



# PostFinance SmartBusiness API



**PostFinance**

## What is an API?

An API (application programming interface) is a software system programming interface that can be used to connect other programs to the system.

## Purpose of the PostFinance SmartBusiness API

This connection allows external software programs to carry out a range of actions in PostFinance SmartBusiness without any human interaction and to define automated processes – which may not be available in PostFinance SmartBusiness.

Examples include webshop applications which automatically create an invoice in PostFinance SmartBusiness whenever goods or services are ordered, before sending it to the recipient by e-mail or post. The API can also be used to automatically synchronize a CRM system with the contact database in PostFinance SmartBusiness to avoid the need for multiple data entry.

Details of other connection options are given in the API documentation.

## Use of the API

In principle, the API is available to all SmartBusiness customers. However, knowledge of programming in any programming language is required in order to establish a connection.

## PostFinance SmartBusiness API and software communication

Our API is based on the REST standard and uses the widespread OAuth2 standard for authentication purposes. Structured information is exchanged via JSON (representational state transfer).

## Authentication options

The PostFinance SmartBusiness API supports two of the different OAuth2-based authentication options (grant types) available.

### 1. Client credentials

This option is implemented by the software manufacturer or developer when they want to access their data. For example: a company operates its own webshop and wants to create invoices and send them to the relevant customers automatically when orders are placed.

### 2. Authorization code

This option is used if the software or service interacts with third-party data without being the owner of this data.

For example: an online CRM service allows SmartBusiness users to synchronize their contacts. In this setup, the software manufacturer/service provider must also be a registered SmartBusiness customer.



## Customers interested in the API

Contact your software manufacturer to find out if the API can be connected to your software (shop, CRM, etc.).

## Test options for software manufacturers

Please register at [software-info@postfinance.ch](mailto:software-info@postfinance.ch). You will then receive an e-mail with your access data.

## Cost of API use

The API is free of charge and is one of the functions of PostFinance SmartBusiness. Users need a paid package (subscription) to interact with their own data in PostFinance SmartBusiness. Software manufacturers who simply need to register for test purposes or who require an authorization code for the authentication process are given free access (see test options for software manufacturers).

## Documentation

Full documentation including details of interactive testing options can be found via the following link: <https://api-smartbusiness.postfinance.ch/v2/doc/>

## Where can I find the answers to my questions?

Customers: please contact your software manufacturer.

Customer advisors: [smartbusiness@postfinance.ch](mailto:smartbusiness@postfinance.ch)

Software manufacturers: [software-info@postfinance.ch](mailto:software-info@postfinance.ch)