API Reference Guide

sortspoke.com

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Purpose of this Document

This document is intended as an overview of, and reference guide for, the SortSpoke API. This guide includes a high-level description of the SortSpoke API, common use cases for the SortSpoke API, and detailed information on how to work with the SortSpoke API.

SortSpoke API Overview

The SortSpoke API is a RESTful API that allows you to access features of SortSpoke using standard methods.

The core functionality of the SortSpoke API is to upload PDF documents and download JSON output files. This document describes some of the common use cases and provides you the resources for integrating SortSpoke into your app.

This document is updated frequently as new features are developed. New fields may be added to the response output while maintaining backwards compatibility. When parsing responses, ensure that you can accept JSON data that may contain additional fields in the future. These additional fields can be safely ignored unless you choose to take advantage of new functionality.

Authorization

Key	Value
Authorization	Bearer TOKEN_STRING

Authorization header with bearer token must be sent with all client requests. The secret bearer token is obtained through separate out-of-band channels.

If you are a SortSpoke Administrator you can generate your API Token directly in SortSpoke. Alternatively, please contact your administrator(s) directly to obtain or request changes to your secret bearer token.

Common Use Cases

Projects

Get Projects

Get the list of projectIds for an account.

Request

Method	URL
GET	api/v2/projects

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Query	expanded	int	[optional] A value of '1' will return additional project information including Project Name.

Response

The response contains the list of projectIds that are used to refer to the specific **Project** in subsequent API calls.

Status	Response
200	["8a86f3f4-8ead-11e8-970b-01290c080815", "8a87f3d3-8ead-12e4-970b-01290c080816", "8a87f3c7-8ead-19e2-970b-01290c080817",]
400	Bad request
401	Unauthorized

Get Labels

Get document **Categories** (labels) for a project.

Request

Method	URL
GET	api/v2/projects/{projectId}/labels

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	projectId	string	ProjectId that the uploaded document belongs to. Must be sent as part of the route.

Response

The response contains the list of **Categories** (labels), used to refer to the specific (category) label under the project.

Status	Response

200	{
	"projectId": "8a86f3f4-8ead-11e8-970b-01290c080815",
	"acctId": "5r8b6060-4082-37ri-g64r-fa37023e8e90",
	"legacyUserId": "test@test.com",
	"labels": [
	{
	"labelId": "1de7e534-dacc-11e6-811f-5b1e17wp1c4f",
	"name": "Lease"
	},
	{
	"labelId": "f621e24e-ee7b-12e6-811f-5b1e30ew1c9t",
	"name": "Lease Addendum"
	}
	]
	}

400	Bad request
401	Unauthorized

Name	Data Type	Description
projectId	string	ProjectId that the uploaded document belongs to.

accId	string	Account Id that project belongs to.
legacyUserId	string	Unique identifier of the user who created the label.
labels	Array	List of labels related to the specified project.

Get Fields

Get **Field(s)** belonging to the specified **Category** (label).

Request

Method	URL
GET	api/v2/projects/{projectId}/labels/{labelId}/fields

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	projectId	string	ProjectId that the uploaded document belongs to. Must be sent as part of the route.

Response

The response contains the list of **Field(s)**.

Status	Response

200	{
	"labelId": "1de7e538-dccb-11e6-811f-5b1e23ea1c4f",
	"acctId": "5r8b6060-4082-37ri-g64r-fa37023e8e90",
	"projectId": "8a86f3f4-8ead-11e8-970b-01290c080815",
	"fields": [
	{
	"fieldId": "15e4c5e9-6816-11e7-8120-5b1e23ea1c4f",
	"name": "Heading",
	"isRequired": false,
	"isColumn": false,
	"isMulti": false,
	"validationType": null,
	"customValidationRegex": null
	},
	{
	"fieldId": "15e4c5e9-6816-11e7-8120-5b1e23ea1c4f",
	"name": "Lessor",
	"isRequired": false,
	"isColumn": false,
	"isMulti": false,
	"validationType": null,
	"customValidationRegex": null
	}
	]
	}

400	Bad request
401	Unauthorized

Name	Data Type	Description
labelId	string	Label id that the field belongs to.
acctId	string	Account Id that project belongs to.
projectId	string	ProjectId that the uploaded document belongs to.
fields	Array	List of fields related to the specified project and label.

Upload Files

Files can be uploaded to SortSpoke directly for ingestion.

Files must have valid & accurate file extensions to be ingested successfully. Supported file types: pdf, bmp, gif, jpg, png, tif, doc/docx, xls/xlsx, ppt/pptx.

Request

Method	URL
POST	api/v2/projects/{projectId}/upload
POST	api/v2/streams/{streamId}/upload

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	projectId	string	ProjectId to which the uploaded document should be added. Documents will be added to the Default Stream.
Route	streamId	string	StreamId to which the uploaded document should be added. Can target default and custom streams.
Query String	uploadPath	string	[Optional] Specify a virtual folder to upload the file to (e.g. "/inbox/a@a.com"). If not provided: - When a user is specified, the upload path will default to the user's queue. - When a user is not in context, the path will default to the default queue.
Query String	labelId	string	[Optional] Sorts a document to a specific document category. When batched to a user, the document will advance automatically to the Extract tab.
Body	file	multipart/ form-data	Document data in binary form. 200MB limit per request. Supported types: PDF, JPG, GIF, BMP, PNG, TIF, DOC, DOCX, PPT, PPTX, XLS, XLSX.

Samples

Method	Sample (C#)
POST	{{url}}/api/v2/projects/{{projectId}}/upload?uploadPath=username@domain.com&labelId=21001d69-710d-4509-b352-5c24067b93ac
POST	{{url}}/api/v2/projects/{{projectId}}/upload?labelId=21001d69-710d-4509-b352-5c24067b93ac

Response

The response contains the unique DocId of the uploaded that is used to refer to the **Document** in subsequent API calls. It also contains a file name and the size (length) of the uploaded file.

Status	Response

200	[
	{
	"docId": "3gedef-dftrw4-gs4gfdgd-44etegre",
	"filename": "/username@domain.com/filename.pdf",
	"size": 1000,
	"sourceFileId": "cecf5abb-9ecf-11ea-8275-5793c2ae4c49"
	}
	]

400	Bad request
401	Unauthorized

Name	Data Type	Description
docId	string	Document unique identifier generated by the system.
filename	string	Original source file name.
size	int	Document source file size (length).
sourceFileId	string	SourceFile unique identifier generated by the system.

Sourcefiles

Get Sourcefile Status

Gets status for a **source file**.

Request

Method	URL
GET	api/v2/sourceFiles/{sourcefileId}/status

Authorization header must be sent with this request.

Parameters

Type	Params	Values	Description
Route	sourcefileId	string	Sourcefile unique identifier generated by the system. Must be sent as part of the route.

Response

The response contains details for the source file. Note: **State 300** indicates a source file & all child documents are in a 'finished' state.

Status	Response

200	{
	"sourceFileId": "c5625287-d1ae-11ea-820d-57643572dda7",
	"projectId": "dd3d1392-6e7c-11e8-81ec-5f095ac7119a",
	"state": 300,
	"sourceFileName": "sourcefile_name.pdf",
	"pageCount": 8
	}

400	Bad request
401	Unauthorized

Name	Data Type	Description
sourceFileId	string	Source file unique identifier generated by the system.
projectId	string	Unique identifier for Project to which the record belongs.
state	string	Status of the source file.

sourceFileName	string	Original source file name.
pageCount	string	Number of pages in the source file.

Get Sourcefile Documents

Get a list of all child **document(s)** of a source file.

Request

Method	URL
GET	api/v2/sourceFiles/{sourcefileId}/docs

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	sourcefileId	string	Source file unique identifier generated by the system.

Response

The response contains the list of **Documents**, found under the project.

Status	Response

200	[
	{
	"docId": "c5625288-d1ae-11ea-820d-57643572dda7",
	"labelId": "9700eab9-eed6-11e8-8236-5f1a72b316fe",
	"state": 7,
	"sourcePages": [
	{
	"docPageNum": 1,
	"sourceFileId": "c5625287-d1ae-11ea-820d-57643572dda7",
	"sourceFilePageNum": 2
	},
	{
	"docPageNum": 2,
	"sourceFileId": "c5625287-d1ae-11ea-820d-57643572dda7",
	"sourceFilePageNum": 3
	}
	]
	},
	{
	"docId": "ea626dee-d1ae-11ea-820d-57643572dda7",
	"labelId": "9700eab9-eed6-11e8-8236-5f1a72b316fe",
	"state": 7,
	"sourcePages": [
	{
	"docPageNum": 1,
	"sourceFileId": "c5625287-d1ae-11ea-820d-57643572dda7",
	"sourceFilePageNum": 7
	},
	{
	"docPageNum": 2,
	"sourceFileId": "c5625287-d1ae-11ea-820d-57643572dda7",
	"sourceFilePageNum": 8
	}
	]
	}
	]

400	Bad request
401	Unauthorized

Name	Data Type	Description
docId	string	Document unique identifier generated by the system.
labelId	string	The labelId of the Category the file was processed in.
state	string	Status of the document.
sourcePages	Array	List of source file pages in the document.
docPageNum	string	Page number in document.
sourceFileId	string	Source file unique identifier generated by the system.
sourcePageNum	string	Page number in source file.

Mark Sourcefile Delivered

Advance *finished* sourcefiles and related *finished* documents to 'Delivered' status to indicate that exports have been received.

Request

Method	URL
POST	/api/v2/sourcefiles/deliver

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Body	sourcefileIds	array	Source file unique identifier generated by the system.

Response

Status	Response
200	OK
400	Bad request
401	Unauthorized

Documents

Get Document Status

Get **Document(s)** status.

Request

Method	URL
POST	api/v2/status

Authorization header must be sent with this request.

Parameters

Type	Name	Values	Description
Body		[string, string]	An array of docIds.

Response

The response contains the list of **Documents** with corresponding statuses. Note: Document State 7 indicates a document is ready for download/export.

Status	Response

200	[
	{
	"DocId": "r4fefwafw-fwfes4-f3wafasefqa-ggsfw3f",
	"DocumentState": 7,
	"AutoAccepted": true
	},
	{
	"DocId": "r4fefwafw-fwfes4-f3wafasefqa-ggsfw3c",
	"DocumentState": 4,
	"AutoAccepted": false
	}
	]

400	Bad request
401	Unauthorized

Get Document(s) List

Get a list of **Document(s)** for a project. You can filter the list by a string (Query), Status of the document (StateFilter), and/or Category (LabelFilter) and sort the results by the Finished Date (FinishedDate).

Request

Method	URL
POST	api/v2/projects/{projectId}/docs/list
POST	api/v2/streams/{streamId}/docs/list

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	projectId	string	ProjectId for which all documents should be returned. Will return data for the Default Stream.
Route	streamId	string	StreamId for which all documents should be returned. Can specify default or custom streams.
Body	Query	["string"]	[Optional] Search for a string of text. Matches records that **start with** specific string.
Body	StateFilter	"StateFilter": { "FilterValues":[7,8] },	[Optional] Status of the Document (see Document Status Codes for reference)
Body	LabelFilter	"LabelFilter": { "FilterValues":["90e44661-5ad6-11e9-81f2-53ce62da45da"] },	[Optional] The labelId of the Category the file was processed in.

Body	DateFilter	"DateFilter":
		{
		"FromCreationDate": "2022-01-01",
		"ToCreationDate": "2022-12-31T15:45"
		},
		{
		"FromFinishedDate": "2022-02-01",
		"ToFinishedDate": "2022-12-31T15:45"
		},{
		"FromExportedDate": "2022-02-01",
		"ToExportedDate": "2022-02-31T15:45"
			[Optional] Search for documents with an CreationDate/ExportedDate/FinishedDate in the defined date range. Time defaults to 00:00 if not specified.

		},	
Body	Limit	"Limit":1000,	[Optional] Maximum number of results to return (1000 max.)
Body	PageNumber	"PageNumber":1,	[Optional] Page number provides you a way to see more than the first 1000 results.
Body	Sorting	"Sorting": [{ "FieldName" : "FinishedDate", "Type" : "Descending" }]	[Optional] Specify the sort type & order of the output.

Response

The response contains the list of **Documents**, found under the project.

Status	Response

200	{
	"itemCount": 1,
	"pageSize": 1000,
	"pageCount": 1,
	"offset": 0,
	"data": [
	{
	"docId": "3cf66840-5af6-11e9-81f2-53ce62da45da",
	"sourceFileId": "205977d2-6082-11e9-81fd-5f258a7bb38a"
	"containerSourceFileId": "926e37a0-a14e-ef11-af10-5f9008cd344c",
	"batchId": "4c445c7f-54a1-11e9-81f4-575caa4fcc86",
	"state": 7,
	"documentName": "RBC new 10.pdf",
	"pageCount": 2,
	"creationDate": "2019-04-09T18:35:25.337Z",
	"assignee": "user@sortspoke.com",
	"uploadedBy": "user@sortspoke.com",
	"documentSearchProjectLabel": {
	"labelId": "90e44661-5ad6-11e9-81f2-53ce62da45da",
	"name": "T4s",
	"deleted": false
	},
	"rejectionReason": null,
	"exportedDate": "2019-04-09T19:07:11.336Z",
	"finishedDate": "2019-04-09T19:07:12.478Z",
	"rejectedDate": "0001-01-01T00:00:00Z",
	"virusScanFailed": false
	}

400	Bad request
401	Unauthorized

Name	Data Type	Description

itemCount	string	The total number of files returned.
pageSize	string	The limit of the number of results.
pageCount	string	The total number of pages of results.
offset	string	Relates to Limit and PageNumber.
searchTooManyResults	boolean	Indicates if too many results returned when searching by query string. Max. 1000 documents.
data	array	List of documents related to the project.
docId	string	Document unique identifier generated by the system.
sourcefileId	string	Source file unique identifier generated by the system.
containerSourcefileId	string	Unique identifier generated by the system referencing the source file parent of doc-source file set.
batchId	string	Unique identifier of a batch of documents assigned to one user.
state	string	Status of the document.
documentName	string	Name generated for doc based on source file name.
pageCount	string	Number of pages in the source file.
creationDate	string	Document upload date.
assignee	string	User who exported the source file.
uploadedBy	string	User who imported the source file.
documentSearchProjectLabel	array	List of characteristics of Category in which document has been sorted.
labelId	string	The labelId of the Category the file was processed in.
name	string	Name of the Category the file was exported from.
deleted	string	Indicates if the Category [labelId] in file was in has been deleted.
rejectionReason	string	User-entered reason for rejecting a document.
exportedDate	string	Document exported date.
finishedDate	string	Document finished date.
rejectedDate	string	Document rejected date.
virusScanFailed	boolean	Indicates result of anti-virus scan of source file.

Get Sibling Documents

Get a list of all **sibling documents** sharing a parent source file.

Request

Method	URL
GET	api/v2/docs/{docId}/siblings

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	docId	string	Document unique identifier generated by the system.

Response

The response contains the list of **sibling documents** sharing a parent source file.

Status	Response

200	[
	{
	"containsVerifiedFields": true,
	"containsComments": false,
	"ownedByCurrentUser": false,
	"ownedByCurrentUserInDifferentBatch": false,
	"docId": "caa7616a-e7bc-11ea-8224-57643572dda7",
	"labelId": "b7222272-e259-11ea-821f-57643572dda7",
	"state": 7,
	"sourcePages": [
	{
	"docPageNum": 1,
	"sourceFileId": "638be1e3-e24f-11ea-821f-57643572dda7",
	"sourceFilePageNum": 2
	}
	]
	},
	{
	"containsVerifiedFields": false,
	"containsComments": false,
	"ownedByCurrentUser": false,
	"ownedByCurrentUserInDifferentBatch": false,
	"docId": "caa7616b-e7bc-11ea-8224-57643572dda7",
	"labelId": "b7222272-e259-11ea-821f-57643572dda7",
	"state": 5,
	"sourcePages": [
	{

	"docPageNum": 1, "sourceFileId": "638be1e3-e24f-11ea-821f-57643572dda7", "sourceFilePageNum": 5 }] }]
400	Bad request
401	Unauthorized

Name	Data Type	Description
docId	string	Document unique identifier generated by the system.
labelId	string	The labelId of the Category the file was processed in.
state	string	Status of the document.
sourcePages	Array	List of source file pages in the document.
docPageNum	string	Page number in document.
sourceFileId	string	Unique identifier of a batch of documents assigned to one user.
sourcePageNum	string	Page number in source file.
containsVerifiedFields	boolean	Indicates if the document has verified fields.
containsComments	boolean	Indicates if the document has user comments.
ownedByCurrentUser	boolean	Indicates if the document is assigned to the current user.
ownedByCurrentUserInDifferentBatch	boolean	Indicates if the document belongs to the current batch.

Download/Export JSON

Verified data for a specific document is downloaded in the project's export format (e.g. JSON).

Request

Method	URL
GET	api/v2/{docId}/export_file

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	docId	string	Document unique identifier generated by the system. Must be sent as part of the route.
Header	Accept	application/json	[Optional] Allows download in JSON format.

Response

The response contains verified data for a specific document in the project's export format (e.g. JSON).

Status	Response

200	{
	"ExportFormat": "JsonV2",
	"ProjectId": "3frw3fw3r-4fwfsw4rwr-fwf4wrw3rwf-dfwfw3w3",
	"ProjectName": "My Project",
	"DocId": "r4fefwafw-fwfes4-f3wafasefqa-ggsfw3f",
	"SrcFilename": "/inbox/filename.pdf",
	"DstFilename": "/Outbox/Category/filename.pdf",
	"DocClass": "Agreement",
	"DocClassId": "454tw-wrw3w4tw4-6urhryr65r-egfsw34",
	"ReceivedDate": "2017-09-10T17:22:17.48Z",
	"ExportedDate": "2017-09-11T17:33:57.684224Z",
	"Fields": [
	{
	"Name": "Heading",
	"Value": "An Agreement of Purchase and Sale",
	"FieldId": "4ew5tf-3rwr4654-f3rfa3r-4564et"
	},
	{
	"Name": "First Party",
	"Value": "John Doe",
	"FieldId": "45wrw-4twtr4ey-5et4wtkjg-4et4edf"
	},
	{
	"Name": "Second Party",
	"Value": "Smith, Doe and Jones LLP",
	"FieldId": "3wrwf43-4t4eye5gw-wf3t434uyr-et4ewf"
	}
	]
	}

400	Bad request
401	Unauthorized

Name	Data Type	Description
ExportFormat	string	Requested export format.
ProjectId	string	ProjectId that the document belongs to.
ProjectName	string	Project name that the uploaded document belongs to.
DocId	string	Document unique identifier generated by the system.
SrcFilename	string	Document source file generated by the system.
DstFilename	string	Document destination filename and path.
DocClass	string	Document category (label) name.
DocClassId	string	Document category (label) identifier.
ReceivedDate	string	Document upload date.
ExportedDate	string	Document exported date.
Fields	Array	List of fields found in the document.

Download/Bulk Export JSON

Verified data for a list of documents is downloaded in the project's export format (e.g. JSON).

Request

Method	URL
GET	/api/v2/downloads/export_files

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
FormData	docIds[]	string	List of Document unique identifiers generated by the system.

Response

The response contains a binary file in ZIP format.

Status	Response
200	This method returns a binary file.
400	Bad request
401	Unauthorized

Download/Export to Excel

Verified data for a specific document is downloaded in Excel format (e.g. XLSX).

Request

Method	URL
GET	/api/v2/downloads/ExportFinishedDoc/{docId}

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	docId	string	Document unique identifier generated by the system. Must be sent as part of the route.

Response

The response contains verified data for a specific document in Excel format (e.g. XLSX).

Status	Response
200	This method returns a binary file.
400	Bad request
401	Unauthorized

Download/Bulk Export Excel

Verified data for a list of documents is downloaded in Excel format (e.g. xlsx).

Request

Method	URL
GET	/api/v2/downloads/export_files/Excel

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
FormData	docIds[]	string	List of Document unique identifiers generated by the system.

Response

The response contains a binary file in ZIP format.

Status	Response
200	This method returns a binary file.
400	Bad request
401	Unauthorized

Download/Document PDF

Original document is downloaded in PDF format.

Request

Method	URL
GET	/api/v2/downloads/doc/{docId}

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	docId	string	Document unique identifier generated by the system. Must be sent as part of the route.

Response

The response contains a binary file for a specific document in PDF format.

Status	Response
200	This method returns a binary file.
400	Bad request
401	Unauthorized

Mark Document Delivered

Advance *finished* document to 'Delivered' status to indicate that exports have been received.

Request

Method	URL
POST	/api/v2/docs/deliver

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Body	docIds	["c72012a0-f174-11ea-822b-57643572dda7", "c72012a1-f174-11ea-822b-57643572dda7"]	Document unique identifier generated by the system.

Response

Status	Response
200	OK
400	Bad request
401	Unauthorized

View Finished Document

A presigned URL gives access to the finished document specified, granting the recipient access to review the finished document directly in SortSpoke.

Request

Method	URL
GET	/api/v2/presigned/document/{docId}

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	docId	string	Document unique identifier generated by the system.

Response

Status	Response

200	{
	"generatedDate": "2021-01-01T01:37:20.0714807Z",
	"expiryDate": "2021-01-01T02:37:20.0714807Z",
	"returnUrl":
	"https://auth.sortspoke.com/Account/OneTimeAuthTokenLogin?token=5zLmvPHeP_KdVvHj.M8MRg-dJwpgyRScA-gHSxf37CDVrGmDqXid8PuCSONfts63PFoCEmwtKH5MnM0PjZ9ty6RlyfOYUr3ZXBB-y8YADj7LDzSKQczjkRCfDl-hBpwej3h02wGxIUnGzqfJPrntxhwxBwv1wxDk4hJf4gGIENn6h5MUEMJ_SvNzpCzkLloV24dBBFLVmQOwZc6N2S3bMG3CRubPvtovAvJrlatHhhCWaZ4yDhN3sB5Cze4pI1CUIclOmbC_yJLdyNF62MQXkD5PU_Z_8Zl-_JnQn7Kwt8d-gx7NnGq3iHuymkTDop14phfUxXfi-oYRk5lY7xtTOS80bXafY3ver6SyyuNz79lSZWMDDuftH0aYx9gzVmjKOLeEGT4LCsYJ1iVg4c5PL2GE5HsLW6dVrS_0BIvSWB1Js8RSv5zGSql4iPGbwBR_b5FnKRa2D9CRAFZ2F3TFETkvf.7WQXJICFHSd8KvMfWq5muw"
	}

400	Bad request
401	Unauthorized

Split

Split Sourcefile

Split sourcefile into multiple documents to be processed individually in SortSpoke.

Request

Method	URL
POST	api/v2/sourceFiles/{sourceFileId}/split

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	sourceFileId	string	SourceFile unique identifier generated by the system at upload. Must be sent as part of the route.
Body	docPageRanges	array	Contains labelId & sourceFilePageNums.
Body	labelId	string	Unique identifier for category to which document should be sorted.
Body	sourceFilePageNums	array	Page numbers from original sourcefile, separated by commas. Pages must be contiguous.

Response

The response contains verified data for a specific document in Excel format (e.g. XLSX).

Status	Response

200	{
	"sourceFileId": "20597826-6082-11e9-81fd-5f258a7bb38a",
	"documents": [
	{
	"docId": "dd8e449f-eed1-11e8-8236-5f1a72b316fe",
	"labelId": "f2cac21e-7c72-40b2-8a79-922670c66182",
	"pages": [
	1,
	2
	]
	}

	] }
400	Bad request
401	Unauthorized

Name	Data Type	Description
sourceFileId	string	SourceFile identifier.
docId	string	DocumentId generated by the system.
labelId	string	Document category (label) identifier.
pages	Array	List of sourcefile page numbers.

Named Batches

Create a Named Batch

Request

Method	URL
POST	api/v2/projects/{projectId}/batches
POST	api/v2/streams/{streamId}/batches

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	projectId	string	ProjectId to which the batch should be created. Batch will be created in Default Stream.
Route	streamId	string	StreamId to which the batch should be created. Can target default or custom streams.
Body	BatchName	"BatchName" : "string"	Batch names must be unique. Excludes finished batches.
Body	AssigneeUserIdOrUserName	"AssigneeUserIdOrUserName" : "fb3fd0e6-6ca3-4551-9e12-2e1bf8fe8b96"	[optional] Accepts UserId (string) or UserName/Email (string). If 'null' or not included, the batch will remain unassigned and can be claimed by any user when in 'filled' state.

Response

The response contains a single batchId that is used to refer to the specific **Named Batch** in subsequent API calls.

Status	Response
200	"624272e2-9ec8-11ea-8275-5793c2ae4c49"

400	Bad request
401	Unauthorized

Upload File to Named Batch

Request

Method	URL
POST	api/v2/batches/{batchId}/upload

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	batchId	string	BatchId that the uploaded document belongs to. Must be sent as part of the route.
Body		multipart/form-data	Document data in binary form.

Response

The response contains the unique DocId of the uploaded file that is used to refer to the **Document** in subsequent API calls. It also contains a file name and the size (length) of the uploaded file.

Status	Response

200	[
	{
	"docId": "cecf5abc-9ecf-11ea-8275-5793c2ae4c49",
	"filename": "/demo@sortspoke.com/filename.pdf",
	"size": 137290,
	"sourceFileId": "cecf5abb-9ecf-11ea-8275-5793c2ae4c49"
	}
	]

400	Bad request
401	Unauthorized

Name	Data Type	Description
docId	string	Document unique identifier generated by the system.
filename	string	Original source file name.
size	int	Document source file size (length).
sourceFileId	string	SourceFile unique identifier generated by the system.

Update Batch Status

Request

Method	URL
PATCH	api/v2/batches/{batchId}

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	batchId	string	BatchId that the uploaded document belongs to. Must be sent as part of the route.
Body	batchName	"batchName": "string"	BatchName as set at time of creation. Must be included. Update allowed.
Body	state	"state": integer	Current state of batch. See Batch Status Codes for reference. Values allowed: 10, 20, 30.

Response

Status	Response
200	OK
400	Bad request
401	Unauthorized

Get Named Batches List

Get a list of **Named Batches** for a project. You can filter the list by a string (Query), Status of the document (StateFilter) and Assignee (AssigneeFilter). You can sort the results by CreationDate, FinishedDate, or BatchName.

Request

Method	URL
POST	api/v2/projects/{projectId}/batches/list
POST	api/v2/streams/{streamId}/batches/list

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	projectId	string	ProjectId for which all batches should be returned. Will return data for the Default Stream.
Route	streamId	string	StreamId for which all batches should be returned. Can specify default or custom streams.
Body	Query	["string"]	Search BatchName for a string of text.
Body	StateFilter	"StateFilter": { "FilterValues":[50] },	Status of the Named Batch (see Batches Status Codes for reference)
Body	Limit	"Limit":1000,	Maximum number of results to return (maximum is 1000)
Body	PageNumber	"PageNumber":1,	Page number provides you a way to see more than the first 1000 results.
Body	Sorting	"Sorting": [{ "FieldName" : "FinishedDate", "Type" : "Descending" }]	Specify the sort type & order of the output.

Response

The response contains the list of **Named Batches** found under the project.

Status	Response

200	{
	"itemCount": 1,
	"pageSize": 25,
	"offset": 0,
	"data": [
	{
	"batchId": "ee5c2c4d-8e6d-11ea-82ba-5f4a74c154c7",
	"batchName": "Named Batch",
	"docCount": 15,
	"sortingDocCount": 0,
	"extractingDocCount": 0,
	"state": 50,
	"userId": "253c8d5a-3faa-4924-8676-dfc59fc74cf5",
	"isCloudImportedBatch": false,
	"creationDate": "2020-01-01T01:15:11.46Z",
	"finishedDate": "2020-01-01T01:45:11.46Z",
	"isDefault": false
	}
	],
	"pageCount": 1
	}

400	Bad request
401	Unauthorized

Name	Data Type	Description
itemCount	string	Total number of records returned.
pageSize	string	The limit of the number of results.
offset	string	Relates to PageSize and PageCount.
data	Array	List of matching named batches in project.
docId	string	Document unique identifier generated by the system.
batchId	string	Unique identifier of a batch of documents assigned to one user.
batchName	string	Name given to batch.
docCount	int	Total number of documents assigned to batch.
sortingDocCount	int	Number of documents in Sorting state.

extractingDocCount	int	Number of documents in Extracting state.
state	int	Status of the document.
userId	string	User who finished the batch.
isCloudImportedBatch	boolean	Indicates whether the batch was created via cloud storage import.
creationDate	string	Batch's creation date.
finishedDate	string	Batch's completion date.
isDefault	boolean	Indicates if the batch was system-generated.
triageBucketId	string	Indicates if the batch was system-generated.

Get Document List for Batch

Request

Method	URL
GET	api/v2/batches/{batchId}/docs

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Route	batchId	string	BatchId that the active document belongs to. Must be sent as part of the route.
Query	state	string	[optional] Specify a document state to filter document list returned (e.g. state=7 will only return finished documents).
Query	fromFinishedDate	string	[optional] Specify a date range 'start' from which to filter document list by Finished Date (e.g. fromFinishedDate=2020-01-01 or fromFinishedDate=2019-12-25T06:00:00)
Query	toFinishedDate	string	[optional] Specify a date range 'end' to filter document list by Finished Date (e.g. toFinishedDate=2020-06-30 or ftoFinishedDate=2020-12-31T23:59:00)

Response

The response contains the unique DocId of the uploaded that is used to refer to the **Document** in subsequent API calls. It also contains the document's current state.

Status	Response

200	[
	{
	"docId": "15f0922b-a1b5-11ea-8279-5793c2ae4c49",
	"state": 3
	},
	{
	"docId": "15f09239-a1b5-11ea-8279-5793c2ae4c49",
	"state": 7
	}
	]

400	Bad request

401	Unauthorized

Name	Data Type	Description
docId	string	Document unique identifier generated by the system.
state	int	Document state.

Mark Batch Delivered

Advance *finished* batches and related *finished* documents to 'Delivered' status to indicate that exports have been received.

Request

Method	URL
POST	/api/v2/batches/deliver

Authorization header must be sent with this request.

Parameters

Type	Name	Data Type	Description
Body	batchIds	array	List of batch unique identifiers generated by the system.

Response

The response contains the unique webhook subscription ID and encrypted secret value.

Status	Response
200	OK
400	Bad request
401	Unauthorized

Conventions

- Client - Client application.
- Status - HTTP status code of response.
- All the possible responses are listed under ‘Responses’ for each method.
- All request parameters are mandatory unless explicitly marked as `[optional]`
- The type of values accepted for a request parameter are shown the values column like this `[10|<any number>]`. The | symbol means OR. If the parameter is `[optional]`, the default value is shown in blue bold text, as **`10`** is written in `[10|<any number>].`

API Status Codes

All status codes are standard HTTP status codes. The below ones are used in this API.

```
2XX - Success of some kind
4XX - Error occurred in client's part
5XX - Error occurred in server's part
```

Status Code	Description
200	OK
400	Bad request
401	Authentication failure
403	Forbidden
404	Resource not found
405	Method Not Allowed
500	Internal Server Error
501	Not Implemented
503	Service Unavailable

SortSpoke Status Codes

Documents

The status codes below are referred to as the Document State in this API.

	Status	Code	Description
*	Preprocessing	1	Document has been received by SortSpoke. It is being preprocessed.
*	Predicting Sort	2	Document has been preprocessed. It is queued for sorting predictions.
	Sorting	3	Document is ready to be sorted into a document category by a user.
*	Reprocessing pages	310	Document page(s) being reprocessed at user's request (e.g. page rotation).
*	Predicting Values	4	Document has been sorted. It is queued for field predictions.
	Extracting	5	Document is ready for data extraction by a user.
*	Reprocessing pages	510	Document page(s) being reprocessed at user's request (e.g. page rotation).
*	Exporting	6	Document has been accepted. Document data is being exported.
	Finished	7	Document is completed. Export file has been generated.
	Delivered	8	User has updated status to indicate export has been received.
	Preprocessing Error	1002	File failed to complete preprocessing.
	ExportError	1004	Document had an error during export. Please contact SortSpoke for assistance.
	Rejected	1005	Document was rejected by a user.
	Quarantine	1006	Document's source file failed antivirus scan on import.
	DeletedDuringSplit	1100	Document was removed during split, or a document's first page changed during split requiring the document to be regenerated.
	Excel Unpacked	1200	Imported XLSX file has been unpacked by worksheet into separate documents.
	Pending Rejection	91005	Document is marked for rejection. Reject process will move the file in the storage provider and mark it Rejected, if successful.

*NOTE: This is a temporary state pending the completion of a background task.

Sourcefiles

The status codes below are referred to as the Sourcefile State in this API.

	Status	Code	Description
*	Downloaded	100	File was received and is in the preprocessing queue.
	Preprocessed	200	File is ready.
*	Pending Extract	250	All related documents are in a Finished state. The source file will be updated shortly.
	Finished	300	All documents associated with the file have been finished.
	Delivered	310	User has updated status to indicate export has been received.
	Excel Unpacked	320	Imported XLSX file has been unpacked by worksheet into separat souce files.
	Preprocessing Error	400	File failed to complete preprocessing.
	Quarantine	401	Source file failed antivirus scan on import.
	Replaced	1300	When a file downloaded from a cloud storage provider has been updated, we move the original source file to this state.

*NOTE: This is a temporary state pending the completion of a background task.

Batches

The status codes below are referred to as the Batch State in this API.

Status	Code	Description
Filling	10	Batch is receiving documents.
Filled	20	Batch is filled and ready to be claimed.
Claimed	30	A user is assigned to the batch. Documents can now be processed.
Finished	50	All documents in the batch have been finished, either accepted or rejected.
Delivered	60	User has updated status to indicate export has been received.
Aborted	100	For some reason we abandoned the batch, isn't an indication of what happened to the docs in it

Postman Setup

What is Postman?

Postman is a powerful HTTP client for testing web services. Postman makes it easy to test, develop and document APIs by allowing users to quickly put together both simple and complex HTTP requests.

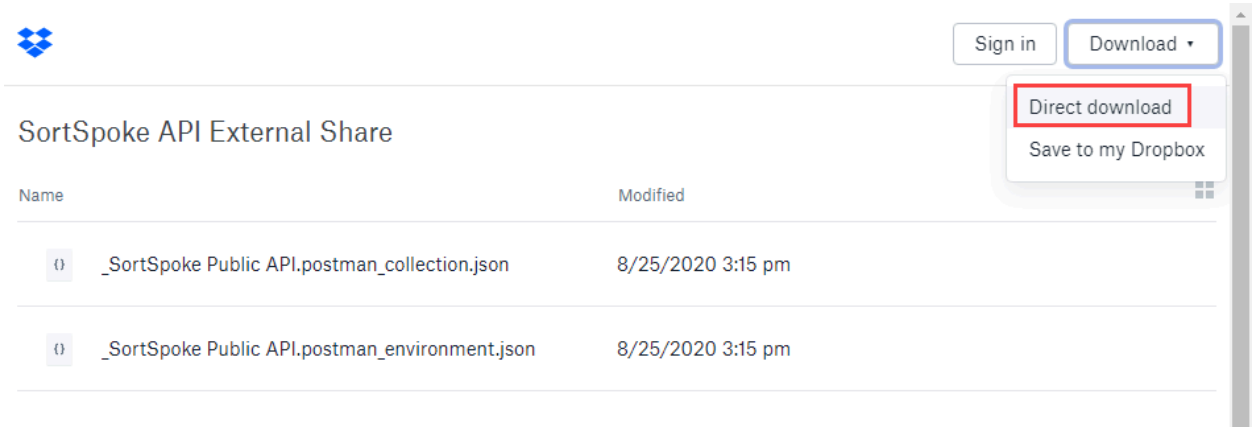
Postman can be downloaded here.

Postman Configuration

The guide below will help you set up Postman for use with SortSpoke with the most common use-case examples.

Download Setup Files

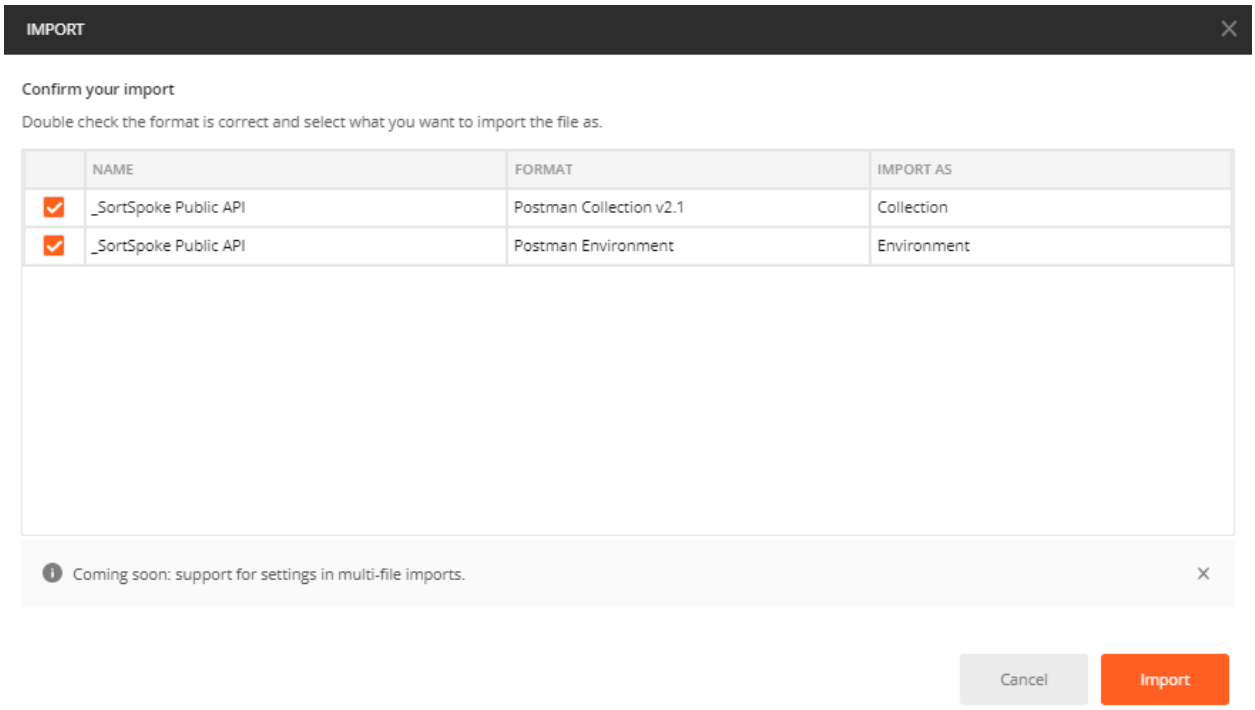
1. Go to our API Reference Guide support page: https://www.sortspoke.com/api-reference-guide
2. Download the SortSpoke Postman Collection archive:
    a. _SortSpoke Public API.postman_collection.json
    b. _SortSpoke Public API.postman_environment.json



3. Extract the ZIP file.

Import Setup Files

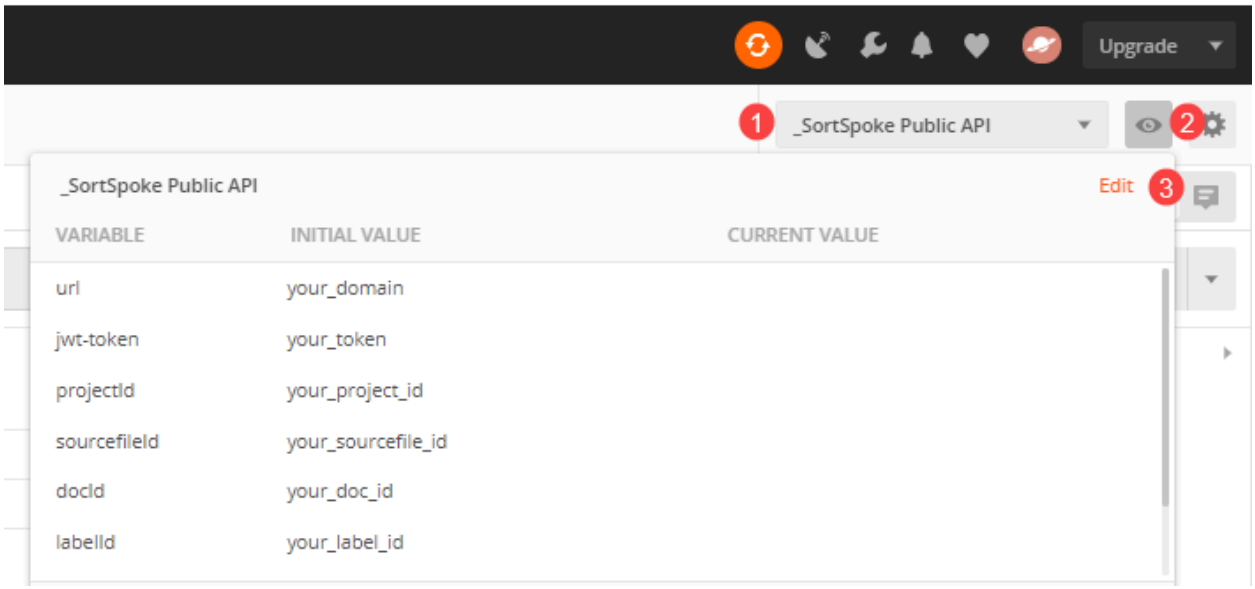
1. In Postman, click on the 'Import' button.
2. On the File tab, click 'Upload Files'.
3. Select both JSON files.



4. Click 'Import'.
5. In the left sidebar, confirm that a collection called **_SortSpoke Public API** has been added to your workspace.
6. Click on any request to open it in the main workspace.

Set Your Variables

1. Select the '_SortSpoke Public API' environment in the upper-right of window
2. Click on the 'Quick Look' icon.
3. Click 'Edit.'

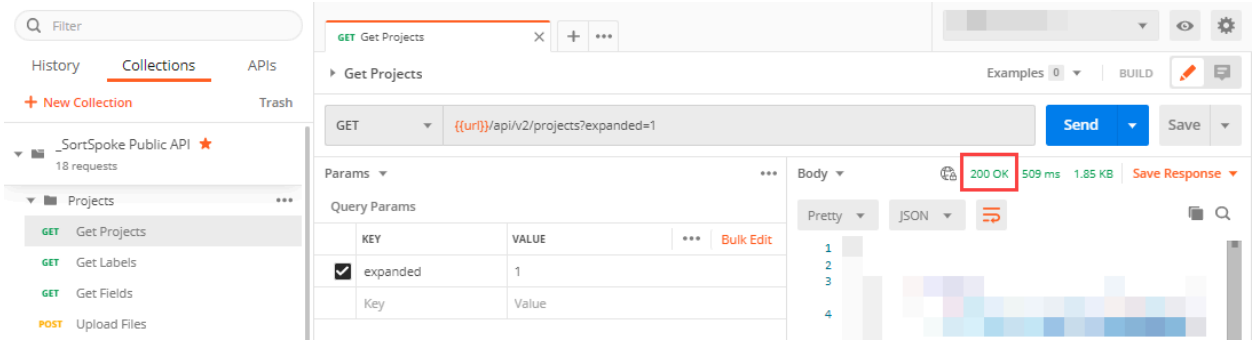


4. Set a value for your **URL** variable:
    a. If access the US data centre, use: https://api.sortspoke.com
    b. If accessing the Canada data centre, use: https://api.ca.sortspoke.com
5. Set a value for your **jwt-token**:
    a. Create a token in Admin → Users → [user profile] → API Tokens. Click for detailed instructions. Or…
    b. Contact your administrator to have an API key generated for you.

6. Click 'Update'.

Send Your First API Call

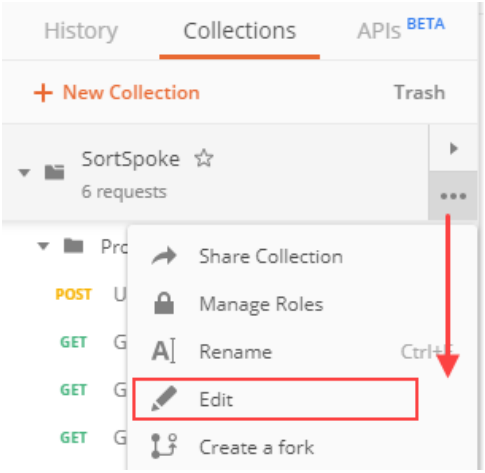
1. In the Projects folder, open the Get Projects request
2. Click 'Send'
3. If you receive a 200 OK response, you are set up.



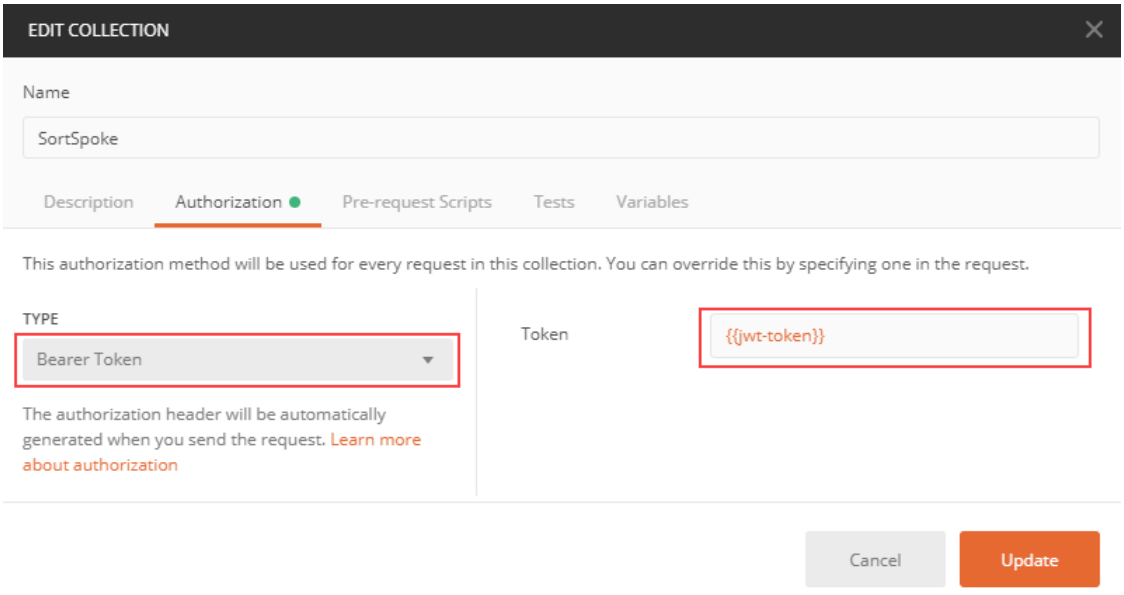
Authorization Setup

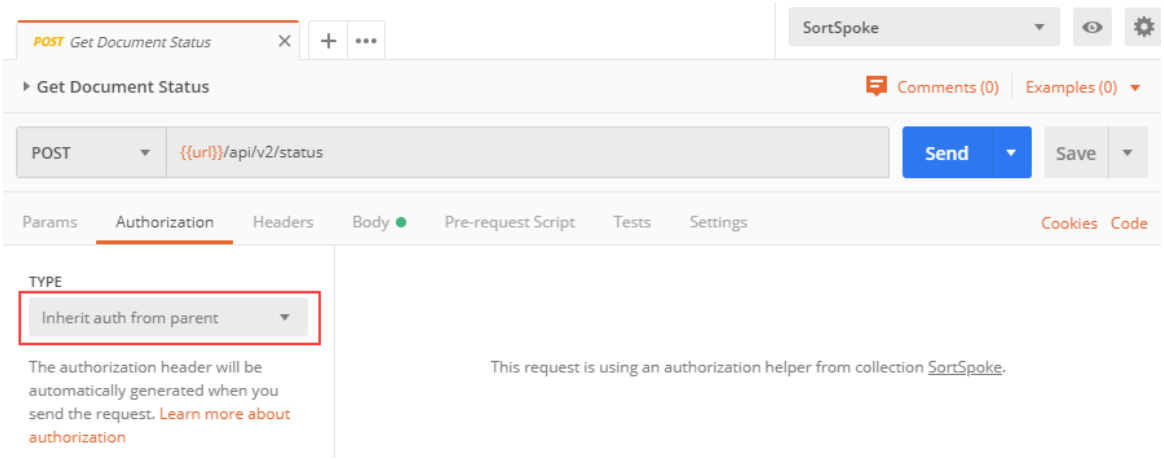
Authorization has been pre-configured in the templates imported. This configuration can be confirmed by following these steps.

1. In the left sidebar, click ‘Edit’ in the ‘More Actions’ dropdown menu of the ‘SortSpoke’ collection.



2. Confirm configuration on the Authorization tab:
   a. **Type** dropdown selection should be ‘Bearer Token’
   b. **Token** value should match the variable as setup in the Environment configuration; in this example, the value should be: `{{jwt-token}}`



3. Open any API request in the SortSpoke collection.
4. Confirm configuration on the Authorization tab:

a. **Type** dropdown selection should be ‘Inherit auth from parent’.