



Dotloop Public API v2 Quick Start Guide

This guide is intended for partners looking to access the Dotloop v2 public API without needing to setup any additional infrastructure to support the OAuth 2.0 authorization flow (callbacks, ect). This would include cases like an exploratory evaluation or integrations where only a small number of pre-predefined accounts will need api access.

This also provides a method to acquire an evergreen refresh token.

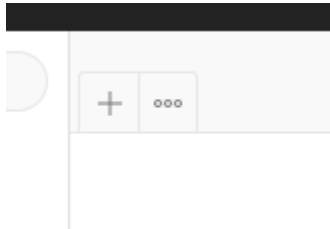
Prerequisites

- Public Api Client has been created and you are in possession of the Client ID and Secret
- A dotloop login w/access to appropriate
- An API client tool that has support for OAuth 2.0 authentication. Specific documentation is provided below for [Postman](#) and [Insomnia](#) (free downloads)

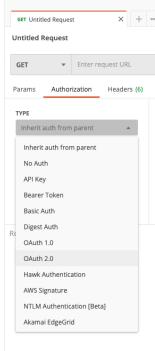
It would also be helpful to familiarize yourself with the capabilities of the v2 api by reviewing the technical documentation found here: <https://dotloop.github.io/public-api/>

Postman Configuration

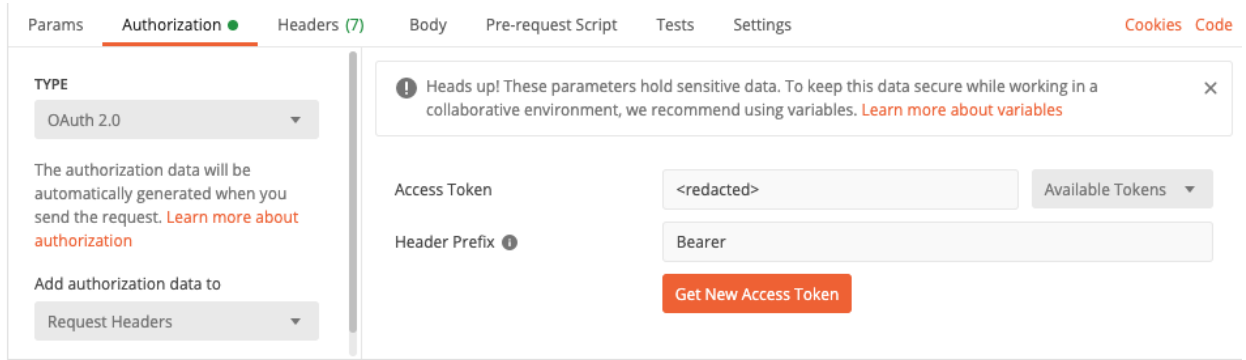
- 1.) Click on the “+” tab to create a new request



- 2.) Click on the “Authorization” section, select “OAuth 2.0” from the “Type” dropdown



3.) Click on the “Get New Access Token” button



4.) Enter the client configuration data as follows:

| | |
|------------------------|---|
| Grant Type* | Authorization Code |
| Callback URL | <i>The callback does not have to be a functioning url, but it does need to match the value registered with your client exactly.</i> |
| Auth URL* | https://auth.dotloop.com/oauth/authorize |
| Access Token URL* | https://auth.dotloop.com/oauth/token |
| Client ID | <i>Client ID for your client</i> |
| Client Secret | <i>Client Secret for you client</i> |
| Client Authentication* | Send as Basic Auth Header |

* standard config, values can be cut/pasted directly from guide

All other fields can be ignored, screen should look like this:

GET NEW ACCESS TOKEN

Token Name: Token Name

Grant Type: Authorization Code

Callback URL: -your callback goes here

Auth URL: https://auth.dotloop.com/oauth/authorize

Access Token URL: https://auth.dotloop.com/oauth/token

Client ID: -your client id goes here

Client Secret: -your client secret goes here

Scope: e.g. read:org

State: State

Client Authentication: Send as Basic Auth header

Buttons: Cancel, Request Token

5.) Click “Request Token”

6.) You should be presented with a Dotloop login modal. Enter account credentials.

dotloop - peoplework, not paperwork.

dot loop

Welcome to dotloop.

PLEASE COMPLETE THESE FIELDS.

YOUR EMAIL

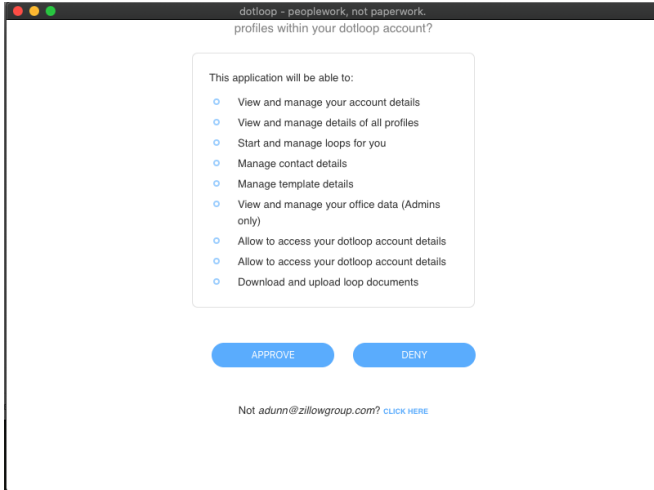
YOUR PASSWORD

FORGOT YOUR PASSWORD?

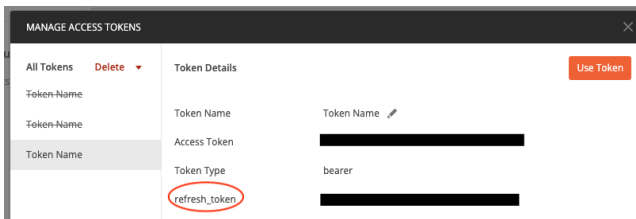
SIGN IN

SIGN UP IF YOU ARE NOT A MEMBER.

7.) Click “Approve” on the following screen (application scopes may be different for your client):



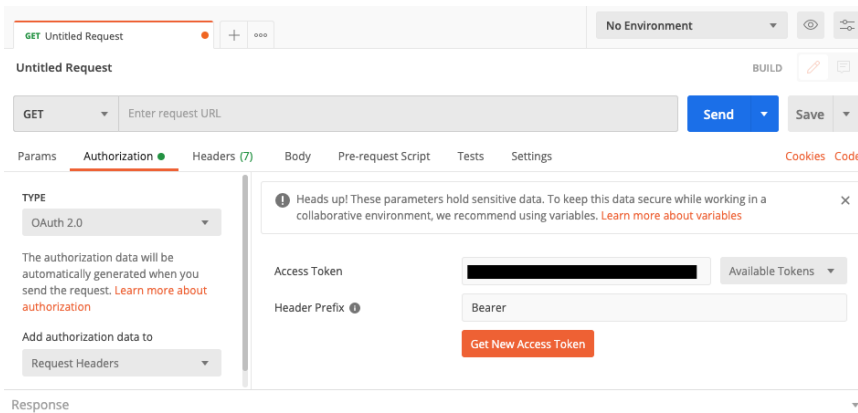
8.) Postman will now display the token that was generated for your user.



Take note specifically of the refresh_token value. This will not expire and can potentially be used in your production integration. Record and store in a secure place, as it can be used to gain access to your data. Treat refresh tokens like a password, do not share.

9.) Click the “Use Token” button.

You should now be setup to make requests to the dotloop v2 public api in Postman.



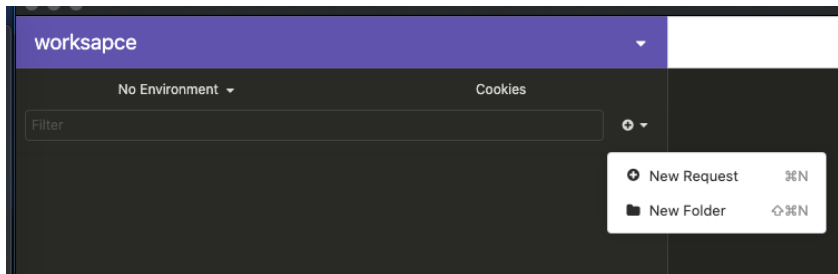
Postman will manage your tokens and automatically add the required authorization header on requests that are configured to use this token. It should also automatically refresh the token after expiration.

- 10.) Test your api access by entering the Request URL "<https://api-gateway.dotloop.com/public/v2/account>" and hitting send. You should receive a response that looks like [this](#).

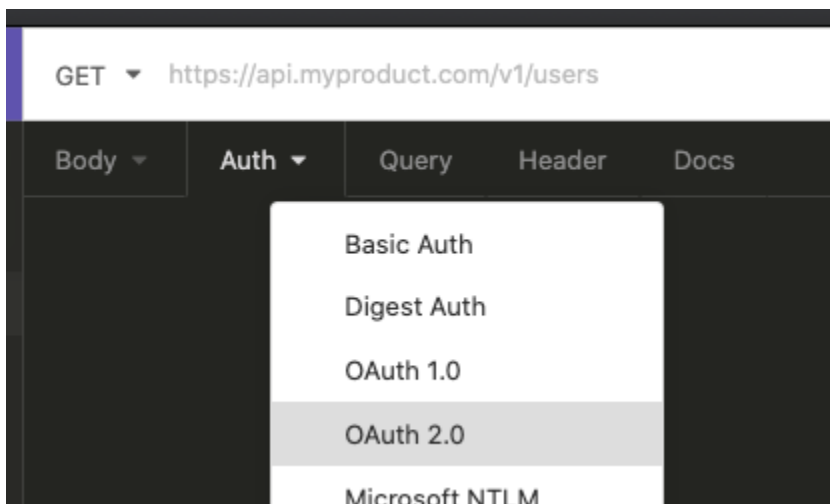
You are now setup to begin exploring the Dotloop v2 public api. Documentation on specific endpoints and capabilities can be found here: <https://dotloop.github.io/public-api/>

Insomnia Configuration

- 1.) Create a new request by clicking on "+" icon



- 2.) Click on the "Auth" tab and select "OAuth 2.0"



- 3.) Enter the client configuration data as follows:

| | |
|--------------|--|
| Grant Type* | Authorization Code |
| Callback URL | <i>The callback does not have to be a functioning url, but it does need to match the</i> |

| | |
|-------------------|---|
| | <i>value registered with your client exactly.</i> |
| Auth URL* | https://auth.dotloop.com/oauth/authorize |
| Access Token URL* | https://auth.dotloop.com/oauth/token |
| Client ID | <i>Client ID for your client</i> |
| Client Secret | <i>Client Secret for you client</i> |

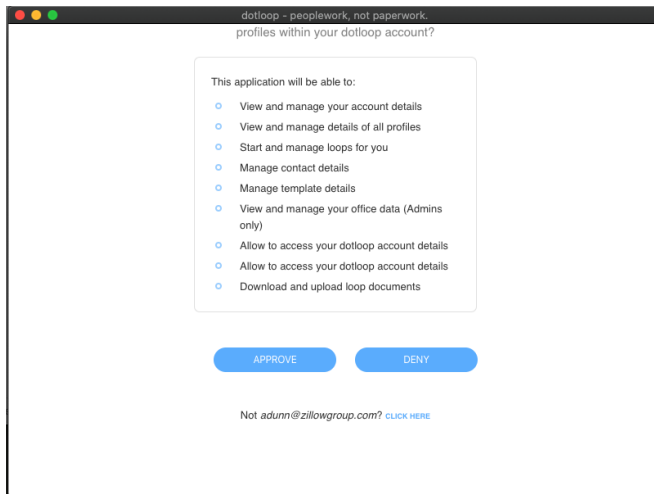
* standard config, values can be cut/pasted directly from guide

All other fields can be ignored, screen should look like this:

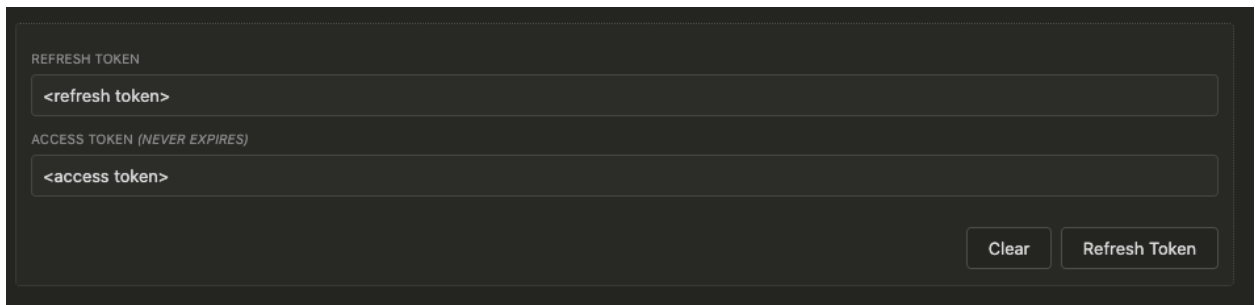
4.) Click the “Fetch Tokens” button

5.) You should be presented with a Dotloop login modal. Enter account credentials.

6.) Click “Approve” on the following screen (application scopes may be different for your client):



7.) If successful, refresh and access token should now be populated



Take note specifically of the refresh_token value. This will not expire and can potentially be used in your production integration. Record and store in a secure place, as it can be used to gain access to your data. Treat refresh tokens like a password, do not share.

8.) Test your api access by entering the Request URL

“<https://api-gateway.dotloop.com/public/v2/account>” and hitting “Send”. You should receive a response that looks like [this](#).



Insomnia will manage your tokens and automatically add the required authorization header on requests that are configured to use this token. It should also automatically refresh the token after expiration.

You are now setup to begin exploring the Dotloop v2 public api. Documentation on specific endpoints and capabilities can be found here: <https://dotloop.github.io/public-api/>