

# LISTREPORTS API SPECIFICATION

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## OVERVIEW

This document outlines the fields both required and optional for integrating with ListReports for the List Reports Retain product line using csv files and an FTP drop point.

### FTP connection details

- FTP: ftp.listreports.com
- Username: <APIKEY>
- Password: supplied to you by ListReports

You will be issued a separate API for staging and production.

### Closed Loan Data Model

When generating your closed loan CSV file use the following filename convention

CL-enterpriseNMLS-MMDDYYYY.csv

Example: CL-12345-01012018.csv

For each new loan closing the following data will be sent to ListReports for processing.

Field Name	Re qd	Type	Description	Default Value
loan_id	Yes	String	Unique reference id of the loan	
loan_address	Yes	String	Address of the property	
loan_amount	Yes	Number	Amount of the loan	
loan_date	Yes	Date	Date of the loan MM/DD/YYYY	
loan_term_months	No	Number	Loan term in months	
loan_down_payment	No	Number	Loan down payment	
loan_interest	No	Number	Loan interest rate	

loan_type	No	String	Type of loan: 10 15 30 FHA VA	
final_sale_amount	No	Number	Property Sale Amount	
recently_sold_alert_radius	No	Number	Radius in miles for recently sold alert area	1
loan_owner_occupied	No	Boolean	yes, if the owner is occupying the property	
loan_currently_serviced	No	Boolean	retained servicing marketing, EBR stays in tact	
loan_msr_sale	No	Boolean	Servicing has been released and customer can only be marketed to if responded within 18 months	
loan_officer_first_name	Yes	String	First Name of the loan officer	
loan_officer_last_name	Yes	String	Last Name of the loan officer	
loan_officer_individual_nmls_id	Yes	Number	NMLS of the loan officer	
loan_officer_email	Yes	String	Email of the loan officer	
loan_officer_phone	No	String	Mobile of the loan officer	
loan_officer_company	No	String	Company of the loan officer	
loan_officer_enterprise_nmls_id	No	Number	Enterprise NMLS of the loan officer	
loan_officer_branch_nmls_id	No	Number	Enterprise NMLS of the loan officer	
loan_officer_marketing_zip	No	Number	Zip code for the loan officer market coverage area	
buyer_agent_first_name	Yes	String	First name of the Buyer Agent	
buyer_agent_last_name	Yes	String	Last name of the Buyer Agent	
buyer_agent_email	Yes	String	Email of the Buyer Agent	
buyer_agent_phone	No	String	mobile of the Buyer Agent	
buyer_agent_company	No	String	Company of the Buyer Agent	
listing_agent_first_name	Yes	String	First name of the listing agent	
listing_agent_last_name	Yes	String	Last name of the listing agent	

<b>listing_agent_email</b>	<b>Yes</b>	String	Email of the listing agent	
listing_agent_phone	No	String	Mobile of the listing agent	
listing_agent_company	No	String	Company of the listing agent	
<b>buyer_lead_first_name</b>	<b>Yes</b>	String	First name of the buyer lead	
<b>buyer_lead_last_name</b>	<b>Yes</b>	String	Last name of the buyer lead	
<b>buyer_lead_email</b>	<b>Yes</b>	String	Email of the buyer lead	
buyer_lead_phone	No	String	Mobile of the buyer lead	

## Buyer Lead Data Model

When generating your buyer lead CSV file use the following filename convention:

LD-enterpriseNMLS-MMDDYYYY.csv

Example: LD-12345-01012018.csv

For each new Pre-Approval, Pre-Qualification, the following data will be sent to ListReports for processing.

Field Name	Reqd	Type	Description	Default Value
lead_id	Yes	String	Unique record ID of the lead	
first_name	Yes	String	First name of the buyer	
last_name	Yes	String	Last name of the buyer	
email	Yes	String	Email of the buyer	
phone	No	String	Mobile of the buyer	
owner_email	Yes	String	Email of the Loan Officer for the buyer	
status	Yes	String	Stage of the buyer: Appointment Set Attempting Contact Bad Contact Closed Contacted Funded Hot In Process New Not Interested Nurture Pre-Approved Pre-Qualified	
pre_amount	Yes	Number	Loan amount the buyer has been approved for	
pre_exp_date	Yes	Date	Date the pre-approval expires	60 days
pre_follow_up_stage	Yes	String	Stage set once approval expires. Appointment Set Attempting Contact Bad Contact Closed Contacted	

			Funded Hot In Process New Not Interested Nurture Pre-Approved Pre-Qualified	
pre_exp_notify	No	Boolean	Notify users on expiration of pre-approval	Yes
buyer_prefs_location	No	String	City, state or zip code of the area the buyer is searching	
buyer_prefs_price	No	Number	Price the buyer is looking to purchase.	
buyer_prefs_amenities	No	String	What the buyer is looking for the the surrounding neighborhood: walkability restaurants outdoors all	
buyer_prefs_school_importance	No	String	If the buyer is interested in the quality of the schools: very somewhat not	
buyer_prefs_home_type	No	String	What type of home structure the buyer is looking for: attached detached either	
buyer_prefs_beds	No	Number	Number of bedrooms the buyer is looking for	
buyer_prefs_baths	No	Number	Number of baths the buyer is looking for	
buyer_prefs_age_home	No	String	Age of the home the buyer is looking for: 0-9 10-49 50+ any	
buyer_prefs_stories	No	String	How many stories the buyer is looking for: 1 2 either	
buyer_prefs_sqft	No	String	Square Footage the Buyer is looking for	
buyer_prefs_lot_size	No	String	Lot Size the buyer is looking for	

purchase_time_frame	No	String	The purchase time from the buyer is looking to buy a home in: ASAP I just started looking Only if it's my perfect home Just Checking Things Out	
buyer_agent_first_name	No	String	First name of the Buyer Agent	
buyer_agent_last_name	No	String	Last name of the Buyer Agent	
buyer_agent_email	No	String	Email of the Buyer Agent	
buyer_agent_phone	No	String	mobile of the Buyer Agent	
buyer_agent_company	No	String	Company of the Buyer Agent	
buyer_agent_name	No	String	Full name of the Buyer Agent if the name is not broken up into first and last name	