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Customer Support

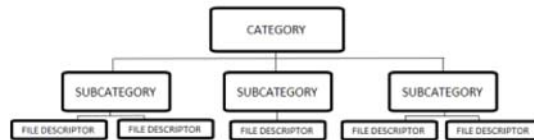
File Services Plus API

File Services Plus is GOLDPoint Systems' secure file storage system to save files to accounts or applicants/borrowers with your institution. File formats allowed are .pdf, .wav, .doc, .docx, .png, .gif, .jpg, .tif, .tiff, .htm, .html, .xml, .txt, .csv, and .fax. Examples of the kinds of files to be connected to accounts/persons include:

- Scans of driver's licenses
- Bank statements
- Copies of loan documents
- Collateral photos

How Files are Organized in File Services Plus

Using the API, you can upload files to be connected to the account, application, or person. All files are assigned a category, subcategory, and file descriptor.



Category: By default, there are three categories: Deposits, Loans, and Teller. GOLDPoint Systems establishes the category IDs. If you want to add an additional category, contact your GOLDPoint Systems account manager.

Subcategory: Subcategories are defined by your institution to use to organize files into groups to suit your institutions needs.

File Descriptor: File descriptors are defined by your institution to use to organize files within subcategories.

Security to view files with those categories, subcategories, or file descriptor can also be established for users at your institution. Those security settings can also restrict certain files (based on category, subcategory, or file descriptor) from being emailed or faxed.

Note

The File Services Plus API requires a one-time setup fee, as well as additional charges should your institution need more space on our servers than designated in your contract. Contact your GPS account representative for more information.

Uploading and Updating Files

Files can be uploaded with the [Upload/V2 call](#). In the body, pass the file you would like to upload. In the header, pass in the file name with extension, descriptor, and at least one of the following pieces of information:

- Customer SSN or EIN number
- Deposit Number
- Loan Number
- Lender Number

Tip

See [Uploading Files with GOLDPoint Systems](#) for steps and code examples on uploading files.

Use the following calls to modify existing files:

- [DeleteFile](#)
- [UpdateFileName](#)
- [UpdateFileDescriptor](#)
- [AddFileLinks](#)
- [Update](#)

File Linking

To improve searchability of files uploaded, add file links to your uploads using the [AddFileLinks](#) and [AddLinkToAllFiles](#) endpoints. File links associate files to people, accounts, and/or loan applications. With file

links, files can be searched for by:

- Customer SSN
- Customer EIN
- Lender Number
- Loan Number
- Deposit Account Number

To link information to a file, send the FileID with any of the above link options. You may only send one of each link option i.e. only one Customer SSN per file. You can have a SSN and a Loan Number, but not two loan numbers or two Customer SSN.

Lender, Loan, and Deposit Account numbers should be input separated by dashes between office number, account number, and check digit where applicable.

Adding File Links to Multiple Files

You can add a file links to all files associated with a specific:

- Loan Account
- Deposit Account
- Customer
- Lender

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Uploading Files with a GOLDPoint Systems API

The following steps show how to upload a file with GOLDPoint System's APIs with a complete C# code sample following. In this example, we'll retrieve the file through a FileStream instance.

Request

Use the URL of the endpoint you are sending your request to. You may need to check with your GOLDPoint representative for the complete, correct URL for your specific use case. This will be a POST request (note the HTTPMethod.Post in the example below).

```
{
    string result = string.Empty;
    var client = new HttpClient();
    string urlString = YourUrlHere;
    if (!string.IsNullOrEmpty(urlString))
    {
        Uri url = new Uri(urlString);
        using (HttpRequestMessage rm = new HttpRequestMessage(HttpMethod.Post, url))
```

Headers

All GOLDPoint APIs will require the Institution Number and Token headers. Add any other required headers for the API as well as the Content header to include the file to upload. For this example, the StreamContent class is used.

```
rm.Headers.Add("X-InstitutionNumber", "123"); // Your unique institution number.
rm.Headers.Add("X-Token", "YourTokenHere"); // This would be the token given to you by GP
rm.Content = new StreamContent(request);
```

Note

The URL and required token will come from GOLDPoint Systems. Contact your GPS representative for access.

The parameter to the StreamContent can be any stream. In this example, it is the FileStream that was created in main and passed to the method that calls the API.

```
var result = UploadFileExample(new FileStream(@"C:\Users\johnd\Documents\DesktopFilesToT
```

If file upload is successful, the API response will return a 200 Success code.

See the following complete C# sample code:

Example

```
namespace ExampleAPICalls
{
    using Newtonsoft.Json;
    using System;
    using System.Collections.Generic;
    using System.IO;
    using System.Net.Http;
    using System.Text;
    class Program
    {
        static void Main(string[] args)
        {
            var result = UploadFileExample(new FileStream(@"C:\Users\johnd\Documents\DesktopFi
```

```
Console.WriteLine($"Upload File result: \r\n{result}");
}
/// <summary>
/// Uploading File
/// </summary>
/// <param name="request">The file</param>
/// <returns>the response from the api</returns>
static private string UploadFileExample(Stream request)
{
    string result = string.Empty;
    var client = new HttpClient();
    string urlString = YourUrlHere;

    if (!string.IsNullOrEmpty(urlString))
    {
        Uri url = new Uri(urlString);
        using (HttpRequestMessage rm = new HttpRequestMessage(HttpMethod.Post, url))
        {
            {
                rm.Headers.Add("X-InstitutionNumber", "125"); // Required for all GOLDPoint APIs
                rm.Headers.Add("X-Token", "YourTokenHere"); // Required for all GOLDPoint APIs
                rm.Headers.Add("formatid", "7"); // Pass additional data about the file in the
                rm.Headers.Add("filename", "fileTest2.txt"); // Pass additional data about the
                rm.Content = new StreamContent(request);
                using (HttpResponseMessage resp = client.SendAsync(rm).Result)
                {
                    string response = resp.Content.ReadAsStringAsync().Result;
                    // When you get the response, you can grab the information from that as you
                }
            }
        }
        return response;
    }
}
```