NextGen
Open API

User Instruction Guide

1. Introduction

Welcome to the NextGen Open API user program. This guide walks you through enabling, configuring, and testing the Open API feature in your NextGen account.

The Open API allows your firm to connect NextGen with external third-party tools—such as accounting platforms, document management systems, CRMs, calendaring apps, and business intelligence tools like Power BI—through a secure, bi-directional data sync. Instead of relying on pre-built integrations, your development team (or a third-party developer) can build custom integrations tailored to your firm's workflows.

Key Highlights

- **Available on all tiers —** Unlike competitors who gate API access behind premium plans, Open API is available across all NextGen pricing tiers.
- Secure OAuth 2.0 authentication with granular read/write/delete permissions
- Dedicated Developer Portal with dashboard, API documentation, and activity logs
- Sandbox environment for safe testing before going live
- No limit on the number of apps you can create

2. Prerequisites

- **Administrator access** to your NextGen account (only administrators can enable Open API)
- A developer or third-party technical resource to build and configure the integration
- The redirect URL and website URL of the external application you intend to integrate
- To grant portal access to a third-party developer: either share your credentials or **create a new administrator user** in your account for them

> 💡 *This is a technical feature. Firms will need a developer resource—this is not something a non-technical user can configure on their own. This is standard across the industry for Open API integrations.*

3. Enabling Open API

1. Log in to your NextGen account as an administrator.
2. Navigate to **Setup** by clicking on profile icon located on top right corner.

3. Click on **Apps.**
4. Scroll down to the **API Integrations** section. You will see the **Open API** card with an OFF toggle.

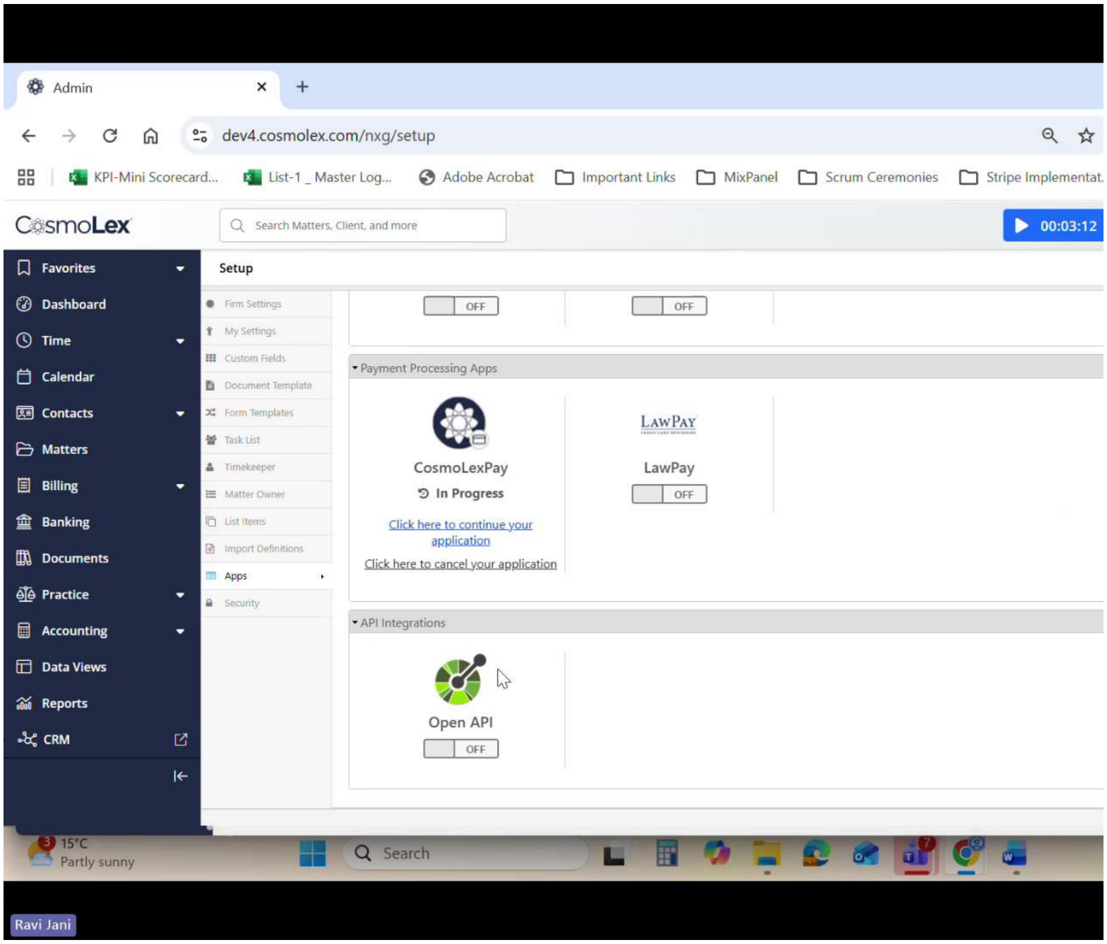

Figure 1: Setup → Apps → API Integrations — Open API toggle (shown OFF)

5. Toggle Open API to **ON**.
6. Click **Redirect** to open the **ProfitSolv Developer Portal** in a new browser tab.

4. Developer Portal Overview

After enabling Open API and signing in, you will land on the Developer Portal dashboard.

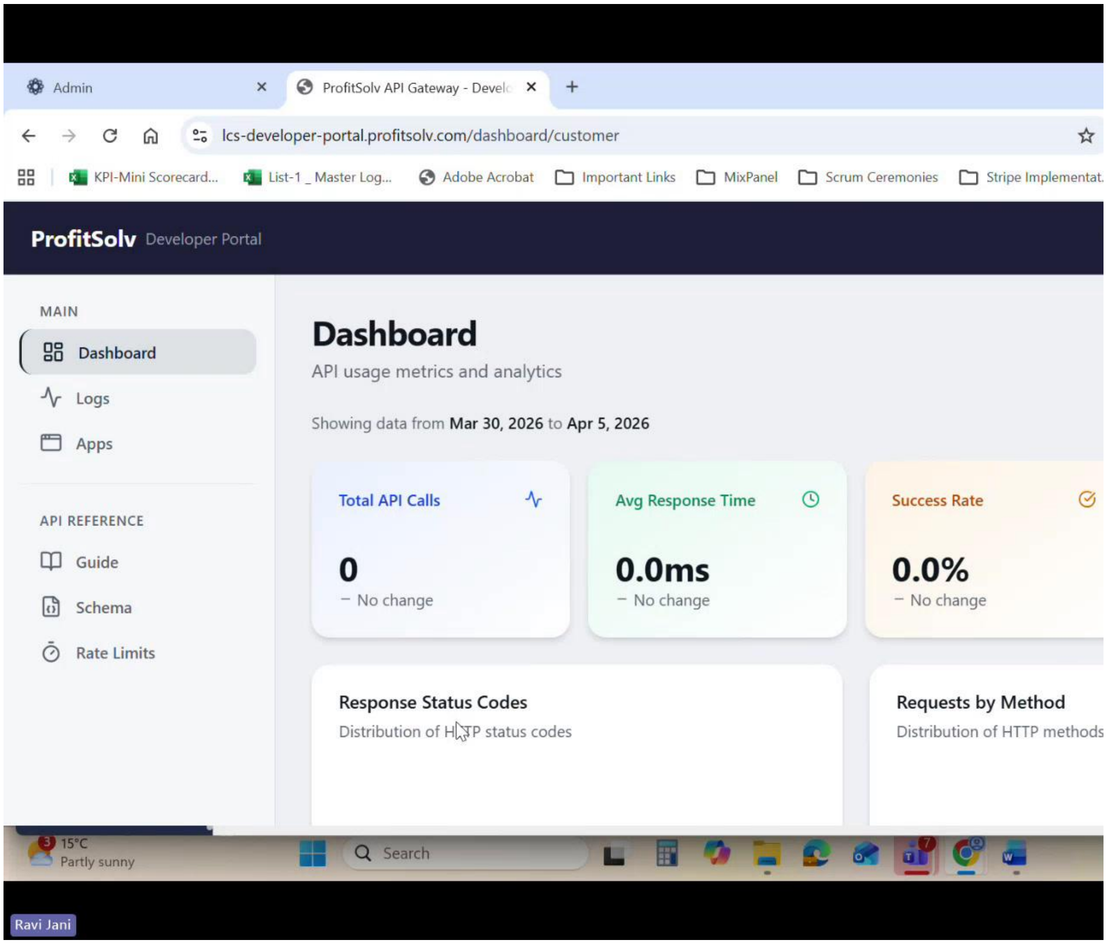

Figure 2: ProfitSolv Developer Portal — Dashboard with KPI metrics

The portal is organized into the following sections:

- **Dashboard —** KPI metrics including Total API Calls, Avg Response Time, Success Rate, and Rate Limit Rules
- **Logs —** Detailed log of all API calls made, including data sent, updated, or deleted
- **Apps —** Manage all your created applications, API keys, and permissions
- **Guide —** Full API documentation with endpoint details and example values
- **Schema —** Data schemas showing all available fields for each API
- **Rate Limits —** View peak/off-peak schedules and endpoint-specific quotas

5. Creating an Application

1. In the Developer Portal, click **Apps** in the left sidebar, then click **+ Create App**.
2. Fill in the **Name** field (e.g., the name of the tool you are integrating with).
3. Add a **Description** of the integration’s purpose (e.g., “To sync my Accounts Payable bills”).
4. Enter the **Redirect URI** (required) and **Website URL**. Your developer will know what to enter here.

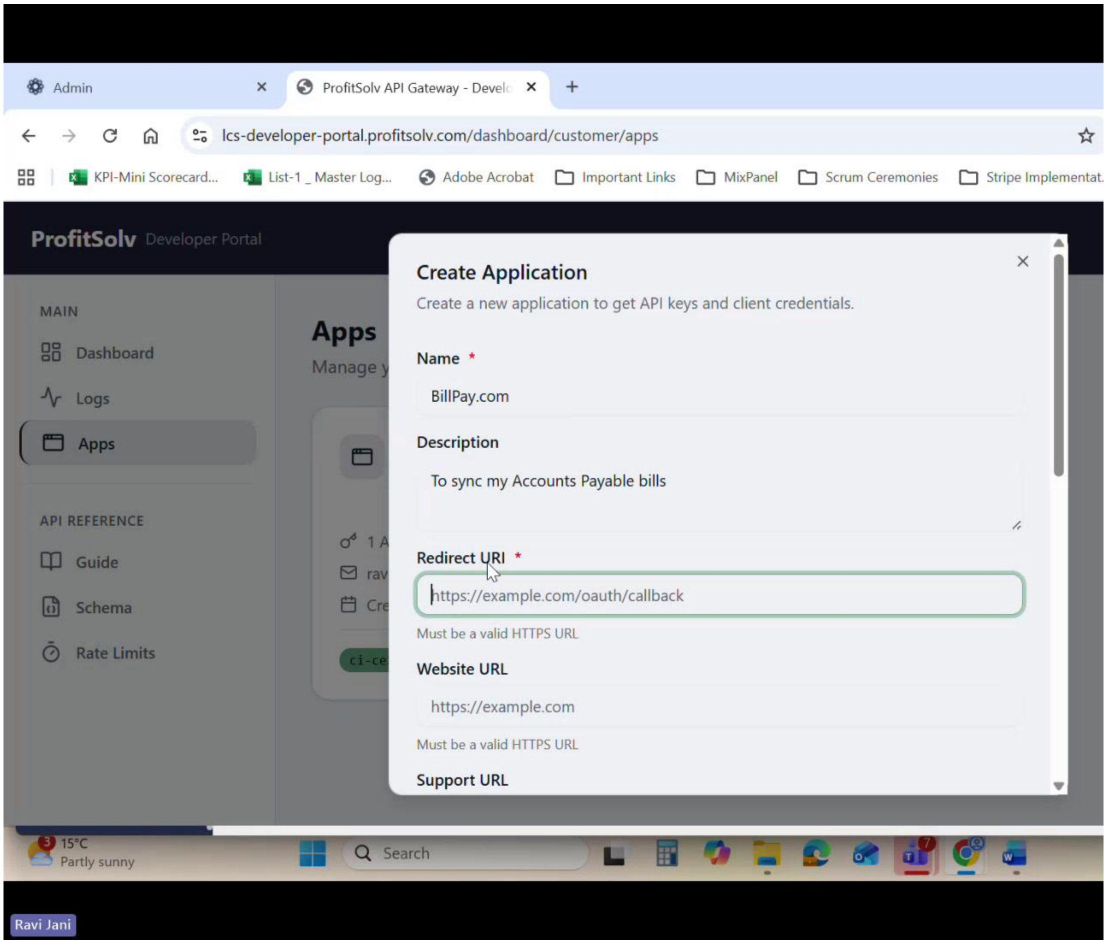

Figure 3: Create Application form — Name, Description, Redirect URI, and Website URL

5. Scroll down to configure **Permissions / Scopes** (see Section 6).
6. Click **Create app** to generate your API credentials.
7. (Optional) Upload an app icon. This appears only in the Developer Portal—not in NextGen.

> 💡 *You can create multiple apps for different integrations. There is no limit on the number of apps you can configure.*

6. Configuring Permissions (Scopes)

During app creation, you will be asked to select permissions (scopes) for each data area. This controls what the connected application is allowed to do with your data.

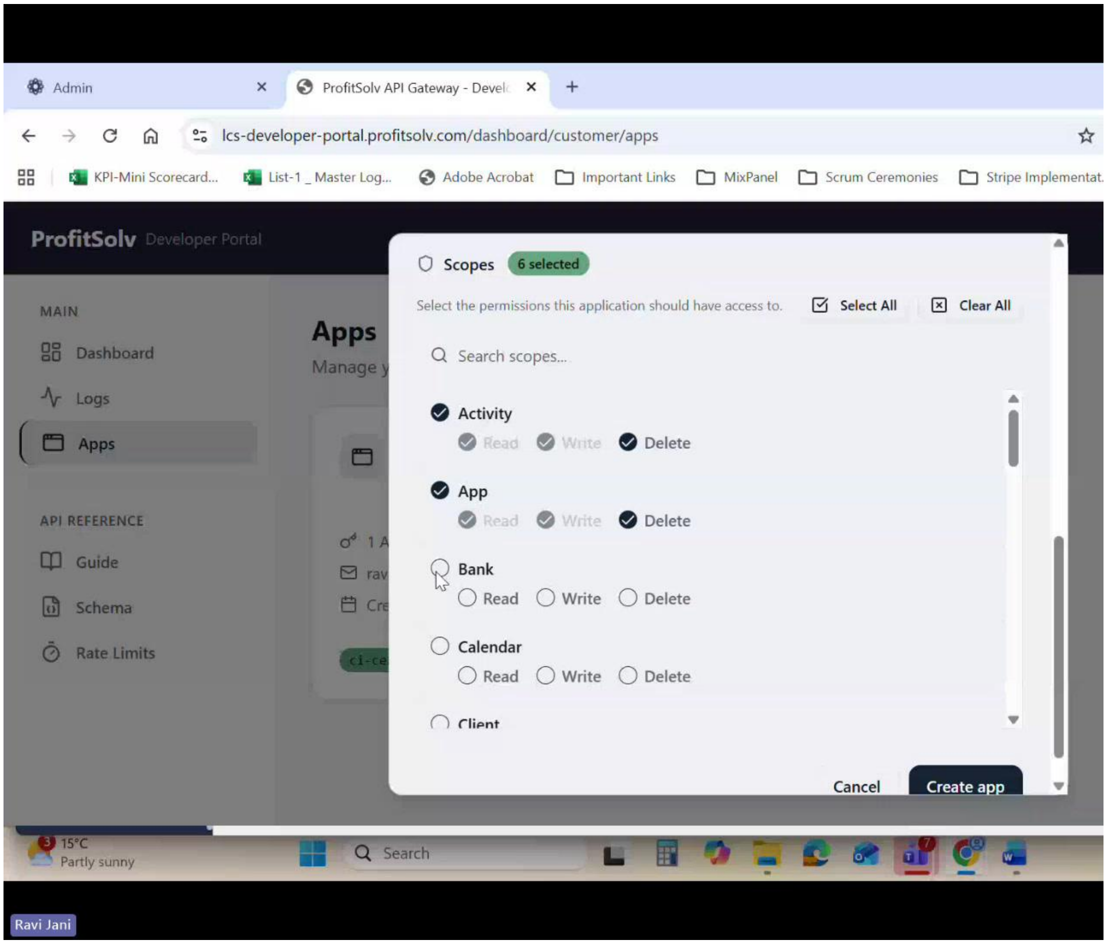

Figure 4: Scopes selection — Read, Write, and Delete permissions per data area

Permission	What It Allows	Example
Read	Retrieve and view data from NextGen	Pull client list into Power BI for reporting
Write	Create or update records in NextGen	Create a new AP bill when one is generated externally
Delete	Delete records from NextGen	Remove an AP bill when it is deleted in the external tool

How permission selection works:

- Selecting the main checkbox for a data area (e.g., Activity, Client) automatically checks Read, Write, and Delete.
- You can uncheck Delete to allow only Read + Write.
- You can further uncheck Write to allow Read-only access.
- Permissions can be updated at any time from the application detail page.

> ⚠️ *Permissions directly govern what API operations are allowed. If you do not want the external app to delete records from your account, ensure the Delete permission is unchecked.*

7. API Keys and OAuth Authentication

After creating an app, the portal generates your client credentials.

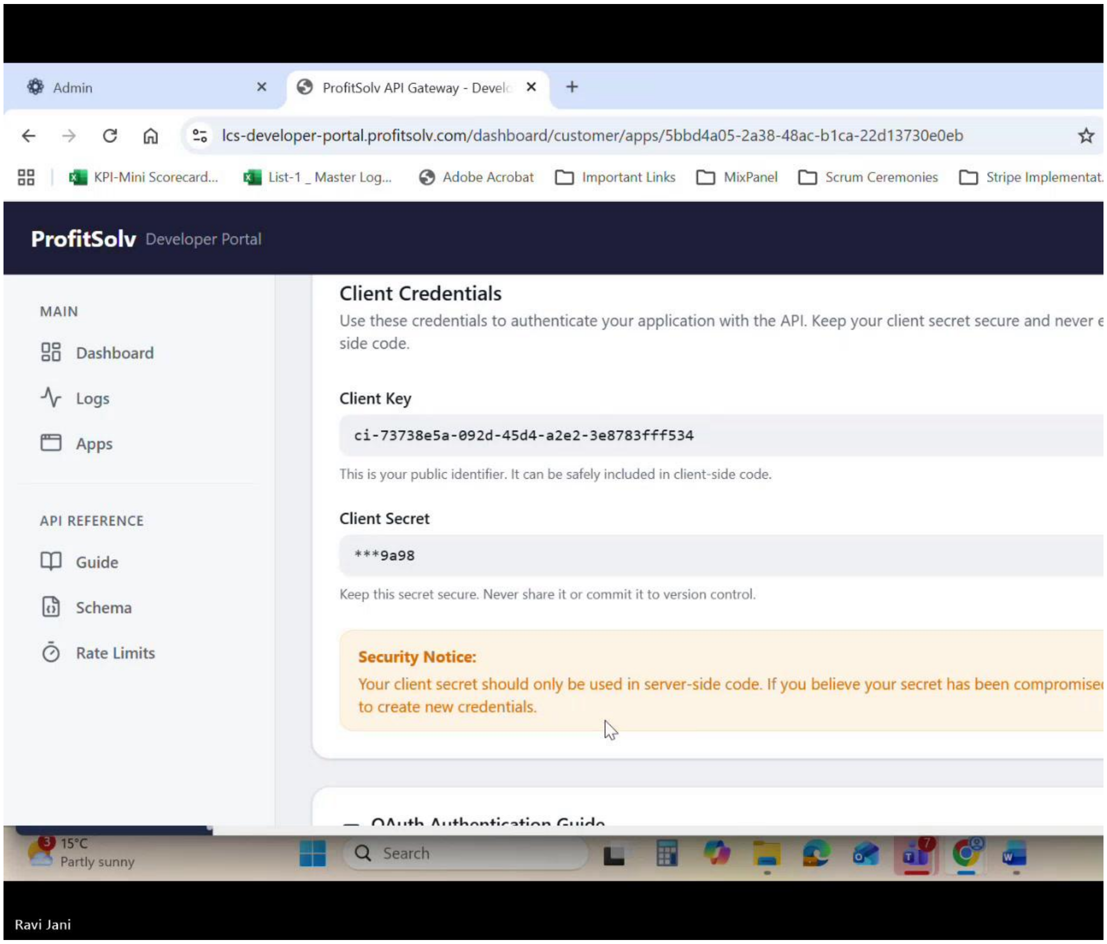

Figure 5: Client Credentials — Client Key and Client Secret with security notice

- **Client Key —** Your public identifier. Can be safely included in client-side code. Use the copy button for convenience.
- **Client Secret —** A confidential key that must **never** be shared with unauthorized individuals or committed to version control. Use only in server-side code.

Below the credentials, you will find the **OAuth Authentication Guide** with endpoint URLs and step-by-step instructions for:

1. Sending an authorization request to the ProfitSolv OAuth endpoint
2. Exchanging the authorization code for access and refresh tokens
3. Using tokens to authenticate subsequent API calls

> 🔒 *Treat your Client Secret like a password. Do not expose it in client-side code, public repositories, or share it with anyone not authorized to work on your integration. If compromised, use the Regenerate button to create new credentials.*

8. Using the API Documentation

The **Guide** section in the Developer Portal provides complete API documentation for all available endpoints.

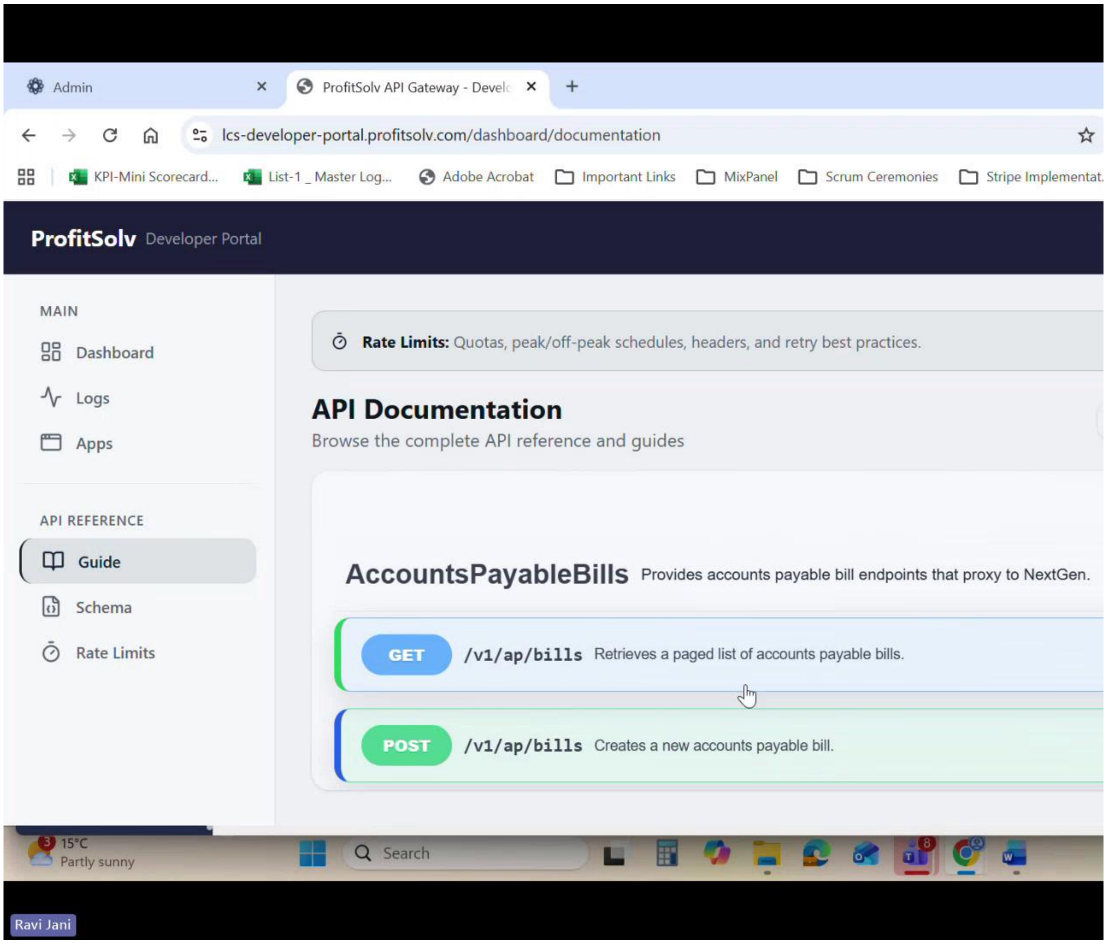

Figure 6: API Documentation — GET and POST endpoints for Accounts Payable Bills

Each API endpoint entry shows the HTTP method (GET, POST, PUT, DELETE), the URL path, and a description. Click on any endpoint to expand it and view the full request/response schema.

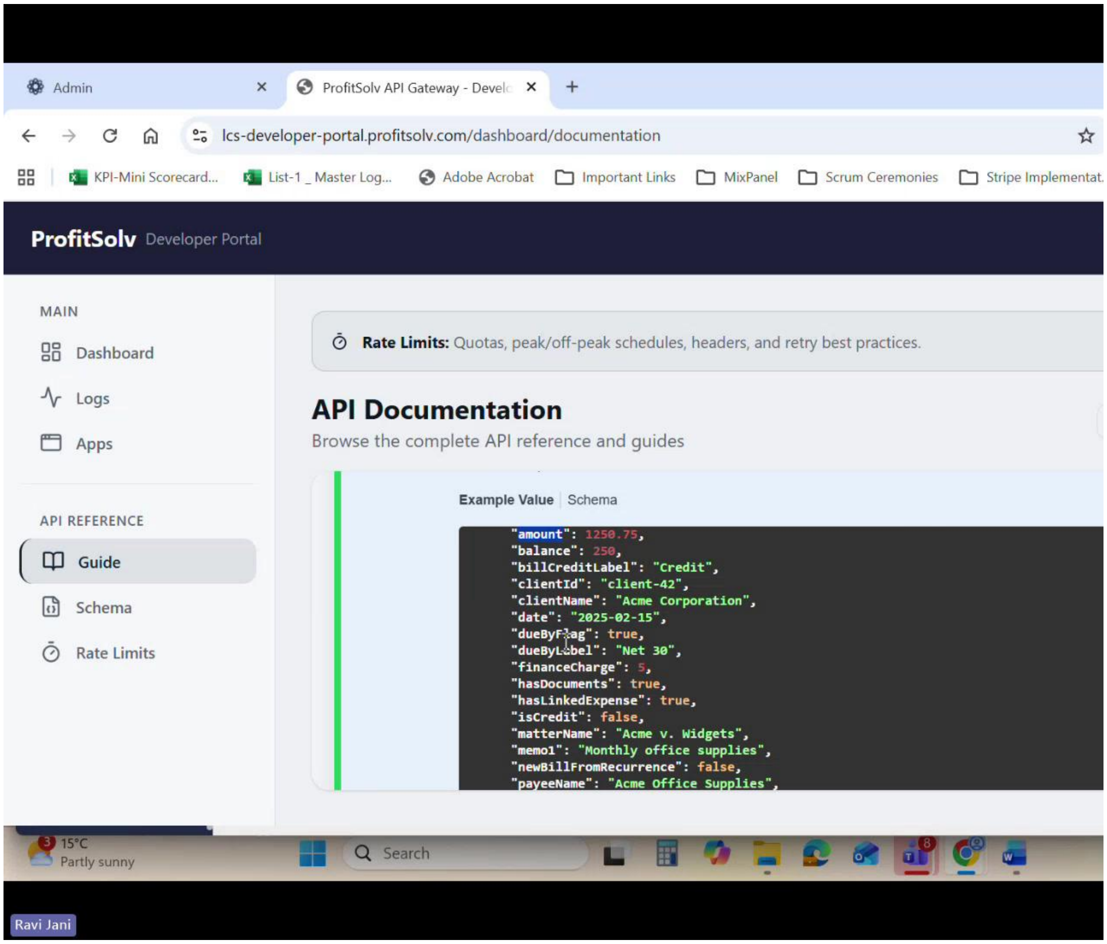

Figure 7: API Schema — Example JSON response with field definitions

Data areas currently covered include:

- Accounts Payable Bills
- Clients and Contacts
- Expenses
- Matters
- Time Entries

> 💡 *During the user period, some schemas may not expose every data field. Additional fields will be added based on feedback. If you need a specific field that is not currently available, please report it through your user contact.*

9. Webhook Subscriptions (Optional)

From the application detail page, you can create **webhook subscriptions** to receive real-time notifications when specific events occur in NextGen. This is optional and typically configured by your developer. Available event types include Accounts Payable Bills, Clients, Contacts, Expenses, Matters, and Time Entries.

10. API Rate Limits

To ensure system stability, NextGen enforces rate limits on API requests. Limits are applied per account and do not affect other tenants.

Window	Hours (Eastern Time)	Requests per Minute
Peak Hours	9:00 AM – 8:00 PM ET	60
Off-Peak Hours	8:00 PM – 9:00 AM ET	200

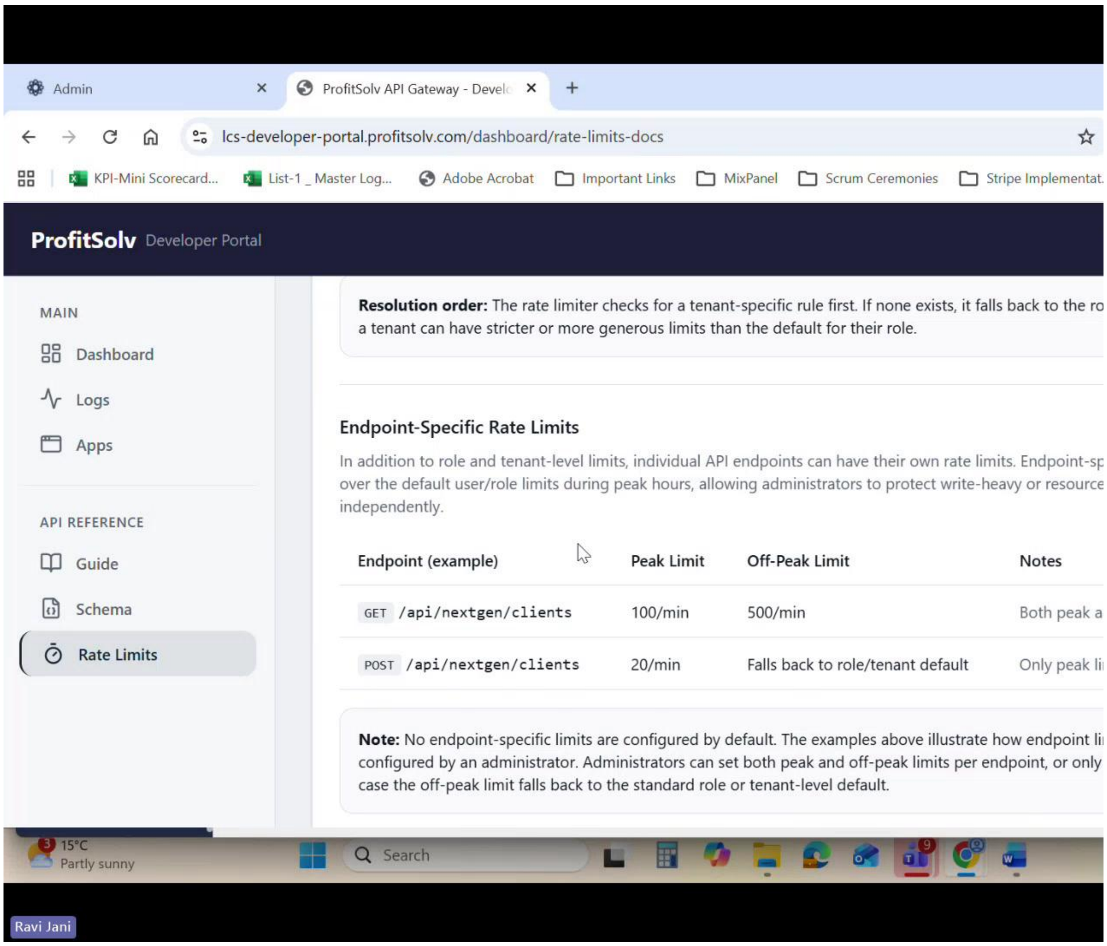

Figure 8: Endpoint-Specific Rate Limits in the Developer Portal

Additional rate-limit details:

- Individual endpoints can have their own limits (e.g., GET /api/nextgen/clients: 100/min peak, 500/min off-peak).
- Weekday and weekend schedules are pre-configured by the system.
- You can configure public holidays to adjust peak/off-peak windows for your region.
- Tenants may override certain limits from within the portal.
- If the rate limit is exceeded, the API returns an **error message** indicating the retry window.

11. Setting Up the Sandbox Environment

The sandbox lets you test API integrations safely without affecting live data. Access the sandbox options from the same Setup → Apps → API Integrations page where you enabled Open API.

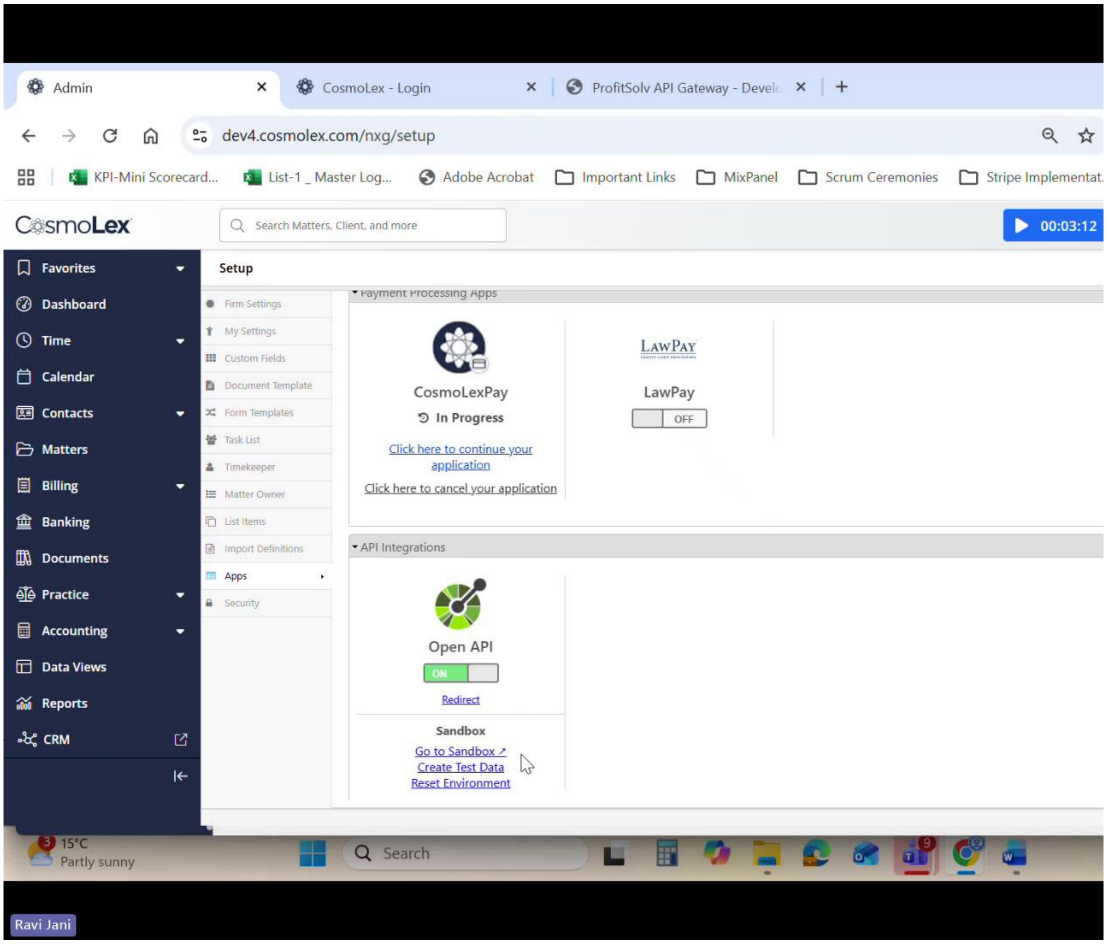

Figure 9: Sandbox options — Go to Sandbox, Create Test Data, and Reset Environment

Creating a Sandbox Account

1. In **Setup** → **Apps** → **API Integrations**, click **Go to Sandbox** or the sandbox creation option.
2. Enter your administrator credentials. If 2FA is enabled, provide your code when prompted.
3. The system displays your sandbox URL, username, and password.
4. **Copy and securely store these credentials immediately** (e.g., in a password manager). They may not be displayed again after closing the dialog.

Loading Test Data and Resetting

- Click **Create Test Data** and enter your admin credentials to populate the sandbox with sample records.
- Use the **Go to Sandbox** link to access the staging environment and verify test data.

- To start fresh, click **Reset Environment**. This deletes the sandbox account, allowing you to recreate from scratch.

12. Support Scope and Boundaries

Understanding what NextGen will and will not support is critical:

What We Support ☑	What We Do Not Support ✕
Access to the Open API platform and Developer Portal	Building or configuring your custom integration
API documentation, schemas, and endpoint reference	Troubleshooting third-party application errors
Investigating issues with the API itself (e.g., incorrect responses)	Configuring OAuth on your behalf
Exposing additional data fields based on feedback	Diagnosing why a third-party integration is failing
Sharing API documentation links and support articles	Providing development guidance or code reviews

13. Quick-Start Checklist

1. Confirm you have administrator access to your NextGen account.
2. Enable Open API via Setup → Apps → API Integrations.
3. Open the ProfitSolv Developer Portal.
4. Create your first App with the correct URLs and permission settings.
5. Copy and securely store your Client Key and Client Secret.
6. Set up OAuth authentication following the portal's OAuth Guide.
7. Create a Sandbox environment and load test data.
8. Test your API calls in the sandbox before going live.
9. Review rate limits and plan your request patterns accordingly.
10. Report any issues, missing fields, or feedback to your user contact.

14. Providing User Feedback

As a user participant, your feedback is invaluable. Please share:

- Any API errors or unexpected responses you encounter
- Data fields or endpoints you need that are not yet available
- Suggestions for improving the Developer Portal experience
- Your use case and integration scenario for our records

Thank you for participating in the NextGen Open API user. We look forward to your feedback and to making this feature even better for the full launch on April 22, 2026.