

## PUBLIC API DOCUMENT(V2)

### 1. Get country List

**URL:** <https://api-demo.diligencevault.com/api/v2/countrylist>

**Method:** GET

**CURL:** curl -X GET <https://api-demo.diligencevault.com/api/v2/countrylist>

--header 'x-api-key: API\_KEY'

--header 'Authorization: Bearer TOKEN'

### 2. Get Currency List

**URL:** <https://api-demo.diligencevault.com/api/v2/currencylist>

**Method:** GET

**CURL:** curl -X GET <https://api-demo.diligencevault.com/api/v2/currencylist>

--header 'x-api-key: API\_KEY'

--header 'Authorization: Bearer TOKEN'

### 3. Get Users List (For Dynamic custom fields)

**URL:** [https://api-demo.diligencevault.com/api/v2/team\\_members](https://api-demo.diligencevault.com/api/v2/team_members)

**Method:** GET

**CURL:** curl -X GET [https://api-demo.diligencevault.com/api/v2/team\\_members](https://api-demo.diligencevault.com/api/v2/team_members)

--header 'x-api-key: API\_KEY'

--header 'Authorization: Bearer TOKEN'

### 4. Get Teams List (For Dynamic custom fields)

**URL:** <https://api-demo.diligencevault.com/api/v2/teams>

**Method:** GET

**CURL:** curl -X GET <https://api-demo.diligencevault.com/api/v2/teams>

--header 'x-api-key: API\_KEY'

--header 'Authorization: Bearer TOKEN'

### 5. Get Tags

**URL:** <https://api-demo.diligencevault.com/api/v2/tags>

**Method:** GET

**CURL:** curl -X GET <https://api-demo.diligencevault.com/api/v2/tags>

--header 'x-api-key: API\_KEY'

--header 'Authorization: Bearer TOKEN'

**Method:** POST

**Request Body:** [{

    "name":String,

    "type": String,

}]

**Description:** Create new tags

Tag type - assetallocation, conviction, InvestmentThesis, WatchList, Geography, Investor, Question, Relationship, Contact, Attachments, DocumentGroups

## 6. Get Strategies

**URL:** <https://api-demo.diligencevault.com/api/v2/strategies>

**Method:** GET

**CURL:** curl -X GET <https://api-demo.diligencevault.com/api/v2/strategies>

```
--header 'x-api-key: API_KEY'
--header 'Authorization: Bearer TOKEN'
```

**Method:** POST

**Request Body:** {'strategies': [strings]}

**Description:** Create new strategy/strategies

## 7. Firms

**URL:** </api/v2/firms>

- **Method:** GET

- **Response**

```
{
    "id": 47502,
    "name": "Manager",
    "firm_domain": "diligencevault.com",
    "firm_type": "Asset Manager",
    "relationship_owner_email": null,
    "alternate_name": null,
    "relationship_status_name": "RELATION",
    "internal_key": "ABCD",
    "tag_names": [
        "AssetsAllocation",
        "ConvictionLevel",
        "GeoGraphicFocus",
        "Investment-focus",
        "Watch-Your-List"
    ],
    "is_active": true,
    "created_at": "2020-09-01T06:31:50.877000",
    "created_by": "inv@diligencevault.com",
    "updated_at": "2020-12-02T14:08:29.140000",
    "updated_by": "inv2@diligencevault.com",
    "address": [],
    "custom_fields": {
        "Link Field": {
            "type": "link",
            "has_multiple": false,
            "is_mandatory": false,
            "has_href": false,
            "label": "Link Field"
        }
    }
}
```

```

        "href": "",
        "data": [
            {
                "value": "Name",
                "url": "http://www.google.com"
            }
        ]
    }
}
}

```

- **Method: PUT**
- **Description: Update existing firm**
- **Example Request:**

```

{
    "data": [
        {
            "source_id": "771234",
            "dv_id": 47731,
            "metadata": {
                "firm_type": "administrator",
                "alternate_name": "firm771-1",
                "secondary_contact_emails": [],
                "location": [
                    {
                        "address_id": 999,
                        "phone_1": "9710346888",
                        "phone_2": "9710346999",
                        "street_2": "st24",
                        "zipcode": "360371",
                        "city": "city",
                        "is_headquarter": true,
                        "country": "norway",
                        "street_1": "st222",
                        "state": "st",
                        "fax": "998888"
                    }
                ],
                "custom_fields": {
                    "dept name": "music"
                }
            },
            "source_type": 1
        }
    ]
}

```

- **CURL REQUEST:**

```
curl -X PUT 'https://DV_API_URL/api/v2/firms' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZWM5NzA5MzYyMmZjIiwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZXNoIjpmYWxzZSwidHIwZSI6ImFjY2VzcycIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjMyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJBcnRoYW5jZSBMTEMgMyIsInVzZXJfdHlwZSI6OTM2LCJhY2Nlc3N0eXB1aWQiOjkyNSwicGVybWlzc2lvbnMiOiJmdW5kOnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-jI5qwDEG6g43usf5ug' -H 'Content-Type: application/json' --data-raw '{  
    "data": [  
        {  
            "source_id": "771234",  
            "dv_id": 47731,  
            "metadata": {  
                "firm_type": "administrator",  
                "alternate_name": "firm771-1",  
                "secondary_contact_emails": [],  
                "location": [  
                    {  
                        "address_id": 455,  
                        "phone_1": "9710346888",  
                        "phone_2": "9710346999",  
                        "street_2": "st24",  
                        "zipcode": "360371",  
                        "city": "city",  
                        "is_headquarter": true,  
                        "country": "norway",  
                        "street_1": "st222",  
                        "state": "st",  
                        "fax": "998888"  
                    }  
                ]  
            },  
            "custom_fields": {  
                "dept name": "music"  
            }  
        }  
    ],  
    "source_type": 1  
},
```

- **Request Fields Explained:**

- **mandatory fields:** source\_id, dv\_id
- **Fields Explained:**
  - dv\_id: DiligenceVault Database unique ID returned in GET call
  - address\_id: unique ID for address returned in GET call

- **Output:**

```
[
  {
    "source_type": 1,
    "dv_id": 47731,
    "source_id": "771234",
    "error": null,
    "status": "success",
    "address_ids": [999]
  }
]
```

- **Output Explained:**

- dv\_id: unique ID of DiligenceVault Database
- source\_id: unique ID of client's DB
- error: if any error found, it will be returned here
- address\_ids: unique ID's for each address provided
- status:
  - success: no error found; `dv\_id` would be not null
  - Partial\_success:
    - error found in `secondary\_contact\_emails` and `custom\_fields`
    - `dv\_id` would be not null
  - Fail:
    - error found, message will be in `error` key, in case of `fail` ;
    - `dv\_id` would be null

## 8. PRODUCTS

**Endpoint:** /v2/products

- **Method: GET**

```
[{
  "id": 8343,
  "name": "Product 1",
  "alternate_name": "First product 1",
  "strategy": "PE: Venture",
  "firm_name": "Publicapi Manager",
  "firm_id": 47502,
  "internal_key": "ABCDEFGH",
  "relationship_owner_email": "inv@diligencevault.com",
  "relationship_status_name": "ABCDE",
```

```

"tag_names": [
    "AssetsAllocation",
    "ConvictionLevel",
    "GeoGraphicFocus",
    "Investment-focus",
    "Watch-Your-List"
],
"created_at": "2020-09-04T06:13:44.830000",
"created_by": "inv@diligencevault.com",
"updated_at": "2020-09-07T06:02:29.647000",
"updated_by": "inv@diligencevault.com",
"is_active": true,
"firm_key": null,
"custom_fields": {
    "One name field": {
        "type": "text",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "value": "First Product",
                "url": ""
            }
        ]
    }
}
}
]

```

- **Method: PUT**
- **Description: Updated the existing product details**
  - Only Fields inside `metadata` and `custom\_fields` will be updated in PUT
  - If `metadata` and `custom\_fields` are empty : nothing will be updated in the existing product

- **Example Request:**

```
{
    "data": [
        {
            "dv_id": 8559,
            "source_id": "1114",
            "name": "prod1114",
            "strategy_id": 38101,
            "associated_firm_id": 1,
            "metadata": {
                "alternate_name": "alternate name prod",
                "description": "this product is about something",
                "internal_key": "PROD_11",
            }
        }
    ]
}
```

```

    "associated_primary_email": "hank@dcompany-domain.com",
    "secondary_contact_emails": ["hank1@dcompany-
domain.com", "hank2@dcompany-domain.com"],
    "tag_id": [11],
    "relationship_status_id": 0
},
"custom_fields": {
    "dept name": ["sales"]
}
},
],
"source_type": 1
}

```

- **CURL REQUEST:**

```

curl -X PUT 'https://DV_API_URL/api/v2/products' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE2MDMzMjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZW M5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX NoIjpmYWxzZSwidHIwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOj MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOjBcnRoYW5jZSBMTEMgMyIsInVzZXJ fdHIwZSI6OTM2LCJhY2Nlc3N0eXBlaWQiOjkyNSwicGVybWlzc2lvbnMiOiJmdW5k OnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-j-15qwDEG6g43usf5ug' -H 'Content-Type: application/json'
--data-raw '{
  "data": [
    {
      "dv_id": 8559,
      "source_id": "1114",
      "name": "prod1114",
      "strategy_id": 38101,
      "associated_firm_id": 1,
      "metadata": {
        "alternate_name": "alternate name prod",
        "description": "this product is about something",
        "internal_key": "PROD_11",
        "associated_primary_email": "hank@dcompany-domain.com",
        "secondary_contact_emails": ["hank1@dcompany-
domain.com", "hank2@dcompany-domain.com"],
        "tag_id": [11],
        "relationship_status_id": 0
      },
      "custom_fields": {
        "dept name": ["sales"]
      }
    }
  ],
  "source_type": 1
}'

```

}

- **Request Fields Explained:**
  - **mandatory fields:**
    - dv\_id, source\_id, name, strategy\_id, associated\_firm\_id
  - optional fields:
    - every field in `metadata` is optional
    - `metadata`, `custom\_fields` can be empty
- **Fields Explained:**
  - dv\_id: DiligenceVault Database unique ID returned in GET call
  - rest of the fields are same as GET call
- **Output Explained:**
  - dv\_id: unique ID of DiligenceVault Database
  - source\_id: unique ID of client's DB
  - error: if any error found, it will be returned here
  - status:
    - success: no error found; `dv\_id` would be not null
    - Fail:
      - error found, message will be in `error` key, in case of `fail` ;
      - `dv\_id` would be null
    - Partial\_success:
      - error found in `custom\_fields`
      - `dv\_id` would be not null

## 9. Contacts

**Endpoint:** /v2/contacts

- **Method: GET**

```
{
  "id": 69724,
  "first_name": "Publicapi",
  "last_name": "Manager",
  "email": "man@diligencevault.com",
  "firm_id": 47502,
  "firm_name": "Publicapi Manager",
  "firm_alternate_name": null,
  "title": "Title",
  "tag_names": [
    "Contact-type-list",
    "ABCDE"
  ],
  "associated_products": [
    "Product-A",
    "Product-B"
  ]
}
```

```

],
"relationship_owner_email": "inv@diligencevault.com",
"created_at": "2020-09-01T06:31:50.877000",
"created_by": "inv@diligencevault.com",
"updated_at": "2020-09-07T07:36:21.787000",
"updated_by": "inv@diligencevault.com",
"is_active": true,
"address": [
    {
        "id": 928,
        "street_1": "Street 1",
        "street_2": "Street 2",
        "city": "Third City",
        "state": "Fourth State",
        "country": "India",
        "zipcode": "123456A",
        "phone_1": "987456123",
        "phone_2": "325896147",
        "fax": "784523691"
    }
],
"custom_fields": {
    "Alternate name": {
        "type": "text",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "value": "Nothing Is nothing",
                "url": ""
            }
        ]
    }
}
}

```

- **Method: PUT**

- **Description: Update existing contacts.**

- Only Fields inside `metadata` and `custom\_fields` will be updated in PUT
- If `metadata` and `custom\_fields` are empty : nothing will be updated in the existing product
- IF metadata and custom\_fields keys are not present: OUTPUT will return with `fail` status

- **Example Request:**

```
{
  "source_type":1,
  "data": [
    {
      "source_id": "8801",
      "dv_id": 70520,
      "associated_firm_id": 1,
      "metadata": {
        "first_name": "jillio",
        "last_name": "mclovinio",
        "title": "Miss",
        "address": [
          {
            "addresss_id":123,
            "street_1": "53 State St",
            "street_2": "6th Floor",
            "city": "Boston",
            "state": "MA",
            "country": "United States",
            "zipcode": "02109",
            "phone_1": "123-4567-890",
            "phone_2": "123-456-7890",
            "fax": "123-456-7890"
          }
        ]
      },
      "custom_fields": { `fieldname`: `value of the field` ,
        `fieldname`: [ `multiple values` ] }
    }
  ]
}
```

- **CURL REQUEST:**

```
curl -X PUT 'https://DV_API_URL/api/v2/contacts' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZW M5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX NoljmpYWxzZSwidHlwZSI6ImFjY2VzcyIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOj MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJBcnRoYW5jZSBMTEMgMyIsInVzZXJ fdHlwZSI6OTM2LCJhY2Nlc3N0eXBlaWQiOjkyNSwigVybWlzc2lvbnnMiOiJmdW5k OnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-j-l5qwDEG6g43usf5ug' -H 'Content-Type: application/json'
--data-raw '{
  "source_type":1,
  "data": [
    {
      "source_id": "8801",
      "dv_id": 70520,
```

```

    "associated_firm_id": 1,
    "metadata": {
        "first_name": "jillio",
        "last_name": "mclovinio",
        "title": "Miss",
        "address": [
            {
                "street_1": "53 State St",
                "street_2": "6th Floor",
                "city": "Boston",
                "state": "MA",
                "country": "United States",
                "zipcode": "02109",
                "phone_1": "123-4567-890",
                "phone_2": "123-456-7890",
                "fax": "123-456-7890"
            }
        ]
    },
    "custom_fields": { `fieldname`: `value of the field`,
        `fieldname`: [ `multiple values`]
    }
}
]
```

- **Request Fields Explained:**

- **mandatory fields:**
  - dv\_id, source\_id, associated\_firm\_id, metadata, custom\_fields
- **Fields Explained:**
  - dv\_id: DiligenceVault Database unique ID returned in GET call
  - rest of the fields are same as GET call

- **Output:**

```
[
{
    "source_type": 1,
    "dv_id": 70520,
    "source_id": "8801",
    "error": null,
    "status": "success",
    "address_ids": []
}
```

- **Output Explained:**

- dv\_id: unique ID of DiligenceVault Database

- source\_id: unique ID of client's DB
- error: if any error found, it will be returned here
- address\_ids: unique ID's for each address provided
- status:
  - success: no error found; `dv\_id` would be not null
  - fail: error found, message will be in `error` key, in case of `fail` ;
    - `dv\_id` would be null
  - partial\_success:
    - error in `custom\_fields`
    - `dv\_id` would be not null

## 10. VEHICLE

- **Endpoint:** /v2/vehicles

- **Method: GET**

```
{
    "id": 8479,
    "name": "Second Vehicle",
    "alternate_name": "Second",
    "relationship_owner_email": "inv@diligencevault.com",
    "relationship_status_name": "ABCDE",
    "product_name": "First product 1",
    "product_id": 8343,
    "firm_name": "Publicapi Manager",
    "firm_id": 47502,
    "internal_key": "SEC213",
    "tag_names": null,
    "currency": "INR ",
    "inception_date": "2020-12-03T00:00:00",
    "is_active": true,
    "created_at": "2020-12-03T16:51:44.720000",
    "created_by": "inv@diligencevault.com",
    "updated_at": null,
    "updated_by": null,
    "custom_fields": {}
}
```

- **Method: PUT**

- **Description: Update existing vehicle**

- Only Fields inside `metadata` and `custom\_fields` will be updated in PUT
- If `metadata` and `custom\_fields` are empty : nothing will be updated in the existing product
- **Example Request:**
  - {

```
"data": [
  {
    "dv_id": 8502,
    "source_id": "67890",
    "name": "vehi67890",
    "currency": 908,
```

```

    "metadata": {
        "alternate_name": "vehic11",
        "inception_date": "2018-01-01",
        "internal_key": "VEHIC11"
    },
    "custom_fields": { `fieldname`: 'value', `fieldname`: ['multiple values'] }
}
],
"source_type": 1
}

```

- **CURL REQUEST:**

```

curl -X PUT 'https://DV_API_URL/api/v2/vehicles' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwanRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZWM5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZXNoIjpmYWxzZSwidHlwZSI6ImFjY2VzcycIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjMyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJBcnRoYW5jZSBMTEMgMyIsInVzZXJfdHlwZSI6OTM2LCJhY2Nlc3N0eXBlaWQiOjkyNSwicGVybWlzc2lvbnMiOiJmdW5kOnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-j-l5qwDEG6g43usf5ug' -H 'Content-Type: application/json'
--data-raw '{
    "data": [
        {
            "dv_id": 8502,
            "source_id": "67890",
            "name": "vehi67890",
            "currency": 908,
            "metadata": {
                "alternate_name": "vehic11",
                "inception_date": "2018-01-01",
                "internal_key": "VEHIC11"
            },
            "custom_fields": { `fieldname`: 'value', `fieldname`: ['multiple values'] }
        }
    ],
    "source_type": 1
}'

```

- **Fields Explained:**

- dv\_id: DiligenceVault Database unique ID returned in GET call
- rest of the fields are same as GET call

- **Output:**

[

```
[
  {
    "source_type": 1,
    "dv_id": 8502,
    "source_id": "67890",
    "error": null,
    "status": "success"
  }
]
```

- **Output Explained:**

- dv\_id: unique ID of DiligenceVault Database
- source\_id: unique ID of client's DB
- error: if any error found, it will be returned here
- status:
  - success: no error found; `dv\_id` would be not null
  - fail: error found, message will be in `error` key, in case of `fail` ; `dv\_id` would be null
  - partial\_success: error in `custom\_fields`
    - `dv\_id` would be not null

## 11. PROJECTS

- **Endpoint: /v1/projects**

- **Method: GET**

- **Example Request:**

```
curl -X GET "https://DV_API_URL/api/v1/projects" -H "accept: application/json" -H
"Authorization: Bearer
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZl6MTU3MDQ4Nzg
4NSwianRpIjoiMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjIiwiZXhwIjoxNTc
wNDg4Nzg1LCjpZGVudGl0eSI6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXjfY
2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXjtX2IkIjoyLCJ1c2VyX3R5cGUiOjkzNSwiYWNjZXNzdHlwZ
WIkIjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ9fQ.VqHfIED55pT3L81NvMSqsRFOD
kX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432"
```

- **Example Output:**

```
[
  {
    "id": 266472,
    "entity_id": -1,
    "entity_type": "Fund",
    "entity_name": null,
    "due_at": "2021-02-11T18:01:54.727000",
    "created_at": "2020-12-28T18:02:13.803000",
    "started_at": "2020-12-28T18:02:13.803000",
    "closed_at": null,
    "type": null,
    "status": "Started",
    "completed_at": null,
```

```
        "is_internal": true,
        "name": "test002",
        "acknowledged_at": null,
        "template_id": 1820,
        "template_name": "Review Template",
        "tofirm_id": 2224,
        "tofirm_name": "DV Client Firm",
        "fromfirm_id": 2224,
        "fromfirm_name": "DV Client Firm",
        "created_by_id": 3104,
        "created_by_name": "Investor account 1",
        "strategy_name": null,
        "question_count": 3,
        "answer_count": 0,
        "percentage_complete": 0,
        "as_of_date": "2020-12-28T18:01:49.123000",
        "frequency": null,
        "parent_entity_id": null,
        "custom_fields": {}
    }
]
```

## Projects Download

- **Endpoint:** /v1/projects/projects\_download?start\_date=stat\_date&end\_date=end\_date&exclude\_notes=true&include\_response\_as\_document=true
  - **Method:** GET
  - **Description:** Projects zip file which contains all the projects directory with documents and responses.

### **Example Request:**

```
curl -X GET "https://DV_API_URL/api/v1/projects/projects_download" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZiI6MTU3MDQ4Nzg4NSwiarnRpIjoiMGU2ZmU5OGQtZDlkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXjtX2IkIjoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWIkIjpudWxsLCJwZXJtaXNzaW9ucyl6mZ1bmQ6cmVhZCJ9fQ.VqHflED55pT3L81NvMSqsRF0dkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -output download.zip
```

## Example Output:

Zip file contains

`projects.json` – Which includes information about each projects

Project directories – Each directory contains project responses and documents

## CUSTOM FIELDS

- **Custom Fields:**
  - **Description:** Input/Output of custom fields in firm/product/contact/vehicle PUT endpoints
  -

- **Types of custom fields and examples:**

**Notes:**

1 - If `Make this field mandatory` checkbox is ticked(on web):  
Must provide that field in PUT.

2 - If `Allow Multiple fields to be added` is checked values can  
be provided in an array.

- **Integer(int):** for whole numbers without decimal
  - Eg for single value: {"custom\_fields": {"fieldname": 23}}
  - Multiple: {"custom\_fields": {"fieldname": [23, 30]}}}
- **Numeric(numeric):** for numbers with decimal
  - single: {"custom\_fields": {"fieldname": 23.40}}
  - Multiple: {"custom\_fields": {"fieldname": [23.40, 30.50]}}}
  -
- **Text(text):** for text line
  - Eg for single value: {"custom\_fields": {"fieldname": "random text"}}
  - Multiple: {"custom\_fields": {"fieldname": ["text1", "text 2"]}}}
  -
- **Paragraph(textmultiline):** for text paragraph
  - Eg for single value: {"custom\_fields": {"fieldname": "start of random paragraph just for the example..."))}}
  - Multiple: {"custom\_fields": {"fieldname": ["start of a random paragraph just for the example..., "start of a random paragraph just for the example... again..."]}}}
  -
- **Dropdown(dropdown):** for single selection of value
  - single: {"custom\_fields": {"fieldname": "Option 1"}}
  - Multiple: Multiples are not allowed in dropdown
- **Link(link):** for saving URL
  - single: {"custom\_fields": {"fieldname": "[>https://www.random.org](https://www.random.org)"}}
  - Multiple: {"custom\_fields": {"fieldname": ["[>https://www.random.org](https://www.random.org)", "[>https://www.something.com](https://www.something.com)"]}}}
- **Checkbox(checkbox):** For multiple selection (same as dropdown)
  - single: {"custom\_fields": {"fieldname": "Option 1"}}
  - Multiple: {"custom\_fields": {"fieldname": ["Option 1", "Option 1"]}}}

- **Dynamic:**

**Note:**

- 1 - In dynamic: values are the id's of corresponding types.
- 2 - Id's can be fetched from their GET API's.
- 3 - `multiple`, `required` field rules are applied as explained above.

Let's assume: ids are 23,45

- **Type of dynamic fields:**

- **Contact(contact): GET /v2/contacts.**
- **Product(fund): GET /v2/products**
- **Project(diligence): GET /v1/diligence**
- **Vehicles(vehicles): GET /v2/vehicles**
- **Templates(templates): GET /v2/templates**
- **Team members(team\_members):GET /v2/team\_members**
- **Teams(teams): GET /v2/teams**
- **Firms (firm): GET /v2/firms (for investor)**
- **Investors (investors): GET /v2/firms (for manager)**

- Example:

- single: {"custom\_fields": {"fieldname":23}}
- Multiple: {"custom\_fields": {"fieldname": [23,45]}}}

- **OUTPUT for integer, numeric, link, text, paragraph:**

```
{
  "custom_fields": {
    "f-text": {
      "type": "int",
      "has_multiple": false,
      "is_mandatory": false,
      "has_href": false,
      "href": "",
      "data": [
        {
          "value": 90,
          "dynamic_url": "https://app.diligencevault.com/#/app/firms/1/funds/90/profile"
        }
      ]
    }
  }
}
```

- **OUTPUT explained:**

- **fieldname** - name given by user while creating the field
- **has\_multiple** - boolean value whether multiple values are allowed or not in the field
- **is\_mandatory** - boolean value whether if field is marked mandatory or not
- **has\_href** - boolean value whether **URL** is added in field
- **href** - URL added to the field, **has\_href** would be **True** in this Case

- data: (array of values)
  - value - values you have entered.
    - Eg: 24, "text line", "paragraph", 34.5
  - dynamic\_url - If user have ticked `Allow users to add a URL` while creating custom field
    - url automatically created based on the value provided
- type:
  - int - (integer)
  - numeric - (numeric)
  - text - (text)
  - textmultiline - (paragraph)
  - link - (link)

- **OUTPUT for Dynamic fields and dropdown/checkbox::**

```
{
  "custom_fields": {
    "fieldname": {
      "type": "contact",
      "has_multiple": false,
      "is_mandatory": false,
      "has_href": false,
      "href": "",
      "data": [
        {
          "id": 57,
          "value": "MollyPan"
        }
      ]
    }
  }
}
```

- **Output explained:**

- fieldname - name given by user while creating the field
- has\_multiple - boolean value whether multiple values are allowed or not in the field
- is\_mandatory - boolean value whether if field is marked mandatory or not
- has\_href - boolean value whether URL is added in field
- href - URL added to the field, `has\_href` would be **True** in this case
- type -

- dropdown (Dropdown)
- checkbox (Checkbox)
- contact - Dynamic contact
- product - Dynamic product
- diligence - Dynamic project
- templates - Dynamic templates
- vehicles - Dynamic vehicle
- team\_members - Dynamic team members
- teams - Dynamic teams
- firm - Dynamic firms
- investors - Dynamic investor
- data - array of data:
  - id - id of the value you selected
- value - name of the selected id