

DiligenceVault Public API Overview

DiligenceVault API is built to allow you to create a proprietary functional application or integrate with your existing applications quickly and easily. DiligenceVault API can be used to fetch all/any of Projects / Products / Vehicles / Firms and related data for your firm.

Our APIs follow RESTful standards. We use many standard HTTP features, like HTTP verbs, which can be understood by many HTTP clients. JSON/File is the standard return response from API which includes HTTP response codes to indicate any API errors/status. Select APIs are made public to allow for easy integration. Please contact ask@diligencevault.com for any issues / questions / suggestions.

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API Key Generation

Accessing data via our public APIs require a unique api_key assigned to each user. This is available under Firm Settings, accessible from top navigation.

The screenshot shows the DiligenceVault web application. At the top, there's a user profile for "Mary Andreas" from "New State Pensions". Below the header, a navigation bar includes "Settings", "Firm Settings" (which is highlighted in blue), and "Logout". The main content area has a dark sidebar on the left with various settings options like "Firm Profile", "Team Members", and "Integrations". On the right, a section titled "API Integration Key & Documentation" contains a message: "If you want to talk to DiligenceVault in special API way, you can. Our entire platform is based on robust REST APIs, and you can access your API key here." Below this message is a redacted API key field with the instruction "Be sure to keep your API key a secret." At the bottom of the sidebar, the "Open API" button is highlighted with a red border.

Get Token

Endpoint: `get-token`

Params: `key`

Method: `POST/GET`

Using this endpoint, you're able to get a JWT (JSON Web Token) to access all API endpoints

Example:

```
curl -X POST "https://DV_API_URL/api/v1/get-token/" -H "accept: application/json" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -H "Content-Type: application/json" -d "{\"key\": \"19d91bef00874630bcc59568af9b1432\"}"
```

```
curl -X GET "https://DV_API_URL/api/v1/get-token/" -H "accept: application/json" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -H "Content-Type: application/json"
```

Firms

Endpoint: `/firms`

List out all the firms and related information

```
curl -X GET "https://DV_API_URL/api/v1/firms" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpljoiMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGI0eSI6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2IkjoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkjpuWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

Example Output:

```
[{
  'id': 47385,
  'name': 'public API Investor Firm',
  'website': 'http://www.diligencevault.com',
  'owner_name': 'Manager Account',
  'alternate_name': None,
  'relationship_status_name': None,
  'internal_key': "FIRM1",
  'tag_names': ["TAG1", "TAG2", "TAG3"],
  'is_active': true,
  'custom_fields': {}
}]
```

Endpoint: firms/firms_download?start_date=&end_date=

(optional) start_date & end_date will apply filter on documents and notes.

Example:

```
curl -X GET "https://DV_API_URL/api/v1/firms/firms_download?start_date=YYYY-MM-DD&end_date=YYYY-MM-DD" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpljoiMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGI0eSI6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2IkjoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkjpuWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

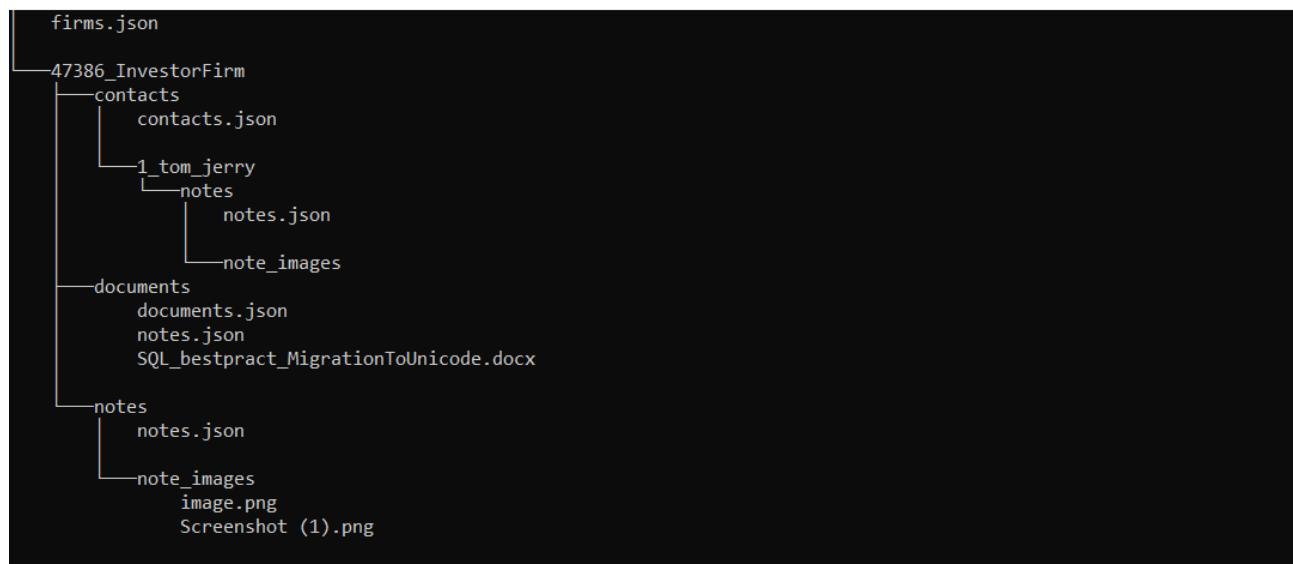
You can download .zip file which includes all firm relationships data including notes, contacts, and documents.

Folder Structure of zip file. (owner_firm_name_timestamp.zip)

- **firms.json:** list of all firms/investors
- **firmid_firmname:** All data related to this firm will be under this folder.
 - **Contacts**
 - contacts.json: Contact details like address associated with this product
 - **contactid_firstname_lastname** - (folder for each contact)
 - notes
 - notes.json
 - note_images
 - **Documents**
 - file_name1.docx
 - file_name2.docx

- [documents.json](#): Metadata about all documents including document tags, group names
- [notes.json](#) – All documents related notes which can be mapped with entity_name(filename) attribute.
- **Notes**
 - **note_images** – (embedded images for in the note text)
 - [notes.json](#): Metadata about all the notes included creation date
- **addresses.json**
 - All addressed for the firm
- **AUM.json**
 - AUM and Track records for the firm

Folder structure example:



1) firms.json

```
{
  'id': 47385,
  'name': 'public API Investor Firm',
  'website': 'http://www.diligencevault.com',
  'owner_name': 'Manager Account',
  'alternate_name': None,
  'relationship_status_name': None,
  'key': None,
  'tag_names': None,
  'is_active': True,
  'custom_fields': {}
}
```

The screenshot shows the DiligenceVault web application. The top navigation bar includes 'New', 'Diligence', 'Dash', 'Manage', 'Form ADV', 'Excel Sync', and account information for 'Managers Account Arthance LLC'. The main content area displays a table of firm records. The sidebar on the left has sections for 'Monitor Firm' and 'Products', with 'Investors' highlighted and surrounded by a red box. The table columns are 'Status', 'DiligenceVault Owner', and 'Last TouchPoint'. The footer contains pagination and a search bar.

2) YOURFIRMID_YOURFIRMFNAME > documents > documents.json

```
{
  'blob_name': 'permissions.docx',
  'created_at': '2019-09-25T09:22:02.210000',
  'updated_at': None,
  'name': 'permissions.docx',
  'as_of_date': '2019-09-24T18:30:00',
  'owner_firm_name': 'Public API Manager Firm',
  'created_by_name': 'Manager Account',
  'updated_by_name': None,
  'group_names': None,
  'tag_names': [
    'Articles of Incorporation'
  ]
}
```

The screenshot shows the DiligenceVault interface with a modal dialog titled 'Add New Document'. The dialog form includes fields for 'Entity Type' (set to 'Firm'), 'Associated Firm' (a dropdown), 'Document Name' (set to 'public api documentation'), 'Document Types' (a dropdown), 'As of Date' (a date input), 'Select File' (a file upload area with a red box around the 'blob_name' field containing 'public api documentation.pdf'), and 'Upload' and 'Cancel' buttons. The background shows the firm's profile summary and other sections like 'Workflow Process' and 'Open Tasks / Reminders'.

The screenshot shows the DiligenceVault web application. The top navigation bar includes links for New, Diligence, Dash, Manage, Form ADV, Excel Sync, and Managers Account (Arthance LLC). A red box highlights the 'My Firm' tab in the 'Manage' dropdown menu. The main content area is titled 'My Firm' and contains sections for DDQs, Products, Investors, and Contacts. Below these are search fields for 'Document Name' and 'Search by name' along with a 'Search documents' button. A large table lists various documents with details like 'Independent Controls Audit', '28-February-2018', 'Mitesh Manager', etc. A search bar at the top right is labeled 'Search for documents...'.

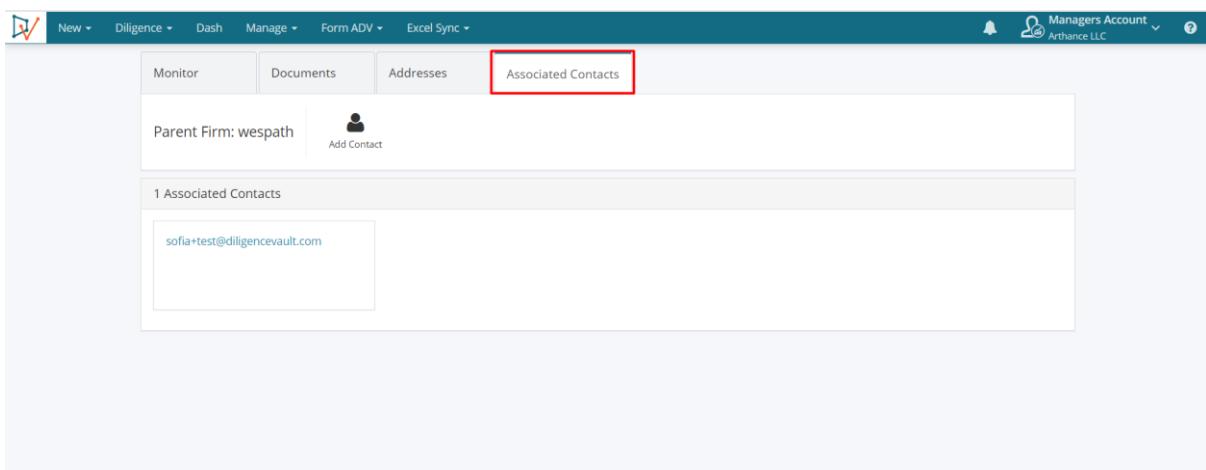
3) YOURFIRMID_YOURFIRMNAME > contacts > contacts.json (Team members)

```
{
  'id': 1,
  'firstname': 'investors',
  'lastname': 'account',
  'firm_id': 1,
  'firm_name': 'Your Firm Name',
  'email': 'investors+publicapi@diligencevault.com',
  'owner_name': 'Manager Account',
  'title': None,
  'city': None,
  'country_name': None,
  'state': None,
  'type_names': None,
  'key': None,
  'is_active': true,
  'phone1': None,
  'phone2': 1,
  'fax': None
}
```

The screenshot shows the DiligenceVault web application. The top navigation bar includes links for New, Diligence, Dash, Manage, Form ADV, Excel Sync, and Managers Account (Arthance LLC). A red box highlights the 'Team Members' tab in the 'Firm Settings' section of the left sidebar. Another red box highlights the 'Team Members' tab in the top right corner of the screen, which also includes options for My Settings, Firm Settings, Privacy Policy, and Sign out. The main content area is titled 'Team Members' and displays a grid of profiles for users: Anjali Jain, Austin Manager, Bhautik Manager, Bill Manager, Compliance Team, and Heidi Morrow. Each profile includes a user icon, title, access level (e.g., Admin, ReadWrite), and edit/delete buttons.

4) **FIRMID_FIRMNAME > contacts > contacts.json**

```
{
  'id': 1,
  'firstname': 'investors',
  'lastname': 'account',
  'firm_id': 2,
  'firm_name': 'Investor Firm Name',
  'email': 'investors+publicapi@diligencevault.com',
  'owner_name': 'Manager Account',
  'title': None,
  'city': None,
  'country_name': None,
  'state': None,
  'type_names': None,
  'key': None
  'is_active': true,
  'phone1': '123456789',
  'phone2': '123456789',
  'fax': '123456789'
}
```

5) **FIRMID_FIRMNAME > contacts > CONTACTID_FIRSTNAME_LASTNAME > notes > notes.json** (Select any contact from screenshot #2). If any note text contains images embedded you will find those images saved under the note_images folder.

```
{
  'text': 'First meeting.<br/>',
  'updated_at': '2019-09-25T13:04:52.370000',
  'email': 'manager+publicapi@diligencevault.com',
  'as_of_date': '2019-09-25'
}
```

Sofia Manager Account (Demo) ● Sofia B
DiligenceVault Owner

Associated Products (Top 1 of 1 products)

- Besyakov Artificial Int

Open Tasks / Reminders

There are no open tasks present!

Contact Details

EMAIL: sofia+freemanager@diligencevault.com
PHONE:
PHONE 2:
CONTACT TYPE: INVESTOR-RELATIONS
STREET ADDRESS:
STREET ADDRESS 2:

New Note

Note Type: General Date: 04-October-2019 Add Note

Timeline (2)

Investor Team Account added a few seconds ago General @04-Oct-19

Lorum Ipsum is simply dummy text of the printing and typesetting industry. Lorum Ipsum has been the industry's standard dummy text ever since the 1500s, when an

- 6) **FIRMID_FIRMINAME > Documents > documents.json** (Select any product from the above screenshot 1 and go to documents tab to access a list of documents)

```
{
  'blob_name': 'permissions.docx',
  'created_at': '2019-09-25T09:22:02.210000',
  'updated_at': None,
  'name': 'permissions.docx',
  'as_of_date': '2019-09-24T18:30:00',
  'owner_firm_name': 'Public API Manager Firm',
  'created_by_name': 'Manager Account',
  'updated_by_name': None,
  'group_names': None,
  'tag_names': [
    'Articles of Incorporation'
  ]
}
```

Monitor Documents Addresses Associated Contacts

wespath Firm | 1 document Add Document Search for documents...

Document Name	Document Types	As of Date	Uploaded By
Appendix B - Enterprise Ven...	Fund1	25-July-2019	Sofia Besyakov

- 7) **FIRMID_FIRMNAME > documents > notes.json** (Select any document from the above list to access notes for a document. Notes.json will have notes for all listed documents under documents.json which can be mapped using entity_name attribute)

```
{
  'text': 'First meeting.<br/>',
  'updated_at': '2019-09-25T13:04:52.370000',
  'email': 'manager+publicapi@diligencevault.com',
  'as_of_date': '2019-09-25',
  'entity_name': 'file_name'
}
```

The screenshot shows a document titled "Marketing Document.docx" with a version of "Version 1". The document type is "MARKETING DECK / PITCH BOOK". On the right side, there are several sections: "More Actions", "Go back", "Review History (3)", "Review 1", "Review 2", "Review 3", "Open Tasks / Reminders (1)", and "Version History". The "Notes" section is highlighted with a red box. It contains one note from Austin Monceret: "Austin Monceret added a month ago Review, please approve @Heidi Thompson".

- 8) **FIRMID_FIRMNAME > notes > notes.json** (If any note text contains images embedded you will find those images saved under the note_images folder)

```
{
  'text': 'First meeting.<br/>',
  'updated_at': '2019-09-25T13:04:52.370000',
  'email': 'manager+publicapi@diligencevault.com',
  'as_of_date': '2019-09-25',
  'entity_name': 'firm name'
}
```

The screenshot shows the DiligenceVault interface with the 'Monitor' tab selected. The main content area displays the firm profile for 'Kings Endowment PVT LTD'. The 'Timeline (5)' section is highlighted with a red box, showing a note from 'Mitesh Manager' and a task from '@Heidi Thompson'.

9) FIRMID_FIRMNAME > addresses.json

```
{
    'street1': 'street1',
    'street2': 'Street 2',
    'city': 'Mumbai',
    'state': 'Maha',
    'country_name': 'India',
    'zipcode': '987456ACV',
    'phone1': '1234567890',
    'phone2': '1234567890',
    'fax': '1234567890',
    'created_at': '2019-09-25T09:20:16.940000',
    'updated_at': '2019-09-25T09:20:16.940000',
    'is_headquarter': false,
}
```

10) FIRMID_FIRMNAME > AUM.json

```
{
    "name": "Diligencevault Manager: AUM Monthly 1",
    "values": {
        "January": 1000.0000,
        "February": 2000.0000,
        "March": 3000.0000,
        "April": 4000.0000
    }
}

{
    "name": "Diligencevault Manager: AUM Monthly 1",
    "values": {
        "January - March": 1000.0000,
        "April - June": 2000.0000,
        "July - September": 3000.0000,
        "October - December": 4000.0000
    }
}
```

Products

Endpoint: /products

List out all the products and related information

```
curl -X GET "https://DV_API_URL/api/v1/products" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjoiMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGI0eS16MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2IkIjoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWIkIjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ9fQ.VqHflED55pT3L81NvMSqsRF0dkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

Example Output:

```
[{
    'id': 8240,
    'fund_name': 'Data Provider Firm',
    'strategy': 'Commodity1',
    'key': 'PAP1',
    'owner_name': None,
    'relationship_status_name': None,
    'tag_names': None,
    'updated_at': '2019-09-25T09:20:16.940000',
    'shareclass_count': '1',
    'return': '90.00',
    'returnasofdate': '2019-09-30T23:59:59'
}]
```

Endpoint: products/products_download?start_date=&end_date=

Example:

```
curl -X GET "https://DV_API_URL/api/v1/products/products_download?start_date=YYYY-MM-DD&end_date=YYYY-MM-DD" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjoiMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGI0eS16MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2IkIjoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWIkIjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ9fQ.VqHflED55pT3L81NvMSqsRF0dkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

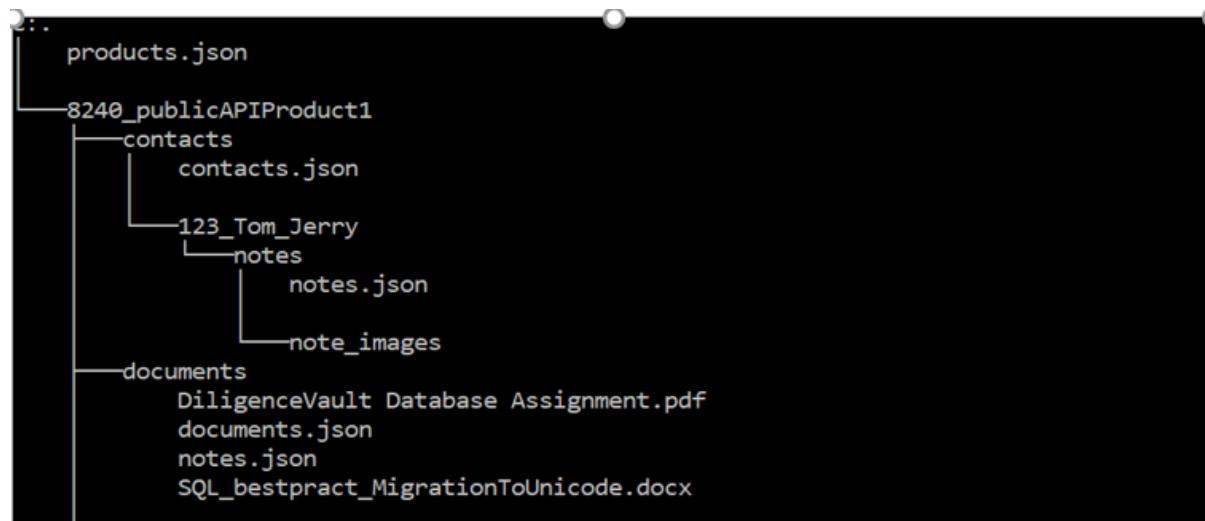
You can download .zip file which includes all product relationships data including notes, meetings, contacts, and documents.

Folder Structure of zip file. (owner_firm_name_timestamp.zip)

- **products.json**: list of all your products
- **productid_productname**: All data related to this product will be under this folder.
 - **Contacts**
 - contacts.json: Contact details like address associated with this product
 - **contactid_firstname_lastname** - (folder for each contact)
 - notes
 - notes.json

- note_images
- **Documents**
 - file_name1.docx
 - file_name2.docx
 - **documents.json**: Metadata about all documents including document tags, group names
 - **notes.json** – All documents related notes which can be mapped with entity_name(filename) attribute.
- **AUM.json**
 - AUM and Track records for the firm

Folder structure example:



1) products.json

```
{
  'id': 8240,
  'fundname': 'Data Provider Firm',
  'strategy': 'Commodity1',
  'key': 'PAP1',
  'owner_name': None,
  'relationship_status_id': None,
  'relationship_status_name': None,
  'tag_names': None,
  'updated_at': '2019-09-25T09:20:16.940000',
  'shareclass_count': '1',
  'return': '90.00',
  'returnasofdate': '2019-09-30T23:59:59'
}
```

Product Name	Description	Share Class
Beta Compliant	# SHARE CLASS: 1	
Investors	# SHARE CLASS: 1	
Contacts		
Document Product	BoA FI	Jan23_product2
Commodity	Core Fixed Income	Core Fixed Income
# SHARE CLASS: 1	# SHARE CLAS: 1	# SHARE CLASS: 1
MAR 2019 : 5.00%		
Mitesh Document Fund 05201 8	Core Fixed Income	New Fund 003
# SHARE CLASS: 1	# SHARE CLASS: 1	Core Fixed Income
Sourav Capitals 42	test core FI	Test FI Fund
Core Fixed Income	Core Fixed Income	Core Fixed Income
# SHARE CLASS: 1	# SHARE CLASS: 1	# SHARE CLASS: 1
		Test R Product 05_07_2018_01
		Core Fixed Income
		# SHARE CLASS: 1

2) PRODUCTID_PRODUCTNAME > contacts > contacts.json

```
{
  'firstname': 'investors',
  'lastname': 'account'
  'firm_id': 2,
  'firm_name': 'Investor Firm Name',
  'email': 'investors+publicapi@diligencevault.com',
  'owner_name': 'Manager Account',
  'title': None,
  'city': None,
  'country_name': None,
  'state': None,
  'type_names': None,
  'key': None,
  'is_active': true,
  'created_at': '2019-09-25T09:20:16.940000',
  'updated_at': null,
  'bounced_at': null,
  'phone1': '123456789',
  'phone2': '123456789',
  'fax': '123456789'
}
```

The screenshot shows the DiligenceVault web application. At the top, there is a navigation bar with links: New, Diligence, Dash, Manage, Form ADV, Excel Sync, Managers Account (Arthance LLC), and a help icon. Below the navigation bar, there is a horizontal menu with tabs: Summary, AUM & Track Record, DDQ, Documents, Address Details, and Associated Contacts. The Associated Contacts tab is highlighted with a red box. In the main content area, there is a section titled "MP Multiple Contact Product" with the sub-section "Parent Firm Arthance LLC". Below this, there is a button labeled "Add Contact". Underneath, a box labeled "1 Associated Contact(s)" contains a single contact entry: "Mitesh Prajapati".

- 3) **PRODUCTID_PRODUCTNAME > contacts > CONTACTID_FIRSTNAME_LASTNAME > notes > notes.json** (Select any contact from screenshot #2). If any note text contains images embedded you will find those images saved under the note_images folder.

```
{
  'text': 'First meeting.<br/>',
  'updated_at': '2019-09-25T13:04:52.370000',
  'email': 'manager+publicapi@diligencevault.com',
  'as_of_date': '2019-09-25',
  'entity_name': 'product name'
}
```

The screenshot shows the DiligenceVault web application. At the top, there is a navigation bar with links: New, Diligence, Dash, Manage, Analyze, Form ADV, Reports, Investors Team Account (World Endowment), and a help icon. Below the navigation bar, there is a contact profile for "Sofia Manager Account (Demo)" at Besyakov Asset Management, owned by "Sofia B" (DiligenceVault Owner). The contact has "Associated Products (Top 1 of 1 products)" listed as "Besyakov Artificial Int". There are sections for "Open Tasks / Reminders" (none present) and "Contact Details" (Email: sofia+freemanager@diligencevault.com, Phone: blank, Contact Type: INVESTOR-RELATIONS, Street Address: blank). On the right, there is a "New Note" section with a rich text editor, a "Note Type" dropdown set to "General" (Date: 04-October-2019), and a "Timeline" section showing a note from "Investor Team Account" added a few seconds ago. The note content is: "Investor Team Account added a few seconds ago. Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an".

- 4) **PRODUCTID_PRODUCTNAME > Documents > documents.json** (Select any product from the above screenshot 1 and go to documents tab to access a list of documents)

```
{
  'blob_name': 'permissions.docx',
  'created_at': '2019-09-25T09:22:02.210000',
  'updated_at': None,
  'name': 'permissions.docx',
  'as_of_date': '2019-09-24T18:30:00',
  'firm_name': 'Public API Manager Firm',
  'created_by_name': 'Manager Account',
  'updated_by_name': None,
  'group_names': None,
  'tag_names': [
    'Articles of Incorporation'
  ]
}
```

Document Name	Document Types	As of Date	Uploaded By
wf snapshots.docx	Background Check Report and 1 more	21-August-2019	Managers Account
Board Bios Baillie Gifford ...		19-September-2019	Sofia Besyakov
Bios Blackrock.docx		19-September-2019	Sofia Besyakov

- 5) **PRODUCTID_PRODUCTNAME > documents > notes.json** (Select any document from the above list to access notes for a document. Notes.json will have notes for all listed documents under documents.json which can be mapped using entity_name attribute)

```
{
  'text': 'First meeting.<br/>',
  'updated_at': '2019-09-25T13:04:52.370000',
  'email': 'manager+publicapi@diligencevault.com',
  'as_of_date': '2019-09-25',
  'entity_name': 'blob_name'
}
```

The screenshot shows a document named 'Marketing Document.docx' with a version labeled 'Version 1'. The interface includes a navigation bar with 'New', 'Diligence', 'Dash', 'Manage', 'Analyze', 'Form ADV', and 'Reports'. On the right, there's an 'Investor Team Account' dropdown and a 'World Endowment' link. The main content area displays various document metadata and activity logs.

Products -> AUM.json

```
{
  "name": "Diligencevault Manager: AUM Monthly 1",
  "values": {
    "January": 1000.0000,
    "February": 2000.0000,
    "March": 3000.0000,
    "April": 4000.0000
  }
}
{
  "name": "Diligencevault Manager: AUM Monthly 1",
  "values": {
    "January - March": 1000.0000,
    "April - June": 2000.0000,
    "July - September": 3000.0000,
    "October - December": 4000.0000
  }
}
```

Projects

Projects Information

Endpoint 1: `projects?start_date=&end_date=&status=&date_type=`

Method: GET

Parameter: start_date(optional), end_date(optional) , status(optional), date_type = 'started_at','completed_at', 'created_at', 'updated_at'

- created_at , completed_at, Started_at = For project's started, completed and created date
- updated_at = Any responses which updated in given time span
- status = can be multiple with comma separated value(started,completed,invited)

Example:

```
curl -X GET "https://DV_API_URL/api/v1/projects?start_date=YYYY-MM-DD &end_date=YYYY-MM-DD" -H
"accept: application/json" -H "Authorization: Bearer
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjIwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zjp7InVzZXJfaWQiOjEwLCJmaXJtX2I
kljoyLCJ1c2VyX3R5cGUiOjkzNSwiYWNjZXNzdHlwZWlkjpuWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ
```

```
9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY:  
19d91bef00874630bcc59568af9b1432"
```

OUTPUT:**- List of projects**

```
[  
  {  
    "id": project_id,  
    "as_of_date": "2020-03-27T00:00:00",  
    "due_at": "2020-03-27T00:00:00",  
    "fromfirm_name": "Bhautik Investor Firm",  
    "tofirm_name": "Bhautik Manager Firm",  
    "type": "Standard",  
    "acknowledged_at": "2020-02-11T05:50:11.063000",  
    "template_id": template_id,  
    "created_at": "2020-02-11T05:49:33.787000",  
    "started_at": "2020-02-11T05:50:10.980000",  
    "entity_name": "Bhautik Manager Firm",  
    "closed_at": null,  
    "created_by_name": "bhautik+investor@diligencevault.com ",  
    "is_internal": false,  
    "status": "Started",  
    "created_by_id": user_id,  
    "fromfirm_id": firm_id,  
    "entity_type": "Firm",  
    "completed_at": null,  
    "name": null,  
    "strategy_name": null,  
    "entity_id": fir_id,  
    "tofirm_id": firm_id,  
    "template_name": "All question type"  
  }  
]
```

[Download Project Content](#)**Endpoint 1:**

[projects/projects_download?start_date=&end_date=&exclude_documents=true&exclude_notes=true&status=completed&date_type](#)

Method: GET**Optional Parameters: exclude_documents, exclude_notes, status , date_type**

- Possible values for the **status(single or multiple with comma separated)**: Invited, Started, Followup, Completed, Approved, NotApproved, ExtensionRequested, PendingRestart
- Possible values for the **date_type**: created_at, completed_at, started_at, updated_at
 - created_at , completed_at, Started_at = For project's started, completed and created date
 - updated_at = Any responses which updated in given time span

Example:

```
curl -X GET "https://DV_API_URL/api/v1/projects/projects_download?start_date=YYYY-MM-DD  
&end_date=YYYY-MM-DD" -H "accept: application/json" -H "Authorization: Bearer  
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE1NzA0ODc4ODUsIm5iZiI6MTU3MDQ4Nzg4NSwianRpIjo  
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI  
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zJp7InVzZXJfaWQiOjEwLCJmaXJtX2I  
kljoyLCJ1c2VyX3R5cGUiOjkzNSwiYWNjZXNzdHlwZWlkjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ
```

```
9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY:  
19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

Endpoint 2: (To get only projects for selected projects)

projects/projects_download

Method: POST

**Body: {"projects": "[project ids]"}
Example:**

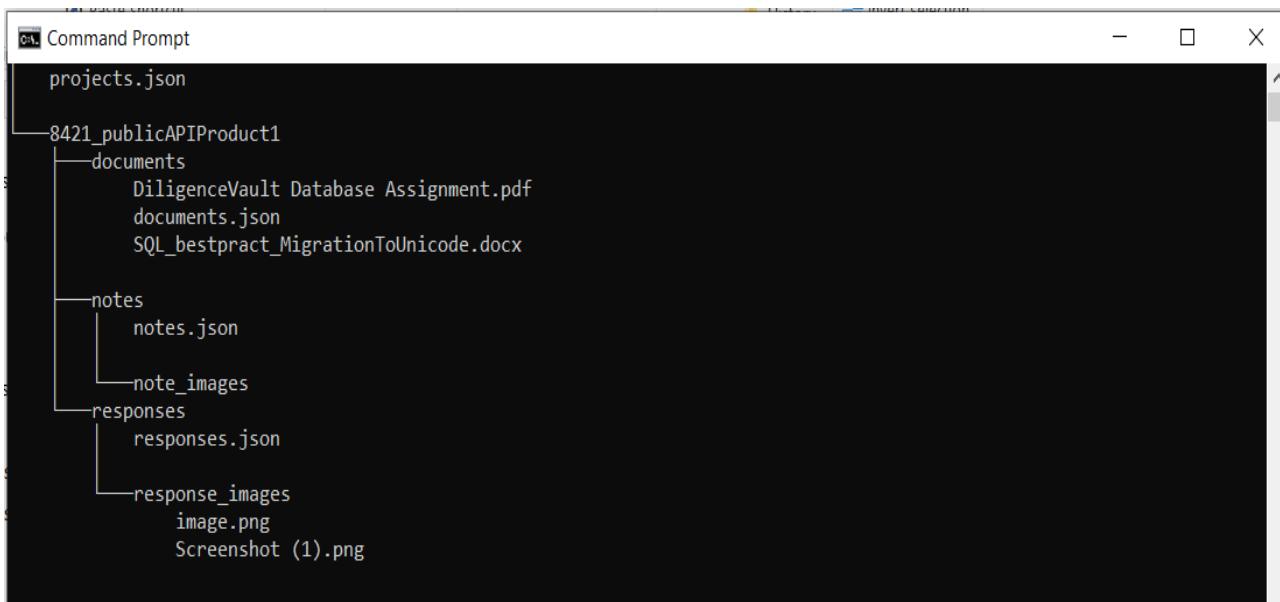
```
curl -X GET "https://DV_API_URL/api/v1/projects/projects_download?start_date=YYYY-MM-DD  
&end_date=YYYY-MM-DD" -H "accept: application/json" -H "Authorization: Bearer  
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo  
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI  
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJFY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2I  
kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ  
9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY:  
19d91bef00874630bcc59568af9b1432" --data-raw '{"projects": "[projectids]"}' -o ./output_filename.zip
```

You can download .zip file which includes all projects data including responses, notes, and documents.

Folder Structure of zip file. (owner_firm_name_timestamp.zip)

- [projects.json](#): list of all closed projects & profiles.
- [id_entity_name](#): All data related to this project will be under this folder.
 - [documents](#)
 - [file_name1.docx](#)
 - [file_name2.docx](#)
 - [documents.json](#): Metadata about all documents including document tags, group names
 - [notes.json](#) – All documents related notes which can be mapped with entity_name(filename) attribute.
 - [notes](#)
 - [note_images](#) – (embedded images for in the note text)
 - [notes.json](#): Metadata about all the notes included creation date
 - [responses](#)
 - [response_images](#) – (embedded images in the response text)
 - [responses.json](#)

Folder structure example:



1) projects.json

```
{
  'id': 8430,
  'created_at': '2019-10-07T12:19:18.240000',
  'started_at': '2019-10-07T12:19:29.183000',
  'closed_at': None,
  'type': 'Standard',
  'status': 'Completed',
  'completed_at': '2019-10-07T12:19:48.600000',
  'is_internal': False,
  'name': 'minal test project',
  'entity_type': 1219,
  'acknowledged_at': '2019-10-07T12:19:29.247000',
  'entity_name': 'All Seasons',
  'template_name': 'minal test template 3',
  'tofirm_name': 'Arthance LLC 3',
  'tofirm_id': 1,
  'fromfirm_name': 'World Pensions',
  'created_by': 'investors@diligencevault.com',
  'strategy_name': 'Core Fixed Income',
  'as_of_date': '2019-10-07T12:19:48.600000',
  'due_at': '2019-10-07T12:19:48.600000',
  'question_count': '1',
  'percentage_complete': '100',
  'parent_entity_id': 100,
}
```

Attribute name	Description
entity_type	Product/Firm/Vehicle
entity_name	Product/Firm Name
type	Investors: Profile for internal profiles Standard for all external and internal DDQs Managers: Profile for Pre-approved Q&A Content

	Document for investor ad hoc requests which are uploaded on DiligenceVault Standard for all standard annual and quarterly DDQs
fromfirm_id	A firm that initiates the project request
fromfirm_name	A name of the firm that initiates the project request
tofirm_name	Name of the firm that receives the request from another firm, in case of internal standard project & profile project, this will be None
is_internal	Internal projects like Q&A content and product/firm DDQs. Only initiator firm can access this project.

Project Types

1) Q&A Content

```
{
  'id': 8441,
  'created_at': '2019-10-14T06:15:44.920000',
  'started_at': '2019-10-14T06:15:44.667000',
  'closed_at': None,
  'type': 'Profile',
  'status': 'Started',
  'completed_at': None,
  'is_internal': True,
  'name': 'Firm Profile',
  'entity_type': 1220,
  'acknowledged_at': None,
  'entity_name': 'Public API Manager Firm',
  'template_name': 'Profile Template',
  'tofirm_name': None,
  'fromfirm_name': 'Public API Manager Firm',
  'created_by_name': 'Manager Account',
  'strategy_name': None
}
```

2) Investor document request/project

```
{
  'id': 8442,
  'created_at': '2019-10-14T06:15:44.920000',
  'started_at': '2019-10-14T06:15:44.667000',
  'closed_at': None,
  'type': 'Document',
  'status': 'Started',
  'completed_at': None,
  'is_internal': True,
  'name': 'Firm Profile',
  'entity_type': 'Product',
  'acknowledged_at': None,
  'entity_name': 'Product 100',
  'template_name': 'Profile Template',
```

```
'tofirm_name': 'investor firm name', (Investor Firm Name)
'fromfirm_name': 'Public API Manager Firm',
'created_by_name': 'Manager Account',
'strategy_name': None
}
```

3) External investor request on DiligenceVault

```
{
'id': 8407,
'created_at': '2019-09-25T09:44:18.217000',
'started_at': '2019-09-25T09:50:29.427000',
'closed_at': None,
'type': 'Standard',
'status': 'Started',
'completed_at': None,
'is_internal': False,
'name': None,
'entity_type': 1219,
'acknowledged_at': '2019-09-25T09:50:29.480000',
'entity_name': 'public API Product 1',
'template_name': 'All Response Clone',
'tofirm_name': 'Public API Manager Firm', (Your firm)
'fromfirm_name': 'public API Investor Firm', (Investor Firm Name)
'created_by_name': 'investors account',
'strategy_name': 'Commodity1'
}
```

a. closed projects (completed between provided start_date & end_date)

Entity Name	Questionnaire	Status
Arthance LLC	Request(28).docxTemplate	APPROVED
Forever Alpha	ILPA DDQ	APPROVED
All Seasons Core	All Unique	APPROVED
Dangerous Capital Multi Fund	Manager Request(20).docxTemplate	APPROVED
Artificial Everything Strategy	Test1test1	APPROVED
Artificial Everything Strategy	Test1test1	APPROVED
Forever Alpha	Fullerton Unit Trusts DD	APPROVED
All Seasons Core	AIMA / AITEC Cyber Security DDQ	APPROVED
Arthance LLC	Demo 9.19.2019	APPROVED
Forever Alpha	Fullerton Unit Trusts DD	PENDING

Approved: Closed and request accepted | Not Approved: Closed and request not accepted

b. on-going projects (started between provided start_date & end_date)

My Projects In-progress Invites Closed Sent 2019-04-14 - 2019-10-14

Client Name	Entity Name	Due Date	Questionnaire	# of Questions	
public API Investor Firm	Public API Manager Firm	09-November-2019	All Response Clone	37	0 %
public API Investor Firm	Public API Manager Firm	09-November-2019	All Response Clone	37	0 %
public API Investor Firm	Public API Manager Firm	26-October-2019	All Response Clone	37	0 %
public API Investor Firm	Public API Manager Firm	09-November-2019	HF: Generic	161	0 %
public API Investor Firm	public API Product 1	09-November-2019	All Response Clone	37	0 %
public API Investor Firm	public API Product 1	25-October-2019	All Response Clone	37	0 %
public API Investor Firm	public API Product 1	04-December-2019	All Response Clone	37	0 %
public API Investor Firm	public API Product 1	14-November-2019	All Response Clone	37	0 %
public API Investor Firm	public API Product 1	09-November-2019	All Response Clone	37	43 %

1 - 9 of 9 items

STARTED Response being populated COMPLETED Response submitted RESTART REQUESTED Restart requested FOLLOWUP Q&A between Investor & Manager

- c. profiles (any response updated between provided start_date & end_date).

2) PROJECTID_ENTITYNAME > documents > documents.json

Summary Questionnaire Documents Internal Notes Ratings

5_10 Manager Add Document Search for documents...

Document Name	Document Types	As of Date	Uploaded By
table changes update.xlsx	Administrator Agreement	15-September-2019	Investor Team Account
new questionnaire.docx	Articles Of Incorporation and 1 more	29-August-2019	Investor Team Account
Marketing Document.docx	Marketing Deck / Pitch Book	03-September-2019	Heidi Thompson
letter of credit.docx		21-September-2019	Investor Team Account

- 3) **PROJECTID_ENTITYNAME > documents > notes.json** (Select any document from the above list to access notes for a document. Notes.json will have notes for all listed documents under documents.json which can be mapped using entity_name attribute)

The screenshot shows a document titled "new questionaire.docx" with a version labeled "Version 1". The "Notes (1)" section is highlighted with a red box. It contains one note from "Investor Team Account" added a few seconds ago, which reads: "Please share document with all our managers." Below this, there are sections for "Workflow Process" (empty), "Manager Access Details" (empty), "Review History" (empty), "Open Tasks / Reminders" (empty), and "Version History" (empty).

- 4) **PROJECTID_ENTITYNAME > notes > notes.json**

```
{
  'text': 'project level followup',
  'updated_at': '2019-10-14T09:27:58.463000',
  'email': 'manager+publicapi@diligencevault.com',
  'as_of_date': '2019-10-14'
  "entity_name": 'question text'
}
```

The screenshot shows a navigation bar with tabs: Summary, Questionnaire, Documents, Internal Notes (highlighted with a red box), and Ratings. Below the tabs, it says "5_10 Manager" and "Status: STARTED". It displays "Showing 1 Internal Note(s)". The content area shows a note from "Investor Team Account" added a few seconds ago, which reads: "please attach AUM report here." There are edit and delete links next to the note.

- 5) **PROJECTID_ENTITYNAME > responses.json** (if any response has embedded images, you can find those under response_images folder and it can be mapped using file_name)

Responses.json Documentation

responses.json has all questions & responses available for a specific project.

```
{
  'project_id': '8421',
  'entity_name': 'public API Product 1',
  'is_repeatable': False,
  'response': [
    {
      'comments': '',
      'is_mandatory': False,
      'is_na': False,
      'question_id': 106235,
      'response_type': 'type_boolean',
      'sequence_id': 6820,
      'text': 'aum history',
      'value': False,
      'table_data': {}
    }
  ]
}
```

Attribute name	Description
project_id	Project Unique identifier
entity_name	Product Name , Vehicle Name, or Firm Name
is_repeatable	Please click here to check an example.
Comment	Please click here to check an example.
is_mandatory	Please click here to check an example.
is_na	Please click here to check an example.
question_id	Unique Identifier for a question
response_type	Please click here for description.
sequence_id	You will find multiple sequence_id for the same question_id & section_id if is_repeatable is true.
Value	Answer text for the question.
Text	Question text

table_data	this attribute will have values only for special response types like type_aumtable, type_dynamicgrid, type_grid and type_returntable. Please click here to check an example for table data json. type_grid/type_dynamicgrid – click here type_aumtable & type_returntable – click here
section_id	Unique Identifier for section/category
section_name	Please click here for an example
subsection_id	Unique identifier for sub section/ sub category
subsection_name	Please click here for an example

Repeatable section

The screenshot shows a project summary page with various tabs: Summary, Questionnaire (selected), Documents, Internal Notes, and Ratings. Below the tabs, there are status indicators: My Assignments (0), To-Dos / WIP (0), Answered (1), Unanswered (0), Not Applicable (0), and Follow-up (0). A red box highlights a specific section under 'category 1' labeled 'sub category 1'. This section contains two identical questions, both titled '1. Office Location & Address'. The first question has the answer 'India' and the second has the answer 'USA'. The entire highlighted area is enclosed in a red border.

Comment

The screenshot shows a project summary page with tabs: Summary, Questionnaire (selected), Documents, Internal Notes, and Ratings. Below the tabs, there are status indicators: My Assignments (0), To-Dos / WIP (0), Answered (1), Unanswered (46), Not Applicable (0), and Follow-up (0). A red box highlights a comment section under 'Basic Informa...' labeled 'Firm Overview'. The comment box contains the text: '1. What is your annual compensation? Yes (Ullamcorper morbi tincidunt ornare massa eget egestas purus viverra accumsan. Diam donec adipiscing tristique risus nec feugiat in fermentum posuere. Nisi scelerisque eu ultrices vitae auctor eu augue ut. Imperdiet massa tincidunt nunc pulvinar sapien et ligula ullamcorper. Posuere lorem ipsum dolor sit)'. The entire highlighted area is enclosed in a red border.

Responsetypes

Type	Description
------	-------------

type_attachment	Attachment
type_aumtable	AUM History
type_dynamicgrid	Customize Grid / Table
type_date	Date
type_textemail	Email
type_grid	Grid / Table
type_identifier	Identifier
type_checkBox	List of multiple choices / Checkbox
type_dropdown	List of single choice / Dropdown
type_bookends	Min-max range
type_numeric	Numeric – Decimal
type_integer	Numeric – Integer
type_percentage	Percentage
type_textphone	Phone #
type_text	Text Explanation - One Line
type_textmultiline	Text Explanation – Paragraph
type_returntable	Track Record
type_boolean	Yes/No
type_noplus	Yes/No with explanation for No
type_booleanplus	Yes/No with explanation for Yes

Section / SubSection

The screenshot shows the DiligenceVault software interface. At the top, there's a navigation bar with links like 'New', 'Diligence', 'Dash', 'Manage', 'Analyze', 'Form ADV', and 'Reports'. On the right, there's an 'investor account' dropdown set to 'World Pensions'.

The main area has tabs for 'Summary', 'Questionnaire' (which is selected), 'Documents', 'Internal Notes', and 'Ratings'. Below these tabs, it shows '12' items and was last updated on '07 October 2019'. There are buttons for 'More Actions' and 'Closed Project'.

Under the 'Questionnaire' tab, there are several status indicators: 'My Assignments' (0), 'To-Dos / WIP' (0), 'Answered' (7), 'Unanswered' (30), 'Not Applicable' (1), and 'Follow-up' (0). A red box highlights the 'Section' and 'Sub section' sections.

The 'Section' section shows a list of items: 'Sub section' (28), '1. aum history' (marked as N/A), '2. email' (Yes), and 'New parent' (4) and 'Mandatory que...' (5).

The 'Sub section' section shows a list of items: 'Sub section' (24 questions), '1. aum history' (marked as N/A), and '2. email' (Yes).

Mandatory Question

Summary Questionnaire Documents Internal Notes Ratings

12 Last Updated 07 October 2019 Auto-fill Responses Finish More Actions

My Assignments To-Dos / WIP Answered Unanswered Not Applicable Follow-up

Section Sub section 28 We think our instructions would help you

✓ 1. aum history
☐ Yes ☐ No

New parent Mandatory question ✓ 2. email
Mandatory que... ☐ Yes ☐ No

✓ 3. checkbox
☐ Yes ☐ No

Not Applicable (is_na)

Summary Questionnaire Documents Internal Notes Ratings

12 Last Updated 07 October 2019 Auto-fill Responses Finish More Actions

My Assignments To-Dos / WIP Answered Unanswered Not Applicable Follow-up

Section Sub section 28 We think our instructions would help you

✓ 1. aum history
This question has been marked as N/A

✓ 2. email
☐ Yes ☐ No

✓ 3. checkbox
☐ Yes ☐ No

Grid/ Dynamic Grid

The screenshot shows a software interface for managing survey responses. On the left, there's a sidebar with options like 'New', 'Diligence', 'Dash', 'Manage', 'Analyze', 'Form ADV', and 'Reports'. The main area displays a survey form with two questions:

- Question 17:** 'yes+' with a note '*No Response Available*'.
- Question 18:** 'I like to create a mess' (text). Below it is a grid table with the following data:

	Name	Office	Title	Years within firm	Years of experience
	Tom	India	CEO	10	30
- Question 19:** 'I am greedy for space' (text). Below it is a grid table with the following data:

	Employee	Start Date	Term Date	Title	Functions	Office	Employment Term	Reason for Leaving
1								
2								
3								
.								

JSON for above example:

```
{
  'project_id': '8400',
  'entity_name': 'Autofill Test Firm 01',
  'is_repeatable': False,
  'response': [
    {
      'comments': None,
      'is_mandatory': False,
      'is_na': False,
      'question_id': 1268,
      'response_type': 'type_grid',
      'sequence_id': 6759,
      'text': 'I like to create a mess',
      'value': None,
      'table_data': {
        'rows': [
          ''
        ],
        'columns': [
          'Name',
          'Office',
          'Title',
          'Years within firm',
          'Years of experience'
        ],
        ':': [
          'Tom',
          'India',
          'CEO',
          '10',
          '30'
        ]
      }
    },
    {
      'section_id': 21357,
      'section_name': 'Section',
      'subsection_id': 21360,
      'subsection_name': 'Sub section'
    }
  ]
}
```

AUM & Track Record

Financial Data

1. Please provide AUM data.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	50.00	60.00	75.00	5.00	90.00							

2. Please provide track record data.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2019													0.00 %
2018	10.00 %	-5.00 %											4.50 %

JSON for above example

```
{
  'diligence_id': '8431',
  'entity_name': 'Dangerous Capital',
  'is_repeatable': False,
  'response': [
    {
      'comments': None,
      'is_mandatory': False,
      'is_na': False,
      'question_id': 106466,
      'response_type': 'type_aumtable',
      'sequence_id': 6833,
      'text': 'Please provide AUM data.',
      'value': None,
      'table_data': {
        'columns': [
          'Jan',
          'Feb',
          'Mar',
          'Apr',
          'May'
        ],
        'rows': [
          '2019'
        ],
        '2019': [
          '50.0000',
          '60.0000',
          '75.0000',
          '5.0000',
          '90.0000'
        ]
      }
    },
    {
      'comments': None,
      'is_mandatory': False,
      'is_na': False,
      'question_id': 106467,
      'response_type': 'type_tradtbl',
      'sequence_id': 6834,
      'text': 'Please provide track record data.',
      'value': None,
      'table_data': {
        'columns': [
          'Jan',
          'Feb',
          'Mar',
          'Apr',
          'May',
          'Jun',
          'Jul',
          'Aug',
          'Sep',
          'Oct',
          'Nov',
          'Dec',
          'YTD'
        ],
        'rows': [
          '2019'
        ],
        '2019': [
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          ''
        ],
        '2018': [
          '10.00 %',
          '-5.00 %',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          '',
          ''
        ]
      }
    }
  ]
}
```

```

        '75.0000',
        '5.0000',
        '90.0000'
    ],
}
},
],
{
'section_id': 23661,
'section_name': 'Data',
'subsection_id': 23662,
'subsection_name': 'Financial Data'
}
}

```

Nested Questions Example (nested_questions)

The screenshot shows the DiligenceVault platform interface. At the top, there's a navigation bar with 'New', 'Diligence', 'Dash', 'Manage', 'Analyze', 'Form ADV', and 'Reports'. On the right, there's a user icon for 'investor account' and 'World Pensions'. Below the navigation is a toolbar with tabs for 'Summary', 'Questionnaire' (which is selected), 'Documents', 'Internal Notes', and 'Ratings'. Underneath the toolbar are buttons for 'MP', 'Auto-fill Responses', 'Finish', and 'More Actions'. Below these are sections for 'My Assignments' (0), 'To-Dos / WIP' (0), 'Answered' (1), 'Unanswered' (0), 'Not Applicable' (0), and 'Follow-up' (0). A 'Firm Overview' section shows 'Location Data' with 1 question. The main content area displays a question: '1. Do you have an office outside of the country? If yes, provide an address'. Below it are radio buttons for 'Yes' and 'No'. A text input field contains the word 'India'. A red box highlights this entire section.

JSON for above example :

```

{
  'project_id': '8432',
  'entity_name': 'Arthance LLC',
  'is_repeatable': False,
  'response': [
    {
      'comments': None,
      'is_mandatory': False,
      'is_na': False,
      'question_id': 106468,
      'response_type': 'type_boolean',
      'sequence_id': 6834,
      'text': 'Do you have an office outside of the country? If yes, provide an address',
      'value': False,
      'table_data': {},
    },
    'nested_questions': [
      [
        {
          'question_id': 106469,
          'text': 'Provide office address',
        }
      ]
    ]
  }
}

```

```

'response_type': 'type_textmultiline',
'is_na': False,
'comments': 'India',
'is_mandatory': False,
'last_updated_at': '2019-10-08 17:43:36.747000',
'sequence_id': 6834,
'value': 'India',
'parent_questionid': 106468,
'nesting_condition': 'equal true'
}
]
]
},
],
'section_id': 23663,
'section_name': 'Firm Overview',
'subsection_id': 23664,
'subsection_name': 'Location Data'
}

```

Vehicles

Vehicles Information

Endpoint 1: /vehicles

Method: GET

Description: Retrieve the Vehicles information

Example:

```
curl -X GET "https://DV_API_URL/api/v1/vehicles" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI 6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2I kljoyLCJ1c2VyX3R5cGUIoJkzNSwiYWNjZXNzdHlwZWIkIjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ 9fQ.VqHflED55pT3L81NvMSqsRF0dkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432"
```

OUTPUT:

- **List of vehicles**

```
[
{
  "key": "Key",
  "fund_name": "FUND NAME",
  "created_at": "2020-01-01T10:36:57.840000",
  "owner_name": "OWNER EMAIL ID",
  "fund_id": "FUND ID",
  "id": "VEHICLE_ID",
  "inception_at": "2000-01-02T00:00:00",
  "relationship_status_name": "RELATIONSHIP STATUS",
  "vehicle_name": "VEHICLE NAME",
  "updated_at": "2020-05-02T00:00:00",
  "tag_names": ["tag1"],
}
```

```

    }
]
```

Download Vehicle Content

Endpoint 1: /vehicles/vehicles_download?start_date=&end_date=

Endpoint 2: /vehicles/vehicles_download/vehicle_id

Method: GET

Description: Download Vehicles/Vehicle data including Documents, Notes

Example:

```
curl -X GET "https://DV_API_URL/api/v1/vehicles/vehicles_download?start_date=YYYY-MM-DD
&end_date=YYYY-MM-DD" -H "accept: application/json" -H "Authorization: Bearer
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpljo
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zlp7InVzZXJfaWQiOjEwLCJmaXJtX2I
kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWIkjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ
9fQ.VqHflED55pT3L81NvMSqsRF0dkX04dun4f3h57auA_g" -H "X-API-KEY:
19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

```
curl -X GET "https://DV_API_URL/api/v1/vehicles/vehicles_download/1234" -H "accept: application/json" -H
"Authorization: Bearer
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpljo
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zlp7InVzZXJfaWQiOjEwLCJmaXJtX2I
kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWIkjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ
9fQ.VqHflED55pT3L81NvMSqsRF0dkX04dun4f3h57auA_g" -H "X-API-KEY:
19d91bef00874630bcc59568af9b1432" -o ./output_filename.zip
```

You can download .zip file which includes all vehicles/single vehicle data including notes, and documents

Folder Structure of zip file. (owner_firm_name_timestamp.zip)

- **vehicles.json:** list of all closed vehicles.
- **id_entity_name:** All data related to this vehicle will be under this folder.
 - **documents**
 - file_name1.docx
 - file_name2.docx
 - **documents.json:** Metadata about all documents including document tags, group names
 - **notes.json** – All documents related notes which can be mapped with entity_name(filename) attribute.
 - **notes**
 - **note_images** – (embedded images for in the note text)
 - **notes.json:** Metadata about all the notes included creation date

Templates

Endpoint: /templates

Method: GET

Description: List out all the **questionnaire templates** and related information

Example Request:

```
curl -X GET "https://DV_API_URL/api/v1/templates" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI 6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQoJewLCJmaXJtX2I kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkjpuWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ 9fQ.VqHflED55pt3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432"
```

Example Output:

```
[{"id": 8240, "name": "ODD Template", "strategy": "Commodity1", "type": "standard", "description": "DESCRIPTION OF TEMPLATE", "question_count": 8, "updated_at": "2019-09-25T09:20:16.940000", "frequency": "Annually"},]
```

Endpoint: /templates/template_id**Method: GET**

Description: List of all the **question** from the given templateid.

Example Request:

```
curl -X GET "https://DV_API_URL/api/v1/templates/<template-id>" -H "accept: application/json" -H "Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI 6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQoJewLCJmaXJtX2I kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkjpuWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ 9fQ.VqHflED55pt3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY: 19d91bef00874630bcc59568af9b1432"
```

Example Output:

```
[{"order": 3072, "optionvalues": null, "question_id": 105683, "repeated": false, "gridformat": {"rows": null, "columns": [{"name": "Column 1", "order": 1}, {"name": "Column 2", "order": 2}]}}
```

```

        ]
    },
    "type": "type_dynamicgrid",
    "category_id": 27355,
    "is_mandatory": false,
    "text": "Dynamic Grid",
    "subcategory_name": "Untitled Subcategory",
    "subcategory_id": 27357,
    "category_name": "Untitled Category",
    "is_nested": false
}
]

```

Endpoint: /templates/templates_download**Method:** GET**Description:** List of all the **question** from the given templateid.**Example Request:**

```
curl -X GET "https://DV_API_URL/api/v1/templates/templates_download" -H "accept: application/json" -H
"Authorization: Bearer
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2I
kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkIjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ
9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY:
19d91bef00874630bcc59568af9b1432" -o "output.zip"
```

Example Output:Zip file with name - **templates_{random_number}.zip**Zip file contains all **Active** Templates in json format – **{template_id}.json**

Contacts

Endpoint: /Contacts**Method: GET****Status Code:**

201: Created,
 401: Unauthorized,
 403: Forbidden,
 500: Internal Server Error

Description: List out all the **contacts** and related information**Example Request:**

```
curl -X GET "https://DV_API_URL/api/v1/contacts" -H "accept: application/json" -H "Authorization: Bearer
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOjE1NzA0ODc4ODUsIm5iZil6MTU3MDQ4Nzg4NSwianRpIjo
iMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTcwNDg4Nzg1LCJpZGVudGl0eSI
6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjEwLCJmaXJtX2I
kljoyLCJ1c2VyX3R5cGUIOjkzNSwiYWNjZXNzdHlwZWlkIjpudWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ
9fQ.VqHflED55pT3L81NvMSqsRFODkX04dun4f3h57auA_g" -H "X-API-KEY:
19d91bef00874630bcc59568af9b1432"
```

Example Output:

```
[{
  'id': 8240,
  'title': 'title',
  'first_name': 'First Name',
  'last_name': 'Last Name',
  'firm_name': 'Firm',
  'email': 'xyz@xyz.com',
  'is_active': true,
  'street1': 'street 1',
  'street2': 'street 2',
  'city': 'Mumbai',
  'state': 'Maharashtra',
  'country': 'India',
  'created_at': '2019-09-25T09:20:16.940000',
  'updated_at': '2019-09-25T09:20:16.940000',
  'tag_names': ['Mumbai'],
}

]
```

Custom Fields

Team members:

```
{"custom_fields": {
  "DV Team Members": {
    "type": "team_members",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
      {
        "id": 69726,
        "value": "Team Member"
      }
    ]
  }
}}
```

Template Field:

```
{"custom_fields": {
  "Dv Template": {}}
```

```

    "type": "template",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
        {
            "id": 5173,
            "value": "internal template"
        }
    ]
}

```

Vehicle filed:

```

{ "custom_fields": {
    "Dv Vehicle": {
        "type": "vehicle",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "id": 8370,
                "value": "First Vehicle"
            }
        ]
    }
}

```

Product Field:

```

{ "custom_fields": {
    "DV Product": {

```

```

    "type": "product",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
        {
            "id": 8343,
            "value": "First product 1"
        }
    ]
}

```

Firm Field:

```

{ "custom_fields": {
    "DV Firm": {
        "type": "firm",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "id": 47502,
                "value": "Manager Firm"
            }
        ]
    }
}

```

Contact Field:

```

{ "custom_fields": {
    "DV Contact": {

```

```

    "type": "contact",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
        {
            "id": 69724,
            "value": "Manager Contact"
        }
    ]
}

```

Checkbox Field:

```

{ "custom_fields": {
    "Checkbox field": {
        "type": "checkbox",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "value": "Option 1",
                "id": 95
            }
        ]
    }
}

```

Link Field:

```

{ "custom_fields": {
    "Link Field": {

```

```

    "type": "link",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
        {
            "value": "Name",
            "dynamic_url": "https://www.google.com"
        }
    ]
}
}

```

DropDown Field:

```

{ "custom_fields": {
    "Dropdown field": {
        "type": "dropdown",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "value": "Option 2",
                "id": 93
            }
        ]
    }
}

```

Numeric Field:

```

{ "custom_fields": {
    "Numeric field": {

```

```

    "type": "numeric",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
        {
            "value": 123.235,
            "dynamic_url": ""
        }
    ]
}

```

Integer Field:

```

{ "custom_fields": {
    "integer field": {
        "type": "int",
        "has_multiple": false,
        "is_mandatory": false,
        "has_href": false,
        "href": "",
        "data": [
            {
                "value": 123,
                "dynamic_url": ""
            }
        ]
    }
}

```

Multiline/Paragraph Field:

```

{ "custom_fields": {
    "Paragraph expl": {

```

```

    "type": "textmultiline",
    "has_multiple": false,
    "is_mandatory": false,
    "has_href": false,
    "href": "",
    "data": [
        {
            "value": "Paragraph value",
            "dynamic_url": ""
        }
    ]
}
}

```

Single line field:

```

{ "custom_fields": {
    "name": {
        "type": "text",
        "has_multiple": true,
        "is_mandatory": true,
        "has_href": true,
        "href": true,
        "data": [
            {
                "value": "Name field",
                "dynamic_url": "https://www.google.com/Name field"
            },
            {
                "value": "Hahaha",
                "dynamic_url": "https://www.google.com/Hahaha"
            }
        ]
    }
}

```

```
}
```

```
}
```

Common Errors/Questions

a) Getting time out error.

Please check with IT team if API_URL is not blocked due to proxy/firewalls.

b) Understanding API responses

Responses from our endpoint return standard HTTP response codes, which are displayed below:

- **200:** Request was received and processed without any error or issues.
- **400:** Returned if there's an exception in the request body (missing required field, data in an incorrect format, etc.).
- **401:** Returned either if API key is not provided, or if key is provided but is invalid
- **500:** Returned if our server encountered an issue saving your data. *If this does happen, please let us know (ask@diligencevault.com) and we'll get it resolved ASAP.*

c) API Usage Guidelines

- The API usage is subject to the following limits (subject to change):
 - 5 requests per day resets at midnight UTC
- We will be adding a daily usage tracking functionality in the future
- We reserve the right to change or deprecate the APIs over time - we will provide advance notification in those cases.