

API Specification Sheet

This document is a summary of the API endpoints based on the OpenAPI specification.

Full Documentation: <https://docs.api.tol-solo.com>

Quick Reference

Base URLs

Environment	URL
Production	https://solo.transferonline.com
Sandbox	https://sandbox.solo.transferonline.com

Authentication

All API requests require Bearer token authentication using OAuth 2.0 Client Credentials flow.

Required Headers:

Header	Value
Authorization	Bearer YOUR_ACCESS_TOKEN
Content-Type	application/json

Response Codes

Code	Status	Description
200	OK	Request succeeded
400	Bad Request	Invalid parameters or malformed request
401	Unauthorized	Invalid or expired access token
403	Forbidden	Insufficient permissions for this resource
404	Not Found	Resource does not exist
409	Conflict	Duplicate request (idempotencyId already used)
500	Internal Server Error	Server-side error

What's New (2025-12-12)

New Response Fields

The following endpoints now return additional fields:

Endpoint	New Fields
GET /api/v1/Issuer/shareholder/details	shareholderTypeEnum, customerCertificateId, controlCertificateId
GET /api/v1/Issuer/shareholder/cap/table	shareholderTypeEnum
GET /api/v1/Shareholder/Details	TypeEnum

New Request Parameters

Endpoint	New Parameter	Description
POST /api/v1/Shareholder/CreateOrUpdate	idempotencyId	Unique identifier to prevent duplicate request submissions
POST /api/v1/Transaction/CreateNewIssuance	idempotencyId	Unique identifier to prevent duplicate request submissions

New JSON Response: Transaction List

POST /api/v1/Report/Generate/Transaction/List now supports a new ReturnJSON parameter. When set to true, the endpoint returns full transaction data as JSON instead of a PDF download URL.

New Request Parameter: ReturnJSON (boolean) - When true, overrides IsPDF and returns transaction data as JSON.

See full documentation for complete JSON response structure.

Certificate

Method	Path	Description	Auth
GET	/api/v1/Certificate/GetHoldingCertificates	Retrieve holding certificates for a specified shareholder.	Yes

Dividend

Method	Path	Description	Auth
GET	/api/v1/Dividend/GetList	Retrieve a list of dividends for an issuer.	Yes

Method	Path	Description	Auth
POST	/api/v1/Dividend/ GenerateDividendDetails	Generate a detailed report for a specified dividend.	Yes

Issuer

Method	Path	Description	Auth
GET	/api/v1/Issuer/GetIssuerSecurityTypes	Retrieve security types associated with an issuer.	Yes
GET	/api/v1/Issuer/ GetIssuerActiveCertificateDefinitions	Retrieve active certificate definitions for an issuer.	Yes
GET	/api/v1/Issuer/ GetTransferAgentIssuers	Retrieve a list of issuers using transfer agents.	Yes
GET	/api/v1/Issuer/GetIssuerBalance	Retrieve balance information for a specified issuer.	Yes
GET	/api/v1/Issuer/shareholder/cap/table	Retrieve shareholder cap table for a specified issuer.	Yes
GET	/api/v1/Issuer/shareholder/details	Retrieve shareholder details for a specified issuer.	Yes

Proxy

Method	Path	Description	Auth
GET	/api/v1/Proxy/GetList	Retrieve a list of proxies for an issuer.	Yes
POST	/api/v1/Proxy/GenerateProxyDetails	Generate details for a specific proxy.	Yes

Report

Method	Path	Description	Auth
GET	/api/v1/Report/GetTA2Report	Retrieve TA2 report data.	Yes
GET	/api/v1/Report/ GetOwnershipPercentage	Retrieve ownership percentage details.	Yes
GET	/api/v1/Report/GetDilutedPercentage	Retrieve diluted ownership percentage for an issuer.	Yes
POST	/api/v1/Report/ GenerateDilutedPercentage	Generate a diluted percentage report.	Yes

Method	Path	Description	Auth
POST	/api/v1/Report/GenerateShareholderList	Generate a detailed shareholder list report.	Yes
POST	/api/v1/Report/GenerateHoldingsStatement	Generate a holdings statement for shareholders.	Yes
POST	/api/v1/Report/GenerateDRSStatement	Generate a DRS (Direct Registration System) statement.	Yes
POST	/api/v1/Report/GenerateRejectionList	Generate a rejection list report.	Yes
POST	/api/v1/Report/GenerateIssuerContacts	Generate a report of issuer contacts.	Yes
POST	/api/v1/Report/GenerateMailingLabels	Generate mailing labels for an issuer.	Yes
POST	/api/v1/Report/Generate/Issuer/Balance	Generate an issuer balance report by security type.	Yes
POST	/api/v1/Report/Generate/Ownership/Percentage	Generate an ownership percentage report.	Yes
POST	/api/v1/Report/Generate/Transaction/List	Generate a transaction list for a specified date range.	Yes
POST	/api/v1/Report/Generate/Control/Book	Generate a control book report.	Yes
GET	/api/v1/Report/DownloadReport/{fileCode}/{fileName}/{accessCode}	Download a previously generated report.	Yes

Shareholder

Method	Path	Description	Auth
POST	/api/v1/Shareholder/CreateOrUpdate	Create a new shareholder or update an existing record.	Yes
GET	/api/v1/Shareholder/Details	Retrieve detailed information for a single shareholder.	Yes
GET	/api/v1/Shareholder/GetHoldingSummary	Retrieve a summary of holdings for a shareholder.	Yes
GET	/api/v1/Shareholder/Details/List	Retrieve a list of shareholder details.	Yes

Transaction

Method	Path	Description	Auth
POST	/api/v1/Transaction/ GenerateTransactionDetails	Generate transaction details for completed transactions.	Yes
POST	/api/v1/Transaction/ CreateNewIssuance	Create a new share issuance transaction.	Yes
GET	/api/v1/Transaction/ GetTASStatusTransactions	Retrieve TA status transaction information.	Yes
POST	/api/v1/Transaction/ GenerateTransactions	Generate transaction records.	Yes

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