

Payliance

# Presentation Manager API Reference

v1

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# Overview

## Endpoints

- The Payliance API accepts HTTP POST requests in either JSON or XML format.
  - JSON Content-Type: application/json
  - XML Content-Type: text/xml
- HTTP Request Method: POST
- The Payliance API has two Endpoint URLs:
  - Staging API Endpoint: <https://staging.api.payliance.com/<request path>>
  - Production API Endpoint: <https://api.payliance.com/<request path>>

## Authentication

The Payliance API authentication uses a Bearer Authentication header.

Authorization: Bearer <SecretKey>

An Authentication key will be provided for each configured merchant location. Separate keys will be provided for Staging and Production environments.

## Whitelisting

- The Staging API Endpoint uses geofencing to restrict access to the United States and Canada. To access the Staging endpoint from locations outside the United States or Canada, contact your Sales or Implementations representative to whitelist your IP address.
- The Production API Endpoint uses IP address whitelisting to restrict access. Contact your Sales or Implementations representative to whitelist your IP address prior to your production go-live.
- Attempting to access the API from a restricted location will result in a HTTP 403 (Forbidden) response.

## Presentation Manager API Functions

The Payliance Presentation Manager API includes the following functions.

Function	Description	Request Path
create	Submit a new debt placement to Presentation Manager.	api/v1/placement/create
cancel	Cancel remaining collections on an existing debt placement within Presentation Manager.	api/v1/placement/cancel
retrieve	Retrieve data on an existing debt placement from Presentation Manager.	api/v1/placement/retrieve

## CREATE:

Use the CREATE function to submit a new debt placement to Presentation Manager.

CREATE Request

Endpoint: api/v1/placement/create

Element	Description	Format
uniqueAccountId	<b>Required</b> Merchant-defined unique account reference.	String, up to 50 characters.
<b>account</b>		
firstName	<b>Required.</b> Consumer's first name.	String, up to 50 characters.
lastName	<b>Required.</b> Consumer's last name.	String, up to 50 characters.
address1	<b>Required.</b> Consumer's billing street address.	String, up to 50 characters.
address2	Consumer's billing street address, line 2.	String, up to 50 characters.
city	<b>Required.</b> Consumer's billing city.	String, up to 50 characters.
state	<b>Required.</b> Consumer's billing state code.	String, 2 letter USPS state code.  Example: OH <a href="#">USPS State Codes</a>
zipCode	<b>Required.</b> Consumer's billing zip code.	Numeric string, 5 or 9 digits.
phoneNumber	Consumer's phone number.	Numeric string, 10 digits.
emailAddress	Consumer's email address.	String, up to 128 characters.
mobilePhone	Consumer's mobile phone number.	Numeric string, 10 digits.
<b>echeck</b>		
routingNumber	<b>Required.</b> Consumer's bank routing number.	Numeric string, 9 digits.
accountNumber	<b>Required.</b> Consumer's bank account number.	Numeric string, 2- 17 digits.
memoField1	<b>Required.</b> Merchant identifier for eCheck memo line.	String, up to 100 characters.
memoField2	<b>Required.</b> Merchant identifier for eCheck memo line 2.	String, up to 100 characters.
payeeLine	Pay to the order of line.	String, up to 100 characters.
<b>detail</b>		
paymentDate	Last known date consumer received paycheck.	Date, mm/dd/yyyy
paymentFrequency	<b>Required if paymentDate is populated.</b>  Consumer's paycheck schedule.	String.  Values: WEEKLY, BIWEEKLY, ENDOFMONTH, SEMIMONTHLY, TWICEMONTHLY, MONTHLY
paymentAmount	Custom transaction size. <i>Note: Additional merchant configuration is required to use custom paymentAmount.</i>	Numeric.
outstandingBalance	<b>Required.</b>	Numeric.

	Dollar amount of the placement.  This is the total amount to be collected from the consumer.	Do not include currency symbols or commas.
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## CREATE Response

The following response format is returned for the CREATE function.

Element	Description	Format
authorizationId	The unique identifier assigned by Payliance for the submission.  The authorizationId can be used to cancel a submission with the CANCEL function and retrieve status details for the submission using the RETRIEVE function.	GUID String, 36 characters.
message	Descriptive error message if successful is false.	String.
successful	Indicates whether the create placement request was submitted successfully.	Boolean.

## CANCEL:

Use the CANCEL function to stop remaining collections on an existing debt placement within Presentation Manager.

### CANCEL Request

Endpoint: `api/v1/placement/cancel`

A Cancel request must include one of the two elements – either `uniqueAccountId` or `authorizationId`.

Element	Description	Format
<code>uniqueAccountId</code>	Merchant-defined unique account reference that was used in the CREATE function when the account was submitted.	String, up to 50 characters.
<code>authorizationId</code>	The unique identifier assigned by Payliance returned in the CREATE response.	GUID String, 36 characters.

## CANCEL Response

The following response format is returned for the CANCEL function.

Element	Description	Format
<code>message</code>	Descriptive error message if <code>successful</code> is false.	String.
<code>successful</code>	Indicates whether the cancel request was submitted successfully.	Boolean.

## RETRIEVE:

Retrieve data on an existing debt placement from Presentation Manager.

[RETRIEVE Request](#)

Endpoint: `api/v1/placement/retrieve`

A Retrieve request must include one of the two elements – either `uniqueAccountId` or `authorizationId`.

Element	Description	Format
<code>uniqueAccountId</code>	Merchant-defined unique account reference that was used in the CREATE function when the account was submitted.	String, up to 50 characters.
<code>authorizationId</code>	The unique identifier assigned by Payliance returned in the CREATE response.	GUID String, 36 characters.

## RETRIEVE Response

The following response format is returned for the RETRIEVE function.

Element	Description	Format
<code>authorizationId</code>	The unique identifier assigned by Payliance for the submission. The <code>authorizationId</code> can be used to cancel a submission with the CANCEL function and retrieve status details for the submission using the RETRIEVE function.	GUID String.
<code>uniqueAccountId</code>	Merchant-defined unique account reference for the account that was used in the CREATE function when the account was submitted.	String.
<code>placementId</code>	The Id of the placement batch associated with the submission.	String.
<code>dateReceived</code>	Date the account was received.	Date.
<code>currentStatus</code>	The status of the account.	String.  Values: NEW, INVALIDATED, VALIDATED, CANCELLED, SCHEDULED, AWAITING VERIFICATION RESULT, DONE.
<code>validationStatus</code>	Indicates whether the placement has been validated and provides a descriptive reason if the placement invalidated.	String.
<code>verificationResult</code>	The result of the account verification, if applicable.	String.  APPROVED, DECLINED, QUALIFICATION SKIPPED
<b>account</b>		
<code>firstName</code>	Consumer's first name submitted on CREATE.	String.
<code>lastName</code>	Consumer's last name submitted on CREATE.	String.



address1	Consumer's billing street address submitted on CREATE.	String.
address2	Consumer's billing street address, line 2 submitted on CREATE.	String.
city	Consumer's billing city submitted on CREATE.	String.
state	Consumer's billing state submitted on CREATE.	String.
zipCode	Consumer's billing zip code submitted on CREATE.	String.
phone	Consumer's billing phone number submitted on CREATE.	String.
emailAddress	Consumer's email address.	String.
mobilePhone	Consumer's mobile phone number.	String.
<b>echeck</b>		
routingNumber	Consumer's bank routing number submitted on CREATE.	String.
accountNumber	Consumer's bank account number submitted on CREATE.	String. Masked format: "*****" + Last 4 digits of account number
memoField1	Merchant identifier for eCheck memo line.	String.
memoField2	Merchant identifier for eCheck memo line 2.	String.
payeeLine	Pay to the order of line.	String.
<b>detail</b>		
balanceSubmitted	Dollar amount of the placement submitted on CREATE.	Numeric.
paymentDate	Last known date consumer received paycheck, submitted on CREATE.	Date.
paymentFrequency	Consumer's paycheck schedule submitted on CREATE.	String.
paymentAmount	Custom transaction size submitted on CREATE.	Numeric.
<b>transactions</b>		
transactionId	The unique identifier assigned by Payliance for the transaction.	String.
amount	The amount of the transaction.	Numeric.
status	The status of the transaction.	String.  NEW, AWAITING 1 <sup>ST</sup> RESULT, RESUBMISISON READY, REPRESENTED, FINISHED - SUCCESS, FINISHED - FAILED
<b>attempts</b>		
submittedDate	The date the transaction was submitted to be processed.	Date.
resultDate	The date the transaction result was received.	Date.
resultCode	The code that corresponds to the transaction's result.	String.  For echeck, a transaction that settles will have a resultDate but will not have a resultCode.

			A transaction that returns will return the return code in resultCode.
message		Descriptive error message if successful is false.	String.
successful		Indicates whether the retrieve request was submitted successfully.	Boolean.