

Transaction & Customer Management API Documentation

Base URL: http://localhost:5000 (or your deployed URL)

Authentication: Requires Authorization: Bearer <token> header for all endpoints.

1. Transactions

Create Transaction

Create a new transaction entry in the system.

- **Endpoint:** POST /transaction
- **Body Parameters:**
 - customerId (String, Required): Core Customer ID (e.g., "1000659") or MongoDB ID.
 - customerType (String, Required): "IndividualProfile" or "CorporateProfile".
 - transactionDate (Date, Required): e.g., "2023-10-27".
 - transactionTime (String): e.g., "14:30".
 - branch (String, Required): Branch name.
 - invoiceNumber (String, Required): Invoice identifier.
 - invoiceAmount (Number): Amount on invoice.
 - source (String): "Online", "Offline", or "Select".
 - transactionType (String, Required): "Deposit" or "Withdrawal".
 - product (String, Required): Product name.
 - payments (Array): List of payment methods.
 - { "mode": "Cash", "amount": 500 }
 - totalAmount (Number, Required): Total transaction amount.
- **Example Request:**

```
{
  "customerId": "1000659",
  "customerType": "IndividualProfile",
  "transactionDate": "2023-10-27T00:00:00.000Z",
  "branch": "Main Branch",
  "invoiceNumber": "INV-101",
  "transactionType": "Deposit",
  "product": "Savings",
  "payments": [
    { "mode": "Card", "amount": 1000 }
  ],
  "totalAmount": 1000
}
```

2. Customer Management (Transaction Route)

These endpoints allow you to search, view, edit, and delete customers directly from the transaction module.

List Customers (Table View)

Retrieve a paginated list of customers with fields optimized for the selection table.

- **Endpoint:** GET /transaction/customers
- **Query Parameters:**
 - page (Number): Page number (default 1).
 - limit (Number): Items per page (default 10).
 - search (String): Search by customer name.
 - searchType (String): "Core customer number", "Name", etc.
 - searchValue (String): Value to search for.
- **Response Fields:**
 - coreCustId: Displayed as "Core Cust ID".
 - name: Displayed as "Name".
 - mobile: Displayed as "Mobile".
 - country: Displayed as "Country".
 - idNumber: Displayed as "ID Number".
 - idExpDate: Displayed as "ID Exp Date".

Get Customer Details

View full details of a specific customer.

- **Endpoint:** GET /transaction/customers/:id
- **Path Parameter:** id (MongoDB ID of the profile).

Update Customer

Edit an existing customer's profile.

- **Endpoint:** PUT /transaction/customers/:id
- **Path Parameter:** id (MongoDB ID).
- **Body:** JSON object with fields to update (e.g., mobile, address).

Delete Customer

Soft delete a customer profile.

- **Endpoint:** DELETE /transaction/customers/:id
- **Path Parameter:** id (MongoDB ID).

Download Customer Profile

Download the full customer profile as a JSON file.

- **Endpoint:** GET /transaction/customers/download/:id
- **Path Parameter:** id (MongoDB ID).
- **Response:** Triggers a file download (Content-Disposition: attachment).