

Transaction API

Documentation

Version: 1.1.0 | **Date:** 2026-02-11

Authentication: All endpoints require a valid `Bearer Token` in the `Authorization` header.

1. Create Transaction

`POST`

`/transaction/createTransaction`

Content-Type: `multipart/form-data`

Description

Creates a new transaction for a customer **owned by the logged-in user**. The server automatically saves the user's ID.

Request Body (FormData)

| Key | Type | Required | Description |
|---------------------------|--------|----------|--|
| <code>customerId</code> | String | Yes | The <code>_id</code> of the profile. Must belong to the logged-in user. |
| <code>customerType</code> | String | No | <code>IndividualProfile</code> or <code>CorporateProfile</code> . (Auto-detected if omitted) |

| Key | Type | Required | Description |
|------------------------------|-------------|-----------------|--|
| <code>invoiceNumber</code> | String | Yes | Unique invoice identifier. |
| <code>branch</code> | String | Yes | Branch name. |
| <code>transactionType</code> | String | Yes | <code>Deposit</code> or <code>Withdrawal</code> . |
| <code>product</code> | String | Yes | Product name. |
| <code>totalAmount</code> | Number | Yes | Total transaction amount. |
| <code>payments</code> | String | Yes | JSON String of payment array. Example: <code>[{"mode": "Cash", "amount": 100}]</code> |
| <code>file</code> | File | No | Optional file attachment. |

Success Response (201 Created)

```
{
  "message": "Transaction created successfully",
  "customerType": "IndividualProfile",
  "transaction": {
    "_id": "653b...",
    "userId": "653a...",
    "customerId": "6539...",
    "invoiceNumber": "INV-001",
    "totalAmount": 150,
    "status": "Success",
    "createdAt": "2023-10-27T10:00:00.000Z"
  }
}
```

Error Responses

- **400 Bad Request:** Missing required fields.
- **403 Forbidden:** `customerId` does not belong to the logged-in user.
- **404 Not Found:** Customer profile not found.

2. Get Transactions

GET

/transaction/getTransactions

Description

Retrieves a paginated list of transactions **belonging to the logged-in user**.

Query Parameters

| Parameter | Type | Default | Description |
|--------------------------|--------|---------|--|
| <code>page</code> | Number | 1 | Page number. |
| <code>limit</code> | Number | 10 | Items per page. |
| <code>searchType</code> | String | - | Filter by: <code>Name</code> , <code>Core customer number</code> , <code>Mobile</code> |
| <code>searchValue</code> | String | - | Value to search for. |

Success Response (200 OK)

```
{  
  "data": [  
    {  
      "_id": "653b...",  
      "transactionId": "653b...",  
      "invoiceNumber": "INV-001",  
      "customerName": "John Doe",  
      "amount": 100.0,  
      "date": "2023-10-01T12:00:00Z"  
    }  
  ]  
}
```

```
        "customerName": "John Doe",
        "totalAmount": 150,
        "status": "Success",
        "date": "2023-10-27T10:00:00.000Z"
    }
],
"pagination": {
    "total": 50,
    "page": 1,
    "limit": 10,
    "pages": 5
}
}
```

3. Cancel Transaction

PATCH

/transaction/:transactionId/cancel

Description

Cancels a transaction. **User can only cancel their own transactions.**

Success Response (200 OK)

```
{
  "message": "Transaction cancelled successfully",
  "transaction": {
    "_id": "653b...",
    "status": "Cancelled"
  }
}
```

Error Responses

- **404 Not Found:** Transaction not found OR does not belong to the user.
- **400 Bad Request:** Transaction is already cancelled.

4. Delete Transaction (Soft Delete)

PATCH

/transaction/:transactionId/delete

Description

Soft deletes a transaction. **User can only delete their own transactions.**

Success Response (200 OK)

```
{  
  "message": "Transaction deleted successfully",  
  "transaction": {  
    "_id": "653b...",  
    "isDeleted": true  
  }  
}
```

Error Responses

- **404 Not Found:** Transaction not found OR does not belong to the user.
- **400 Bad Request:** Transaction is already deleted.