

creditsafe[✓]

Connect Global Monitoring

API Quick Start Guide



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Creditsafe Connect is a REST API that provides access to the Creditsafe Global Company Database. It enables you to control your master data, utilise up-to-date business and director information to enhance your onboarding and qualification processes, and receive alerts when your customers and suppliers' Credit Report change.

To start your Creditsafe Connect API integration you will need to have activated your account and set a password by following the instructions in your Welcome Email. If you have not received a Welcome Email, please contact your Creditsafe Account Manager. You will need your username and password to generate an authentication token.

For the full list of API endpoints for Global Monitoring and other products, please visit Creditsafe Connect OpenAPI documentation: www.creditsafe.com/gb/en/enterprise/integrations/api-documentation.html

1. Authenticate

POST: /v1/authenticate

Endpoint to generate a Bearer JWT (Authentication Token). Use the `token` in an `Authorization` header on all other Creditsafe Connect calls as proof of your authenticity.

Tokens can exist concurrently and persist for 1 hour from its issued time. Must generate new authentication token after it expires. You must pass your username and password in the Request Body.

Header Parameters	Request Body
Content-Type: application/json	<pre>{ "username": "{{Creditsafe username}}", "password": "{{Creditsafe password}}" }</pre>
Query Parameters	Path Parameters
None	None

Example Authentication Request

Example Request	Example Request Body
<p>POST: https://connect.creditsafe.com/v1/authenticate</p>	<pre>{ "username": "john.smith@creditsafe.com", "password": "p@55W0rD" }</pre>
Example Response	
<pre>{ "token": "hMKeTXlqmeFkaQz0P6HyjdL671Acp8WqWWW8n74hWGeCJVtZ1pObfAwfls... pbWUiOjE1OTI4MTQ0MjlsImkCcl6ImxvY2FslwidXNlcm5hbWUiOiJBbmRyZ... 80kESE5LRMXCYyIfbZF4pDxoL399LG4BtcZGLiWT3-hKKeA" }</pre>	

2. Monitoring user details

GET: /v1/monitoring/user/details

Endpoint to show various user related details such as user and customer ID's, last access date and contract end date.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
None	None

Example GET request to view user details

Example Request
GET: <code>https://connect.creditsafe.com/v1/monitoring/user/details</code>
Example Response
<pre>[{ "countryCode": "US", "createdDate": "2020-06-04T12:41:51", "csCustomerId": 101662701, "csUserId": 101509154, "isAutoTracker": false, "languageCode": "GB", "lastAccessDate": "2020-07-02T11:17:36", "modifiedDate": "2020-07-02T11:17:36", "contractEndDate": "", "userId": 188574 }]</pre>

3. Company Search

GET: /v1/companies

Endpoint to search for Companies based on the provided Search Criteria. Build your URL using any combination of the allowed parameters to get the most relevant results; it is recommended to use a unique identifier such as **regNo** where available. If a unique identifier is not available, use a combination of the companies registered **postCode** and **name** for the next best hit rate.

When a company is found, you can use the **safeNo** of the company to add it to a portfolio.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
regNo: Local Company Identifier vatNo: Company VAT number name: Company Name postCode: Company postcode/zip code status: active OR inactive Full list of query parameters per Country can be found by calling the Company Search Criteria endpoint found below	None

Example GET request to search for an active company called 'tesco' in Great Britain

Example Request	Example Path Parameters
GET: <code>https://connect.creditsafe.com/v1/companies?status=active&name=tesco&countries=GB</code>	<code>?status=active &name=tesco &countries=GB</code>
Example Response	
<pre>{ "totalSize": 1, "companies": [{ "id": "GB-1-7288318", "country": "GB", "safeNo": "UK17086602", "name": "TESCO", "address": { "simpleValue": "KINGSTON PARK CENTRE, NEWCASTLE UPON TYNE, TYNE AND WEAR, NE3 2FP", "street": "KINGSTON PARK CENTRE", "city": "NEWCASTLE UPON TYNE", "postCode": "NE3 2FP" }, "status": "Active", "type": "NonLtd", "dateOfLatestChange": "2019-12-17T12:29:23.000Z", "phoneNumbers": ["0345 266 6547"], "statusDescription": "Active" }] }</pre>	

4. Company Search Criteria

GET: `/v1/companies/searchcriteria?countries={countryCode}`

Returns the set of available Company Search parameters/fields for a provided list of countries.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
None	<code>{countryCode}</code> : A comma separated list of ISO/Alpha 2 format country codes, or singular country Code. e.g. US,GB will return the common searchable Company fields in the United States and Great Britain.

Example GET request to see all search parameters for Great Britain

Example Request	Example Path Parameters
GET: https://connect.creditsafe.com/v1/companies/searchcriteria?countries=GB	?countries=GB
Example Response	
<pre>{ "countries": ["GB"], "languages": ["EN"], "criteriaSets": [{ "id": { "required": true } }, { "safeNo": { "minLength": 10, "maxLength": 10, "validationRegExp": "GB\\d{8}", "required": true } }, { "regNo": { "minLength": 2, "maxLength": 8, "required": true }, ... }] }</pre>	

5. Create new monitoring portfolio

POST: /v1/monitoring/portfolios

Endpoint to create a new Portfolio based on the supplied criteria. A portfolio can contain any number of companies that you wish to monitor changes to. The only required Body parameter is "name" for Connect users.

Header Parameters	Request Body
Content-Type: application/json Authorization: <code>{{token}}</code>	<pre>{ "name": string, "isDefault": boolean, "emails": { "firstName": string, "lastName": string, "emailAddress": string (Optional email to receive Event Notification) } "emailSubject": string }</pre> <p>* = Required</p>
Query Parameters	Path Parameters
None	None

Example POST request to create portfolio

Example Request	Example Request Body
POST: https://connect.creditsafe.com/v1/monitoring/portfolios	<pre>{ "name": "Portfolio 123" }</pre>
Example Response	
<pre>{ "messageId": "acbac1f0-b4cc-11ea-96a4-02513bf3a2c0", "userId": 188344, "csUserId": 101534554, "processingMs": 50, "data": { "portfolioId": 1148353, "userId": 188344, "name": "Portfolio 123", "isDefault": false } }</pre>	

6. Delete a portfolio

DELETE: /v1/monitoring/portfolios/{portfolioId}

Endpoint to delete a portfolio. Please note there is no easy way to recover a deleted portfolio, you will need to contact your account manager or support desk.

Header Parameters	Request Body
Authorization: {{token}}	None
Query Parameters	Path Parameters
None	{portfolioId}: The unique identifier for the portfolio that wish to delete, obtained from /portfolios

Example DELETE request to delete a portfolio

Example Request
DELETE: https://connect.creditsafe.com/v1/monitoring/portfolios/1651812
Example Response
<pre>{ "message": "Portfolio removed" }</pre>

7. List all portfolios and their corresponding IDs

GET: /v1/monitoring/portfolios

Endpoint to get all Portfolios for the user if no query parameters are provided. Can be searched by using the query parameter in the URL.

The “portfolioId” is a unique identifier that is required in majority of Monitoring related requests.

Header Parameters	Request Body
Authorization: {{token}}	None
Query Parameters	Path Parameters
searchQuery: Return portfolios that match the given value page: (Default: 0) Starting page number pageSize: (Default: 50 max: 1000) Number of items per page	None

Example GET request listing portfolios with a search query parameter

Example Request
GET: https://connect.creditsafe.com/v1/monitoring/portfolios?searchQuery=portfolio
Example Response
<pre>{ "correlationId": "ec6d3d70-b4d4-11ea-860f-06bc8182190e", "totalCount": 1, "paging": { "size": 50, "prev": null, "next": null, "last": 0.0 }, "data": { "portfolios": [{ "portfolioId": 1148353, "name": "Portfolio 123", "isDefault": false, "isSharedPortfolio": 0 }], "sharedPortfolios": [] } }</pre>

8. List all eventRules for a portfolio

GET: `/v1/monitoring/portfolios/{portfolioId}/eventRules`

Endpoint to that lists all the eventRules, their status and parameters based on a portfolio Id.

Newly created portfolios are without any notification event rules by default, but you can switch rules on/off per country or on a global basis. There are different rules available for each country due to the different type of change event data that's available. The following GET request lists all the available rules for a portfolio.

(Note: XX country code indicates a global rule i.e. available for ALL countries)

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
None	<code>{portfolioId}</code> : The unique identifier for the portfolio that wish to retrieve notification event rules for, obtained from <code>/portfolios</code>

Example GET request that lists all eventRules for a portfolio

Example Request
GET: <code>https://connect.creditsafe.com/v1/monitoring/portfolios/13157163/eventRules</code>
Example Response
<pre>[{ "isActive": 1, "ruleCode": 101, "ruleCountryCode": "XX", "ruleType": 4, "ruleTypeName": "Rating band change - 3 input", "name": "International Rating Reduce by {0} Band(s) OR Less than Band {1}", "param0": "1", "param1": "A" }, { "isActive": 1, "ruleCode": 1308, "ruleCountryCode": "LU", "ruleType": 1, "ruleTypeName": "Bool", "name": "New Accounts" }, ]</pre>

9. List all eventRules for a portfolio per country

GET: `/v1/monitoring/portfolios/{portfolioId}/eventRules/{countryCode}`

Endpoint to that lists all the eventRules, their status and parameters based on a portfolio Id, filtered by country.

Newly created portfolios are without any notification event rules by default, but you can switch rules on/off per country or on a global basis. There are different rules available for each country due to the different type of change event data that's available. The following GET request lists all the available rules for a portfolio.

(Note: XX country code indicates a global rule i.e. available for ALL countries)

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
None	<p><code>{portfolioId}</code>: The unique identifier for the portfolio that wish to retrieve notification event rules for, obtained from <code>/portfolios</code></p> <p><code>{countryCode}</code>: Country code to show events for. 2 Characters.</p>

Example GET request that lists Great Britain eventRules for a portfolio

Example Request
GET: <code>https://connect.creditsafe.com/v1/monitoring/portfolios/13157163/eventRules/GB</code>
Example Response
<pre>[{ "isActive": 1, "ruleCode": 101, "ruleCountryCode": "XX", "ruleType": 4, "ruleTypeName": "Rating band change - 3 input", "name": "International Rating Reduce by {0} Band(s) OR Less than Band {1}", "param0": "1", "param1": "A" }, { "isActive": 1, "ruleCode": 1807, "ruleCountryCode": "GB", "ruleType": 1, "ruleTypeName": "Bool", "name": "Liquidation Notices" },]</pre>

10. Edit/update portfolio eventRules

PUT: `/v1/monitoring/portfolios/{portfolioId}/eventRules/{countryCode}`

Endpoint to update an eventRule in a portfolio. Must provide a portfolio unique identifier and a country code in the URL of the PUT request.

The Body of the request must contain the “ruleCode” number of the eventRule you want to update, with an “isActive” parameter. Some event rules may also contain specific parameters, which can be set with “param0”, “param1”, etc. parameters. Get the above information by calling the [List All eventRules](#) endpoint.

Header Parameters	Request Body
Content-Type: application/json Authorization: <code>{{token}}</code>	<pre>[{ "ruleCode": string, "isActive": string, (0=false, 1=true) "param0": string, "param1": string }]</pre> <p>* = Required</p>
Query Parameters	Path Parameters
None	<p><code>{portfolioId}</code>: The unique identifier for the portfolio that wish to update notification event rules for, obtained from /portfolios</p> <p><code>{countryCode}</code>: Country code to show events for. 2 Characters.</p>

Example PUT request which updates specific eventRules for a portfolio

Example Request	Example Request Body
<p>PUT: <code>https://connect.creditsafe.com/v1/monitoring/portfolios/13157163/eventRules/GB</code></p>	<pre>[{ "ruleCode": 101, "isActive": 1 }, { "ruleCode": 1801, "isActive": 1, "param0": "20" }]</pre>
Example Response	
<p>204 No Content</p>	

11. Reset eventRules to default values for a portfolio

PUT: `/v1/monitoring/portfolios/{portfolioId}/eventRules/setDefault`

Endpoint to reset eventRules to default values in a portfolio. Must provide a portfolio unique identifier code in the URL of the PUT request.

(Note: Default values mean all eventRules are turned off [“active”: 0])

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
None	<code>{portfolioId}</code> : The unique identifier for the portfolio that wish to reset rules to default, obtained from <code>/portfolios</code>

Example PUT request which resets eventRules to default values for a portfolio

Example Request
PUT: <code>https://connect.creditsafe.com /v1/monitoring/portfolios/13157163/eventRules/setDefault</code>
Example Response
<code>204 No Content</code>

12. Add a company to a portfolio

POST: /v1/monitoring/portfolios/{portfolioId}/companies

Endpoint to add a company using a company id, into a portfolio provided in as a path parameter. Optional fields can be used to add a personalReference, freeText, and personalLimit. They are required in the request body, but can be left as blank strings.

Header Parameters	Request Body
Content-Type: application/json Authorization: {{token}}	<pre>{ "id": string, "personalReference": string, "freeText": string, "personalLimit": string, }</pre> <p>* = Required</p>
Query Parameters	Path Parameters
None	<p>{portfolioId}: The unique identifier for the portfolio that wish to add a company to, obtained from /portfolios</p>

Example POST request to create portfolio and set it as default

Example Request	Example Request Body
<p>POST: https://connect.creditsafe.com/v1/monitoring/portfolios</p>	<pre>{ "id": "GB-1-72884345", "personalReference": "reference here", "freeText": "More room for text", "personalLimit": "1976000" }</pre>
Example Response	
<pre>{ "correlationId": "tdga1f0-b4cc-11fa-96a4-02513bf4fg42f", "message": "Company Added" }</pre>	

13. List all companies in a portfolio

GET: `/v1/monitoring/portfolios/{portfolioId}/companies`

Endpoint to get all companies from a specific portfolio based on the portfolio id, optionally filtered with query parameters.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
<code>searchQuery</code> : Return companies names that match the given value <code>countryCode</code> : Return companies that match the given country code <code>page</code> : (Default: 0) Starting page number <code>pageSize</code> : (Default: 50 max: 1000) Number of items per page	<code>{portfolioId}</code> : The unique identifier for the portfolio that wish to view companies in, obtained from <code>/portfolios</code>

Example GET request listing companies from a portfolio, filtered to show only GB companies

Example Request
<p>GET: <code>https://connect.creditsafe.com/v1/monitoring/portfolios/1131744/companies?countryCode=GB</code></p>
Example Response
<pre>{ "correlationId": "2f7acb30-ba09-11ea-b9af-06bcc69a383e", "totalCount": 3, "paging": { "size": 1, "prev": null, "next": 1, "last": 2.0 }, "data": [{ "id": "GB-0-12345423d8", "safeNumber": "UK179355431", "name": "BOCIORE LIMITED", "address": "55 ASHBY ROAD, HINCKLEY, LE23 3SQ", "countryCode": "GB", "portfolioId": 1131744, "creditLimit": 500, "dateLastEvent": "2019-12-05T22:56:42", "freeText": "Follow up next quarter", "personalLimit": "1976000.00", "personalReference": "Andy 10/06", "ratingCommon": "C", "ratingLocal": "42", "companyStatus": "1" }, ...] }</pre>

14. Delete a company from a portfolio

DELETE :

`/v1/monitoring/monitoring/portfolios/{portfolioId}/companies/{companyId}`

Endpoint to delete a company from a portfolio.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
None	<p><code>{portfolioId}</code>: The unique identifier for the portfolio which contains the company you want to remove, obtained from <code>/portfolios</code></p> <p><code>{companyId}</code>: The unique identifier of the company you wish to delete from the portfolio</p>

Example DELETE request to delete a company from a portfolio

Example Request
DELETE : <code>https://connect.creditsafe.com/v1/monitoring/portfolios/1131744/companies/GB-0-12345678</code>
Example Response
<pre>{ "messageId": "078aa790-ba0d-11ea-af4b-02eb5b7e8a40", "userId": 188574, "csUserId": 101509154, "processingMs": 89, "data": { "message": "Company deleted successfully from the portfolio" } }</pre>

15. List notification events in all portfolios

GET: `/v1/monitoring/notificationEvents`

Get notification events generated for companies monitored in your portfolios, based on the notification rules enabled. The notification events returned are filtered based upon the supplied search criteria in query parameters.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
<p><code>searchQuery</code>: Return events that match a company name</p> <p><code>sortBy</code>: Sort by column: <code>companyName</code>, <code>countryCode</code>, <code>eventId</code>, <code>eventDate</code></p> <p><code>sortDir</code>: (Default: asc) The direction that you wish to sort results by, <code>asc</code> OR <code>desc</code></p> <p><code>startDate</code>: The start date on which results are filtered based on <code>createdDate</code> field</p> <p><code>endDate</code>: The end date on which results are filtered based on <code>createdDate</code> field</p> <p><code>page</code>: (Default: 0) Starting page number</p> <p><code>pageSize</code>: (Default: 50 max: 1000) Number of items per page</p> <p><code>isProcessed</code>: (Default: shows all) Filter by <code>isProcessed</code> flag, <code>true</code> OR <code>false</code></p>	

Example GET request which lists Notification Events from all portfolios, from date 2020-06-20 and showing results with `isProcessed` flag set to `false`

Example Request

GET: <https://connect.creditsafe.com/v1/monitoring/notificationEvents?startDate=2020-06-20T00:00:00Z&isProcessed=false>

Example Response

```
{
  "correlationId": "0992e6d0-b961-11ea-b9af-06bcc69a383e",
  "totalCount": 139,
  "data": [
    {
      "company": {
        "id": "FR-X-4852353452",
        "safeNumber": "FR08645343",
        "name": "A.S.E.L.",
        "countryCode": "FR",
        "portfolioId": 1144496,
        "portfolioName": "FR import test"
      },
      "eventId": 614790937,
      "eventDate": "2020-06-27T04:04:20",
      "newValue": "52",
      "oldValue": "51",
      "createdDate": "2020-06-27T14:28:25",
      "notificationEventId": 117618008,
      "notificationId": null,
      "processedDate": null,
      "ruleCode": 201,
      "ruleName": "Any Rating Change",
      "summary": "Update Rating",
      "ruleText": null,
      "localEventCode": "RA2013",
      "isProcessed": false
    },.....
  ],
  "paging": {
    "size": 10,
    "prev": null,
    "next": 1,
    "last": 138.0
  }
}
```

16. List notification events in a specified portfolio

GET: `/v1/monitoring/portfolios/{portfolioId}/notificationEvents`

Get notification events generated for companies monitored in portfolio based on the portfolioId provided in path parameter, based on the notification rules enabled. The notification events returned will be filtered based upon the supplied search criteria in query parameters.

Header Parameters	Request Body
Authorization: <code>{{token}}</code>	None
Query Parameters	Path Parameters
<p><code>searchQuery</code>: Return events that match a company name</p> <p><code>sortBy</code>: Sort by column: <code>companyName</code>, <code>countryCode</code>, <code>eventId</code>, <code>eventId</code></p> <p><code>page</code>: (Default: 0) Starting page number</p> <p><code>sortDir</code>: (Default: asc) The direction that you wish to sort results by, <code>asc</code> OR <code>desc</code></p> <p><code>startDate</code>: The start date on which results are filtered based on <code>createdDate</code> field</p> <p><code>endDate</code>: The end date on which results are filtered based on <code>createdDate</code> field</p> <p><code>page</code>: (Default: 0) Starting page number</p> <p><code>pageSize</code>: (Default: 50 max: 1000) Number of items per page</p> <p><code>isProcessed</code>: (Default: shows all) Filter by isProcessed flag, <code>true</code> OR <code>false</code></p>	<p><code>{portfolioId}</code>: The unique identifier for the portfolio you wish to see notification events for, obtained from <code>/portfolios</code></p>

Example GET request which list Notification Events for companies in a specific portfolio (include portfolio id parameter)

Example Request
<p>GET:</p> <p><code>https://connect.creditsafe.com/v1/monitoring/portfolios/65398/notificationEvents?startDate=2018-01-01T01:00:00Z&endDate=2018-08-01T23:00:00Z&page=0&pageSize=10&sortDir=desc&sortBy=eventId</code></p>
Example Response
<p>See example response in the section above</p>

Example GET request which list Notification Events for a specific company (include company id parameter)

Example Request
<p>GET: <code>https://connect.creditsafe.com/v1/monitoring/portfolios/65398/companies/DK-X-DK02940507/notificationEvents?startDate=2018-01-01T01:00:00Z&endDate=2018-08-01T23:00:00Z&page=0&pageSize=10</code></p>
Example Response
<p>See example response in the section above</p>

17. Update isProcessed flag on a notification event

PATCH:

`/v1/monitoring/portfolios/{portfolioId}/notificationEvents/{notificationEventID}`

Endpoint to set isProcessed flag to a true or false for a given event inside portfolio. The portfolio ID and Notification event ID must be provided in the path parameters.

Header Parameters	Request Body
Content-Type: application/json Authorization: <code>{{token}}</code>	<pre>{ "isProcessed"*: Boolean (true OR false) }</pre> <p>* = Required</p>
Query Parameters	Path Parameters
None	<p><code>{portfolioId}</code>: The unique identifier for the portfolio where the event is located</p> <p><code>{notificationEventId}</code>: The unique identifier of the event you want to update</p>

Example PATCH request to update the isProcessed flag

Example Request	Example Request Body
PATCH: https://connect.creditsafe.com/v1/monitoring/portfolios/1131744/notificationEvents/113874183	<pre>{ "isProcessed": true }</pre>
Example Response	
<pre>{ "correlationId": "6aa291e0-b976-11ea-b9af-06bcc69a383e", "data": { "message": "Updation successful" } }</pre>	

18. List all notification events for a specific company

GET: /v1/monitoring/companies/{companyId}/events

Endpoint to get all portfolios for the user if no query parameters are provided.

Header Parameters	Request Body
Authorization: {{token}}	None
Query Parameters	Path Parameters
page: (Default: 0) Starting page number pageSize: (Default: 50 max: 1000) Number of items per page	{companyId}: The unique identifier of the company you wish to view notification events for

Example GET request listing all events for a specific company

Example Request
GET: https://connect.creditsafe.com/v1/monitoring/companies/FR-X-485356092/events
Example Response
<pre>{ "correlationId": "a8b02d70-b972-11ea-8ea8-02a93862f7aa", "totalCount": 1, "data": [{ "eventId": 273015551, "companyId": "FR08645745", "portfolioId": 1144496, "ruleName": "Telephone Number", "localEventCode": "TLF", "globalEventCode": "AC", "newValue": "0241591689 0241599173", "oldValue": " ", "eventDate": "2019-06-02T09:23:14", "createdDate": "2019-06-02T09:23:14" }], "paging": { "size": 1, "prev": null, "next": 1, "last": 6.0 } }</pre>

19. List portfolio user permissions (sharing)

GET: /v1/monitoring/portfolios/{portfolioId}/sharingPermissions

Endpoint to retrieve user permissions for all users within the customer, for a specific portfolio.

Header Parameters	Request Body
Authorization: {{token}}	None
Query Parameters	Path Parameters
None	{portfolioId}: The unique identifier for the portfolio you want to view user permissions for

Example GET request listing user permissions for a portfolio

Example Request
GET: https://connect.creditsafe.com/v1/monitoring/portfolios/1137522/sharingPermissions
Example Response
<pre>{ "correlationId": "50055ee0-bace-11ea-b9af-06bcc69a383e", "data": { "portfolioId": "1137522", "customerId": 101662701, "userPermissions": [{ "csUserId": 101435674, "userName": "JohnSmith", "permissions": "View,Add" }, { "csUserId": 101435687, "userName": "SirJenkins", "permissions": "View" }] } }</pre>

20. Update portfolio user permissions (sharing)

PATCH: /v1 /monitoring/portfolios/{portfolioId}/sharingPermissions

Endpoint to update user permissions for a portfolio. The 'revokeAll' field will revoke all permissions for shared users. The permissions are detailed as follows:

View

The portfolio will show in the shared users' portfolio list. No other permissions can be created without View.

Add

The shared user will be able to add other companies to the shared portfolio either from an import file or API call.

Edit

The shared user will be able to change the settings of the portfolio and the notifications that are generated.

Remove

The shared user will be able to remove companies from within the portfolio, but they cannot delete the portfolio.

Header Parameters	Request Body
Content-Type: application/json Authorization: {{token}}	<pre>{ "userPermissions": [{ "csUserId": string, "permissions": "Add,View,Edit,Remove" }] }</pre> <p>* = Required</p>
Query Parameters	Path Parameters
None	{portfolioId}: The unique identifier for the portfolio you want to update user permissions for

Example PATCH request to update the isProcessed flag

Example Request	Example Request Body
PATCH: https://connect.creditsafe.com/v1 /monitoring/portfolios/1137522/sharingPermissions	<pre>{ "revokeAll": "false", "userPermissions": [{ "csUserId": 101435674, "permissions": "Add,View" }] }</pre>
Example Response	
<pre>{ "correlationId": "5f7d6a00-bad0-11ea-b9af-06bcc69a383e", "data": { "portfolioId": "1137522", "customerId": 101662701, "status": "Success" } }</pre>	

21. Import a portfolio using .csv, .xls

POST: `/v1/monitoring/portfolios/{portfolioId}/import`

Endpoint allows you to import a list of companies to add to the selected portfolio along with some personal information for the company. Importing a portfolio will add the companies to the specified portfolio, duplicates in the import file will be ignored.

You may also optionally add an email to the body of the request and get an email notification when the import is processed. The import file must be in either a .csv, .xls or .xlsx format and contain 6 columns, an example is shown below:

SafeNumber / ID	Org Number	Country	Reference	Note	Personal Limit
FR-X-4444001473			High-value client		10000.00
IT08217412				Free text field	

The Organisation Number and Country rows can be left blank if company SafeNumber/ID are used.

Header Parameters	Request Body
Content-Type: application/json Authorization: <code>{{token}}</code>	<pre>{ "importCsv": FILE_PATH, "email": string, }</pre> <p><i>* = Required</i></p>
Query Parameters	Path Parameters
None	<code>{portfolioId}</code> : The unique identifier for the, obtained from <code>/portfolios</code>

Example POST request importing a .csv file with a list of companies into a portfolio

Example Request	Example Request Body
POST: <code>https://connect.creditsafe.com/v1/monitoring/portfolios/1157128/import</code>	<pre>{ "importCsv": C:/import_file.csv, "email": "john.smith@creditsafe.com" }</pre>
Example Response	
<pre>{ "correlationId": "49774550-bc6a-11ea-860f-06bc8182190e", "message": "Accepted for processing. Import Id 334695" }</pre>	

22. Sync a portfolio using .csv, .xls

POST: /v1/monitoring/portfolios/{portfolioId}/sync

Endpoint allows you to sync a portfolio file with your portfolio. **Sync action will delete all companies in your specified portfolio, and then add the companies from the file into the portfolio.**

You may also optionally add an email to the body of the request and get an email notification when the import is processed. The import file must be in either a .csv, .xls or .xlsx format and contain 6 columns, an example is shown below:

SafeNumber / ID	Org Number	Country	Reference	Note	Personal Limit
FR-X-4444001473			High-value client		10000.00
IT08217412				Free text field	

The Organisation Number and Country rows can be left blank if company SafeNumber/ID are used.

Header Parameters	Request Body
Content-Type: application/json Authorization: {{token}}	{ "importCsv": FILE_PATH, "email": string, }
Query Parameters	Path Parameters
None	{portfolioId}: The unique identifier for the, obtained from /portfolios

Example POST request to sync a .csv file with a portfolio

Example Request	Example Request Body
POST: https://connect.creditsafe.com/v1/monitoring/portfolios/1157128/sync	{ "importCsv": C:/sync_file.csv, "email": "john.smith@creditsafe.com" }
Example Response	
{ "correlationId": "49774550-bc6a-11ea-860f-06bc8182190e", "message": "Accepted for processing. Import Id 334698" }	