": "balance",
    "workflow_route": null
  },
  "status": {
    "id": "UTFsV2tOaUdkYUloeDVRby9LOHNHQT09",
    "client_workflow_id": "QlozamhHN3NBMzdRRitFT21dZ0N1zz09",
    "status_id": "K0lnZ3lSQUlIWlo1UlhMYTZFVm9vQT09",
    "status_name": "COMPLETED",
    "start_date": "18/10/2018 13:02:49",
    "end_date": null,
    "days_in_status": "22",
    "class": "bgm-green"
  }
}

```

Documents (relating to this workflow):

```

"documents": [
  {
    "id": "QnJuc2E2cGhJMGFDNGg2bWxiZmZCdz09",
    "client_id": "M0ZDMTVxcnlyRGZTaXN6MjFuTlBrZz09",
    "client_visible": "1",
    "document_template_id": null,
    "template_name": null,
    "document_ref_data_id": "eFdtS0NVUnlLM3B0Q0ZsVWZCalVKdz09",
    "document": "SYSTEM",
    "document_type_ref_data_id": "MWR0ZjkgvUXQxaW9la2g4V0IwRzFzd09",
    "document_type": "sfs-framework",
    "filename": "sfs-framework.pdf",
    "extension": "PDF",
    "date_added": "2018-10-18 13:02:52",
  }
]

```

```
    "date_opened": null,
    "base64_content":
"JVBERi0xLjQKMSAwIG9iago8PAovVGl0bGUgKP7\AEUAbQBiAGEAcgBrKQovQ3JlYXRvcjAo.
..",
    "mime_type": "application/pdf",
    "allow_delete": "0",
    "created_at": "2018-10-18 13:02:52",
    "updated_at": "2018-10-18 13:02:52"
  },
  ...
]
```

Credit Information:

```
"unsecured_debts": [
  {
    "id": "MnlNT1dtdkZlYXo5Y0JxeWtPZ2dodz09",
    "product_id": "VTFKODE1N2RZMjBKNE54dEJ5ZWt6UT09",
    "product_name": "barclaycard",
    "debt_ref_data_id": "WjMyMXdJME1vTTZnMjhUZlMrWEFsQT09",
    "debt_type": "DEBT_TYPE.CREDIT_CARD",
    "type": "DEBT_TYPE",
    "who_ref_data_id": "dlZIUkVGTHllyTFtRHgwbG9qc0t0UT09",
    "who": "WHO.MYSELF",
    "outstanding_balance": "7000.00",
    "contractual_payment_amount": "300.00",
    "actual_payment_amount": null,
    "missed_payment": null,
    "allow_delete": 1,
    "account_number": null,
    "source_code": null,
    "account_type": null,
    "company_type": null,
    "credit_report": null
  },
  ...
]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```

All Clients (requires authentication)

Provides a list of all clients in the Embark platform

URL

<https://{{endpoint}}/clients>

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients' \  
  --header 'Content-Type: application/json' \  
  --header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of clients is returned.

```
[  
  {  
    id: "WGh6cGtZNnN14NXMyaEpoUT09",  
    user_id: "eU8xVGhrR2tESX4ydnVDZz09",  
    client_reference: null,  
    personal_details_id: "eU8xVGhrR2mNsTm4ydnVDZz09",  
    username: "bloggs@fakeemail.com",  
    privacy_policy: null,  
    marketing: null,  
    last_login": "19/09/2018 15:39:14",  
    date_created": "19/09/2018 15:20:06",  
    product_ref_data_id: null,  
    product: null,  
    brand_id: "bHhzSnA0TFdXkJiQk5kUT09",  
    brand_name: "embark",  
    is_vulnerable: "0",  
    vulnerability: null,  
    send_chase: "1",  
    active: "Active",  
    personal_details: {  
      id: "eU8xVGhrR2tESsTm4ydnVDZz09",  
      title_ref_data_id: null,  
      title: null,  
      firstname: "Fake",  
      surname: "Bloggs",  
      dob: "19/09/2018",  
      call_time_ref_data_id: null,  
      call_time: null,  
      marital_ref_data_id: null,  
      marital: null,  
      help_for_ref_data_id: null,  
      help_for: null,  
      partner_client_id: null,  
      client_authority: []  
    },  
    status: null,  
    active_id: "1",  
    client_authority: []  
  },  
],
```

```
    ...  
  ]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{  
  error: "This action needs a valid token!"  
}
```

All Client Workflows (requires authentication)

Provides a list of all client workflows in the Embark platform

URL

<https://{{endpoint}}/clients/workflows>

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients/workflows' \  
  --header 'Content-Type: application/json' \  
  --header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of clients is returned.

```
[  
  {  
    "id": "b2h3VVg4a1VnN2VjRHBtc25YVkVTUT09",  
    "client_id": "NkZ1TGF6S2VXYk1Yd2hLSWNGTU1NQ09",  
    "client_reference": "CHRIS-MOBILE-TEST",  
    "workflow_id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",  
    "start_date": "2018-11-09 12:04:24",  
    "completed_date": null,  
    "invite_email_id": null,  
    "visible_by": "CLIENT",  
    "is_locked": "0",  
    "latest_step": {  
      "workflow_task_id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
```

```

"task_name": "TASK_MY_DETAILS.NAME",
"task_order": "1"
},
"client": {
  "id": "NkZ1TGF6S2VXYk1Yd2hLSWNGTU1NQT09",
  "user_id": "VWxRKzdhbznZaR3FlWWNKbnExVkpPhdz09",
  "client_reference": "CHRIS-MOBILE-TEST",
  "personal_details_id": "THVwN0xtcVpWZjJwUUxqU2pZZVJZQT09",
  "username": "00447854536669",
  "privacy_policy": null,
  "marketing": null,
  "last_login": "09\11\2018 15:10:09",
  "date_created": "09\11\2018 12:04:24",
  "product_ref_data_id": null,
  "product": null,
  "brand_id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
  "brand_name": "embark",
  "is_vulnerable": "0",
  "vulnerability": null,
  "send_chase": "1",
  "status": "0",
  "addresses": [],
  "phones": [],
  "personal_details": {
    "id": "THVwN0xtcVpWZjJwUUxqU2pZZVJZQT09",
    "title_ref_data_id": "NkZ1TGF6S2VXYk1Yd2hLSWNGTU1NQT09",
    "title": "TITLE.MR",
    "firstname": "Chris",
    "surname": "Boyle",
    "dob": "01\01\1900",
    "call_time_ref_data_id": null,
    "call_time": null,
    "marital_ref_data_id": null,
    "marital": null,
    "help_for_ref_data_id": null,
    "help_for": null,
    "partner_client_id": null,
    "client_authority": null
  },
  "client_authority": null
},
"workflow": {
  "id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
  "workflow_reference": "financial-statement",
  "active": "1",
  "title": "WORKFLOW_YOUR_BUDGET.TITLE",
  "description": "WORKFLOW_YOUR_BUDGET.ADMIN_DESCRIPTION",
  "confirmation": null,
  "thankyou": null,
  "icon": "balance",
  "workflow_route": null
},
"status": {
  "id": "V3hNTXlWTHFldkVaVlZwSUxyZmxtZz09",
  "client_workflow_id": "b2h3VVg4a1VnN2VjRHBtc25YVkvVTUT09",
  "status_id": "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
  "status_name": "NEW",
  "start_date": "09\11\2018 12:04:24",
  "end_date": null,
  "days_in_status": "0",
  "class": "alert-info"
}

```

```
    },  
    ...  
  ]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{  
  error: "This action needs a valid token!"  
}
```

Client Documents (requires authentication)

Provides a list of documents related to a specific client.

URL

https://{{endpoint}}/clients/{{cliend_id}}/documents

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients/{{client_id}}/documents \  
  --header 'Content-Type: application/json'  
  --header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of client documents is returned.

```
[  
  {  
    "id": "QnJuc2E2cGhJMGFDNGg2bWxiZmZCdz09",  
    "client_id": "M0ZDMTVxcnlyRGZTaXN6MjFuTlBrZz09",  
    "client_visible": "1",  
    "document_template_id": null,  
    "template_name": null,  
    "document_ref_data_id": "eFdtS0NVUnlLM3B0Q0ZsVWZCalVKdz09",  
    "document": "SYSTEM",  
    "document_type_ref_data_id": "MWR0ZjkgvUXQxaW9la2g4V0IwRzFzdz09",  
    "document_type": "sfs-framework",
```

```
    "filename": "sfs-framework.pdf",
    "extension": "PDF",
    "date_added": "2018-10-18 13:02:52",
    "date_opened": null,
    "base64_content":
"JVBERi0xLjQKMSAwIG9iago8PAovVGl0bGUgKP7\//AEUAbQBiAGEAcgBrKQovQ3JlYXRvciAo.
..",
    "mime_type": "application/pdf",
    "allow_delete": "0",
    "created_at": "2018-10-18 13:02:52",
    "updated_at": "2018-10-18 13:02:52"
  },
  ...
]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```

Client Budgets (requires authentication)

Provides a list of budgets related to a specific client.

URL

https://{{endpoint}}/clients/{{cliend_id}}/budgets

Methods

GET

Example Request

```
Curl -request GET \
  --url 'https://{{endpoint}}/clients/{{client_id}}/budgets \
  --header 'Content-Type: application/json'
  --header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of client budgets is returned.

[

```

{
  "id": "ZzAxN1VKZFJmM1hVODdVcHVMdz09",
  "budget_date": "2018-10-18T13:00:53Z",
  "current": "1",
  "total_income": "4000.00",
  "total_expenditure": "2489.95",
  "adults_in_household": "2",
  "children_in_household": "1",
  "under16s_in_household": "1",
  "vehicles": "0",
  "budget":
  [
    {
      "budget_group_id": "bHhzSnA0TFdMUyXmKJiQk5kUT09",
      "group_type": "income",
      "group_name": "BUDGET_GROUPS.INCOME.NAME",
      "group_reference": "BUDGET_GROUPS.INCOME.NAME",
      "group_description": "BUDGET_GROUPS.INCOME.DESC",
      "group_order": "1",
      "parent_group_id": null,
      "icon": "#expenditure",
      "budget_criteria": null,
      "groups":
      [
        {
          "budget_sub_group_id":
          "VUVTbkclNkg3Mit3bHgZL2hTeSttZz09",
          "group_type": "income",
          "group_name": "BUDGET_GROUPS.EARNINGS.NAME",
          "group_reference":
          "BUDGET_GROUPS.EARNINGS.NAME_SUB",
          "group_description": null,
          "group_order": "1",
          "parent_group_id":
          "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
          "icon": null,
          "budget_criteria": null,
          "items": [{
            "id": "K3RCd3JBNlduYkJUNws4cndNMUxaZz09",
            "budget_item_id":
            "bHhzSnA0TFdXRklGMUYxMkJiQk5kUT09",
            "item_name": "BUDGETS.SALARY.NAME",
            "budget_item_name": null,
            "requires_additional": "0",
            "hint_tip": "BUDGETS.SALARY.DESCRPTION",
            "amount": "4000.00",
            "calculated_amount": null,
            "modified_amount": "4000.00",
            "budget_frequency_id":
            "cmRtUW9rZTdIeVhiVW40MGxBbXJEQT09",
            "budget_frequency": "MONTHLY",
            "in_arrears": "N",
            "arrears_amount": null,
            "arrears_payment_amount": null,
            "modified_arrears_amount": null,
            "budget_note": null,
            "repayment_agreed": null,
            "repayment_frequency_id": null,
            "repayment_frequency": null,
            "source_ref_data_id":
            "VTNvbWtLeDMvbE1qeTBoR045NmFBZz09",

```

```
        "source": "Client Disclosure",
        "payments": "0",
        "mandatory": "false",
        "hidden": "0",
        "allow_delete": "0",
        "show_arrears": "0",
        "budget_criteria": null
    },
    ...
  ]],
  "group_total": 82.5
},
...
],
  "surplus": 1510.05
},
...
]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```

Client Creditors (requires authentication)

Provides a list of the clients credit commitments.

URL

https://{{endpoint}}/clients/{{cliend_id}}/debts

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients/{{client_id}}/debts \  
  --header 'Content-Type: application/json'  
  --header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of client budgets is returned.

```
[
  {
    "id": "MnlNT1dtdkz1YXo5Y0JxeWtPZ2dodz09",
    "product_id": "VTFKODE1N2RZMjBKNE54dEJ5ZWt6UT09",
    "product_name": "barclaycard",
    "debt_ref_data_id": "WjMyMXdJME1vTTZnMjhUZlMrWEFsQT09",
    "debt_type": "DEBT_TYPE.CREDIT_CARD",
    "type": "DEBT_TYPE",
    "who_ref_data_id": "dlZIUkVGTHllyTFtRHgwbG9qc0t0UT09",
    "who": "WHO.MYSELF",
    "outstanding_balance": "7000.00",
    "contractual_payment_amount": "300.00",
    "actual_payment_amount": null,
    "missed_payment": null,
    "allow_delete": 1,
    "account_number": null,
    "source_code": null,
    "account_type": null,
    "company_type": null,
    "credit_report": null
  },
  ...
]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```

Client Assets (requires authentication)

Provides a list of the clients assets.

URL

https://{{endpoint}}/clients/{{cliend_id}}/assets

Methods

GET

Example Request


```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients/{{client_id}}/assets \  
  --header 'Content-Type: application/json'  
  --header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of client budgets is returned.

```
[  
  {  
    asset_ref_data_id: "RjJvQzRpU3ZPtjaVpYNitGZz09"  
    asset_type: "ASSETS.HOME_WHERE_YOU_LIVE"  
    charging_order: null  
    estimated_value: "160000.00"  
    id: "TVpLMWV3Rk3MUZvTUJJa3Z3QT09"  
    outstanding_balance: "155000.00"  
    secured_loan: null  
    who: "WHO.MYSELF"  
    who_ref_data_id: "dlZIUkVGTHllHgwbG9qc0t0UT09"  
  },  
  ...  
]
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{  
  error: "This action needs a valid token!"  
}
```

Client Situation (requires authentication)

Provides details of the clients situation, e.g. number in household etc...

URL

https://{{endpoint}}/clients/{{cliend_id}}/debt-management

Methods

GET

Example Request

```
Curl -request GET \  
  --url 'https://{{endpoint}}/clients/{{cliend_id}}/debt-management'
```

```
--url 'https://{{endpoint}}/clients/{{client_id}}/debt-management \
--header 'Content-Type: application/json'
--header 'token: {{token}}'
```

Success Response

HTTP Code : 200

An array of client budgets is returned.

```
{
  "id": "c3NURm9ESW9OQ3BhOXB0OE9KZDdIQT09",
  "marital_ref_data_id": "MlFsSXN5SitsSQXp5S1IwT1J1UHJQQT09",
  "marital_status": "MARITAL_STATUS_REF.MARRIED",
  "currently_in_ref_data_id": null,
  "currently_in": null,
  "currently_in_provider": null,
  "where_in_uk_ref_data_id": null,
  "where_in_uk": null,
  "adults_in_household": "2",
  "children_in_household": "1",
  "under16s_in_household": "1",
  "housing_ref_data_id": "YWN1bWdqQVdrWTlCTjRWR2gweUhzQT09",
  "housing_details": null,
  "housing_status": "HOUSING_STATUS.MORTGAGE",
  "self_employed": null,
  "additional_properties": null,
  "vehicles": "0",
  "vehicle_hire_purchase": null,
  "contacted_by": [{
    "id": null,
    "contact_ref_data_id": "M2hsMUtPRG9GcEFKYUJjNzY5a3o1dz09",
    "contact": "Debt Collection Agency ",
    "checked": "0"
  }, {
    "id": null,
    "contact_ref_data_id": "VWY5Q0NmS05qWFpnYW9MODc2QzZCUT09",
    "contact": "A Bailiff",
    "checked": "0"
  }, {
    "id": null,
    "contact_ref_data_id": "cVV1bnB0cnN6MHFSeVpNaVEzbWRIQT09",
    "contact": "Legal ",
    "checked": "0"
  }, {
    "id": null,
    "contact_ref_data_id": "cmgwVXRzSkpaOWJ3bDlWVFBXZ2RiUT09",
    "contact": "Other",
    "checked": "0"
  }
  ]
}
```

Error Response

HTTP Code : 401 UNATHOURIZED

```
{
  error: "This action needs a valid token!"
}
```



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