

Retrieve, create and update investor contacts, contact relationships and other contact reference attributes.

**TAGS:** insight, kyc, CRM,

**ENDPOINT:** Metadata

**ENDPOINT DESCRIPTION:**

Returns a contact name and primary email address for a particular contact or list of contacts.

**PROD URL:** <https://api.seic.com/v2/contacts/metadata>

**TEST URL:** <https://test.api.seic.com/v2/contacts/metadata>

**TLS URL\*:** <https://mtls.api.seic.com/v2/contacts/metadata>

\*The TLS endpoint is only used if Server Based Application was selected during the App Registration process.

**STEP 1**

OAuth Token

**STEP 2**

Pass the OAuth Token and the App key to invoke this endpoint for a particular application.

**REQUEST PARAMETERS:**

Name	Description	Data Type	Parameter Type
Authorization	access_token value obtained from the Token endpoint.This is passed as "Bearer access_token"	string	header
AppKey	This is the Consumer Key provided during the App Registration process and is used to identify the user's application.	string	header
externalId	The client specific or external identifier that represents the product, fund, contact, investor, or alternate entity recognized by SEI and a third party system or application. Many times the externalId is used to synchronize SEI sourced data with another data source for the same records.	string	query
alternateId	Alternate identifier. Typically used when integrating between systems.	string	query
primaryEmail	Primary email for the contact. A contact may have none, one or up to four email addresses. If multiple exist, only one email can be primary. Primary email is used for Investor Dashboard access if applicable.A full or partial email is accepted as a request parameter.	string	header
changeStartDate	Last change start date for the contact. Required date format yyyy-MM-ddTHH:mm:ss.SSS. Can be used to target contacts modified on, since or between specified datetime. Date only can also be accepted. Datetime is Eastern Standard Time (EST).	string	query
changeEndDate	Last change end date for the contact. Required date format yyyy-MM-ddTHH:mm:ss.SSS. Can be used to target contacts modified on, since or between specified datetime. Date only can also be accepted. Datetime is Eastern Standard Time (EST).	string	query
createStartDate	Created start date for the contact. Required date format yyyy-MM-ddTHH:mm:ss.SSS. Can be used to target contacts created on, since or between specified datetime. Date only can also be accepted. Datetime is Eastern Standard Time (EST).	string	query

createEndDate	Created end date for the contact. Required date format yyyy-MM-ddTHH:mm:ss.SSS. Can be used to target contacts created on, since or between specified datetime. Date only can also be accepted. Datetime is Eastern Standard Time (EST).	string	query
limit	The pageSize or number of records returned per page	integer	query

#### SAMPLE REQUEST:

```
curl -X GET \
  https://api.seic.com/v2/contacts/metadata?externalId=ip1 \
  -H 'appkey: gsedgaerhDSHGRSH' \
  -H 'authorization: Bearer ADsgdnnkjnfIKJN' \
```

#### REQUEST HEADER:

```
Authorization: Bearer ADsgdnnkjnfIKJN
AppKey: gsedgaerhDSHGRSH
```

#### RESPONSE PAYLOAD MODEL:

Name	Description	Data Type(L)
externalId	Unique business identifier that represents a contact, investor, product, transaction or alternate entity recognized by SEI and a third party system or application. Many times the externalId is used to synchronize SEI sourced data with another data source for the same record.	string
alternateId	Alternate identifier. This is a secondary identifier typically used when integrating between systems. Use of this field is optional.	string (100)
fullName	The full legal name of the investor, manager or contact or any other entity represented by the object grouping of the field in the JSON response structure.	string
primaryEmail	Primary email for the contact. A contact may have none, one or up to four email addresses. If multiple exist, only one email can be primary. Primary email is used for Investor Dashboard access (if applicable).	string
primary	Indicates that the email is the primary email if there is more than one.	boolean
emailType	Indicates the type of email. A full list of email types can be obtained through the Lists API.	string
changeDate	Latest date the entity relevant to the API was modified. Date is in ISO 8601 format YYYY-MM-DD. Datetime is Eastern Standard Time (EST).	string
createDate	Initial create timestamp for the record. Datetime is Eastern Standard Time (EST).	string
links	Embedded URLs in responses that allow for easier navigation.	array
rel	The name of a link returned by the href URL. This is immutable.	string
href	Fully configured URL to obtain more information regarding an entity. Allows for easier navigation across products. These links should not be cached.	string

#### RESPONSE PAYLOAD MODEL:

Name	Description	Data Type(L)
externalId	The client specific or external identifier that represents the product, fund, contact, investor, or alternate entity recognized by SEI and a third party system or application. Many times the externalId is used to synchronize SEI sourced data with another data source for the same records.	string
alternateId	Alternate identifier. Typically used when integrating between systems.	string
fullName	Full name of the contact. This can be an individual, institution or entity represented in a single field.	string

primaryEmail	Primary email for the contact. A contact may have none, one or up to four email addresses. If multiple exist, only one email can be primary.	string
primary	Indicates that the email is the primary email if there is more than one. Value options are "true" or "false".	string
emailType	Indicates the type of email. Value options for this field are "Group", "Other", "Personal" or "Work"	string
changeDate	Latest date the contact was modified. Datetime is Eastern Standard Time (EST).	string
createDate	Date the contact was created. Datetime is Eastern Standard Time (EST).	string
links	Links to obtain more information regarding the contact.	array
rel	A relation aka 'rel' is the name of the link. This is immutable	string
href	Fully configured URL to API endpoints to obtain more information regarding the contact. These links should not be cached by the application.	string
totalCount	The total number of records	string
limit	The pageSize or number of records returned per page	string
first	URL to the first page of records with respect to the API request	string
prev	URL to the previous page of records with respect to the API request	string
next	URL to the next page of records with respect to the API request	string
last	URL to the last page of records with respect to the API request	string
self	The Original Request API URL	string

#### RESPONSE ERRORS:

Name	Description
200	OK- The request has succeeded and the response has been returned.
400	Bad request - The server cannot or will not process the request due to an inaccurate request submitted by the client application. Please resubmit the request after making the required corrections indicated in the error response. For more info on SEI Error Standards please refer to the API Standards FAQ under Support.
401	Unauthorized - Invalid authentication details have been provided. Also useful to trigger an authorization pop up if the API is used from a browser.
403	Forbidden-The SEI Server understood the request but refuses to fulfill it.
404	Not Found- The requested resource or the underlying resource does not exist. Please resubmit the request after making the required corrections
500	Internal Server Error - The server was unable to fulfill the request due to an unknown condition. Please contact SEI for support. For More Info please refer to the "Response & Errors" FAQ under support.

#### SAMPLE RESPONSE:

```
{
  "data": [
    {
      "externalId": "ip1",
      "alternateId": "001x4291020",
      "fullName": "John Jameson",
      "primaryEmail": "dnel@seic.com",
      "primary": true,
      "emailType": "Personal",
      "changeDate": "2019-08-15T11:58:27.03",
      "createDate": "2014-04-24T22:58:11",
      "links": [
```

```
    {
      "rel": "contactDemographics",
      "href":
"https://test.api.seic.com/v2/contacts/demographics?firmId=9999&externalId=ip1&validateRequest=false"
    },
    {
      "rel": "contactRelationships",
      "href":
"https://test.api.seic.com/v2/contacts/relationships?firmId=9999&externalId=ip1&validateRequest=false"
    }
  ]
},
"paging": {
  "cursors": {
    "before": "NzE1MQ==",
    "after": "NzE1MQ==",
    "max": "NzE1MQ==",
    "last": null,
    "resultCount": 1
  },
  "totalCount": 1,
  "limit": 25,
  "previous": null,
  "next": null,
  "self": "https://test.api.seic.com/v2/contacts/metadata?externalId=ip1",
  "first": "https://test.api.seic.com/v2/contacts/metadata?externalId=ip1&limit=25",
  "last": null
}
}
```

#### RESPONSE HEADER:

```
Content-Type: application/json
Status: 200 OK
requesttrackingid: 67e1ff68-164f-03ad-0f2d-5cbbfda56ec9
```