

BD Rep

DATA REQUEST	UNIQUE ROUTE	METHOD
All BD Rep	/V1/AllBDRep/ YOURCUSTOMERID /BDRep	GET
BD Rep by CRD	/V1/BDRepByCRD/ YOURCUSTOMERID /BDRep/ CRD	GET
BD Rep Change from Date	/V1/BDRepByDate/ YOURCUSTOMERID /BDRep?deltaDate= YYYY-MM-DD	GET

BD Firm

DATA REQUEST	UNIQUE ROUTE	METHOD
All BD Firm	/V1/AllBDFirm/ YOURCUSTOMERID /BDFirm	GET
BD Firm by CRD	/V1/BDFirmByCRD/ YOURCUSTOMERID /BDFirm/ CRD	GET
BD Firm Change from Date	/V1/BDFirmByDate/ YOURCUSTOMERID /BDFirm?deltaDate= YYYY-MM-DD	GET

BD Branch

DATA REQUEST	UNIQUE ROUTE	METHOD
All BD Branch	/V1/AllBDBranch/ YOURCUSTOMERID /BDBranch	GET
BD Branch by ID	/V1/BDBranchByID/ YOURCUSTOMERID /BDBranch/ ID	GET
BD Branch Change from Date	/V1/BDBranchByDate/ YOURCUSTOMERID /BDBranch?deltaDate= YYYY-MM-DD	GET

RIA Rep

DATA REQUEST	UNIQUE ROUTE	METHOD
All RIA Rep	/V1/AllRIAREp/ YOURCUSTOMERID /RIAREp	GET
RIA Rep by CRD	/V1/RIAREpByCRD/ YOURCUSTOMERID /RIAREp/ CRD	GET
RIA Rep Change from Date	/V1/RIAREpByDate/ YOURCUSTOMERID /RIAREp?deltaDate= YYYY-MM-DD	GET

RIA Firm

DATA REQUEST	UNIQUE ROUTE	METHOD
All RIA Firm	/V1/AllRIAFirm/ YOURCUSTOMERID /RIAFirm	GET
RIA Firm by CRD	/V1/RIAFirmByCRD/ YOURCUSTOMERID /RIAFirm/ CRD	GET
RIA Firm Change from Date	/V1/RIAFirmByDate/ YOURCUSTOMERID /RIAFirm?deltaDate= YYYY-MM-DD	GET

RIA Branch

DATA REQUEST	UNIQUE ROUTE	METHOD
All RIA Branch	/V1/AllRIABranch/ YOURCUSTOMERID /RIABranch	GET
RIA Branch by ID	/V1/RIABranchByID/ YOURCUSTOMERID /RIABranch/ ID	GET
RIA Branch Change from Date	/V1/RIABranchByDate/ YOURCUSTOMERID /RIABranch?deltaDate= YYYY-MM-DD	GET

Trust Company

DATA REQUEST	UNIQUE ROUTE	METHOD
All Trust Company	/V1/AllTrustCompany/ YOURCUSTOMERID /TrustCompany	GET
Trust Company by Cert #	/V1/TrustCompanyByCert/ YOURCUSTOMERID /TrustCompany/ CERT	GET
Trust Company Change From Date	/V1/TrustCompanyByDate/ YOURCUSTOMERID /TrustCompany?deltaDate= YYYY-MM-DD	GET

Trust Staff

DATA REQUEST	UNIQUE ROUTE	METHOD
Trust Staff	/V1/AllTrustStaff/ YOURCUSTOMERID /TrustStaff	GET
Trust Staff by Contact ID	/V1/TrustStaffByContactID/ YOURCUSTOMERID /TrustStaff/ CONTACTID	GET
Trust Staff Change from Date	/V1/TrustStaffByDate/ YOURCUSTOMERID /TrustStaff?deltaDate= YYYY-MM-DD	GET

*Please input the requested information where the red text is displayed.

Description

All: Retrieves all (of the selected data request) of the records.

By Unique Identifier (CRD, Cert #, Contact ID, etc): Retrieves details by a specific identifier matching the user's filter criteria.

Change From Date: Retrieves modified delta details based on a date matching the filter criteria. This returns the latest change on record within the call period. Requires action on behalf of the user. See Delta Types in the Data & Delta section in the Technical Guide.