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|  | eRelocation RefExchange API  Documentation – version 1.0 |

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|  | eRelocation RefExchange API  Documentation – version 1.0  Introduction |

eRelocation supports a suite of .NET web service methods to be consumed, which provide functionality to a broker or referral source to be able to add referrals, and receive updates back as changes are made.

**What can the API do for me?**

As a broker, it allows for a third-party lead source, or even your website, to automatically place referrals into your eRelocation instance, link them up to their end. And then, as the status changes, updates are received, and/or notes are added, those changes are automatically sent back to the source.

As a third-party who sends leads and referrals to real estate brokerages, the RefExchange allows you to partner with some of the most-respected brokers across the US. You’ll have the ability to effortlessly send referrals to brokers, receive status changes back, new updates, and/or new notes, depending on the mutual needs you and the broker have.

**Some Technical Details**

Supported protocols include SOAP 1.2, SOAP 1.1, and HTTP POST requests, depending on a client’s needs and abilities.

Account validation is handled via basic authentication over HTTPS. One username & password combination is required per RefExchange client, and access can be granted to that RefExchange client to any number of mutually-consenting brokers.

The production API can be found at: <https://refexchange.erelocation.net>  
There is no separate QA API, but we can work with you to create a test instance.

Production WSDL: <https://refexchange.erelocation.net/?wsdl>

If you have any problems or questions, please contact our development team at [developmentsupport@askrealestatetechnology.com](mailto:developmentsupport@askrealestatetechnology.com) who would be more than happy to assist you.

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|  | eRelocation API  *GetMyBrokers* Documentation |

<https://refexchange.erelocation.net/default.asmx?op=GetMyBrokers>

The GetMyBrokers method of the RefExchange API allows a client to be able to identify the brokers that the current username has access to. Especially important is the BrokerID element, which will late be used when calling other methods on behalf of a specific broker. If you do not see an expected broker name / broker ID combo listed within here, your account has not been provisioned with access to that brokrer.

No parameters are required to be able to invoke the GetMyBrokers method. An example of a response is listed below, as well as an explanation of the values.

<Config>  
 <ExchangePartnerID>3</ExchangePartnerID>  
 <ExchangePartnerName>ABC Lead Network</ExchangePartnerName>  
 <ExchangePartnerUsername>abcln</ExchangePartnerUsername>  
 <Brokers>  
 <Broker>  
 <BrokerID>262</BrokerID>  
 <BrokerName>ABC Real Estate Company</BrokerName>  
 <CorpAddr>2700 N Main St</CorpAddr>  
 <CorpCity>Sarasota</CorpCity>  
 <CorpState>FL</CorpState>  
 <CorpZip>00000</CorpZip>  
 <BrokerPhone>(000) 0000</BrokerPhone>  
 </Broker>  
 <Broker>  
 <BrokerID>179</BrokerID>  
 <BrokerName>Ref Exchange Test</BrokerName>  
 <CorpAddr/>  
 <CorpCity/>  
 <CorpState/>  
 <CorpZip/>  
 <BrokerPhone/>  
 </Broker>  
 </Brokers>  
</Config>

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| --- | --- | --- |
| Element Name | Type | Description |
| /Config/Brokers/Broker/BrokerID | Integer | eRelocation’s ID # of this broker that you have access to |

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|  | eRelocation API  *GetBrokerOptions* Documentation |

<https://refexchange.erelocation.net/default.asmx?op=GetBrokerOptions>

GetBrokerOptions will return various pieces of information that you may need to know to be able to feed referrals into a broker’s eRelocation instance, including Books of Business, Referral Sources, Staff member IDs, and more.

<eRelocationConfig>  
 <BrokerOptions>  
 <BooksOfBusiness>  
 <BookOfBiz>  
 <BoBID>1</BoBID>  
 <BoBDesc>Corporate</BoBDesc>  
 </BookOfBiz>  
 <BookOfBiz>  
 <BoBID>2</BoBID>  
 <BoBDesc>Broker-to-Broker</BoBDesc>  
 </BookOfBiz>  
 <BookOfBiz>  
 <BoBID>3</BoBID>  
 <BoBDesc>Affinity</BoBDesc>  
 </BookOfBiz>  
 <BookOfBiz>  
 <BoBID>4</BoBID>  
 <BoBDesc>Internet Leads</BoBDesc>  
 </BookOfBiz>  
 <BookOfBiz>  
 <BoBID>5</BoBID>  
 <BoBDesc>Rental</BoBDesc>  
 </BookOfBiz>  
 </BooksOfBusiness>  
 <ReferralSources>  
 <ReferralSource>  
 <ReferralSourceID>1</ReferralSourceID>  
 <ReferralSourceName>Broker-to-Broker</ReferralSourceName>  
 </ReferralSource>  
 <ReferralSource>  
 <ReferralSourceID>2</ReferralSourceID>  
 <ReferralSourceName>SIRVA</ReferralSourceName>  
 </ReferralSource>  
 <ReferralSource>  
 <ReferralSourceID>3</ReferralSourceID>  
 <ReferralSourceName>Weichert Workforce Mobility</ReferralSourceName>

</ReferralSource>  
 <ReferralSource>  
 <ReferralSourceID>4</ReferralSourceID>  
 <ReferralSourceName>Weichert Lead Network</ReferralSourceName>  
 </ReferralSource>  
 <ReferralSource>  
 <ReferralSourceID>5</ReferralSourceID>  
 <ReferralSourceName>CARTUS</ReferralSourceName>  
 </ReferralSource>  
 <ReferralSource>  
 <ReferralSourceID>6</ReferralSourceID>  
 <ReferralSourceName>CARTUS - USAA</ReferralSourceName>  
 </ReferralSource>  
 </ReferralSources>  
 <StaffIDs>  
 <StaffPerson>  
 <PersonID>6</PersonID>  
 <PersonName>Sally Jones</PersonName>  
 <FirstName>Sally</FirstName>  
 <LastName>Jones</LastName>  
 </StaffPerson>  
 <StaffPerson>  
 <PersonID>1</PersonID>  
 <PersonName>Sharon Smith</PersonName>  
 <FirstName>Sharon</FirstName>  
 <LastName>Smith</LastName>  
 </StaffPerson>  
 </StaffIDs>  
 </BrokerOptions>  
</eRelocationConfig>

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| Element Name | Type | Description |
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|  | eRelocation API  *CreateReferral* Documentation |

<https://refexchange.erelocation.net/default.asmx?op=CreateReferral>

CreateReferral allows for a client to be able to submit a referral into a broker’s eRelocation instance.

Depending on the mutual needs between you and our customer, we have some flexibility in how this is setup, and default values are handled.

For example: if you’re going to be specifying the agent upfront, then we’d likely bypass the staff notification, and simply just apply the needed update requests (if applicable). This setup would happen in the configuration on our end. We can also default the referral fees, book of business, referral source, staff person to notify, and more.

While the below information should give you a solid start, feel free to reach out to us if you need further guidance. [developmentsupport@askrealestatetechnology.com](mailto:developmentsupport@askrealestatetechnology.com)

CreateReferral Example:

<NewReferral><ExchangePartnerID>3</ExchangePartnerID><BrokerID>182</BrokerID><BuySellRentBMA>Buy</BuySellRentBMA><IncomingOrOutgoing>Incoming</IncomingOrOutgoing><CustomerFirstName>Tim</CustomerFirstName><CustomerLastName>Smith</CustomerLastName><CustomerSecondaryFirstName>Sharon</CustomerSecondaryFirstName><SubsourceID>1</SubsourceID><AssignedAgentID>3</AssignedAgentID></NewReferral>

Response will be in the format of:

<operationStatus>

<result>0</result>

<resultDesc>Referral Create was Successful</resultDesc>

<RefID>123</RefID>

<YourReferralID>ABC-444-303</YourReferralID>

<RMActionIDs>10678,10679</RMActionIDs>

</operationStatus>

Result codes:

0 = Referral Create was Successful

-1 = There was an error parsing your ReferralXML string.

-2 = Your account has not been provisioned for the service requested.

-3 = Can’t login to master database - there was a validation error with the supplied broker id(s)

-7 Can't figure out referral type from what was supplied, or what was defaulted by broker's business rules

-8 = CustomerLastName is required

-9 = Can't figure out referral status from what was supplied, or what was defaulted by broker's business rules

-10 = Can't figure out referral source from what was supplied, or what was defaulted by broker's business rules

-12 = Based on the ReferralID provided, that referral seems to already exist from your side.

-99 - An unknown error has occurred

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| Element Name | Type | Description |
| BrokerID | Bigint | eRelocation Broker ID # to identify which instance this should be inserted into |
| ReferralID | varchar(38) | Your software’s ID of this referral. If you’ve already transmitted this to us, we’ll let you know by returning <result>12</result> (Based on the ReferralID provided, that referral seems to already exist from your side.) |
| CustomerFirstName | varchar(50) | Customer Name – Primary contact’s first name |
| CustomerLastName | varchar(50) | Customer Name – Primary contact’s last name |
| CustomerSecondaryFirstName | varchar(50) | Customer Name – Secondary contact’s first name |
| CustomerSecondaryLastName | varchar(50) | Customer Name – Secondary contacts last name, if it differs from the primary last name |
| ReferralOwnerIDNum | Bigint | Our person ID # for who owns this referral in eRelocation. If you don’t pass this, we’ll use the integration’s default |
| IncomingOrOutgoing | varchar(15) | Direction of the referral – either Incoming, or Outgoing. If not passed, we’ll use the integration’s default |
| BuySellRentBMA | varchar(10) | Service type of the referral – either Buy, Sell, Rent, or BMA. If not passed, we’ll use the integration’s default |
| ReferralStatus | varchar(20) | Current status of the referral. Active, Pending, Listed, Received – Not Placed. If not passed, we’ll use the integration’s default |
| SubsourceID | Smallint | ID# of the subsource to tag this referral to. Optional, and may already be defaulted in a partner’s profile. |
| PriEmail | varchar(150) | Primary customer’s email address |
| SecEmail | varchar(150) | Secondary customer’s email address |
| HomePhone | varchar(20) | Customer’s home phone # |
| OtherPhone | varchar(20) | Customer’s other phone # |
| PriCell | varchar(20) | Primary customer’s cell # |
| SecCell | varchar(20) | Secondary customer’s cell # |
| PriWork | varchar(20) | Primary customer’s work # |
| SecWork | varchar(20) | Secondary customer’s work # |
| FileNum | varchar(30) | File # which we should communicate when discussing this referral with your company |
| FileNum2 | varchar(50) | Secondary file # which we should communicate when discussing this referral with your company |
| InquiredOn | varchar(100) | Typical for internet leads – property address the customer is inquiring on |
| ShowingReqDate | Date | Typical for internet leads – date the customer is requesting to be shown the property |
| ShowingReqTime | varchar(30) | Typical for internet leads – time the customer is requesting to be shown the property, on the date specified for ShowingReqDate |
| InterestedInAreas | varchar(100) | For buyer referrals, areas that the buyer is interested in purchasing in |
| ListingAgentName | varchar(50) | Typical for internet leads, name of the listing agent that has the “InquiredOn” property listed (above). |
| ListingBrokerName | varchar(100) | Typical for internet leads, name of the listing company that has the “InquiredOn” property listed (above). |
| MailingAddress | varchar(100) | Customer’s mailing address |
| MailingCity | varchar(50) |  |
| MailingState | varchar(5) |  |
| MailingZip | varchar(10) |  |
| ReferralComments | varchar(MAX) | Comments on the referral, shown to the agent |
| ThirdPartyProcedures | varchar(MAX) | Your company’s instructions to the agent, on how to service this referral |
| PrivateComments | varchar(MAX) | Comments on this referral that are only available to relocation staff |
| AssignedAgentID | Bigint | eRelocation’s person ID # that the referral should be assigned to. OK to be null if Relocation is to assign the referral. |
| ReferralContactName | varchar(50) | Contact name at your company, for this referral |
| ReferralContactPhone | varchar(20) |  |
| ReferralContactEmail | varchar(150) |  |
| ReferralCheckMailAddress | varchar(50) | Where should this referral fee be mailed to upon completion of service |
| ReferralCheckMailCity | varchar(50) |  |
| ReferralCheckMailStateProvince | varchar(5) |  |
| ReferralCheckMailPostalCode | varchar(10) |  |
| ReferralCheckTaxID | varchar(15) |  |
| ReferralFeePercent | Money | Percent of function commission you are to receive upon closing. |
| ReferralFeeFlatDollars | Money | Flat referral fee you are to receive upon closing, regardless of the price of the closing |
| NameReq | Boolean | Flag to dictate whether the agent was requested. False by default. |
| PriEmployer | varchar(50) | Primary person’s employer |
| SecEmployer | varchar(50) | Secondary person’s employer |
| ThirdPartyFeeComments | varchar(MAX) | Special instructions for the referral fee that will ultimately be sent to you. |
| DirectToAgent | Boolean | Specifies whether you have already gone to the assigned agent with this referral. If True, we will attempt to schedule all needed update requests. If False, we will set these based on the broker’s setup in eRelocation. False by default. |

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|  | eRelocation API  *LinkReferrals* Documentation |

<https://refexchange.erelocation.net/default.asmx?op=LinkReferrals>

If it’s possible that our mutual customer already has your referrals in eRelocation, then you’ll need to link those referrals up. Linking referrals will take an existing referral within your referral source, if it exists, and mark that this referral is now linked via the RefExchange, so you can pull update, receive notes, etc. Think of linking referrals as granting yourself access to your own, existing referrals.

Note – for security reasons, you can only link referrals that are already in the defaulted referral source that your RefExchange account is already setup under.

Example:

<LinkReferrals>  
 <Referral>  
 <FileNum>12345</FileNum>  
 <InternalLinkID>12345</InternalLinkID>  
 <BuySellRentBMA>Buy</BuySellRentBMA>  
 </Referral>  
</LinkReferrals>

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| --- | --- | --- |
| Element Name | Type | Description |
| FileNum |  | The file number that should be referenced when the end user is communating with your company about this referral. |
| InternalLinkID |  | The file number that links up this referral on your end, which is what we’ll send notes, updates, referral changes, etc, for. OK (and typical) to be the same as “FileNum” |
| BuySellRentBMA |  | Service type of the referral – either Buy, Sell, Rent, or BMA. If not passed, we’ll use the integration’s default |

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|  | eRelocation API  *GetAgents* Documentation |

<https://refexchange.erelocation.net/default.asmx?op=GetAgents>

Return Example:

<eRelocation\_People>

<Person>

<eRelo\_Agent\_ID>3</eRelo\_Agent\_ID>

<LastName>Chapman</LastName>

<FirstName>Sarah</FirstName>

<OfficeName>Kettering</OfficeName>

<OfficeAddress>4060 Executive Dr</OfficeAddress>

<OfficeCity>Dayton</OfficeCity>

<OfficeStateProvince>OH</OfficeStateProvince>

<OfficePostalCode>45430</OfficePostalCode>

<OfficePhone>(937) 458-3100</OfficePhone>

<AgentPrefPhone>9374583100</AgentPrefPhone>

<AgentEmail>sarah.chapman@askrealestatetechnology.com</AgentEmail>

<AgentGUID>C55B2304-587E-4E19-8FF9-FAC33FD9B3ED</AgentGUID>

<OfficeNum>1</OfficeNum>

<CompanyName>Ref Exchange Test</CompanyName>

</Person>

<Person>

<eRelo\_Agent\_ID>6</eRelo\_Agent\_ID>

<LastName>Smith</LastName>

<FirstName>Michael</FirstName>

<OfficeName>Kettering</OfficeName>

<OfficeAddress>4060 Executive Dr</OfficeAddress>

<OfficeCity>Dayton</OfficeCity>

<OfficeStateProvince>OH</OfficeStateProvince>

<OfficePostalCode>45430</OfficePostalCode>

<OfficePhone>(937) 458-3100</OfficePhone>

<AgentPrefPhone>0000000000</AgentPrefPhone>

<AgentEmail>sarahtyler@askrealestatetechnology.com</AgentEmail>

<AgentGUID>35F739D1-AC65-4275-B22B-B12815F72E14</AgentGUID>

<OfficeNum>1</OfficeNum>

<CompanyName>Ref Exchange Test</CompanyName>

</Person>

</eRelocation\_People>

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| Element Name | Type | Description |
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|  | eRelocation API  *GetReferrals* Documentation |

<https://refexchange.erelocation.net/default.asmx?op=GetReferrals>

Return Example:

<Referrals>

<Referral>

<RefID>48A4842C-7B55-4C6E-A568-DACFFE00FCDE</RefID>

<RefSeqID>9</RefSeqID>

<ExchangePartnerRefID>199265111</ExchangePartnerRefID>

<BrokerID>179</BrokerID>

<BrokerName>Ref Exchange Test</BrokerName>

<StatusID>2</StatusID>

<Status>Active</Status>

<BookOfBusinessID>4</BookOfBusinessID>

<BookOfBusiness>Internet Leads</BookOfBusiness>

<ReferralSourceID>4</ReferralSourceID>

<ReferralSource>ABC Lead Network</ReferralSource>

<CreationDate>2014-10-06T00:00:00</CreationDate>

<ReferralOwnerName>Smith, Michael</ReferralOwnerName>

<ReferralOwnerID>6</ReferralOwnerID>

<ReferralOwnerPhone>0000000000</ReferralOwnerPhone>

<ReferralOwnerEmail>sarahbeth@askrealestatetechnology.com</ReferralOwnerEmail>

<LastEditedDate>2014-10-08T12:33:00</LastEditedDate>

<LastEditedBy>eRelo SysAdmin</LastEditedBy>

<BuySellRentBMA>Buy</BuySellRentBMA>

<SideOfDeal>Selling</SideOfDeal>

<IncomingOrOutgoing>Incoming</IncomingOrOutgoing>

<RegisteredCustomer>false</RegisteredCustomer>

<AGR>false</AGR>

<NameReq>false</NameReq>

<Renter>false</Renter>

<Inventory>false</Inventory>

<FirstName>Samantha</FirstName>

<LastName>Scarpelli</LastName>

<DisplayName>Samantha Scarpelli</DisplayName>

<Agent1eReloID>4</Agent1eReloID>

<Agent1EmailAddress>jacob.zimmerman@erelocation.net</Agent1EmailAddress>

<Agent1Name>Jacob Zimmerman</Agent1Name>

<Agent1OfficeName>Kettering</Agent1OfficeName>

<ActiveTimestamp>2014-10-06T00:00:00</ActiveTimestamp>

<ThirdPartyFeePct>35.0000</ThirdPartyFeePct>

<FunctionCommission>0.0000</FunctionCommission>

<MailAddress>123 Main St</MailAddress>

<MailCity>San Antonio</MailCity>

<MailState>TX</MailState>

<MailZip>77192</MailZip>

<CustomerPriCell>9375551212</CustomerPriCell>

<CustomerPriEmail>samscarpelli@erelocation.net</CustomerPriEmail>

<ReferralComments>Properties of Interest: Areas of Interest:</ReferralComments>

<PriFileNum>1992651</PriFileNum>

<OtherFirmName>ABC Lead Network</OtherFirmName>

<OtherFirmAddress>123 Main St</OtherFirmAddress>

<OtherFirmCity>New York</OtherFirmCity>

<OtherFirmState>NY</OtherFirmState>

<OtherFirmZip>07950</OtherFirmZip>

<ReferralCheckComments>Referral Fee: 25% under $100,000; 35% $100,000 and above</ReferralCheckComments>

</Referral>

</Referrals>

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| Element Name | Type | Description |
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|  | eRelocation API  Return Methods Documentation |

eRelocation can supply data back to your app, via a standard SOAP web service as well. We have some flexibility in how we can accommodate this, so please let us know what you have in mind to see if we can make it work.

<https://refexchange.erelocation.net/default.asmx?op=GetReferrals>

Examples:

<Notes><Note><NotesID>6030509</NotesID><EnteredAt>2014-09-26T11:01:00</EnteredAt><Note>File Number: 3383776&#x0D; Initial Contact Report &#x0D; &#x0D; &#x0D; &#x0D; Was live contact made? Yes&#x0D; &#x0D; What is the date you made contact? 09/25/2014&#x0D; &#x0D; Who did you speak to? Maria&#x0D; &#x0D; Is customer setup to receive listings by email? No&#x0D; &#x0D; Was the home-finding trip date scheduled? &#x0D; &#x0D; Home-find trip date: &#x0D; &#x0D; &#x0D; &#x0D; Comments: Working with client on her credit</Note><EnteredBy>Suzanne Summers</EnteredBy><AgentViewable>true</AgentViewable><ExchangePartnerRefID>2125176</ExchangePartnerRefID></Note></Notes>

<Referrals><Referral><RefID>6A44DA23-79C0-41FA-80D4-75BE2BAF9331</RefID><RefSeqID>76096</RefSeqID><ExchangePartnerRefID>2136069</ExchangePartnerRefID><BrokerID>78</BrokerID><BrokerName>ABC Realty</BrokerName><StatusID>2</StatusID><Status>Active</Status><BookOfBusinessID>4</BookOfBusinessID><BookOfBusiness>Internet Leads</BookOfBusiness><ReferralSourceID>51</ReferralSourceID><ReferralSource>ABC Lead Network</ReferralSource><CreationDate>2014-09-23T00:00:00</CreationDate><ReferralOwnerName>Summers, Suzanne</ReferralOwnerName><ReferralOwnerID>1</ReferralOwnerID><ReferralOwnerPhone>9375551212</ReferralOwnerPhone><ReferralOwnerEmail>suzanne.summers@erelocation.net</ReferralOwnerEmail><LastEditedDate>2014-09-23T18:59:00</LastEditedDate><LastEditedBy>Suzanne Summers</LastEditedBy><BuySellRentBMA>Buy</BuySellRentBMA><SideOfDeal>Selling</SideOfDeal><IncomingOrOutgoing>Incoming</IncomingOrOutgoing><RegisteredCustomer>false</RegisteredCustomer><AGR>false</AGR><NameReq>false</NameReq><Renter>false</Renter><Inventory>false</Inventory><CustomFlag1>false</CustomFlag1><CustomFlag2>false</CustomFlag2><CustomFlag3>false</CustomFlag3><CustomFlag4>false</CustomFlag4><CustomFlag5>false</CustomFlag5><FirstName>Rania</FirstName><LastName>Elsabrouty</LastName><DisplayName>Rania Elsabrouty</DisplayName><Agent1eReloID>331</Agent1eReloID><Agent1ThirdPartyID>25288257</Agent1ThirdPartyID><Agent1EmailAddress>suzannesummers@erelocation.net</Agent1EmailAddress><Agent1Name>Suzanne Summers</Agent1Name><Agent1OfficeName>Relocation</Agent1OfficeName><ActiveTimestamp>2014-09-23T00:00:00</ActiveTimestamp><ThirdPartyFeePct>35.0000</ThirdPartyFeePct><MailAddress>123 Main St</MailAddress><MailCity>Dayton</MailCity><MailState>OH</MailState><MailZip>45459</MailZip><CustomerHomePhone>9379991212</CustomerHomePhone><CustomerPriEmail>customer@erelocation.net</CustomerPriEmail><ReferralComments>Properties of Interest: Areas of Interest: &#x0D; Southside</ReferralComments><PriFileNum>3398288</PriFileNum><OtherFirmName>ABC Lead Network</OtherFirmName><OtherFirmAddress>123 E Fifth Ave</OtherFirmAddress><OtherFirmCity>New York</OtherFirmCity><OtherFirmState>NY</OtherFirmState><OtherFirmZip>55555</OtherFirmZip></Referral></Referrals>

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| --- | --- | --- |
| Element Name | Type | Description |
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