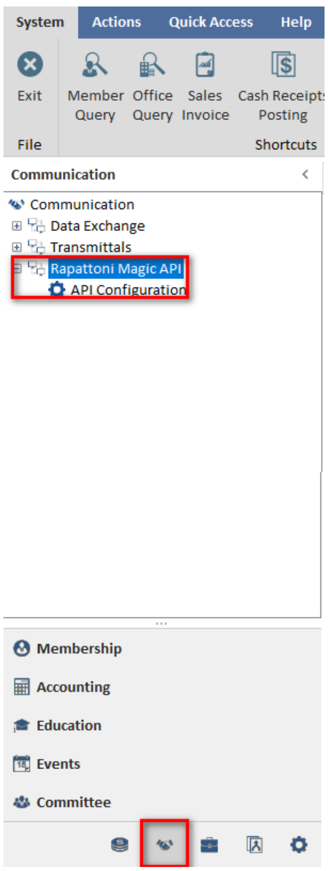
Rapattoni AMS API Setup Guide

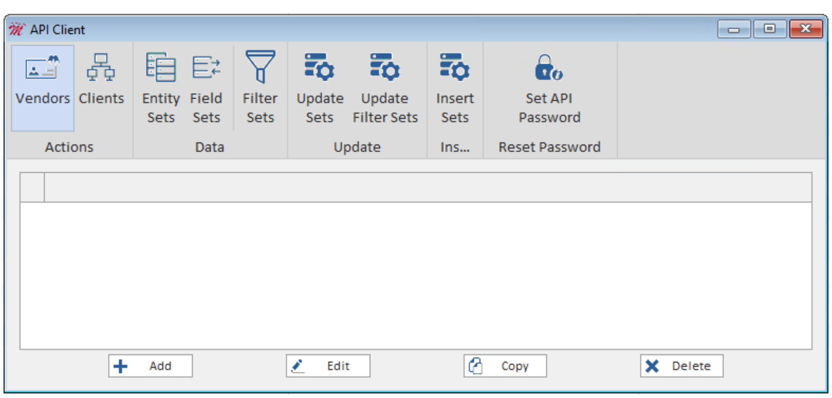
The AMS API setup interface allows users to create their own API client for filtering information to third-party vendors.

Follow these steps to complete the AMS API setup:

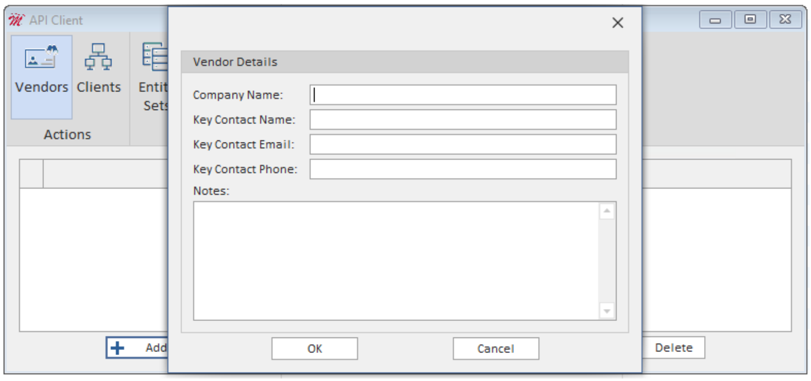
1) Go to the **Communications** tab on the menu bar and click the **API Configuration** option under the **Rapattoni Magic API** option.



2) The **API Client** will appear. First select the **Vendors** option in the **Actions** menu.

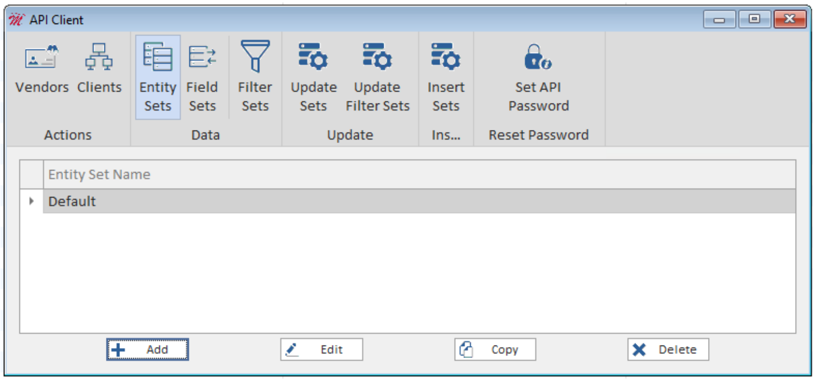


3) Fill out the four required fields:
   a. **Company Name** – Enter the vendor’s name.
   b. **Key Contact Name** – Enter the vendor’s key contact name.
   c. **Key Contact Email** – Enter the vendor’s key contact email.
   d. **Key Contact Phone** – Enter the vendor’s key contact phone number.
   e. **Notes** – Enter additional notes. (Optional)

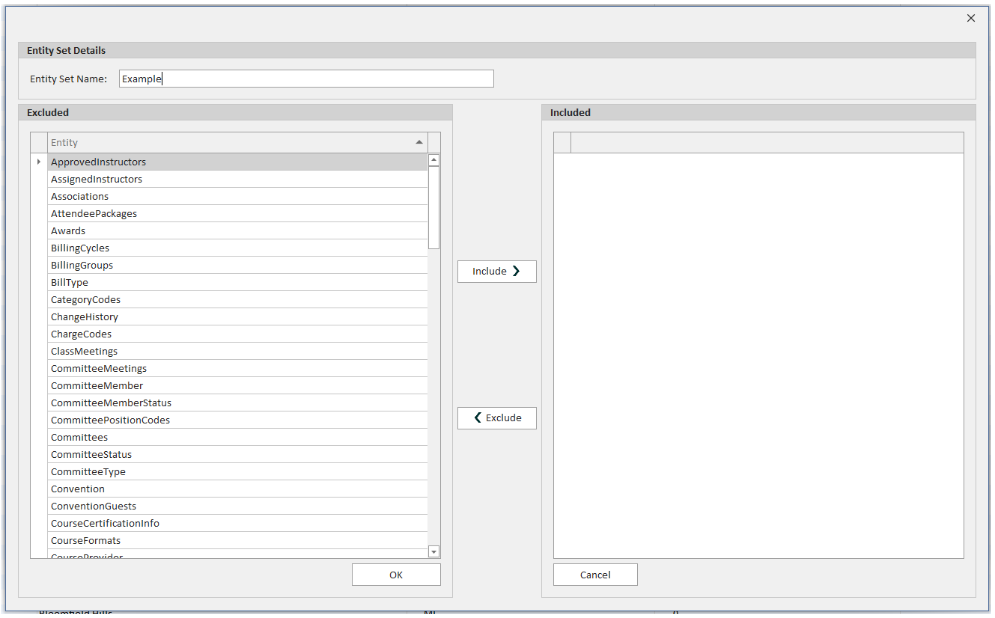


4) Select the **Entity Sets** option in the **Data** menu.

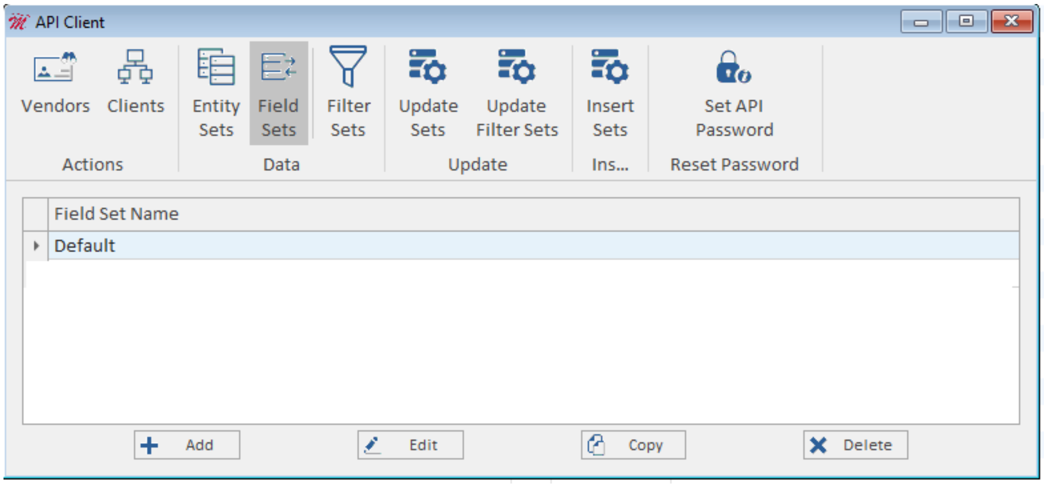
5) You can select the **Default** entity set name if you have previously set up the default entity, or use the **Add** button to create a new entity set. You can also use the **Edit** button to update any previously created entity sets.



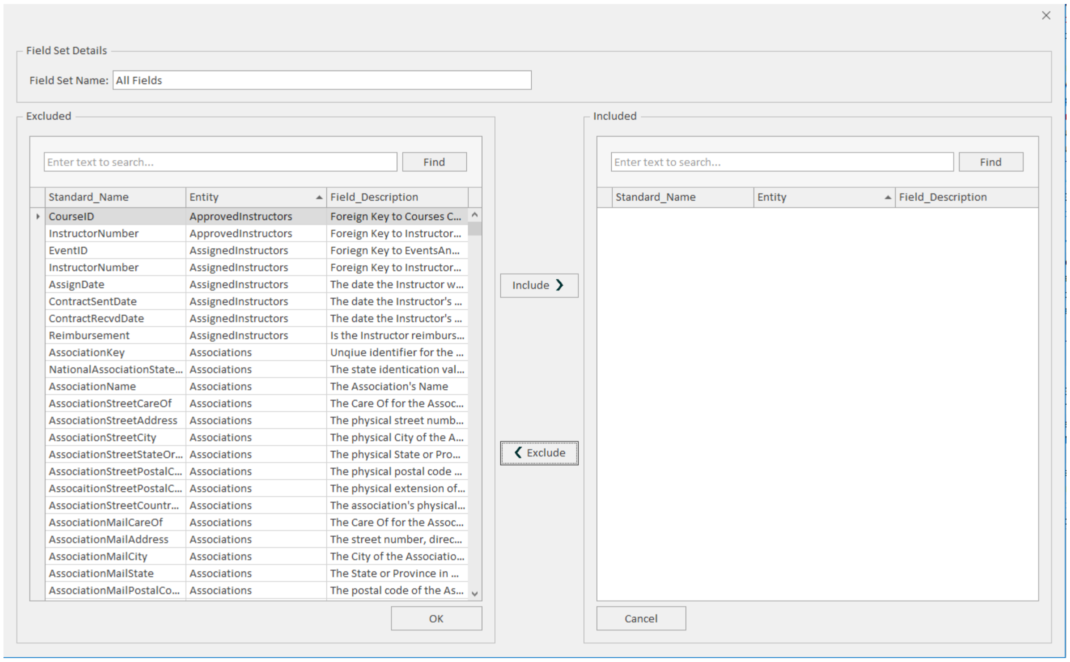
   a. After clicking the **Add** or **Edit** button, the **Excluded** and **Included** entities will display. Move any entities to the Included side to allow vendor access to the corresponding data. Please note that an entity provides access to the overall fields under a specific entity but specific fields within that entity will still need to be included or excluded in a later step.



6) Next, select the **Field Sets** option in the **Data** menu.

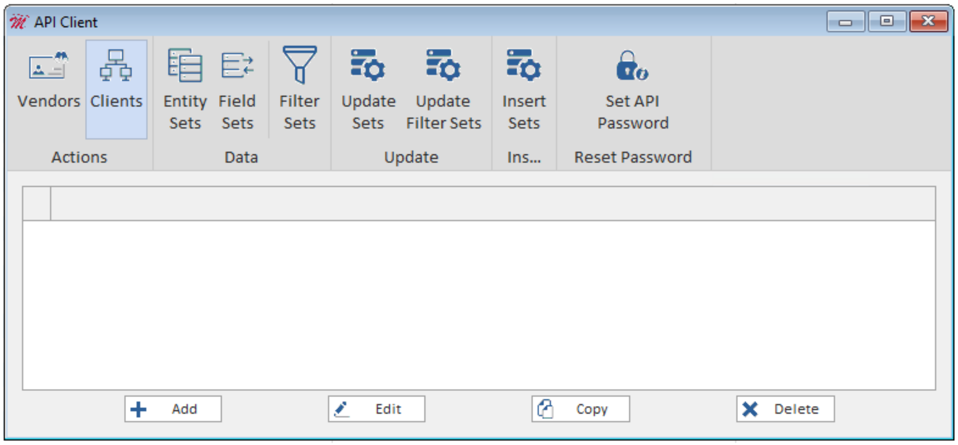


a. Click the **Add** button or **Edit** button to select the specific fields (Standard_Name Column) that you want to **Exclude** or **Include**. Please note that if a field belongs to an entity that was not selected during the previous step, the corresponding data for that field will not display.

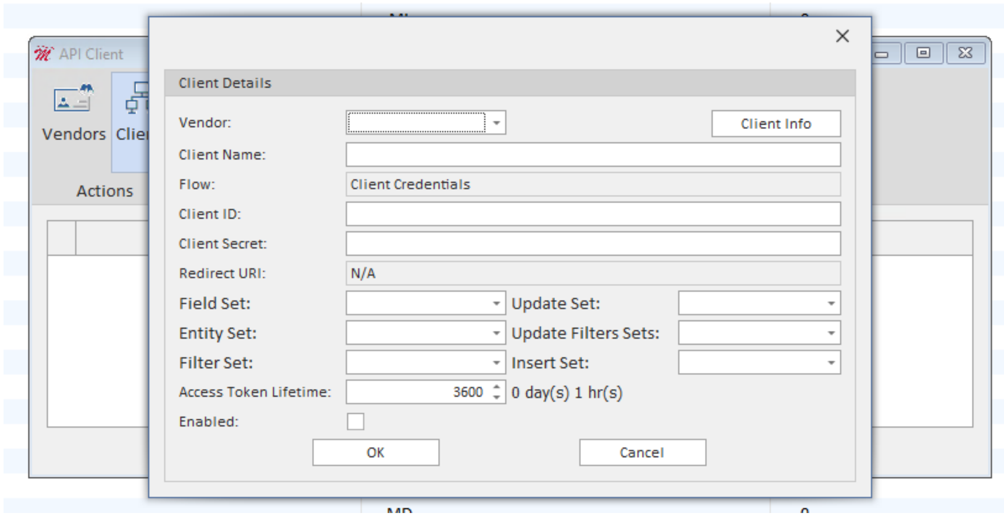


7) (Optional) Select the **Filter Sets** option in the **Data** menu.
   a. The available filters under Filter Sets allows you filter specific associations and values from being accessed.

8) Lastly, highlight the **Clients** button in the **Actions** menu and click the **Add** button.



   a. The **Client Details** pop-up will display.



b. Fill out the following fields:
   i. **Vendor** – Select the desired vendor created in the previous steps.
   ii. **Client Name** – Enter in a client name, usually the company name.
   iii. **Client ID** – Used to identify the vendor, similar to a username.
   iv. **Client Secret** – Enter a password (please use a strong and secure password).
   v. **Field Set** – Select the desired field set.
   vi. **Entity Set** – Select the desired entity set.
   vii. If you did not specify **Filter Set**, **Update Set**, **Update Filters Sets**, and **Insert Set**, select the Default option under their corresponding drop-downs.
   viii. **Access Token Lifetime** – Set to one day using the up/down arrows. *Please note that this field is configured in seconds and there are 86,400 seconds in a day.*
   ix. **Enabled** – Use this check box to enable and disable the client access.

c. After all fields have been filled out, click the **Client Info** Button in the top-right of the Client Details window to copy all of the information that you will need to send to the vendor.

9) Click the **OK** button to finalize client setup.