



MarketLink API

Technical Overview



OVERVIEW

MarketLink API is a technology solution that allows businesses the flexibility to build custom integrations with Discovery Data datasets. It can also connect to various systems (CRMs, marketing platforms, data warehouses, etc) to easily streamline existing workflows. The purpose of this guide is to assist integration users with calling data from the MarketLink open API. This allows clients access to read only data on an unlimited, weekly, monthly or quarterly frequency. No data will be pushed back to Discovery Data.

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ACCESS AND AUTHENTICATION

Connections made through the MarketLink API require authentication using assigned permissions, generated keys, tokens and appropriately formatted requests.

MarketLink API Access

Before starting, please confirm the following has been received from Discovery Data:

- 1
CUSTOMER ID
- 2
API KEY
- 3
SECRET KEY

If this information is missing, please contact the Discovery Data MarketLink API Team at marketlinksupport@discoverydata.com to request access.

Token

The MarketLink API authenticates via the Bearer Authentication method (also called token authentication), a HTTP authentication scheme that involves security tokens.

To obtain the token, the following parameters must be used:

METHOD	ROUTE
POST	/V1/Token
AUTHORIZATION	BODY
No Auth	raw, JSON <pre>{ "customerId": "YOURCUSTOMERID", "apiKey": "YOURAPIKEY", "apiSecret": "YOURSECRETKEY" }</pre>

Please ensure that the client-specific API & Secret Key and CustomerID are included in the parameters for the body. Once the token is received, apply this token for the other API endpoints as well. The token will expire after 8 hours, and users must repeat the process if it expires.

Response Codes

The MarketLink API returns industry standard HTTP response codes to clarify the status of each API request.

Success Codes:

STATUS	TITLE	RESPONSE TYPE
200	OK	Successful GET or BATCH
201	Created	Successful POST

Unsuccessful Codes:

A failed request will result in one of the following codes. Please review the information below to troubleshoot the issue.

STATUS	TITLE	REASON	TROUBLESHOOTING
400	Bad Request	Improperly formatted query parameters	Check the fields indicated in the error response
402	Unauthorized	Failed Authentication	Check the API & Secret Key
403	Forbidden	User lacks required permission(s), data out of range	Check that the user has API permissions, confirm with Discovery Data Admin
404	Not Found	Incorrect URL or ID	Check that the ID is correct, and the user has permission to access it, check URL endpoint

URL AND ENDPOINTS

URL

MarketLink API Base URL: <https://marketlinkapi.discoverydata.com>

Endpoints

There are unique routes for specific data requests for each dataset. In order to request the specific data, the unique route must be added to the end of the base URL, which will create the API endpoint for the request. For example, if All Agent data is being called from the Insurance dataset; the API endpoint will look like the following for the data request:

API Endpoint =

<https://marketlinkapi.discoverydata.com/V1/AllAgents/YOURCUSTOMERID/Insurance>

BASE URL

UNIQUE ROUTE

Please ensure that the client-specific CustomerID is included in the routes to have access to the data.

DATA AND DELTA

Format

When making a data request through the API, the response will return the data in a JSON:API format.

Data Guides

To access the data guides for the available datasets, visit the link below: [Data Guides](#)

Delta Types

Changes to records within a defined period return the delta types values. The latest delta type on a record will display. Please refer to the “End Result” column in the table below to understand how to process the changed records.

N=New, C=Change, and D=Deleted

Delta Type	Delta Date	Delta Type	Delta Date	Delta Type	Delta Date	End Result	Action
D	1/12/22	N	1/31/22	C	2/25/22	C	Client to verify if record exists, if not create and apply field updates, else then apply field updates to existing record.
D	1/12/22	N	1/31/22			N	Client to verify if record exists, if not create and apply field updates, else then apply field updates to existing record.
D	1/12/22					D	Client to verify if the record exists, if exists then client must mark record as inactive or delete. If the record does not exist, client must do nothing.

To review specific data scenarios and best practices, visit the link below:

[Support Site](#)

PAGINATION

Pagination is supported for MarketLink API so that large result sets can be batched into multiple requests. API pages start at page 0 and increase by 50 records per page. There are no limits on pages per request.

To calculate how many pages are returned, divide the total record count by 50 and minus 1.

EXAMPLE:

Calculating Pages – Total records returned 123,456

$123,456 / 50 = 2,469.12$ (round up)

$2,470 - 1$ (page 0) = 2,469 pages are required to cycle through all 123,456 records

EXAMPLE:

Calling all Insurance Licenses -

`https://marketlinkapi.discoverydata.com/V1/AllLicenses/YOURCUSTOMERID/Insurance?page=0`

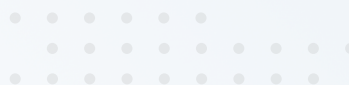
If there are other parameters in the request, a “&” will need to come before the pagination.

EXAMPLE:

Calling the Delta data for a specific date:

`https://marketlinkapi.discoverydata.com/V1/AppointmentByDate/YOURCUSTOMERID/Insurance?deltaDate=2022-01-01&page=0`

Tip: When adding the pagination `page=0` to the URLs, cycle through the pages to avoid calling API multiple times.



SET UP

To ensure access to the MarketLink API, organizing tools around HTTP methods are recommended. Using the MarketLink API involves sending HTTP requests.

To see the results of the data being called, using a development tool like Postman is recommended, a platform for building or using APIs.

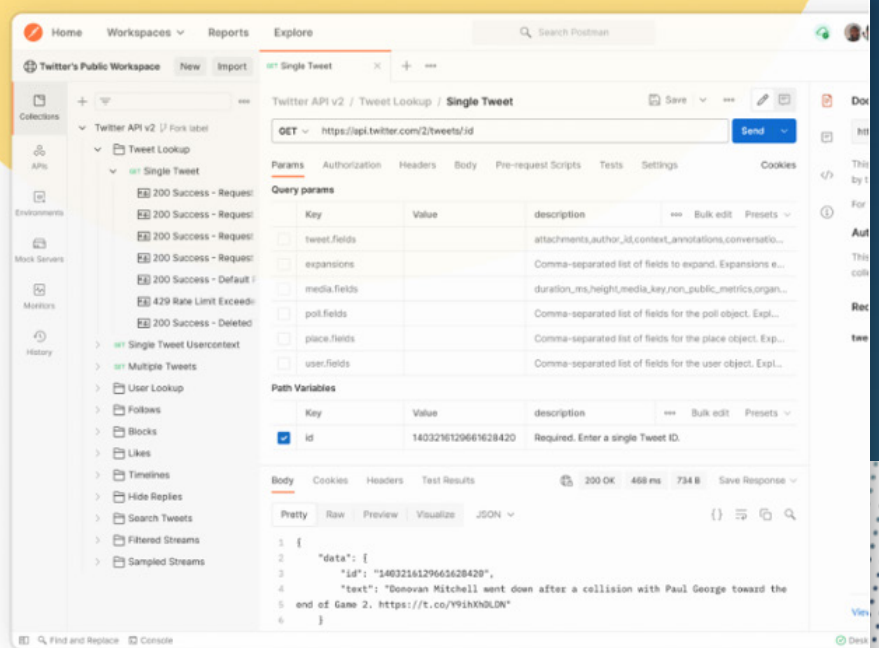
Website: <https://www.postman.com/>

Build APIs together

Over 20 million developers use Postman. Get started by signing up or downloading the desktop app.

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Download the desktop app



FREQUENTLY ASKED QUESTIONS

General

What type of support is available for the API?

Discovery Data can provide best practices and issue resolution support.

Can Discovery Data help clients without API expertise?

Yes – All aspects of an integration can be performed by a recommended partner.

Where does Discovery Data source its data?

Data is provided from each regulatory state reporting process and the public domain.

Does Discovery Data collect customer data?

No, we do not collect customer data.

Technical

Is there a test or sandbox environment?

All testing will be done on production data. You will be allowed to test for a specified time with 24/7 access.

What kind of data can I pull?

Currently, the Insurance dataset is available. This includes Agent, License and Appointments information. Financial Services data is expected to be available for the API December 2022.

Which routes can be paginated?

All routes can be paginated if necessary.

How do I receive an API and Secret Key?

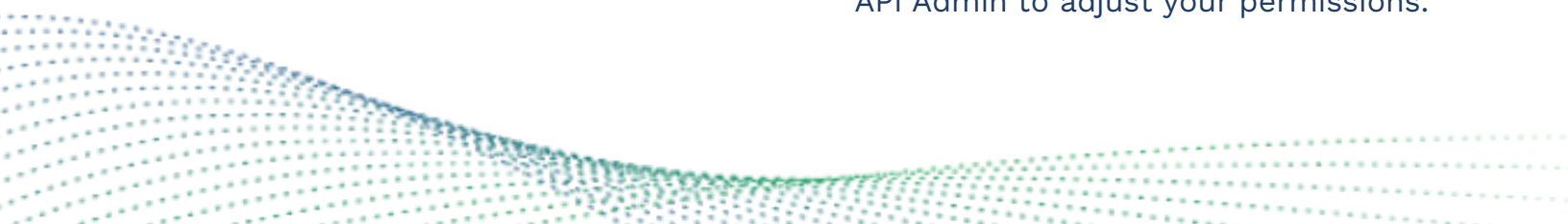
Contact the Discovery Data MarketLink API Admin.

Why is my data returning the same results when changing the page?

If there are multiple parameters in the request URL, a “&” is needed for every parameter after the “?”, which means that the pagination should reflect &page=0 at the end of the URL.

How do I change my current data filters?

Contact the Discovery Data MarketLink API Admin to adjust your permissions.





We're here
to help.



Contact us at:



marketlinksupport@discoverydata.com



732-933-1899

