

SUPER-CHARGE YOUR DOCUMENT-DRIVEN WORKFLOWS WITH AN OCROLUS API INTEGRATION

When you complete an API integration with Oculus, your company achieves enhanced efficiencies. The Solutions team offers plenty of insights to help you begin, including comprehensive guides and documentation. Along with the API documentation, the team has also identified the top questions and answers you may have when getting started. To learn more about how you can make the most of the Oculus API, contact your account executive or reach out to support@ocrolus.com.

FAQs & Helpful Resources

Question	Answer	API Doc Link
Once API integration has started, what are the first steps to begin uploading documents?	<p>The first step to begin uploading is to create your API key and secret on our web-app.</p> <p>Before you can upload documents to Oculus, you have to create a new book to organize them.</p> <p>In order for Oculus to process your documents, the next step would be to Upload the PDF to a book.</p> <p>If you are uploading images, you can upload a group of image files to a book and confirm that all image files have been uploaded to an image group. The image group should represent a complete document.</p>	<p>https://docs.ocrolus.com/reference/getting-started</p> <p>https://docs.ocrolus.com/reference/create-a-new-book</p> <p>https://docs.ocrolus.com/reference/upload-pdf-to-book</p> <p>https://docs.ocrolus.com/reference/upload-images-to-book</p>
What file formats does Oculus accept?	<p>In addition to PDF, we currently support a wide range of image formats, including JPEG, PNG, BMP, GIF and TIFF.</p>	<p>https://docs.ocrolus.com/reference/upload-images-to-book</p>

Question	Answer	API Doc Link
<p>What is a form type?</p>	<p>The optional form_type parameter specifies the document type of the images uploaded. If this parameter is not specified when using the ‘Upload PDF’ endpoint, the document type defaults to a bank statement.</p>	<p>https://docs.ocrolus.com/reference/upload-images-to-book#mark-image-group-complete</p> <p>https://docs.ocrolus.com/reference/upload-pdf-to-book</p>
<p>How do I extract the results/lender analytics?</p>	<p>We provide data for a book in 2 forms, a Transaction List and Analytics. You can retrieve the Ocrolus analytics for a book in JSON or Excel format.</p> <p>The extra_fields parameter to the Analytics (JSON) Endpoint allows a convenient mechanism to request additional optional analytics provided by Ocrolus. The values are passed in as a comma-separated list.</p>	<p>https://docs.ocrolus.com/reference/transaction-listing</p> <p>https://docs.ocrolus.com/reference/analytics</p> <p>https://docs.ocrolus.com/docs/extra-fields</p>
<p>Can I be notified when my results are ready?</p>	<p>Webhooks are a more dynamic mechanism to be notified about completion events, as opposed to polling specific status query endpoints. You can configure the endpoint associated with your API account by using the Configure Webhook Endpoint. A full listing of supported event types can be found on the Registering your Webhook Endpoint Guide.</p>	<p>https://docs.ocrolus.com/reference/configure-webhook</p> <p>https://docs.ocrolus.com/docs/registering-webhook-endpoint</p>
<p>Can I control which accounts in my organization have access to a particular book?</p>	<p>A public book is accessible by all accounts in your organization, while a private book is only accessible by its owner and any accounts that have been explicitly granted access. Update Book Authorization Endpoint allows you to change the public/private status of an existing Book, providing a coarse-grained access-control mechanism.</p>	<p>https://docs.ocrolus.com/reference/update-book-authorization</p>