



Developer's API integration guide for
AutoTaxCert
application

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1. Introduction

1.1 Purpose:

This document is designed to guide the external team to communicate with AutoTaxCert application/web server using JSON and REST API protocol. This document helps to understand the communication process, parameters required, methods supported using the REST API protocols.

1.2 Overview:

AutoTaxCert API provides a way for the third party to place a new order request, get certificate, tax data and supporting documents associated with order placement. Also, it provides a method for the third party to update and cancel the existing order.

1.3 Target Audience:

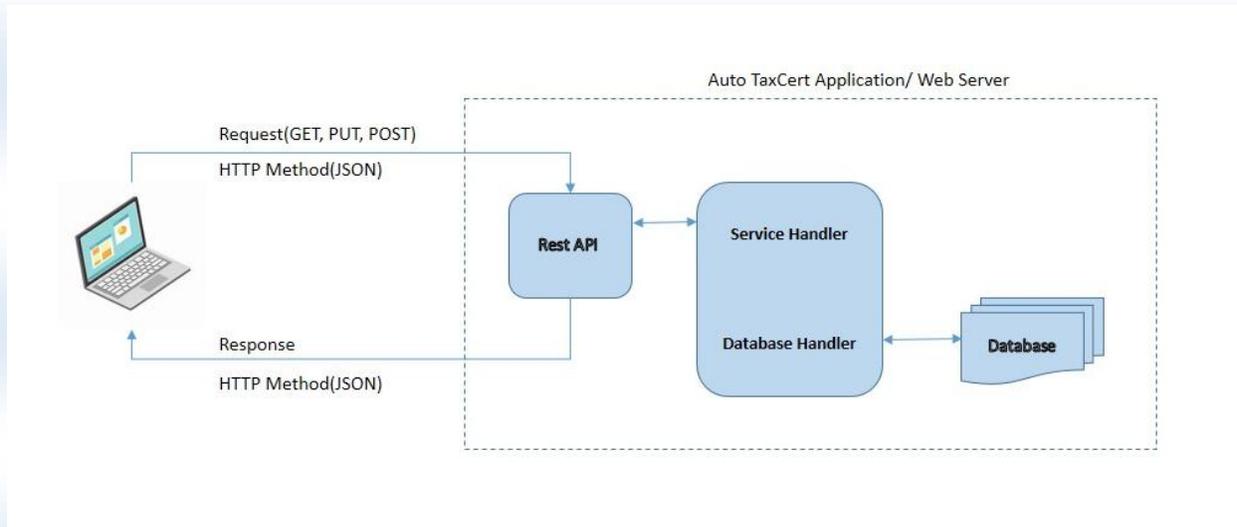
This document is intended for anyone who wants to understand web services communication protocols for order placement.

2. Process Flow

The AutoTaxCert REST API web services can be used for the following

- Generate access token.
- Place a new order.
- Get order status/output (Certificate + supporting document + Tax data)
- Update existing order's priority to Rush and order's detail.
- Cancel existing order.

3. Architecture Diagram



4. Web Services Architecture:

4.1 About REST API:

A REST resource is an abstraction of a piece of information or an action, such as a single data record, a collection of records, or a query. Each resource in REST API is identified by a named Uniform Resource Identifier (URI) and is accessed using standard HTTP methods (GET, POST, PUT, and DELETE). REST API is based on the usage of resources, their URIs, and the links between them. A resource can be used to interact between two systems. For example, you can:

- Generate access token.
- Place a new order.
- Get order status/output (Certificate + supporting document + Tax data)
- Update existing order's priority to Rush and details.
- Cancel existing order.

4.2 API Methods:

The Method defines the action to take regarding the resource. Methods used in our AutoTaxCert web services:

- POST — creates a new resource
- GET — Retrieves one or more existing resources
- PUT — Updates an existing resource

4.3 About JSON:

Support for JSON and XML JSON is by default. The JavaScript Object Notation (JSON) format is supported with UTF-8. Date-time information is in ISO8601 format. XML serialization is like SOAP API. XML requests are supported in UTF-8 and UTF-16, and XML responses are provided in UTF-8 format.

5. AutoTaxCert API Integration Suite:

5.1 Generate Access Token API:

5.1.1 Overview:

The generate access token API is used to fetch the unique access token. The token can be fetched securely by authenticating user login/secret key.

5.1.2 API Details:

The API for fetch access token is mentioned below
The base URL for all API endpoints is: <https://autotaxcert.idaautomation.com>

Login:**Endpoint:** AutoTaxCert - <https://autotaxcert.idaautomation.com/api/login>**Method:** POST**Request Parameters:**

Parameter	Required	Type	Remarks
email	yes	string	The user's email address.
password	yes	string	The user's password.

Request Example:

```
{  
  "email": "client1@ida.com",  
  "password": "Login@123"  
}
```

Response (Success):

- **HTTP Status Code:** 200 OK
- **Response Body:**

```
{  
  "status": "Success",  
  "token": "OasOAWBpqVSBz9dOOsqOsTmWylBQJZDqw9NLGZuP"  
}
```

Response (Error: Invalid Credentials):

- **HTTP Status Code:** 401 Unauthorized
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Invalid credentials"  
}
```

Response (Error: Unauthorized):

- **HTTP Status Code:** 403 Forbidden
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Unauthorized"  
}
```

Response (Error: Validation Failure):

- **HTTP Status Code:** 400 Bad Request
- **Response Body:**

```
{  
  "status": "Error",  
  "messages": [  
    "Email Field is required",  
    "Password Field is required"  
  ]  
}
```

Note:

- The token will automatically expire every 15 minutes, and the user will need to call the login endpoint again with the required parameters to obtain a new token.

Logout:

Endpoint: AutoTaxCert - <https://autotaxcert.idaautomation.com/api/logout>

Method: POST

Request Parameters:

- **token** (string, **required**): The API token of the user.

Request Example:

```
{  
  "token": "7HnLyWbdGqWyt9ELsbvbUgwDmBipvnG71vIV0ymk"  
}
```

```
}
```

Response (Success):

- **HTTP Status Code:** 200 OK
- **Response Body:**

```
{  
  "status": "Success",  
  "message": "Logged out successfully"  
}
```

Response (Error: EmptyToken):

- **HTTP Status Code:** 422 Unprocessable Content
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Token field is required"  
}
```

Response (Error: Invalid Token):

- **HTTP Status Code:** 401 Unauthorized
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Invalid token"  
}
```

Note*: The user's access token will be invalidated upon logout, and they will no longer be able to use the same token for subsequent requests. To access protected resources after logging out, the user must log in again to obtain a new token.

5.2 New Order Placement API:

5.2.1 Overview:

New order placement API enables user to send a new order request to AutoTaxCert.

5.2.2 API Details:

Endpoint: AutoTaxCert - <https://autotaxcert.idaautomation.com/api/create-order>

Method: POST

Request Parameters:

Parameter	Required	Type	Remarks
token	Yes	String	The API token of the user.
order_number	Yes	String	The User defined unique order number.
state_code	Yes	String	The state code for the order. ^
county_name	Yes	String	The name of the county for the order. ^
address	Yes	String	The address for the order.
apn	Optional	String	The Assessor's Parcel Number (APN).
borrower_names	Optional	String	Names of the borrower(s).
customer_id	Optional	String	The customer ID.

(^ - See **Note** section below):

Note:

- State code and county name must be valid. If there are typos, refer to the states and counties list in the spreadsheet below (click to download the Excel file)
 - [states](#)
 - [counties](#)
- If the user does not pass the "**customer_id**", the system will automatically assign the **primary customer** by default.
- "**order_number**" should be unique, if duplicate "**order_number**" found means user will get "**Error**" as response with message saying "**Duplicate order_number. Please use a unique order_number**".

Request Example:

```
{
```

```
"token": "zPJNKldCWrcZpXrbWyFbWGI681JKGn57GqWf7sfx",
"order_number": "TEST2345",
"state_code": "TX",
"county_name": "Harris",
"address": "132 Blavrey st",
"apn": "1234567890reyme",
"borrower_names": "David Billa",
"customer_id": ""
}
```

Response (Success):

- **HTTP Status Code:** 200 OK
- **Response Body:**

```
{
  "status": "Success",
  "message": "Order created successfully",
  "order_id": 35,
  "customer_id": "MTY=",
  "customer_name": "Beluga(default)"
}
```

Response (Error: Validation Failure):

HTTP Status Code: 422 Unprocessable Content

- **Response Body:**

```
{
  "status": "Error",
  "messages": [
    "Order number Field is required",
    "State code Field is required",
    "County name Field is required",
    "Address Field is required"
  ]
}
```

Response (Error: Invalid Token):

- **HTTP Status Code:** 401 Unauthorized
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Invalid token"  
}
```

Response (Error: Invalid State Code):

- **HTTP Status Code:** 400 Bad Request
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Invalid county name for the given state"  
}
```

Response (Error: Duplicate Order):

- **HTTP Status Code:** 409 Conflict
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Duplicate order_number. Please use a unique order_number."  
}
```

5.3 Get Order Status/Output API:

5.3.1 Overview:

Users can query the status of any specific order by providing its order ID. This helps in tracking the current state of the order and understanding where it is in the process, such as whether it's "Open", "InProgress", "Completed", and "Cancelled" or on "Hold".

5.3.2 API Details:

Status:

Endpoint: AutoTaxCert - <https://autotaxcert.idaautomation.com/api/order-status>

Method: POST

Request Parameters:

Parameter	Required	Type	Remarks
token	Yes	Required	The API token of the user.
order_id	yes	Required	The ID of the order for which the status is being queried.

Request Example:

```
{
  "token": "f6T5aJJOtDftfHc4YLR91osnLNCy2qBKGZzEH7r8",
  "order_id": 21
}
```

Response (Success: But not completed):

- **HTTP Status Code:** 200 OK
- **Response Body:**

```
{
  "status": "Success",
  "order_id": 21,
  "order_status": "Cancelled",
  "order_notes": [
    {
      "username": "Client1",
      "role": "client",
      "notes": "Test Order",
      "created_at": "2025-01-23 07:44:37"
    }
  ]
}
```

Note:

- There are a total of 5 statuses: "Open", "InProgress", "Cancelled", "Hold" and "Completed".
- Except for "order_status": "Completed" every response will be in above response format.

Output:

Response (Success: Completed Order with QC Data):

- **HTTP Status Code: 200 OK**
- **Response Body:**

```
{
  "status": "Success",
  "order_id": 24,
  "order_status": "Completed",
  "order_notes": [],
  "raw_tax_data": {
    "tax_note_section": {
      "tax_notes": [
        "This is important line so its in RED",
        "Its normal line so in black text",
        "Same as above"
      ],
      "is_highlighted_note": {
        "This is important line so its in RED": "yes",
        "Its normal line so in black text": "no",
        "Same as above": "no"
      }
    },
    "assessed_value_section": {
      "tax_year": "2023",
      "land_value": "3456",
      "improvement_value": "4634",
      "total_tax_value": "7899",
      "exemptions": {
        "Harris County": "2312",
        "Harris County Flood Control Dist": "2300",
        "Port of Houston Authority": "5437",
        "Harris County Hospital District": "6678",
        "Harris County Dept. of Education": "6544"
      },
      "total_exemption": 23271
    },
    "county_tax_section": {
      "county_payable_address": "23219 WOLFS CROSSING CT",
```

```

"county_payable_phone": "+1 9876543234",
"county_payable_agency": "Parpentis Cloak",
"county_payable_agency_code": "TX101",
"tax_schedule_county": "quarterly",
"county_tax_inst": {
  "first installment": {
    "county_tax_year": "2022",
    "county_status": "Open",
    "county_base_amount": "98897",
    "county_paid_amount": "32344",
    "county_due_amount": "43234",
    "county_delinquent_date": "02-05-2025",
    "county_paid_date": "02-05-2025",
    "county_due_date": "02-05-2025"
  }... more
}
},
"city_tax_section": {
  "city_payable_address": "23019 GOOD DALE LN 77373",
  "city_payable_phone": "+1 9876787899",
  "city_payable_agency": "Tiago Tide",
  "city_payable_agency_code": "TX101",
  "city_tax_schedule": "Custom",
  "city_tax_inst": {
    "first installment": {
      "city_collector": "Houston",
      "city_status": "open",
      "city_tax_year": "2024",
      "city_base_amount": "74674",
      "city_paid_amount": "4848",
      "city_due_amount": "4322",
      "city_delinquent_date": "02-13-2025",
      "city_paid_date": "02-13-2025",
      "city_due_date": "02-13-2025"
    }... more
  }
}
},
"certificate": "RzIDQgMCBSPj4KZW5kb2JqCjQgMCBvYmoKPDwwRm.... more ",
"supporting_files": "JVBERi0xLjQKJeLjz9MKMyAwIG9iago8PC9UeXBl.... more"
}

```

Response Parameters:

- **"Status"** – Indicates the success or failure of the request. In this case, it is "Success", meaning the request was processed successfully.
- **"order_id"** – The unique identifier for the order. Store this order_id for further checking order status.
- **"order_status"** – The current status of the order. For this example, it is "Completed". Possible values are "Open", "Completed", "InProgress", "Cancelled", or "Hold".
- **"order_notes"** – A list of notes related to the order. If there are no notes, it will be an empty array.
- **"raw_tax_data"** – Contains detailed tax information associated with the order, divided into sections.

Inside **"raw_tax_data"**:

- **"tax_note_section"** – Contains the notes related to tax.
- **"tax_notes"** – An array of tax notes related to the order.
- **"is_highlighted_note"** – A map indicating whether each tax note is highlighted ("yes" or "no").
- **"assessed_value_section"** – Contains the assessed value of the property.
- **"tax_year"** – The year for the tax assessment.
- **"land_value"** – The assessed value of the land.
- **"improvement_value"** – The assessed value of improvements on the land.
- **"total_tax_value"** – The total assessed value for tax purposes.
- **"exemptions"** – A map of exemptions applied by various entities (e.g., Harris County, Port of Houston Authority).
- **"total_exemption"** – The total value of exemptions applied.
- **"county_tax_section"** – Contains information about county tax payments.
- **"exemptions"** – The address where county taxes are to be paid.
- **"county_payable_phone"** – The phone number for the county tax agency.
- **"county_payable_agency"** – The name of the county tax agency.
- **"county_payable_agency_code"** – A unique code for the county tax agency.
- **"tax_schedule_county"** – The schedule of county tax payments (e.g., quarterly).
- **"county_tax_inst"** – The details of the county tax instalment(s), including the year, base amount, paid amount, and due amount.
- **"city_tax_section"** – Contains information about city tax payments.
- **"city_payable_address"** – The address where city taxes are to be paid.
- **"city_payable_phone"** – The phone number for the city tax agency.
- **"city_payable_agency"** – The name of the city tax agency.
- **"city_payable_agency_code"** – A unique code for the city tax agency.
- **"city_tax_schedule"** – The schedule of city tax payments (e.g., custom).
- **"city_tax_inst"** – The details of the city tax instalment(s), including the collector's name, tax year, base amount, paid amount, and due amount.
- **"certificate"** – A base64-encoded certificate related to the order, which could be a formal document or certificate.

- **"supporting_files"** – A base64-encoded string representing the supporting files for the order, which may include reports or documents related to the order.

Response (Error: Invalid Token):

- **HTTP Status Code:** 401 Unauthorized
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Invalid token"  
}
```

Response (Error: Order Not Found):

- **HTTP Status Code:** 404 Not Found
- **Response Body:**

```
{  
  "status": "Error",  
  "message": "Order not found"  
}
```