subatomic

Based on the available information, here's a summary of the technical integration methods for each data source:

Data Source Name	Integration Method	API Endpoint / File Location	Authentication Method	Documentation URL	Technical Integration Guide
Formstack	REST API (V2025)	`https:// www.formstack.com/api/ v2025/forms`	Personal Access Tokens (PATs)	Formstack API Overview	Utilize the Formstack API to programmatically access form submissions and attached documents. Authenticate using Personal Access Tokens as detailed in the documentation.
Schwab Custodian System	API integration via Schwab OpenView Gateway®	Contact Schwab for API endpoint details	OAuth2	Schwab Advisor Services	Contact Schwab Advisor Services to obtain API access and integration details. Ensure compliance with their security and authentication protocols.
Fidelity Custodian System	Contact vendor for documentation	Contact Fidelity for API endpoint details	Contact Fidelity for authentication details	Contact vendor for documentation	Reach out to Fidelity directly to acquire integration documentation and authentication requirements.
DocuSign	REST API	`https:// demo.docusign.net/ restapi` (Demo) or `https:// www.docusign.net/restapi` (Production)	OAuth2	DocuSign API Documentation	Use the DocuSign API to retrieve completed envelope metadata and documents. Authenticate using OAuth2 as outlined in the documentation.

Please note that for Schwab and Fidelity Custodian Systems, direct contact with the vendors is necessary to obtain specific integration details and access credentials.

Based on the available information, here's the integration method for Black Diamond:

Data Source Name	Integration Method	API Endpoint / File Location	Authentication Method	Documentation URL	Technical Integration Guide
Black Diamond	API Integration	Not specified	Username and Password	Black Diamond API Documentation	To integrate with Black Diamond, obtain API credentials by contacting their support. Use these credentials to authenticate API requests for accessing client statements. Refer to the provided documentation for detailed integration steps.

Please note that specific API endpoints and file locations are not publicly available and require direct communication with Black Diamond's support team.