dash API FAQs

A guide to assist companies using the dash API

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Philosophy of dash API - General Concepts

This document is designed to help inexperienced users understand the dash API and provide answers to some commonly asked questions.

What is the dash API?

The dash API (web service) is used to send and receive dash data in real time for our partners and vendors. These updates can include Listing, Transaction, Agent, Team, Office, or Company Data.

Why would I use the dash API?

Many companies do not want to manually enter their personnel information, listings (and associated media), pending contracts and closed transactions directly into dash as they already enter the information in other places (MLS, accounting programs, and others). The dash API allows the customer to transmit information from these sources to dash. In addition to this, the dash API allows vendors to directly import newly added or updated information from dash in real time. The ability for the vendor to import dash data in real time should allow companies to add additional offices and update the back-office system without needing the dash help desk or assistance from the dash onboarding teams.

Can I use different vendors to transmit several types of data (listings vs transactions)?

You can use one vendor to transmit listings and a different vendor to transmit personnel and/or transactions. Personnel and teams are typically set at the Company level. Listing specifications and transactions are set at an Office level.

Do all my offices need to use the same vendor to transmit data?

As the dash API is set at the company level for personnel and at the office level for transactions, you do not necessarily use the same vendor to transmit the data. However, you have the flexibility to manually enter and update listings and transactions (pending contracts and closings) for the office directly through dash. If you enter your data manually in dash, you need to notify your back-office vendor about this decision, as the vendor is still able to load the data for the office into their system unless directed otherwise by your company.

What is data ownership in dash and how does it impact the information transmitted?

Data ownership is a vital concept in understanding dash API functionality. Ownership of the data specifically at the field level (media) is equally important as who owns the record (person, listing, and/or transaction). The reason dash can provide our customers with so many set-up options is due to data ownership. But how ownership is transferred and the impact that ownership has on the data can cause some confusion and frustration if not fully understood.

The default setting makes dash the owner of personnel, listing and transaction records. When a company on-boards a vendor using the dash API, ownership for the entities the vendor supports (personnel, listings, or transactions) is then transferred to the dash API vendor. Dash becomes the owner of a record when your company is set up to use the dash API with your vendor, for any record that is entered directly in dash.

Onboarding of dash API

When a company onboards a vendor for dash API, ownership is transferred to the dash API vendor. There are two models for onboarding dash API:

- The company uses dash API for their personnel, listings, and transactions.
- The company uses dash API for personnel and transactions. Only one vendor supplies personnel and transactional information for a company.

Who is the provider?

The provider is a tool or vendor that owns the data. If the record or information in a "protected field" is entered in dash by your vendor's transmission, the vendor is the provider of that information. If the record or data in a protected field is entered manually in dash, dash is the owner of the information. Information for a protected field is owned by dash even though the record the field belongs to is owned by your vendor. The fields are only protected when the vendor transmits through batch methods. If the vendor transmits data in real time, the information transmitted by the vendor replaces the information in dash, even if it is manually added in dash.

Can I still enter information directly in dash if I use dash API?

While you can add new records for listings or transactions directly in dash, you need to use caution. Typically, you need to add the new records through your vendor's system. While the interface allows the vendor to update data in real time for each record, some vendors do not use this functionality and instead overwrite the information that is previously entered in dash. The "last in, wins" rule (the last information successfully saved in dash is the information that is distributed) applies to these companies.

What is the Last in Wins rule?

The last information successfully saved in dash is the information that shows on the national website and is shared with downstream partners and the brand tools. If your vendor imports the information from dash prior to making an update to the record, they always update the most recent data available in dash. If your vendor does not import the data from dash before making an update, the last in, wins rule still applies. This means that, except for "protected fields" (for vendors that transmit using batch methods), the information transmitted through your vendor overwrites the changes that are previously made directly in dash.

How can my vendor take ownership of the record that is "owned" (manually entered) by dash?

After your company is set up to use the dash API with your vendor, if the record is entered directly in dash, dash is the owner of that record. The ownership of the record is transferred to your vendor if the vendor imports the information from dash and then transmits the record unchanged to dash. When the record is successfully processed, you can update the information through your vendor's system.
You need to contact your vendor to assist you in this process.

Can I enter data in dash that is not replaced by the transmission of data from my vendor?

There are two ways to enter data into the dash that prevents it from being replaced by a batch transmission.

- The data is entered directly in dash. If the field is protected, then the data is replaced, but ownership remains with Vendor.
- The data is updated using dash API real time update. In this case, ownership is transferred to the dash API vendor.

What are protected fields?

Both personnel records and listings have protected fields. If your vendor transmits data using the batch methods, information entered manually with a protected field in dash does not get overwritten by future updates from the back-office vendor. This is possible because the data entered directly in dash is "owned" by dash, even though the record the information belongs to is owned by your back-office vendor. The details for the protected fields are addressed in the discussion of personnel and listing records below.

Why can't my vendors information overwrite the information in dash?

This typically takes place for one of two reasons:

- A business error occurred during processing. If the information transmitted for mandatory information transmitted is missing or the information transmitted is not as expected (7 digits for a zip code), an error message is returned to the vendor. You need to correct the information and retransmit the record.
- A duplicate record exists.

Office Information

What office information can I update through my vendor using dash API?

Many of the fields for offices are controlled by franchise administration (as the information is tied to your contract), there are fields that a company can update through dash, and in turn dash API if your vendor supports updating office information through dash API. Examples of office marketing data that an office can update include:

- Office Alias
- Primary Email Address
- Fax Number
- Additional Names (Office Names in different languages)
- Additional Addresses (Other than Business/Physical)
- Additional Phone Numbers
- Additional Email Addresses
- Additional Websites
- Custom Attributes
- Number of Desks
- Office MLS Details
- Office Media
- Geographic Area
- Office Profile
- Office Specialization
- Office Preferences.

Personnel Information

Can I add Sales Associate roles manually in dash?
You cannot add new sales associate records manually in dash. You must enter it through your vendor's system to avoid creating duplicate records. Some vendors do not pull data from dash prior to allowing their customer to create new or update existing personnel records. In dash and dash API you can have one active sales associate record per office.

Can I add administrative roles manually in dash?
Except for the roles owned by franchise administration and the brand (Owner, Responsible Broker, and so on) while you can add and update administrative roles directly through dash, it is recommended to add the roles through your back-office vendors system. If the administrative role is added directly in dash, you must have awareness of the following details:

- While the vendor owns the data for the person, the administrative role(s) added through dash is owned by dash.
- If your vendor transmits data using the batch methods and updates by your vendors system, the person does not overwrite the administrative role entered through dash as the administrative role is owned by dash. If you want the vendor's system to take ownership of the role, you must import the information into your vendor's system. This requires assistance from the support team of your vendor. When the data is in your vendor's system, you need to transmit the data successfully to dash with no changes made for the vendor to acquire ownership of the role. Your vendor cannot take ownership of roles owned by franchise administration and the brand, but these records are imported to your back-office system.

- If you terminate a person's record through the dash API, it can deactivate the administrative role(s) and sales roles owned by dash (except for roles controlled by franchise administration and the brand, these roles are only updated by franchise administration and the brand respectively). If you only de-activate the administrative role(s) supported by your vendor, the administrative role(s) and sales roles owned by dash remain active.

What are Protected Fields for personnel?

If your vendor is using real time methods to transmit the data, no protected fields are available. For vendors who transmit data using the batch methods, if information is entered in a protected field through dash, it does not get removed if your vendor does not supply or support the specific field. If your vendor supplies the field in an update to the record, the information supplied by your vendor replaces the information manually entered in dash. If the vendor supplies the field but the field is empty, it removes the information manually entered through dash. In addition, if you want to allow your vendor to update or remove information that is manually entered in dash, the vendor system needs to import the information from dash and successfully transmit the information to dash without making any changes. Changes are only made to this data after the successful transmission without changes (If the language French is entered in error through dash and you wanted to remove it through your vendor's system, firstly you need to successfully update the records with French and a language for the agent before you can remove French. The protected fields are:

- Sales Role
- Administrative Role
- Address
- Email
- Phone
- License
- Designation
- Language
- Profile
- MLS ID
- Websites
- Company Staff Preference
- Person i18n
- Media
- MediaURL
- MediaTags.

I accidentally created a duplicate person record. How do I correct the issue?

You can correct a duplicate person record by de-activating the duplicate company staff person record. This is accomplished by using the dash API to get a current copy of the invalid company staff record, changing the isActive statement to False and entering the current date for the Deactivation Date, and then putting the revised company staff record back.

How do I re-activate a person that used to work in my company?

You can re-activate a person that is currently deactivated for a company by changing their active status and removing the deactivation date. This is accomplished by using the dash API to get a current copy of the de-activated company staff record, changing the IsActive statement to True and either removing the existing Deactivation Date, or entering a Deactivation Date that is in the future, and then putting the revised company staff record back.

How do I enter a person's information that is moving to my company from another company within the brand and ensure they retain their brand login and access to the brand's tools?

You can ensure a user that is moving from one company to another retains their brand login in and access to the brands tools by using the dash API, to do an update (POST request) with the new company information and the person details along with PersonGUID of the existing profile.

Transactional Information

How does the dash API link the transaction to a listing?

In dash, a listing is one record and the transaction (pending contract, closing) is a separate record. The vendor can link the listing to the transaction. A field is available that notes which listing is associated with the transaction. This means that listing information is retained if a pending contract is canceled. If your vendor does not link the transaction to the listing (you manually enter your listings in dash or have a different vendor send your listing data), dash tries to link the transaction to the listing using the MLS and address information.

I accidentally created a duplicate transaction record. How do I correct the issue?

You can correct a duplicate-pending transaction record by canceling it, or if the transaction is already closed, only REFS or an affiliate with valid privileges (Brokerage Admin, Master Franchise Management, Office Manager, or Transaction Coordinator) can correct the duplicate transaction through the dash UI. To correct a duplicate Pending transaction using the dash API, change the Status Code to "CA" and the Status description as "Canceled" on the invalid transaction and then put the revised transaction record back.

Listing Information

Listing marketing status

Can I show a listing as pending if I have not entered the contract information in dash?

Yes, you can set the listings to pending or closed status for marketing purposes even though the record is not officially pending or closed until the contract information is entered for the transaction. If your MLS passes the pending or closed status to your vendor, the dash API vendor can transmit the status to dash where it is noted for marketing purposes. When the transaction for the record is set to pending or closed status, it changes the status of the listing accordingly.

What are Protected Fields for a Listing?

If your vendor is using real time methods to transmit the data, no protected fields exist. For vendors who transmit data using batch methods, there are three categories of protected fields for listings.

1. The fields in the first category are not overwritten by future updates from the vendor. If your vendor imports this information from dash and retransmits the information, it creates a duplication of the information in dash. If you want your vendor to gain ownership of the data, in addition to having your vendor import the information from dash, you need to contact the dash help desk and request to transfer ownership of the data to your vendor. When you have confirmation that ownership is switched to your vendor, you can have your vendor transmit updates to the record without creating the duplication. These fields are:
   - Media
   - Open House information.

2. The second category involves updating a specific item that as part of a grouping of information (fireplace is a specific property feature in the group of property features). If a specific item is entered in dash and is not included in the group transmitted by the vendor, the specific item gets retained. For example, if “fireplace” is manually entered in dash, but not included in the group of property features supplied by the vendor, “fireplace” remains associated with the listing, even though the vendor is able to update all the other property features submitted. If the vendor includes the specific item, and successfully transmits the record, the vendor takes control of the specific item (acquires ownership of the item). If you want to use your vendor’s system to remove a specific item that is manually entered in dash, you need the vendor to successfully transmit the record with the item. When the record successfully gets updated, you can remove the detail in the vendor’s record, and when the data is successfully transmitted, details get removed from the record. Which means, you should first need to successfully transmit the listing with “fireplace” included in the property features before you can remove it from the listing in your vendor’s system and transmit it to dash to remove the item in dash. The fields that operate in this manner are:

- Listing Remarks
    - Description
    - Remarks Type
    - Language.
- Property Features Group Name – collection protected
- Property Features Name
- Special Programs Feature Group Name
- Special Programs Feature Name.

3. In the third category, if the field with the information is not supplied (supported) by your vendor, the information manually entered in dash is retained. If the field is supplied by your vendor, the information transmitted replaces the information in dash. If the field is supplied by your vendor with no value, the information in dash is removed from the field. These protected fields are:

4. Date Available
5. Year Renovated
6. Number of Parking Places
7. Annual Tax Amount
8. Tax Year
9. Tax Roll Number
10. Number of Levels / Floors
11. Number of Rooms
12. Lot Size
13. Elementary School District
14. Middle/Junior School District
15. High School District
16. Property Location
17. Development
18. Do Not Show Listing Online
19. Do Not Show Address Online
20. Do Not Show List Price Online
21. Price Upon Request
22. Auction
23. Call to Show.

Why is my listing not showing the listing agent?

If a sales associate is not shown, or if the sales associate shown in the record does not match an active sales associate in dash, the listing processes successfully and the listing remains associated with the office instead of the agent. If an update to the listing is transmitted showing an active sales associate in the company, the listing is then associated with the sales associate.

Why is the listing in Unknown status?

Some vendors do not transmit a listing expiration date (many MLSs do not provide the date). As listing expiration date is a mandatory field in dash, dash enters a date of 1/1/32 as a place holder. Your vendor can specify that they can transmit all the active listings every X number of days. The vendor determines the transmission period. If there is no listing expiration date and dash has not received the updated active listing within that period, the listing is sent to unknown status and is taken off market. The listing is updated to the appropriate status upon the next update from dash or the feed.

Listing Media

What is the maximum character length for media captions?

As of June 9, 2021, the Listing media caption information support is extended to 1024 characters.

Mergers and Acquisitions

Do I need to do anything when I open new offices or merge offices (overview)?

In most situations, the office configuration for the vendor is completed automatically behind the scenes for your company. If your company has the vendor designated at the office level instead of the company level, you need assistance from the dash API onboarding team.

When the office is configured for the vendor, the dash API vendor can load the data from dash on demand. This is possible due to the new office being configured in the same way as your company's primary office when the new office is created in dash. As stated, you need to collaborate with their vendor to ensure the office(s) is (are) set up correctly in the vendor's system to avoid challenges in the future. Note: While listing vendors are configured at the office level, accounting (or back-office) vendors are typically configured for personnel and transactions at the company level. Quickly, you can use one dash API back-office vendor for some offices and a different back-office vendor for the new office.

In the rare instance you want to use dash to manually enter listings and transactions (pending contracts and closings) for the office, instead of using the dash API, you have the flexibility to add and update records directly through dash. You need to notify your back-office vendor of this decision as the vendor is still able to load the data for the office into their system unless directed otherwise by your company. When the vendor is configured for dash API at the company level, all personnel must get transmit to dash by your vendor.

What do I need to do when I open a new office?
In most situations, the configuration occurs automatically when the office is created in dash. You need to notify your vendor to load new office information into your back-office system including the owner and responsible broker records when supported by your back-office system.

What do I need to do with a change of ownership?
You need to notify your back-office vendor of the change, so the vendor can load the new owner's dash information into the back-office system. They also want to update the information for other personnel records that are changed.

What do I need to do when I acquire a new office?
In most situations, the configuration occurs automatically when the office is created in dash. You need to notify your vendor to load the office information into the back-office system including personnel, listing, and pending contract records.

What do I need to do to consolidate my offices?
In most situations, vendors can pull updated information into their system on demand. Make sure to confer with your vendor to determine the best way to proceed. While the interface allows the vendor to download the records changed in dash, some vendors prefer that their customers move the active personnel, active listings, and pending transactions prior to the assignment. If the consolidation takes place in dash prior to moving the records into your back-office system, you need your vendor's support team to import the updated records from dash.

Error Messages

List of Common Error Messages

Error Messages	Entity
Business Rule Violation(s) has occurred: Agent should have producing role.	Listing
Business Rule Violation(s) has occurred: No or invalid agents sent.	Listing
Business Rule Violation(s) has occurred: Invalid listing type and property type combination.	Listing
Business Rule Violation(s) has occurred: Deleted Listings cannot be updated.	Listing
Business Rule Violation(s) has occurred: Invalid Property type and sub-type combination.	Listing
Business Rule Error: Listing cannot be processed as Office Guid/Provider identifier is missing or In	Listing
Business Rule Error: Listings are allowed to be created in Active/Available status only	Listing
Business Rule Violation(s) has occurred: Add/ Update Listings in Open and Executed offices only.	Listing
Business Rule Violation(s) has occurred: Closed Listings cannot be updated.	Listing
Business Rule Error: Provider is not authorized to send Listing Data	Listing
Company Staff is Already Deactivated	CompanyStaff

Media error for more than allowed image.

Each brand has its own allowed media count, if the media count is greater than the allowed value, it throws a business validation error.