

Retrieve a predefined list of values from a source of fields in SEI's KYC system. A master List of Lists can be viewed, along with the actual values associated to each List. These lists can collectively be used with existing products in the Investor Lifecycle.

TAGS: insight, kyc, CRM,

ENDPOINT: Lists Metadata

ENDPOINT DESCRIPTION:

Returns the collection of all reference data as it pertains to Investors, Contacts, their relationships and pending capital transaction activity.

PROD URL: <https://api.seic.com/v1/lists/metadata>

TEST URL: <https://test.api.seic.com/v1/lists/metadata>

TLS URL*: <https://mtls.api.seic.com/v1/lists/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 mnemonic of the lookup name	string	query
name	The look up name.	boolean	query
lastModifiedSince	Valid values are thisQuarter, thisYear, thisMonth, thisWeek, yesterday	string	query
createdSince	Valid values are thisQuarter, thisYear, thisMonth, thisWeek, yesterday	string	query

SAMPLE REQUEST:

```
curl -X GET \
  https://api.seic.com/v1/lists/metadata \
  -H 'appkey: gsedgaerhDSHGRSH' \
  -H 'authorization: Bearer ADsgdnnkjnfIKJN' \
```

REQUEST HEADER:

```
Authorization: Bearer ADsgdnnkjnfIKJN
```

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
createDate	Initial create timestamp for the record. Datetime is Eastern Standard Time (EST).	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
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
displayName		string
name	The first, last, and middle name of the user as available in the SEI application.	string

RESPONSE PAYLOAD MODEL:

Name	Description	Data Type(L)
externalId	The client specific or external identifier that represents the product, fund, contact, investor, list 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
name		string
displayName		string
createDate	Date the list value was created in ISO 8601 UTC format. Datetime is Eastern Standard Time (EST).	string
changeDate	Latest date the list value was modified in ISO 8601 UTC format. 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

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 SEI 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:

```
{
  "externalId": "AQCAT",
  "name": "ApprovalQueueCategoryType",
  "displayName": "Approval Queue Category Type",
  "createDate": "2018-05-25T15:13:25.287",
  "changeDate": "2018-05-25T15:13:25.287",
  "links": [
    {
      "rel": "List",
      "href": "https://test.api.seic.com/v1/lists?firmId=9999&externalId=AQCAT"
    }
  ],
  "child": [
    {
      "externalId": "AQCATSUB",
      "name": "ApprovalQueueSubCategoryType",
      "displayName": "Approval Queue Sub Category Type",
      "createDate": "2018-05-25T15:13:25.287",
      "changeDate": "2018-05-25T15:13:25.287",
      "links": [
        {
          "rel": "List",
          "href": "https://test.api.seic.com/v1/lists?firmId=9999&externalId=AQCATSUB"
        }
      ]
    }
  ]
},
"paging": {
  "totalCount": 165,
  "limit": 0,
  "first": null,
  "last": null,
  "previous": null,
  "next": null,
  "self": "https://test.api.seic.com/v1/lists/metadata?limit"
}
}
```

RESPONSE HEADER:

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