Getting Started with the dotloop Public API (Version 2)

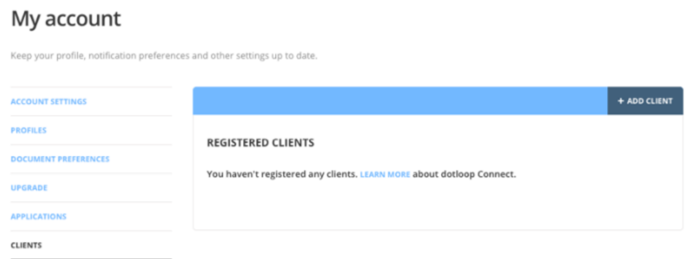
The dotloop Public API allows partners to connect the dots between real estate technology solutions. Syncing transaction data, keeping contacts up to date, and creating loops at the touch of a button are just a few of the capabilities of our API.

Access

The dotloop Public API is available to Business+ and Teams partners. If your company is interested developing custom integrations for your tech stack, reach out to your Partner Success Manager for activation.

> Note: We suggest creating an email address and dotloop account dedicated to managing the API clients, as the activation can only be applied to, and managed by **one** dotloop account. A common examples is *api@yourdomain.com*

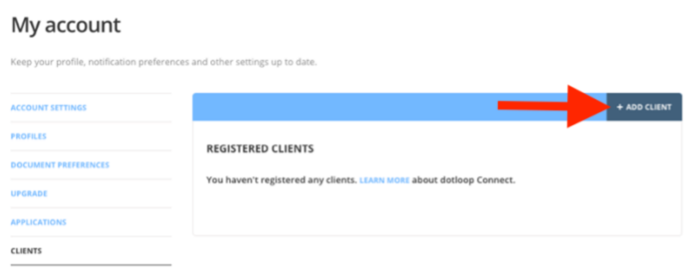
After activation from your Partner Success Manager, to verify API activation, log in to the developer dotloop account. Go to the *My Account* section. A new section will now be available on the left menu titled *Clients*. This section is where the first steps of developing and integrating with the API begin. At this stage, your developer will now take over and create an *Application Client*.



Creating the Application Client

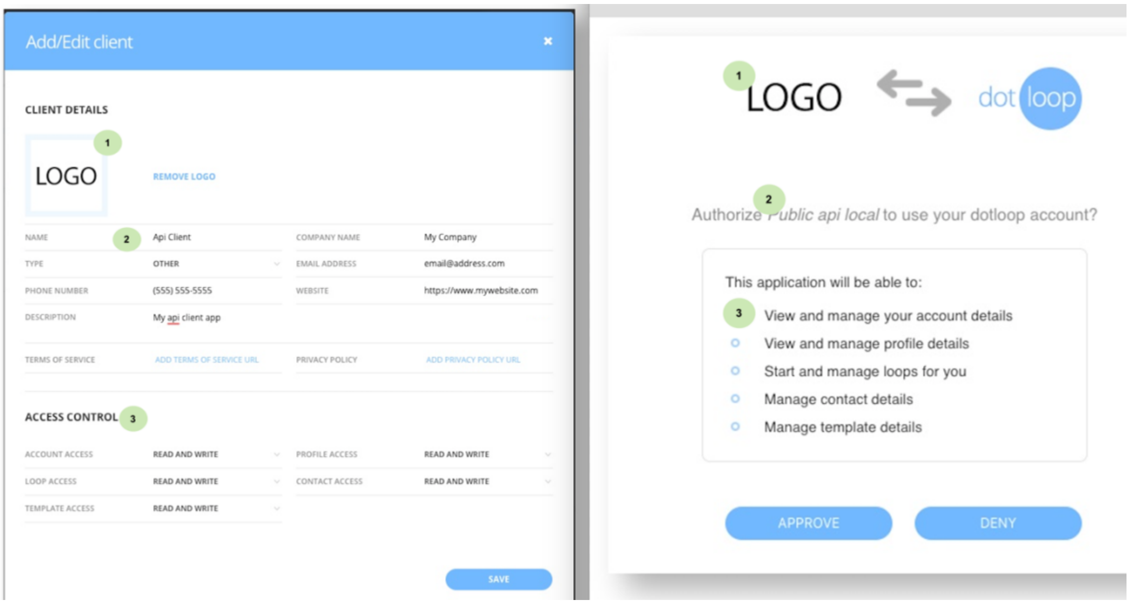
The dotloop API utilizes OAuth 2.0 authentication, which is managed by an Application Client.

Step 1: Create your Application Client



To utilize the API an *Application Client* must be created. Here we will collect the information we need to present to the dotloop users who will be authorizing access to their account. To create a new Client, click the *+Add Client* button.

Step 2: Fill out *Client Details* and set *Access Control*



Left: Client setup   Right: what the user will see to authorize dotloop access for that application.

Completely fill out all the fields in the Client window. Start with uploading a square logo image, and filling out each field in the *Client Details* section. Once complete, set the *Access Control* of each option.

Note: The **Access Control** section of the Client window can only be set **one time**, so ensure to select all appropriate access options with any future goals in mind. If the levels need to be changed, a new Application Client will need to be created.

<u>Explanation of the Client Details fields</u>

*= required

*Logo = Image of the company/software that the user will authorize. (100x100 pixels)

*Name = Name of the POC, that will be managing the integration on their end.

*Email = Email of the POC, that will be managing the integration on their end.

*Phone = Phone of the POC, that will be managing the integration on their end.

*Company Name = Software/company name that the user will authorize.

*Website = Website the user would go to if they would click on the logo in the authorization screen (right image above)

*Description = Brief description of the application/software. This doesn't get presented to the user today, but could in the future.

Terms of Use = URL where the application/software's term of use in case the user would like to review before they authorize access.

Privacy Policy = URL where the application/software's privacy policy in case the user would like to review before they authorize access.

Explanation of the Access Control fields

*= required

*Account Access = access to account details.

*Loop Access = access to the user loops.

*Template Access = Access to the loop templates.

*Profile Access = Access to the user's profiles

*Contact Access = Access to the user's contacts.

Step 3: Save new Client, and privately store the presented Client ID and Secret

After clicking the *Save* button, a window will now appear, proving you with your *Client ID* and *Secret*. This information is needed for implementing with our APIs. Securely record and save this information.

Note: The secret key will not be shown again. If it is lost, click the *Reset Secret* option to generate a new one. This option is located in the overflow icon menu of your Client.

EXTERNAL DEVELOPMENT GUIDE

Once you have the Client ID and Secret Key, you can begin the development on your side using our v2 API Developer Guide, which is available via the dotloop developers public page (clicking the API Documentation button). We also provide a sample application code to provide developers a code sample on the API authentication implementation. Your users will click on that link to authorize access to their dotloop account.

Note: You will need to provide a link on your system for authorization.

Need Additional Assistance?

Dotloop PRO's API experts can assist your developer with guided help, context questions, and more. Find more information at https://www.dotloop.com/products/professional-services/