




API

Developer Documentation

Version 2.0

Sample Lead Form

Here is an example of a lead form.



Quick Pre-Qual for Startup Funding

I understand by clicking 'PreQualify Me!', I am providing written instructions authorizing [Your Company Name] and affiliates to obtain my personal credit profile or other information from credit reporting agencies under the FCRA solely to conduct a credit pre-qualification. I further understand that this is a soft pull and will not harm my credit in any way whatsoever.

FCRA Disclaimer

To be able to provide offers the lead must agree to the FCRA Disclaimer. The lead can agree to this disclaimer when filling out a form or verbally agreeing over the phone.

Sample FCRA Disclaimer

I understand by clicking 'PreQualify Me!', I am providing written instructions authorizing [Your Company Name] and affiliates to obtain my personal credit profile or other information from credit reporting agencies under the FCRA solely to conduct a credit pre-qualification. I further understand that this is a soft pull and will not harm my credit in any way whatsoever.

Required part of FCRA Disclaimer

I am providing written instructions authorizing [Your Company Name] and affiliates to obtain my personal credit profile or other information from credit reporting agencies under the FCRA solely to conduct a credit pre-qualification.

Consent IP and Date/Time

We require the IP address of the lead or agent and the date/time the consent was given.

API Connection

- Production Base URL: <https://pre-fi.com/api/v2>

Security - OAUTH Access Token

- Add HTTP Header - "Authorization" to all api calls.
- Ex. "Authorization: Bearer <AccessToken>"

REST API Methods

- **ping** - Test api call to help get connected to the api.
- **pre-qualification** - Pre-Qualify your customer by providing customer personal information and receive pre-qualification results.

Postman Collection

- We provide a postman collection to help get you started with sample api calls.
- Add your Access Token to the Environments -> Production -> token variable.
- <https://www.postman.com/flight-saganist-12753881/pre-fi/overview>

Ping

GET [Base URL]/ping	
Response <pre>{ "Status": "Success", "Code": "200", "Account": "Company Name", "Errors": ["Error Message"] }</pre>	Status - Success, Failure, or Unauthorized Code - Matches HTTP Response Codes Account - Company Name Errors - Array of error messages

PreQualification

<p>POST [Base URL]/pre-qualification</p> <pre>{ "FirstName": "John", "LastName": "Smith", "Email": "john.smith@gmail.com", "Phone": "1234567890", "ConsentDate": "2024-06-26T09:50:38-0700", "ConsentIP": "172.56.0.42" }</pre>	<p>FirstName - String (50) - Required - Regex [a-zA-Z \-]+</p> <p>LastName - String (50) - Required - Regex [a-zA-Z \-]+</p> <p>Phone - String - Required - US Only</p> <p>Email - String (255) - Required - Requires valid email address.</p> <p>ConsentDate - Date - Required - Format: (YYYY-MM-DDThh:mm:ssTZD) - Date user agreed to FCRA disclaimer.</p> <p>ConsentIP - IP - IPV4 - Required - Requires a valid IP address. - IP Address of the user when agreeing to FCRA disclaimer.</p>
<p>Response</p> <pre>{ "Status": "Success", "Code": "200", "Offers": [{ "Name": "Automatic Financing", "Score": "800", "Details": "Financing Automatically and Instantly Available", "Status": "Approved", "Amount": "\$45,000", "Contingencies": "" }, { "Name": "Unsecured Funding", "Score": "800", "Details": "", "Status": "If Fixed", "Amount": "\$45,000", "Contingencies": "PayD-\$3,000" }], "DataPerfection": { "Emails": ["email@domain.com"], "Phones": ["111-222-3333"], "Bankruptcy": ["01/02/2024"], "Addresses": [{ "Address": "111-222-3333", "City": "San Diego", "State": "CA", "Zip": "92101" }] } }</pre>	<p>Status - Success, Failure, or Unauthorized</p> <p>Code - Matches HTTP Response Codes</p> <p>Offers - Array of Offers - Name - Score - Details - Status - Amount - Contingencies</p> <p>DataPerfection (Optional Service) - Emails - Array of emails - Phones - Array of phone numbers - Bankruptcy - Array of dates (MM/DD/YYYY) - Addresses - Array of addresses - Address - City - State - Zip - DOB - Object - Age - Income - Object - Estimate</p> <p>Errors - Array of error messages</p>

```
    ],  
    "DOB": {  
      "Age": "44"  
    },  
    "Income": {  
      "Estimate": "$150,000"  
    },  
  },  
  "Errors": [  
    "Error Message"  
  ],  
}
```

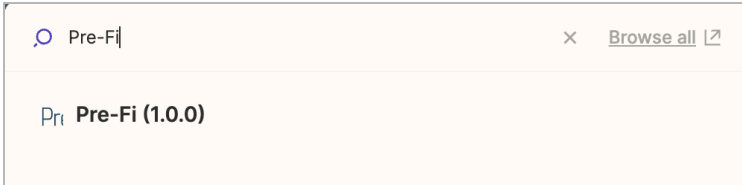
Zapier

We have created a Zapier Integration as an alternative to connecting directly to our API.

1) To start using the Pre-Fi Zapier Application your Zapier Admin will need to click on this link.

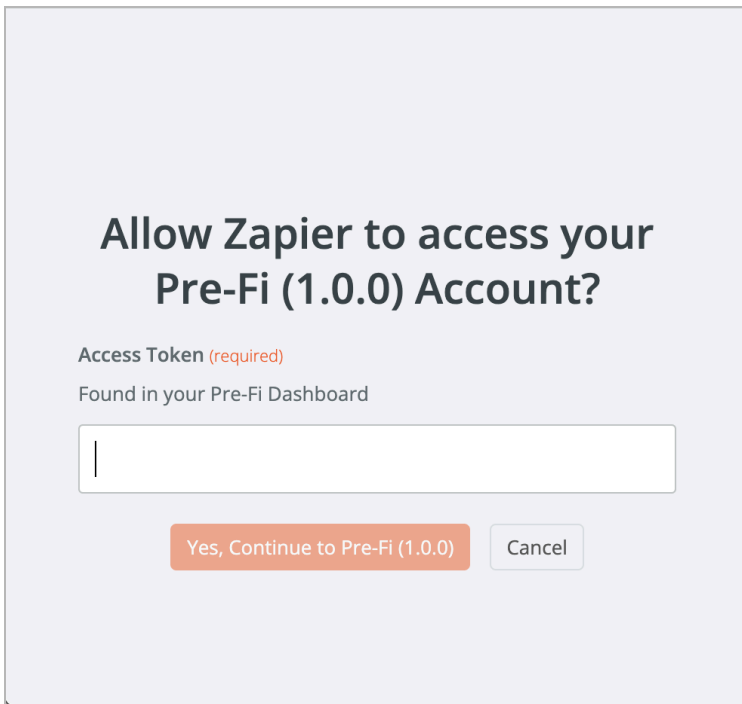
<https://zapier.com/developer/public-invite/207383/13f46baebfbf35d8e94367838ee09269/>

2) Add a step to your Zap and type “Pre-Fi” in the search.

A screenshot of a Zapier search interface. At the top, there is a search bar with the text "Pre-Fi" entered. To the right of the search bar are a close button (X) and a "Browse all" link with an external link icon. Below the search bar, a single result is displayed: "Pre-Fi (1.0.0)" with a small icon to its left.

3) Connect to your Pre-Fi Account

You will need to enter the Access Token provided by your account manager.

A screenshot of a modal dialog box titled "Allow Zapier to access your Pre-Fi (1.0.0) Account?". Below the title, it says "Access Token (required)" in red text, followed by "Found in your Pre-Fi Dashboard". There is a text input field for the access token. At the bottom, there are two buttons: "Yes, Continue to Pre-Fi (1.0.0)" in orange and "Cancel" in grey.

3) Select an Event (Pre-Qualification)

Prf

4. Pre-Fi (1.0.0)

✎ ✕

App & event ▲

Account ○

Action ○

Test ○

Prf Pre-Fi (1.0.0) By Invite

Change

* Event (required)

Choose an event

⌵

CREATE

Pre Qualification
Pre-Qualify your customer by providing customer personal information and receive pre-qualification results.

4) Map the required inputs.

Prf

3. Pre Qualification in Pre-Fi (1.0.0)

✎ ✕

App & event ✓

Account ✓

Action ▲

Test ○

Field search

Refresh

* First Name (required)

Enter text...

Enter a valid value

* Last Name (required)

Enter text...

Enter a valid value

* Mobile Phone (required)

Enter text...

Enter a valid value

* Email (required)

Enter text...

Enter a valid value

* Consent Date ⓘ (required)

Enter text...

Enter a valid value

* Consent IP (required)

Enter text...

Enter a valid value

5) Map the outputs and define your workflow.

Code 200

Offers

Offer Name 1 Automatic Financing

Offer Score 1 800

Offer Details 1 Financing Automatically and Instantly Available

Offer Status 1 Approved/Declined

Offer Amount 1 \$22,000

Offer Contingencies 1

Offer Name 2 Unsecured Financing

Offer Score 2 800

Offer Details 2 Unsecured Revolving Credit Lines

Offer Status 2 As Is/If Fixed/Declined

Offer Amount 2 \$71,000

Offer Contingencies 2 PayD-\$14,000

Data Perfection

Data Perfection Emails

1 email@domain.com

Data Perfection Phones

1 111-222-3333

Data Perfection Addresses

Data Perfection Addresses Address 1 14 Union St.

Data Perfection Addresses City 1 San Diego

Data Perfection Addresses State 1 CA

Data Perfection Addresses Zip 1 92101

Data Perfection Bankruptcy

1 01/02/2024

Data Perfection DOB

Age 47

Data Perfection Income

Estimate \$150,000

Code 200

Offers

Offer Name 1 Unsecured Funding

Offer Score 1 822

Offer Details 1

Offer Status 1 As Is

Offer Amount 1 \$120,000

Offer Contingencies 1

Offer Name 2 Automatic Financing

Offer Score 2 822

Offer Details 2 Financing Automatically and Instantly Available

Offer Status 2 Approved

Offer Amount 2 \$108,000

Offer Contingencies 2

Offer Name 3 Client Financing Prime

Offer Score 3 822

Offer Details 3 0-29%, Term Length up to 36 months. Merchant Keeps 80%

Offer Status 3 Approved

Offer Amount 3 \$30,000

Offer Contingencies 3

DataPerfection

Data Perfection Emails

1 email@domain.com

Data Perfection Phones

1 111-222-3333

Addresses

Data Perfection Addresses Address 1 12 Union Street

Data Perfection Addresses City 1 San Diego

Data Perfection Addresses State 1 CA

Data Perfection Addresses Zip 1 92101