

Taxify Documents API Reference

Overview

Taxify simplifies tax time for taxpayers and their CPAs. Taxpayers upload and manage documents in their taxpayer Taxify account. Taxpayers can authorize their CPA to access their Taxify account, giving the CPA the ability to manage the taxpayer's documents. Taxpayers and CPAs can upload, delete, annotate, and categorize documents that are stored in taxpayer accounts to which the user has access.

About the API Reference

Taxify uses a REST API with action-oriented HTTP verbs (GET, POST, PUT, DELETE) and built-in HTTP features for things like authentication and authorization. All responses include an HTTP status code, header, and response body in JSON or XML.

Errors

Error responses include the HTTP error code and a message describing the reason for the error. Error messages vary depending on the endpoint.

Base URL

<http://api.Taxify.com>

Reference

Tax Documents

Endpoint	Description
Get a document	Retrieves a single document for the specified user.
Get a document's annotations	Retrieves the annotations associated with the specified document.
Create annotations for a document	Creates an annotation on the specified document.
Change a document's category	Changes the category and subcategory (optional) of the specified document.
Delete a document	Deletes the specified document.

Get a document

Retrieves a single document for the specified user.

URL

```
GET /api/v1/users/{userid}/documents/getsingledocument
```

Parameters

Name	Type	Required?	Description
<code>userid</code>	integer	required	The associated taxpayer user ID.
<code>documentid</code>	integer	required	The document ID.
<code>download</code>	boolean	optional	If <code>true</code> , download is initiated. Default is <code>false</code> .

Request

```
curl -X GET --header 'Accept: application/json' --header 'Authorization: Bearer x' 'http://api.Taxify.com/api/v1/users/3659/documents/getsingledocument?id=28404'
```

Response

```
{
  "id": 31946,
  "key": "31258af6-54e9-4845-97e7-0802b437c36c",
  "name": "my w-2 document",
  "extension": "pdf",
  "contentType": "application/pdf",
  "isUploaded": true,
  "createdDateTime": "2017-04-05T15:27:22.6323957+00:00",
  "editedDateTime": null,
  "documentId": 0,
  "uploadPSU": null,
  "uploadPSUExpiry": null,
  "downloadPSU": "https://Taxifyprod.s3.amazonaws.com/31258af6-54e9-4845-97e7-0802b437c36c?AWSAccessKeyId=AKIAJUHO56Z5S5WXTG3A&Expires=1491406503&Signature=LXgbkQ1fVPlO28hpAk3ZPBoevzA%3D",
  "downloadPSUExpiry": "2017-04-05T15:35:02.6673796+00:00"
}
```

Get a document's annotations

Retrieves the annotations associated with the specified document.

URL

```
GET /api/v1/users/{userid}/documents/{documentid}/annotations
```

Parameters

Name	Type	Required?	Description
<code>userid</code>	integer	required	The associated taxpayer user ID.
<code>documentid</code>	integer	required	The document ID.

Request

```
curl -X GET --header 'Accept: text/xml' --header 'Authorization: xxx' 'http://api.Taxify.com/api/v1/users/3659/documents/28404/annotations'
```

Response

```
<?xml version="1.0" encoding="UTF-8"?>
<xfdf xmlns="http://ns.adobe.com/xfdf/" xml:space="preserve">
  <pdf-info xmlns="http://www.pdftron.com/pdfinfo" version="2"/>
  <fields/>
  <xfdf>
    <text subject="Comment" page="0"
      rect="591.559618,725.915739,622.559618,756.915739" flags="print"
      name="f8262b02-f7c8-2844-8b20-1035521fb2c3" title="Tom Taxpayer"
      date="D:20170405084240-07'00'" color="#FFFF00" opacity="1"
      creationdate="D:20170405084232-07'00'" icon="Comment">
      <contents-richtext>
        <body xmlns="http://www.w3.org/1999/xhtml"
          xmlns:xfa="http://www.xfa.org/schema/xfa-data/1.0/" xfa:spec="2.0.2"
          xfa:APIVersion="Acrobat:10.1.3">
          <p dir="ltr">
            <span dir="ltr" style="font-size:10.0pt;text-align:left;color:#000000;font-weight:normal;font-style:normal">This is an
            annotation</span>
          </p>
        </body>
      </contents-richtext>
      <contents>This is an annotation</contents>
    </text>
  </annots>
</pages>
  <defmtx matrix="1,0,0,-1,0,792"/>
</pages>
</xfdf>
```

Create an annotation on a document

Creates an annotation on the specified document.

URL

```
POST /api/v1/users/{userid}/documents/{documentid}/annotations
```

Parameters

Name	Type	Required?	Description
<code>userid</code>	integer	required	The associated taxpayer user ID.
<code>documentid</code>	integer	required	The document ID.
<code>data</code>	string	required	Formatting and content for the annotation.

Request

```
curl -X POST --header 'Content-Type: application/json' --header 'Accept: application/xml' --header 'Authorization: xxx' -d '{ "data": "string" }' 'http://api.Taxify.com/api/v1/users/3659/documents/28424/annotations'
```

Request Body

```
{  
  "data": string  
}
```

Responses

```
Successful: { "httpStatusCode": 200 }
```

```
Failed (document doesn't exist): { "httpStatusCode": 404 }
```

Change a document's category and subcategory

Changes the category and subcategory (optional) of the specified document.

URL

```
PUT /api/v1/users/{userid}/documents/{documentid}/changecategory
```

Parameters

Name	Type	Required?	Description
<code>userid</code>	integer	required	The associated taxpayer user ID.
<code>documentid</code>	integer	required	The document ID.
<code>categoryid</code>	integer	required	The category ID.
<code>suggestionid</code>	integer	optional	The subcategory ID.

Request

```
curl -X PUT --header 'Accept: application/json' --header 'Authorization: Bearer x' 'http://api.Taxify.com/api/v1/users/3659/documents/28404/changecategory?categoryid=11'
```

Response

```
{
  "id": 0,
  "value": "Category has been changed",
  "error": null
}
```

Delete a document

Deletes the specified document.

URL

```
DELETE /api/v1/users/{userid}/documents/{documentid}/delete
```

Parameters

Name	Type	Required?	Description
<code>userid</code>	integer	required	The associated taxpayer user ID.
<code>documentid</code>	integer	required	The document ID.

Request

```
curl -X DELETE --header 'Accept: application/json' --header 'Authorization: Bearer x' 'http://api.Taxify.com/api/v1/users/3659/documents/28424/delete'
```

Response

```
{
  "value": "Document deleted",
  "error": null
}
```