**Practice Management System (PMS)**

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API Document (Mobile App)

### **API List:**

|  |  |  |
| --- | --- | --- |
| **SL. No** | **Module Name** | **Total API** |
| 1 | System Login | 6 |
| 2 | Dashboard and Notification | 17 |
| 3 | Client Management | 12 |
| 4 | File Management | 16 |
| 5 | Payment Management | 7 |
| 6 | Payroll Setup | 5 |
| 7 | Task Management | 12 |
| **Total API** | | **75** |

## **Details List:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Sl. No** | **Module Name** | **APIName** | **URL** | **Status** |
| 1 | Login | Login API | base\_url/login | In-Progress |
| 2 | Profile Update | base\_url/user/image/update | In-Progress |
| 3 | Login ID change | base\_url/login-id/change | In-Progress |
| 4 | Password Change | base\_url/password/change | In-Progress |
| 5 | Profile Picture | base\_url/user/image/update | In-Progress |
| 6 | Signature Update or Change | base\_url/user/signature/update | In-Progress |
| 7 | Dashboard & Notification | Dashboard API | base\_url/dashboard | Done |
| 8 | Notification-device registration API | base\_url/device/register | In-Progress |
| 9 | Notification List API | base\_url/notification/list | In-Progress |
| 10 | Active Task | base\_url/activetasks/list?month=4&year=2024 | In-Progress |
| 11 | Task List by Id | base\_url/tasks/list/?taskid=10 | In-Progress |
| 12 | What's up today API | base\_url/what’suptoday?date=1/12/2024 | In-Progress |
| 13 | Contract documents API | base\_url/contract/documents/list | In-Progress |
| 14 | Receive identification documents API | base\_url/identification/documents | In-Progress |
| 15 | Client list API | base\_url/client/list | In-Progress |
| 16 | Received contract service documents list API | base\_url/contract/service/document/list | In-Progress |
| 17 | Received contract service Document Verify API | base\_url/contract/service/document/Verify | In-Progress |
| 18 | Received contract service Document Reject API | base\_url/contract/service/document/reject | In-Progress |
| 19 | Received contract service Document Delete API | base\_url/contract/service/document/delete | In-Progress |
| 20 | Received contract service Delivery Document API | base\_url/contract/service/delivery/document/list | In-Progress |
| 21 | Received contract service Delivery Document Verify API | base\_url/contract/service/delivery/document/Verify | In-Progress |
| 22 | Received contract service Delivery Document Reject API | base\_url/contract/service/delivery/document/reject | In-Progress |
| 23 | Received contract service Delivery Document Delete API | base\_url/contract/service/delivery/document/delete | In-Progress |
| 24 | Client Management | Registered Client API | base\_url/registeredclients | In-Progress |
| 25 | Active & Inactive Clients API | base\_url/client/profile/status | In-Progress |
| 26 | Client Profile share API | base\_url/client/share/profile | In-Progress |
| 27 | Template List API | base\_url/templates | In-Progress |
| 28 | Push Notification API | base\_url/push\_notification | In-Progress |
| 29 | Email Notification API | base\_url/email/notify | In-Progress |
| 30 | SMS Notification API | base\_urll/send/sms | In-Progress |
| 31 | Contract Document List API | base\_url/contract/documents/list | In-Progress |
| 32 | Contract Documents by Client ID API | base\_url/contract/documents/list/{client\_id} | In-Progress |
| 33 | Approve API(Engagement & 64-8 letter) API | base\_url/document/approve | In-Progress |
| 34 | Reject API(Engagement Letter or 64-8 letter) | base\_url/document/reject | In-Progress |
| 35 | Send Email Query | base\_url/contract/send/email-query | In-Progress |
| 36 | File Management | View Documents | base\_url/documents | In-Progress |
| 37 | Client list API | base\_url/client/list | In-Progress |
| 38 | Contracts list API | base\_url/contracts/list | In-Progress |
| 39 | Task list API | base\_url/task/list | In-Progress |
| 40 | Sub task list API | base\_url/sub/task/list | In-Progress |
| 41 | Service Group view API | base\_url/service/group/view | In-Progress |
| 42 | Service document list API | base\_url/service/document/list | In-Progress |
| 43 | Service document verify API | base\_url/service/document/verify | In-Progress |
| 44 | Service document reject API | base\_url/service/document/reject | In-Progress |
| 45 | Service document delete API | base\_url/service/document/delete | In-Progress |
| 46 | Service document upload API | base\_url/service/document/upload | In-Progress |
| 47 | Service delivery document list API | base\_url/service/delivery/document/list | In-Progress |
| 48 | Service delivery document verify API | base\_url/service/deliver/document/verify | In-Progress |
| 49 | Service delivery document reject API | base\_url/service/delivery/document/reject | In-Progress |
| 50 | Service delivery document delete API | base\_url/service/delivery/document/delete | Done |
| 51 | Service Delivery document upload API | base\_url/service/document/upload | Done |
| 52 | Payment Management | Invoice List | base\_url/invoice/list | Done |
| 53 | Deposit List | base\_url/deposit/list | Done |
| 54 | Deposit Approve list | base\_url/deposit/approve | Done |
| 55 | Deposit Reject list | base\_url/deposit/reject | Done |
| 56 | Deposit Delete list | base\_url/deposit/delete | Done |
| 57 | Direct debit confirmation/make list | base\_url/direct-debit/list | Done |
| 58 | Direct debit confirmation/make | base\_url/direct-debit/confirm | Done |
|  |  | Make payment | base\_url/make-payment | In-Progress |
| 59 | Payroll Setup | Client List | base\_url/client/list | Done |
| 60 | Contracts List | base\_url/contracts/list | Done |
| 61 | Task List | base\_url/task/list | Done |
| 62 | Sub-task List | base\_url/sub/task/list | Done |
| 63 | Payroll Set-up save | base\_url/payroll/save | Done |
| 64 | Task Management | Task List | base\_url/task/list | Done |
| 65 | Check missing info and documents | base\_url/missing/documents/check | Done |
| 66 | Add Task Note | base\_url/task/note/add | Done |
| 67 | Client Sub-task List |  | In-Progress |
| 68 | Task Note List | base\_url/task/note/list | Done |
| 69 | Task Time Log | base\_url/task/time/log | Done |
| 70 | Task Delete | base\_url/task/delete | Done |
| 71 | Generate Invoice | base\_url/invoice/generate | Done |
| 72 | Task Action | base\_url/task/action | In-Progress |
| 73 | Task Edit | base\_url/task/edit | Done |
| 74 | Task Progress list | base\_url/tasks/progress/list | Done |
| 75 | Task Progress Set-up | base\_url/tasks/progress/setup | In-Progress |

Login and profile

## **1. Login API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/login |
| **Authorization** : Bearer {{token}} | false |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | Token |
| Password | profile information |
|  | user\_role |

## **2.Profile update API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/profile/update |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| employee\_code | {  "status": "success",  "message": "user profile update successfully",  } |
| titte |
| first\_name |
| last\_name |
| designation |  |
| email |  |
| mobile |  |
| birth\_date |  |
| nid |  |
| passport |  |
| driving\_licence |  |
| gender |  |
| nationality |  |

## **3. Login id change API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/login-id/change |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| login\_id | {  “Status”: “success”,  “Message”:”login id has been changed ”  } |

## **4. Password change API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/password/change |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| current\_password | {  "status": "success",  "message":" "  } |
| new\_password |
| confirm\_password |
|  |

## 

## **5.Profile picture API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/user/image/update |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  “Status”: “success”,  “message”:” ”  } |
| image( base 64) |  |

## **6. Signature update/change API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/user/signature/update |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  “Status”: “success”,  “message”:” ”  } |
| image( base 64) |  |

Dashboard and Notification

## **1. Dashboard API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/dashboard |
| Authorization : Bearer {{token}} | true |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | contract documents for approval count |
|  | receive identification documents |
|  | received contract documents |
|  | received Service delivery documents |
|  | ~~what's up today task count~~ |
|  | percentage of completed active task |
|  | total client count |
|  |  |

## **2. Notification-device registration API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/device\_registration |
| Authorization : Bearer {{token}} | true |

|  |  |
| --- | --- |
| Request Body | Response |
| device\_token | Success or Error Message |
| User\_id |  |

## **3. Notification List API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/notification/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| User\_id | Status |
| page | Total Notification Count |
| limit | Notification list ->Title, body, date & time |

## 

## **4. Active Task API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/activetasks/list?month=4&year=2024 |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "list\_count": 5,  "data": [  {  "task\_id": 28,  "service\_name": "Accounts Preparation and Submission",  "period": "01-Aug-2023 12:00 AM ~ 31-Jul-2024 11:59 PM",  "client": "3 STAR SUB LIMITED",  "deadline": "30-Apr-2025",  "status": "Manager Approval"  },  {  "task\_id": 30,  "service\_name": "Payroll Sep-2024",  "period": "01-Sep-2024 12:00 AM ~ 30-Sep-2024 11:59 PM",  "client": "3 STAR SUB LIMITED",  "deadline": "05-Oct-2024",  "status": "Preparation"  },  {  "task\_id": 31,  "service\_name": "Corporation Tax Return Preparation and Submission",  "period": "01-Aug-2023 12:00 AM ~ 31-Jul-2024 11:59 PM",  "client": "3 STAR SUB LIMITED",  "deadline": "30-Apr-2025",  "status": "Manager Approval"  },  {  "task\_id": 237,  "service\_name": "Accounts Preparation and Submission",  "period": "05-Jul-2023 12:00 AM ~ 31-Jul-2024 11:59 PM",  "client": "SHAN GROCERIES LTD",  "deadline": "05-Apr-2025",  "status": "Preparation"  },  {  "task\_id": 239,  "service\_name": "Corporation Tax Return Preparation and Submission",  "period": "05-Jul-2023 12:00 AM ~ 31-Jul-2024 11:59 PM",  "client": "SHAN GROCERIES LTD",  "deadline": "05-Apr-2025",  "status": "Preparation"  }  ]  } |
| limit |
| page |
|  |
|  |
|  |

## 

## **5. Task List by Id**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/tasks/list/?taskid=10 |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "recordsTotal": 1,  "data": [  {  "sl": 1,  "id": 184,  "client": {  "id": 2,  "name": "JERK & JOLLOF LTD",  "address\_one": "",  "address\_two": "",  "area": "",  "postcode": "",  "contact\_person\_name": "",  "email": ""  },  "task": "VAT Return Preparation and Submission",  "responsible\_person": "Mr Tarif Ashraf",  "target\_date": "05-Sep-2024 11:59 PM",  "deadline": "07-Oct-2024 11:59 PM",  "status": "Active",  "task\_priority": 1,  "payment\_days": 30,  "reminder\_days": 5,  "contract": {  "id": 2,  "contract\_name": "",  "contract\_short\_name": "",  "sub\_total": 0.0,  "discount": 0.0  }  }  ]  } |
| limit |
| page |
| search\_key |
|  |
|  |

## **6. What's up today API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/what’suptoday?date=1/12/2024 |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "total\_count": 3,  "data": [  {  "service\_name": "Payroll Sep-2024",  "period": "01-Sep-2024 ~ 30-Sep-2024",  "client": "1START TRADING LIMITED",  "manager": "Mr Alen Jack",  "colleague": "Mrs Cheri Hassly"  },  {  "service\_name": "Payroll Sep-2024",  "period": "01-Sep-2024 ~ 30-Sep-2024",  "client": "1START TRADING LIMITED",  "manager": "Mr Ehsan",  "colleague": "Mrs Hosne"  }  ]  } |
| limit |
| page |
|  |
|  |
|  |

## **7.Contract documents list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/documents/list |
| Authorization : Bearer {{token}} | TRUE5 |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "recordsTotal": 38,  "data": [  {  "sl": 1,  "id": 63,  "client\_name": "[23] 2 BE BEAUTIFUL LIMITED",  "client\_id": 79,  "service\_start\_date": "09-Sep-2024 12:00 AM",  "service\_end\_date": "31-Aug-2024 12:00 AM",  "status": "Active",  "document\_name": "-",  "row\_type": true  },  {  "sl": "1.1",  "id": 295,  "client\_name": "2 BE BEAUTIFUL LIMITED ",  "client\_id": 79,  "service\_start\_date": "09-Sep-2024 12:00 AM",  "service\_end\_date": "31-Aug-2024 12:00 AM",  "document\_name": "Engagement Letter",  "status": "Approved",  "status\_id": 2,  "row\_type": false  },  {  "sl": 2,  "id": 62,  "client\_name": "[22] 2 BE BEAUTIFUL LIMITED",  "client\_id": 79,  "service\_start\_date": "01-Jan-1970 12:00 AM",  "service\_end\_date": "01-Jan-1970 12:00 AM",  "status": "Active",  "status\_id": "",  "document\_name": "-",  "row\_type": true  },],} |
| search\_key |
| limit |
| page |

## **8.Received Identification documents API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/identification/documents |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | {  "status": "success",  "files": [  {  "fileId": 1,  "fileName": "images.jpeg",  "description": "Copy of Passport",  "uploadedBy": "Miss Adiba Islam",  "uploadedDate": "2024-06-23T11:48:29",  "fileType": "jpeg",  "fileSize": "6.38KB",  "verificationStatus": "Verified",  "fileUrl": "https://example.com/files/images.jpeg"  },  {  "fileId": 2,  "fileName": "8TGKygETa.jpg",  "description": "Copy of Driving License",  "uploadedBy": "Miss Adiba Islam",  "uploadedDate": "2024-06-23T11:48:46",  "fileType": "jpg",  "fileSize": "45.89KB",  "verificationStatus": "Verified",  "fileUrl": "https://example.com/files/8TGKygETa.jpg"  },  {  "fileId": 3,  "fileName": "abc.jpeg",  "description": "Copy of Utility Bill",  "uploadedBy": "Miss Adiba Islam",  "uploadedDate": "2024-06-23T11:49:10",  "fileType": "jpeg",  "fileSize": "8.30KB",  "verificationStatus": "Verified",  "fileUrl": "https://example.com/files/abc.jpeg"  }  ]  } |
|  |
|  |
|  |

## **9.Client list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/client/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| search\_key | {  "status": "success",  "totalCount": 2,  "clients": [  {  "id": 1,  "name": "JERK & JOLLOF LTD"  },  {  "id": 2,  "name": "[B4] BUCKS VIEW TRADERS"  }  ]  } |
| Limit |
| page |
| user\_id |

## **10.Received contract service document list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/document/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "Success",  "services": [  {  "service\_id": 1,  "service\_name": "Accounts Preparation and submission",  "total\_files": 5,  "files": [  {  "file\_id": 1,  "name": "Your Sales Listing/ Invoices",  "file\_count": 5,  "status": "Verified",  "documents": [  {  "document\_name": "ABC.pdf",  "uploader\_name": "Mr.hasu",  "verifier": "Mr.xyz",  "status": "Approved",  "url": "https://example.com/ABC",  "download\_url": "https://example.com/download/ABC"  },  {  "document\_name": "TXY.pdf",  "uploader\_name": "John Doe",  "verifier": "Jane Smith",  "status": "Pending",  "url": "https://example.com/TXY",  "download\_url": "https://example.com/download/TXY"  },  {  "document\_name": "CST.pdf",  "uploader\_name": "Alice Johnson",  "verifier": "Robert Brown",  "status": "Rejected",  "url": "https://example.com/CST",  "download\_url": "https://example.com/download/CST"  }  ]  }  ]  }  ]  } |
|  |
|  |
|  |

## **11. Received contract service Document Verify API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/document/Verify |
| Authorization : Bearer {{token}} | TRUE |

## **12. Received contract service Document Reject API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/document/reject |
| Authorization : Bearer {{token}} | TRUE |

## **13. Received contract service Document Delete API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/document/delete |
| Authorization : Bearer {{token}} | TRUE |

### 

## **14.Received contract service Delivery Document API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/delivery/document/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "Success",  "services": [  {  "service\_id": 1,  "service\_name": "Accounts Preparation and submission",  "total\_files": 5,  "files": [  {  "file\_id": 1,  "name": "Service Delivery Documents",  "file\_count": 5,  "status": "Verified",  "documents": [  {  "document\_name": "ABC.pdf",  "uploader\_name": "Mr.hasu",  "verifier": "Mr.xyz",  "status": "Approved",  "url": "https://example.com/ABC",  "download\_url": "https://example.com/download/ABC"  },  ]  }  ]  }  ]  } |
|  |
|  |
|  |

### 

## **15 Received contract service Delivery Document Verify API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/delivery/document/Verify |
| Authorization : Bearer {{token}} | TRUE |

## **16 Received contract service Delivery Document Reject API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/delivery/document/reject |
| Authorization : Bearer {{token}} | TRUE |

## 17.Received contract service Delivery Document Delete API

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/service/delivery/document/delete |
| Authorization : Bearer {{token}} | TRUE |

### 

Client management

## **1. Registered Client**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/registeredclients |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | Status |
| search\_key | total client count |
| limit | incorporation number |
| page | client list |
|  | phone number |
|  | active status |
|  | shareholder and director count |
|  | contract count |
|  | application user count |
|  | service count |
|  | document count |
|  | business\_info : > Business name  > Business email  > Business Phone  > Business Address  > Incorporation number  > Incorporation date |
|  | contact\_info : > name  > email  > mobile |
|  | login\_info : > username |
|  | business\_account\_info : > Unique text reference  > What's the incorporation number  > Business start date  > Manager name  > colleague name |
|  | application\_user : application user list - > name  > employee code  > email  > phone |

## **2. Active Inactive Clients API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/client/profile/status |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | Status |
| status | massage |

## **3. Client share profile API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/client/share/profile |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | Status |
| contact\_person\_email | Message |

## **4.Template List API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/templates |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
|  | Status |
|  | template list- > template name  > template content data |

## **5. Push-notification API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/push\_notification |
| Authorization : Bearer {{token}} | TRUE |
|  |  |
|  |  |
| Request Body | Response |
| client\_id | status |
| title | message |
| message |  |

## **6. Email notify API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/email/notify |
| Authorization : Bearer {{token}} | TRUE |
| Request Body | Response |
| contract\_person\_email | status |
| subject | message |
| template\_content |  |
| attachment-list |  |

## **7. SMS notify API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_urll/send/sms |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| mobile\_number | status |
| sms\_content | message |

## **8.Contract documents list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/documents/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "recordsTotal": 38,  "data": [  {  "sl": 1,  "id": 63,  "client\_name": "[23] 2 BE BEAUTIFUL LIMITED",  "client\_id": 79,  "service\_start\_date": "09-Sep-2024 12:00 AM",  "service\_end\_date": "31-Aug-2024 12:00 AM",  "status": "Active",  "document\_name": "-",  "row\_type": true  },  {  "sl": "1.1",  "id": 295,  "client\_name": "2 BE BEAUTIFUL LIMITED ",  "client\_id": 79,  "service\_start\_date": "09-Sep-2024 12:00 AM",  "service\_end\_date": "31-Aug-2024 12:00 AM",  "document\_name": "Engagement Letter",  "status": "Approved",  "status\_id": 2,  "row\_type": false  },  {  "sl": 2,  "id": 62,  "client\_name": "[22] 2 BE BEAUTIFUL LIMITED",  "client\_id": 79,  "service\_start\_date": "01-Jan-1970 12:00 AM",  "service\_end\_date": "01-Jan-1970 12:00 AM",  "status": "Active",  "status\_id": "",  "document\_name": "-",  "row\_type": true  },],} |
| search\_key |
| limit |
| page |

## 

## **9.Contract documents by Client id**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/documents/list/{client\_id} |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "recordsTotal": 2,  "data": [  {  "sl": 1,  "id": 63,  "client\_name": "[23] 2 BE BEAUTIFUL LIMITED",  "client\_id": 79,  "service\_start\_date": "09-Sep-2024 12:00 AM",  "service\_end\_date": "31-Aug-2024 12:00 AM",  "status": "Active",  "document\_name": "-",  "row\_type": true  },  {  "sl": "1.1",  "id": 295,  "client\_name": "2 BE BEAUTIFUL LIMITED ",  "client\_id": 79,  "service\_start\_date": "09-Sep-2024 12:00 AM",  "service\_end\_date": "31-Aug-2024 12:00 AM",  "document\_name": "Engagement Letter",  "status": "Approved",  "status\_id": 2,  "row\_type": false  },  },],} |
| search\_key |
| limit |
| page |

## 

## **10. Approve API(Engagement Letter or 64-8 letter) API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/document/approve |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | status |
| template\_id | message |

## **11. Reject API(Engagement Letter or 64-8 letter) API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/document/reject |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | status |
| template\_id | message |

## **12.Send email query API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contract/send/email-query |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | status |
| template\_id | message |
| email\_id |  |

File management

## **1.View documents API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/documents |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| type\_name | {  "status": "success",  "recordsTotal": 21,  "data": [  {  "name": "THE BACK GRILL LTD",  "total\_files": 12,  "modified": "06-Nov-2024 09:26 AM",  "Files": [  {  "file\_name": "Abc.pdf",  "file\_size": "12kb",  "Url": "",  "modified": "06-Nov-2024 09:26 AM"  }  ]  },  {  "name": "ROUNDS CARS LIMITED",  "total\_files": 5,  "modified": "06-Nov-2024 09:26 AM",  "Files": [  {  "file\_name": "xyz.jpg",  "file\_size": "12kb",  "Url": "",  "modified": "06-Nov-2024 09:26 AM"  }  ]  }  ]  } |
| search\_key |
| limit |
| page |

\* type\_name: clent, service, year, documents,document group

## **2.Client list API**

|  |  |
| --- | --- |
| **Method** | **URL** |
| Post | base\_url/client/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| **Request Body** | **Response** |
| user\_id | {  "status": "success",  "message": "Client and contract data successfully retrieved.",  "data": [  { "id": 2, "name": "JERK & JOLLOF LTD" },  { "id": 4, "name": "BANGLADESH MEDIA CENTRE LONDON LTD" },  { "id": 5, "name": "SHAN FISHERIES LTD" },  { "id": 6, "name": "SHAN GROCERIES LTD" },  { "id": 7, "name": "WESTERN MANAGEMENT LTD" },  { "id": 8, "name": "LQ ESTATES LIMITED" },  { "id": 9, "name": "MY VILLAGE LTD" },  { "id": 10, "name": "ARTISANBURGERHW LTD" },  { "id": 12, "name": "BRAJSITTINGBOURNE LIMITED" },  { "id": 13, "name": "CAKES & SWEETS LTD" },  { "id": 14, "name": "B&W GLOBAL LIMITED" },  { "id": 15, "name": "BA LONDON RAILS LTD" },  { "id": 16, "name": "BUCKS VIEW TRADERS LIMITED" },  { "id": 17, "name": "BUCKSVILL TRADERS LIMITED" },  { "id": 19, "name": "C24 CLEANING SERVICES LTD" },  { "id": 20, "name": "JAK'S CAFE & LAUNDRETTE LIMITED" },  { "id": 21, "name": "CHAPTER ONE CREATIONS LTD" },  { "id": 23, "name": "A-RUN TRANSPORTATION LTD" },  { "id": 24, "name": "A&E HYGIENE AND THERAPY LTD" },  { "id": 25, "name": "KAMPUS GROUP LTD" },  { "id": 26, "name": "R CARS NORTHAMPTON LTD" },  { "id": 28, "name": "ALLIANCE WEALTH LIMITED" },  { "id": 31, "name": "Hasham" },  { "id": 34, "name": "SMERT CARE RECRUITMENT LTD" },  { "id": 36, "name": "IDL 09 LTD" },  { "id": 37, "name": "ECOMMAND SOFTWARE LIMITED" },  { "id": 39, "name": "SPRING KINGDOM LTD" },  { "id": 40, "name": "SKILLS ZONE TRAINING & DEVELOPMENT LIMITED" },  { "id": 41, "name": "ROUNDS CARS LIMITED" },  { "id": 45, "name": "THE BACK GRILL LTD" },  { "id": 47, "name": "CSR RENTALS LTD" },  { "id": 76, "name": "1START TRADING LIMITED" },  { "id": 79, "name": "2 BE BEAUTIFUL LIMITED" }  ]  } |
|  |
|  |
|  |

## **3.Contracts list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contracts/list |
| Authorization : Bearer {{token}} | TRUE |

## 

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | {  "status": "success",  "message": "contract data successfully retrieved.",  "data": [  { "id": "1", "name": "[J2] JERK & JOLLOF LTD" },  { "id": "2", "name": "[J3] JERK & JOLLOF LTD" }  ],  } |
|  |
|  |
|  |

## **4. Task list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| contract\_id | {  "status": "success",  "message": "Task data successfully retrieved.",  "data": [  { "id": 171, "name": "Payroll Jun-2024" }  ]  } |
|  |
|  |
|  |

## **5. Sub task list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/sub/task/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "message": "sub Task data successfully retrieved.",  "data": [  { "id": 171, "name": "Payroll Jun-2024" }  ]  } |
|  |
|  |
|  |

## **6. Service Group view API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/group/view |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "Success",  "data": [  {  "group\_id": 1,  "group\_name": "Service document",  "verify": 1,  "reject": 2,  "send\_for\_verification": 0  },  {  "group\_id": 2,  "group\_name": "Service delivery document",  "verify": 1,  "reject": 2,  "send\_for\_verification": 0  }  ]  } |
| contact\_id |
| Task\_id |
| Sub\_task\_id |

## **7. Service document list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/document/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "success",  "documents": [  {  "id": 1,  "document\_name": "Your sales listing",  "uploader": "",  "verifier": "",  "status": "",  "doc\_files": [  {  "id": 1,  "file\_name": "",  "file\_type": "",  "status": "",  "url": "",  "download\_url": ""  }  ]  }  ]  } |
| contact\_id |
| Task\_id |
| Sub\_task\_id |
| Service\_group\_id |

## **8.Service document verify API**

| Method | URL |
| --- | --- |
| Post | base\_url/service/document/veify |
| Authorization : Bearer {{token}} | TRUE |

## **9.Service document reject API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/document/reject |
| Authorization : Bearer {{token}} | TRUE |

## **10.Service document delete API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/document/delete |
| Authorization : Bearer {{token}} | TRUE |

## **11.Service document upload API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/document/upload |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "success",  “Message”: “File upload success”  } |
| contact\_id |
| Task\_id |
| sub\_task\_id |
| Group\_id |
| document\_id |
| file(base\_64) |  |

## **12. Service delivery document list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/delivery/document/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "success",  "documents": [  {  "id": 1,  "documennt\_name": "Service Delivery Documents",  "uploader": "",  "verifier": "",  "status": "",  "doc\_files": [  {  "file\_id": 1,  "file\_name": "",  "file\_type": "",  "status": "",  "url": "",  "download\_url": ""  }  ]  }  ]  } |
| contact\_id |
| Task\_id |
| Sub\_task\_id |
| Service\_group\_id |

## **13.Service delivery document verify API**

| Method | URL |
| --- | --- |
| Post | base\_url/service/deliver/document/verify |
| Authorization : Bearer {{token}} | TRUE |

## **14.Service delivery document reject API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/delivery/document/reject |
| Authorization : Bearer {{token}} | TRUE |

## **15.Service delivery document delete API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/delivery/document/delete |
| Authorization : Bearer {{token}} | TRUE |

## **16.Service Delivery document upload API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/service/document/upload |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Client\_id | {  "status": "success",  “Message”: “file upload success”  } |
| contact\_id |
| Task\_id |
| sub\_task\_id |
| Group\_id |
| document\_id |
| file(base\_64) |  |

## 

Payment management

## **1.Invoice list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/invoice/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "recordsTotal": 21,  "data": [  {  "sl": 2,  "id": 20,  "client\_name": "THE BACK GRILL LTD",  "invoice\_no": "INV/2024/000020",  "invoice\_date": "16-Jul-2024",  "document\_name": "INVOICE",  "payment\_status": "Paid",  "invoice\_url": "here link to preview pdf",  {  "sl": 3,  "id": 19,  "client\_name": "ROUNDS CARS LIMITED",  "invoice\_no": "INV/2024/000020",  "invoice\_date": "16-Jul-2024",  "document\_name": "INVOICE",  "payment\_status": "Paid",  "invoice\_url": "here link to preview pdf",  },  ]  } |
| search\_key |
| limit |
| page |

## 

## **2..Deposit List API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/deposit/list |
| Authorization : Bearer {{token}} | TRUE |

## 

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status":"success",  "recordsTotal": 17,  "data": [  {  "sl": 1,  "id": 13,  "full\_payment\_code": "P-000006",  "payment\_code": "000006",  "payment\_date": "23-Jun-2024",  "payment\_amount": 63,  "payment\_method": "-",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "1.1",  "id": 13,  "full\_payment\_code": "P-000006",  "payment\_code": "000006",  "payment\_date": "23-Jun-2024",  "payment\_amount": 63,  "payment\_method": "Cash",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 2,  "id": 14,  "full\_payment\_code": "P-000007",  "payment\_code": "000007",  "payment\_date": "23-Jun-2024",  "payment\_amount": 63,  "payment\_method": "-",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "2.1",  "id": 14,  "full\_payment\_code": "P-000007",  "payment\_code": "000007",  "payment\_date": "23-Jun-2024",  "payment\_amount": 63,  "payment\_method": "Cash",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 3,  "id": 16,  "full\_payment\_code": "P-000008",  "payment\_code": "000008",  "payment\_date": "22-Jun-2024",  "payment\_amount": 63,  "payment\_method": "-",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "3.1",  "id": 16,  "full\_payment\_code": "P-000008",  "payment\_code": "000008",  "payment\_date": "22-Jun-2024",  "payment\_amount": 63,  "payment\_method": "Cheque",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 4,  "id": 17,  "full\_payment\_code": "P-000009",  "payment\_code": "000009",  "payment\_date": "01-Jun-2024",  "payment\_amount": 50,  "payment\_method": "-",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "4.1",  "id": 17,  "full\_payment\_code": "P-000009",  "payment\_code": "000009",  "payment\_date": "01-Jun-2024",  "payment\_amount": 50,  "payment\_method": "Bank Acount",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 5,  "id": 18,  "full\_payment\_code": "P-000010",  "payment\_code": "000010",  "payment\_date": "12-Jun-2024",  "payment\_amount": 63,  "payment\_method": "-",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "5.1",  "id": 18,  "full\_payment\_code": "P-000010",  "payment\_code": "000010",  "payment\_date": "12-Jun-2024",  "payment\_amount": 63,  "payment\_method": "Cash",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 6,  "id": 19,  "full\_payment\_code": "P-000011",  "payment\_code": "000011",  "payment\_date": "27-Jun-2024",  "payment\_amount": 1311.75,  "payment\_method": "-",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "6.1",  "id": 19,  "full\_payment\_code": "P-000011",  "payment\_code": "000011",  "payment\_date": "27-Jun-2024",  "payment\_amount": 511.75,  "payment\_method": "Cash",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": "6.2",  "id": 20,  "full\_payment\_code": "P-000011",  "payment\_code": "000011",  "payment\_date": "27-Jun-2024",  "payment\_amount": 800,  "payment\_method": "Cheque",  "payment\_status": "Paid",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 7,  "id": 21,  "full\_payment\_code": "P-000012",  "payment\_code": "000012",  "payment\_date": "03-Jul-2024",  "payment\_amount": 20.67,  "payment\_method": "-",  "payment\_status": "Payment Submitted",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "7.1",  "id": 21,  "full\_payment\_code": "P-000012",  "payment\_code": "000012",  "payment\_date": "03-Jul-2024",  "payment\_amount": 10,  "payment\_method": "Cheque",  "payment\_status": "Payment Submitted",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": "7.2",  "id": 22,  "full\_payment\_code": "P-000012",  "payment\_code": "000012",  "payment\_date": "04-Jul-2024",  "payment\_amount": 10.67,  "payment\_method": null,  "payment\_status": "Payment Submitted",  "current\_role": "admin",  "row\_type": false,  "documents": []  },  {  "sl": 8,  "id": 23,  "full\_payment\_code": "P-000013",  "payment\_code": "000013",  "payment\_date": "05-Sep-2024",  "payment\_amount": 29,  "payment\_method": "-",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": true,  "documents": []  },  {  "sl": "8.1",  "id": 23,  "full\_payment\_code": "P-000013",  "payment\_code": "000013",  "payment\_date": "05-Sep-2024",  "payment\_amount": 29,  "payment\_method": "Cash",  "payment\_status": "Draft",  "current\_role": "admin",  "row\_type": false,  "documents": []  }  ]  } |
| search\_key |
| limit |
| page |

## **3. Deposit approve API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/deposit/approve |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| id | {  “Status”: “success”,  “message”:”approved”  } |
|  |  |

## **4. Deposit Reject API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/deposit/reject |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| id | {  “Status”: “success”,  “message”:”rejected”  } |
|  |  |

## **5. Deposit Delete API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/deposit/delete |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| id | {  “Status”: “success”,  “message”:”deleted”  } |
|  |  |

## **6.Direct debit confirmation/make list API**

| Method | URL |
| --- | --- |
| Post | base\_url/direct-debit/list |
| Authorization : Bearer {{token}} | TRUE |

| Request Body | Response |
| --- | --- |
| user\_id | {  "status":"success",  "recordsTotal": 1,  "data": [  {  "id": 22,  "client\_name": "ARTISANBURGERHW LTD",  "invoice\_no": "INV\/2024\/000022",  "invoice\_date": "17-Nov-2024",  "document\_name": "INVOICE",  "invoice\_status": "Invoice Submitted",  "payment\_status": "Direct Debit",  "role": "admin",  }  ]  } |
| search\_key |
| limit |
| page |

## **7. Direct debit confirmation/make API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/direct-debit/confirm |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| invoice\_no | {  “Status”: “success”,  “Message”:”confirmed direct debit”  } |
|  |  |

## **8. Make Payment**

payroll setup

## **1. Client list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/client/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| user\_id | {  "status": "success",  "message": "Client and contract data successfully retrieved.",  "data": [  { "id": 2, "name": "JERK & JOLLOF LTD" },  { "id": 4, "name": "BANGLADESH MEDIA CENTRE LONDON LTD" },  { "id": 5, "name": "SHAN FISHERIES LTD" },  { "id": 6, "name": "SHAN GROCERIES LTD" },  { "id": 7, "name": "WESTERN MANAGEMENT LTD" },  { "id": 8, "name": "LQ ESTATES LIMITED" },  { "id": 9, "name": "MY VILLAGE LTD" },  { "id": 10, "name": "ARTISANBURGERHW LTD" },  { "id": 12, "name": "BRAJSITTINGBOURNE LIMITED" },  { "id": 13, "name": "CAKES & SWEETS LTD" },  { "id": 14, "name": "B&W GLOBAL LIMITED" },  { "id": 15, "name": "BA LONDON RAILS LTD" },  { "id": 16, "name": "BUCKS VIEW TRADERS LIMITED" },  { "id": 17, "name": "BUCKSVILL TRADERS LIMITED" },  { "id": 19, "name": "C24 CLEANING SERVICES LTD" },  { "id": 20, "name": "JAK'S CAFE & LAUNDRETTE LIMITED" },  { "id": 21, "name": "CHAPTER ONE CREATIONS LTD" },  { "id": 23, "name": "A-RUN TRANSPORTATION LTD" },  { "id": 24, "name": "A&E HYGIENE AND THERAPY LTD" },  { "id": 25, "name": "KAMPUS GROUP LTD" },  { "id": 26, "name": "R CARS NORTHAMPTON LTD" },  { "id": 28, "name": "ALLIANCE WEALTH LIMITED" },  { "id": 31, "name": "Hasham" },  { "id": 34, "name": "SMERT CARE RECRUITMENT LTD" },  { "id": 36, "name": "IDL 09 LTD" },  { "id": 37, "name": "ECOMMAND SOFTWARE LIMITED" },  { "id": 39, "name": "SPRING KINGDOM LTD" },  { "id": 40, "name": "SKILLS ZONE TRAINING & DEVELOPMENT LIMITED" },  { "id": 41, "name": "ROUNDS CARS LIMITED" },  { "id": 45, "name": "THE BACK GRILL LTD" },  { "id": 47, "name": "CSR RENTALS LTD" },  { "id": 76, "name": "1START TRADING LIMITED" },  { "id": 79, "name": "2 BE BEAUTIFUL LIMITED" }  ]  } |
|  |
|  |
|  |

## **2.Contracts list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/contracts/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | {  "status": "success",  "message": "contract data successfully retrieved.",  "data": [  { "id": "1", "name": "[J2] JERK & JOLLOF LTD" },  { "id": "2", "name": "[J3] JERK & JOLLOF LTD" }  ],  } |
|  |
|  |
|  |

## **3. Task list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| contract\_id | {  "status": "success",  "message": "Task data successfully retrieved.",  "data": [  { "id": 171, "name": "Payroll Jun-2024" }  ]  } |
|  |
|  |
|  |

## **4. Sub task list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/sub/task/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "message": "sub Task data successfully retrieved.",  "data": [  { "id": 171, "name": "Payroll Jun-2024" }  ]  } |
|  |
|  |
|  |

## **5. Payroll setup save API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/payroll/save |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id (required) | {  "status": "success",  "message": "saved payroll setup successfully",  } |
| contract\_id (required) |
| task\_id ( required) |
| sub\_task\_id |
| pay\_slip |  |
| p30 |  |
| RTI |  |
| pension\_contribution |  |
| pension\_payment\_sent |  |
| pension\_declaration |  |

Task Management

## **1.Task list API**

|  |  |
| --- | --- |
| **Method** | **URL** |
| **Post** | base\_url/task/list |
| **Authorization : Bearer {{token}}** | TRUE |

|  |  |
| --- | --- |
| **Request Body** | **Response** |
| **user\_id** | {  "status": "success",  "recordsTotal": 49,  "data": [  {  "sl": 4,  "id": 184,  "client": {  "id": 2,  "name": "JERK & JOLLOF LTD",  "address\_one": "",  "address\_two": "",  "area": "",  "postcode": "",  "contact\_person\_name": "",  “email”:” ”  },  "task": "VAT Return Preparation and Submission",  "responsible\_person": "Mr Tarif Ashraf",  "target\_date": "05-Sep-2024 11:59 PM",  "deadline": "07-Oct-2024 11:59 PM",  "status": "Active",  "task\_priority": 1,  "payment\_days": 30,  "reminder\_days": 5,  "contract": {  "id": 2,  "contract\_name": "",  "contract\_short\_name": "",  "sub\_total": 0.0,  "discount": 0.0  }  },  {  "sl": 5,  "id": 77,  "client": {  "id": 22,  "name": "[B4] BUCKS VIEW TRADERS LIMITED",  "address\_one": "",  "address\_two": "",  "area": "",  "postcode": "",  "contact\_person\_name": "",  “email”:” ”  },  "task": "Corporation Tax Return Preparation and Submission",  "responsible\_person": "Mr Demo Colleague",  "target\_date": "21-Jan-2024 11:59 PM",  "deadline": "30-Sep-2024 11:59 PM",  "status": "Active",  "task\_priority": 2,  "payment\_days": 45,  "reminder\_days": 10,  "contract": {  "id": 2,  "contract\_name": "",  "contract\_short\_name": "",  "sub\_total": 0.0,  "discount": 0.0  }  },  {  "sl": 6,  "id": 144,  "client": {  "id": 33,  "name": "SMERT CARE RECRUITMENT LTD",  "address\_one": "",  "address\_two": "",  "area": "",  "postcode": "",  "contact\_person\_name": "",  “email”:” ”  },  "task": "VAT Return Preparation and Submission Q1",  "responsible\_person": "Dr অঙ্কনা রজন্যা",  "target\_date": "06-Jun-2024 11:59 PM",  "deadline": "07-Jul-2024 11:59 PM",  "status": "Active",  "task\_priority": 3,  "payment\_days": 30,  "reminder\_days": 7,  "contract": {  "id": 2,  "contract\_name": "",  "contract\_short\_name": "",  "sub\_total": 0.0,  "discount": 0.0  }  },  {  "sl": "6.1",  "id": 11,  "client": {  "id": 2,  "name": "SMERT CARE RECRUITMENT LTD",  "address\_one": "",  "address\_two": "",  "area": "",  "postcode": "",  "contact\_person\_name": "",  “email”:” ”  },  "task": "VAT Return Preparation and Submission Q1",  "responsible\_person": "Dr অঙ্কনা রজন্যা",  "target\_date": "06-Jun-2024 11:59 PM",  "deadline": "07-Jul-2024 11:59 PM",  "status": "Active",  "task\_priority": 3,  "payment\_days": 20,  "reminder\_days": 3,  "contract": {  "id": 2,  "contract\_name": "",  "contract\_short\_name": "",  "sub\_total": 0.0,  "discount": 0.0  }  },  {  "sl": 7,  "id": 171,  "client": {  "id": 22,  "name": "ECOMMAND SOFTWARE LIMITED",  "address\_one": "",  "address\_two": "",  "area": "",  "postcode": "",  "contact\_person\_name": "",  “email”:” ”  },  "task": "Payroll Jun-2024",  "responsible\_person": "Mr Payroll Manager",  "target\_date": "23-Jun-2024 11:05 AM",  "deadline": "23-Jul-2024 11:59 PM",  "status": "Active",  "task\_priority": 4,  "payment\_days": 60,  "reminder\_days": 15,  "contract": {  "id": 2,  "contract\_name": "",  "contract\_short\_name": "",  "sub\_total": 0.0,  "discount": 0.0  }  }  ]  } |
| **search\_key** |
| **limit** |
| **page** |

## **2.Check missing info and documents API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/missing/documents/check |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "data": {  "missing\_documents": [],  "missing\_informations": [  {  "document\_title": "Missing Payroll Information."  },  {  "document\_title": "Missing VAT Information."  }  ]  }  } |
|  |
|  |
|  |

## **3.Add task note API**

## 

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/note/add |
| Authorization : Bearer {{token}} | TRUE |

## 

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | {  "status": "success",  "message": "saved task note successfully",  } |
| client\_service\_sub\_task\_id |
| title |
| priority\_type |
| note |  |
| id |  |

**N:B: id=0 for creating a new note.and**

**Provide the specific note ID to update an existing task note.**

## **4.Client sub task list**

## 

## **5. Task note list API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/note/list |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "data": [  {  "id": 1,  "title": "The Daily Star is a Bangladeshi English-language daily newspaper.",  "content": "The Daily Star, Leading English Daily among Bangladesh ws. Get latest Bangladesh news, ...",  "created\_at": "28-Aug-2024 10:00 AM",  "priority\_type": 1  },  {  "id": 2,  "title": "awerg",  "content": "aegraerg",  "created\_at": "04-Aug-2024 06:53 PM",  "priority\_type": 2  }  ],  "total\_task\_note": 2  } |
| client\_id |
| page |
| limit |

## **6.Task Time Log API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/time/log |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "data": [  {  "date": "September 1, 2024",  "time": "10:00 AM",  "status": "Draft",  "description": "Task in Draft mode"  },  {  "date": "September 2, 2024",  "time": "12:00 PM",  "status": "Processing",  "description": "Task in Processing mode"  },  {  "date": "September 3, 2024",  "time": "01:00 PM",  "status": "Ready",  "description": "Task in Ready mode"  },  {  "date": "September 4, 2024",  "time": "02:00 PM",  "status": "In-Progress",  "description": "Task in In-Progress mode"  },  {  "date": "September 5, 2024",  "time": "02:00 PM",  "status": "Manager Approval",  "description": "Task in Manager Approval Mode"  }  ]  } |
| client\_id |
|  |
|  |

## **7.Task Delete API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/delete |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| Task\_id, client\_id | {  “Status”: “success”,  “message”:”task delete ”  } |

## **8.Generate invoice API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/invoice/generate |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| client\_id | {  "status": "success",  "message": "Generate invoice successfully",  “Url”:”invoice.pdf”  } |
| contract\_id |
| task\_id |
| attentionn\_to |
| payment\_days |  |
| reminder\_days |  |
| invoice\_date |  |
| bank\_account\_no |  |
| address\_one |  |
| address\_two |  |
| area |  |
| postcode |  |

## **9.task action API**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/action |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "message":" "  } |
| client\_id |
| action\_type |
|  |

\* action\_type: 1 → completed  
\* action\_type: 2 → canceled  
\* action\_type: 1 → postponed

## **10. Task edit API**

## 

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/task/edit |
| Authorization : Bearer {{token}} | TRUE |

## 

## **11.Task progress list API**

## 

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/tasks/progress/list |
| Authorization : Bearer {{token}} | TRUE |

## 

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "data": [  {  “progress\_status\_id”:1,  "date": "May 1, 2024",  "time": "10:00 AM",  "isActive": 1,  "status": "Draft",  "description": ""  },  {  “progress\_status\_id”:2,  "date": "May 2, 2024",  "time": "12:00 PM",  "isActive": 1,  "status": "Processing",  "description": ""  },  {  “progress\_status\_id”:3,  "date": "May 3, 2024",  "time": "01:00 PM",  "isActive": 0,  "status": "Ready",  "description": ""  },  {  “progress\_status\_id”:4,  "date": "May 4, 2024",  "time": "02:00 PM",  "isActive": 0,  "status": "In-Progress",  "description": ""  },  {  “progress\_status\_id”:5,  "date": "May 4, 2024",  "time": "02:00 PM",  "isActive": 0,  "status": "Manager Approval",  "description": ""  },  {  “progress\_status\_id”:6,  "date": "May 4, 2024",  "time": "02:00 PM",  "isActive": 0,  "status": "Client Approval",  "description": ""  },  {  “progress\_status\_id”:7,  "date": "May 4, 2024",  "time": "02:00 PM",  "isActive": 0,  "status": "Payment",  "description": ""  },  {  “progress\_status\_id”:8,  "date": "May 4, 2024",  "time": "02:00 PM",  "isActive": 0,  "status": "Submit",  "description": ""  }  ]  } |
| client\_id |
|  |
|  |

## **12.Task progress setup**

|  |  |
| --- | --- |
| Method | URL |
| Post | base\_url/tasks/progress/setup |
| Authorization : Bearer {{token}} | TRUE |

|  |  |
| --- | --- |
| Request Body | Response |
| task\_id | {  "status": "success",  "message":"Progress change successfully. "  } |
| client\_id |
| progress\_status\_id |
| progress\_description |