

Contact Data and Services 3.3

# Document Status

status: Request for Comment (valid values are < Request for Comment, Preliminary Review, Public Review, Architectural Review, Final Review, Published, Deprecated)

This version: **Assembla**.com. Files Tag = CUFX\_3.3\_RFC\_Active

Previous Version: **Assembla**.com. Files Tag = CUFX\_3.2\_RFC\_Archive

# Authors and Change Log

|  |  |  |
| --- | --- | --- |
| Version | Date | Changes |
| 0.0.01 |  | * Initial Draft |
| 0.0.02 |  | * Updated Overview of Specification |
| 0.0.03 |  | * Minor updates and correction of typos |
| 0.0.04 |  | * Update XSD filenames to PascalCase |
| 0.0.05 |  | * Update examples to be consistent with current XSD |
| 0.0.06 |  | * Added “point” in structure and fine-tuned examples with current XSD. |
| 0.0.07 |  | * Switch to use X-HTTP-METHOD-OVERRIDE standard rather than subMethod non-Standard method for overriding request types. * Create a contactMessage wrapper for every message to increase ability for infrastructure to serialize the data |
| 3.0 | **10/29/2013** | * Versioning and format change with release CUFX 3.0 |
| 3.0 | **12/13/2013** | * Update examples X-API-Version to >=3.0.0 |
| 3.0 | **12/20/2013** | * Review and updated typos, formatting. |
| 3.1 | **07/17/2015** | * Updated to release 3.1 |
| 3.2 | **05/10/2016** | * Updated to release 3.2 |
| 3.3 | **02/15/2017** | * Updated to release 3.3 |

# Overview of Specification

The CUFX contact data model and services defines the contact data model and services for party and relationship. Contacts include contact points such as email, mail, phone, instant message, and social media.

# Any knowN Errors in the document

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| **Error Description** | Status of Error |
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# Document Conventions

List any document conventions such as what bold and italics mean and how the document is intended to be read.

Within this specification, the key words "MUST", "MUST NOT", "REQUIRED", "SHALL", "SHALL NOT", "SHOULD", "SHOULD NOT", "RECOMMENDED", "MAY", and "OPTIONAL" are to be interpreted as described in W3 Working Group (W3C). However, for readability, these words do not appear in all uppercase letters in this specification.

At times, this specification recommends good practice for authors and user agents. These recommendations are not normative and conformance with this specification does not depend on their realization. These recommendations contain the expression "We recommend ...", "This specification recommends ...", or some similar wording.

All formatting in this document utilizes Word Styles.

All Citations must utilize Word Citations so that it automatically shows at the end of the document.

All updates after the initial creation must be performed using Tracking Changes turned on and accepted by the Architecture committee.

# Definitions related to the specification

**Contact**

Any contact point for a person or entity which may have an account relationship with the financial institution and stored in a financial services platform. Most contacts will be created, read, updated, or deleted using the party services. This is just provided as an additional method for updating contact information if necessary.

# Data Elements

## Filters used when accessing the Contact data

Refer to Security Services documentation to understand what may be contained in the header and processed by security procedures. When accessing the data include **MessageContext.xsd** so that the service can determine the scope of the request. Refer to recent CUFX messageContext Data and CUFX Security Services for use of MessageContext.xsd. Include any filter variables related to the request. See **ContactFilter.xsd.** This is useful for pulling back or updating specific contacts, contacts associated to a party, relationship, etc. and, when combined with contact types, for example, all email addresses for a party, relationship, etc.

## Contact Data attributes

All CUFX fields related to a party are defined in Contact.xsd.

Note: Fields not listed in the calling specification are not to be returned to the calling specification. That is, if the field transaction type is not listed in the calling specification, then do not return the data field to alleviate issues with unexpected information or a bloat of information being returned to lightweight applications.

# Party Services

## Overview

|  |  |
| --- | --- |
| Definition | Collection of services to manage a contact |
| Overview of Capabilities | Create, read, update and delete a contact. The following scenarios may exist. The contact may be connected to an existing lead or party. In addition, a contact may exist without an existing party or lead in preparation to be connected to a party or lead. Some systems may need to place the contact in a temporary location until the party or lead is made available. |
| Dependencies | Security Services, messageContext, party |
| Sample CUFX REST LINK | https://api.dataprovider.com/contact/ |
| CUFX SOAP LINK |  |
| CUFX WaDL LINK |  |

## Contact Resource based create, read, update, delete services

|  |  |
| --- | --- |
| INPUTS | cufx:ContactMessage (which includes…)   * [cufx:MessageContext](file:///\\files2\users\CMarjaniemi\Projects\CUFX\MessageContext.html) * cufx:contactFilter (for read, update, delete) * cufx:contactList (for create, update) |
| Outputs | cufx: contactList (except for delete) |
| Return Values | cufx: Error |
| Side Effects | Creation, update or deletion of contact; read has no side effects |
| Dependencies | Security Services for authentication and security |
| Fields used | **Message Headers** : See security services  **messageContext**: See MessageContext.xsd  **Filters**: See ContactFilter.xsd  **Attributes: contactList : See Contact.xsd** |

### REST-JSON CREATE Contact example

This example shows where the party is not known.

Note: Not all fields are listed for simplicity of an example to create a contact. This example creates an email contact.

**Required**: messageContext, at least one contact within contactList

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

X-API-Version: >=3.3.0

**POST h**ttps://api.datasource.com/contact

{

“contactMessage”:{

“messageContext”: { <see MessageContext.xsd>

},

“contactList”: [

{“contactType”:”Email”,

“point”:{

“email”:{

“type”:”Home”,

“address”:[tom@barnum.com](mailto:tom@barnum.com)

}

},

“timeOfDay”:”Afternoon”,

“demonstratedAccess”:{

“dateTime”:”2013-04-30T12:05Z”,

“fullName”:“Tom Ruben Thumb”,

“username”:”tthumb”

}

}

]

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“contactList”: [

{“contactId”:”15345515115df”,

“contactType”:”Email”,

“point”:{

“email”:{

“type”:”Home”,

“address”:[tom@barnum.com](mailto:tom@barnum.com)

}

},

“timeOfDay”:”Afternoon”,

“demonstratedAccess”:{

“dateTime”:”2013-04-30T12:05Z”,

“fullName”:“Tom Ruben Thumb”,

“username”:”tthumb”

}

}

]

}

### REST-JSON READ Contact example

This example reads a specific contact record.

Note: Not all fields are listed for simplicity of an example to read a contact.

**Required**: messageContext, at least one valid filter in contactFilter

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

**X-HTTP-Method-Override: GET**

X-API-Version: >=3.3.0

**POST h**ttps://api.datasource.com/contact

{

“contactMessage”:{

“messageContext”: { <see MessageContext.xsd> },

“contactFilter”:{

“contactIdList”:[

”15345515115df”

]

}

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“contactList”: [

{“contactId”:”15345515115df”,

“contactType”:”Email”,

“point”:{

“email”:{

“type”:”Home”,

“address”:[tom@barnum.com](mailto:tom@barnum.com)

}

},

“timeOfDay”:”Afternoon”,

“demonstratedAccess”:{

“dateTime”:”2013-04-30T12:05Z”,

“fullName”:“Tom Ruben Thumb”,

“username”:”tthumb”

}

}

]

}

### REST-JSON READ Contact example

Note: Not all fields are listed for simplicity of an example to read a contact. This example shows how to read all contacts for a specific party.

**Required**: messageContext, at least one valid filter in contactFilter

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

**X-HTTP-Method-Override: GET**

X-API-Version: >=3.3.0

**POST h**ttps://api.datasource.com/contact

{

“contactMessage”:{

“messageContext”: { <see MessageContext.xsd> },

“contactFilter”:{

“partyIdList”:[

”151349885h348870ag”

]

}

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“contactList”: [

{“contactId”:”15345515115df”,

“contactType”:”Email”,

“point”:{

“email”:{

“type”:”Home”,

“address”:[tom@barnum.com](mailto:tom@barnum.com)

}

},

“timeOfDay”:”Afternoon”,

“demonstratedAccess”:{

“dateTime”:”2013-04-30T12:05Z”,

“fullName”:“Tom Ruben Thumb”,

“username”:”tthumb”

}

},

{“contactId”:”84hrt3654967845”,

“contactType”:”Address”,

“point”:{

“address”:{

“type”:”Home”,

“line1”:”123 Main St”,

“line2”:”Apt 1A”,

“city”:”Anywhere”,

“stateProvince”:”FL”,

“postalCode”:”35999”,

“countryCode”:”USA”

}

}

}

]

}

### REST-JSON UPDATE Contact example

Note: Not all fields are listed for simplicity of an example to update a contact. This example updates an email contact.

**Required**: messageContext, at least one valid filter in partyFilter, the specific id of the party to be updated in the message

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

X-API-Version: >=3.3.0

**PUT h**ttps://api.datasource.com/contact

{

“contactMessage”:{

“messageContext”: { <see MessageContext.xsd>

},

“contactFilter”:{

“contactIdList”:[

”15345515115df”

]

}

“contactList”: [

{“contactId”:”15345515115df”,

“point”:{

“email”:{

“address”:”[iquit@bigandtall.com](mailto:iquit@bigandtall.com)”

}

}

}

]

}

}

**RESPONSE:**

Headers:

Status Code: 200 Ok

Content-type: application/json; charset=utf-8

Content-Language: en-us

{

“contactList”: [

{“contactId”:”15345515115df”

“contactType”:”Email”,

“point”:{

“email”:{

“type”:”Home”,

“address”:”iquit@bigandtall.com”

}

}

]

}

### REST-JSON DELETE Contact example

Note: Not all fields are listed for simplicity of an example to delete a contact. This example deletes all contacts for a party.

**Required**: messageContext, at least one valid filter in partyFilter, the specific id of the party to be updated in the message

**REQUEST:**

Headers:

**<security related header parameters... see Security Services>**

Accept: application/json

Accept-Charset: utf-8

Accept-Language: en-us (IANA – language codes)(W3C, HTTP Protocols)

Content-type: application/json; charset=utf-8

**X-HTTP-Method-Override: DELETE**

X-API-Version: >=3.3.0

**PUT h**ttps://api.datasource.com/party

{

“contactMessage”:{

“messageContext”: { <see MessageContext.xsd> },

“contactFilter”:{

“partyIdList”:[

”151349885h348870ag”

]

}

}

}

**RESPONSE**:

Headers:

Status Code: 200 Ok

# General Error handling For All Services

Refer to latest CUFX documentation *Error Mapping*.

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