

## PUBLICAPI 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,
    }
  }
}
```

```

        "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
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOiJlMjMMDMzODg5MjksIm5iZiI6MTYw
MzM4ODkyOSwianRpIjoibmMmYxZDktODNiYy00YmMzLTgyMTYtZW5NzA5MzYy
MmZjIiwiaXhwIjoibmMmYxZDktODNiYy00YmMzLTgyMTYtZW5NzA5MzYy
wZSI6ImFjY2VzcyIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOiMyLCJmaXJtX2lkIjoibmMmYxZDktODNiYy00YmMzLTgyMTYtZW5NzA5MzYy
JtX25hbWUiOiJlMjMMDMzODg5MjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoibmMmYxZDktODNiYy00YmMzLTgyMTYtZW5NzA5MzYy
aWQiOiJlMjMMDMzODg5MjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoibmMmYxZDktODNiYy00YmMzLTgyMTYtZW5NzA5MzYy
j-15qwDEG6g43usf5ug' -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.eyJpYXQiOiJlMDMzODg5MjksIm5iZiI6
MTYwMzY0ODkyOSwianRpIjoiMmMmYxZDktODNlYy00YmMzLTgyMTYtZW
M5NzA5MzYyMmZjIiwiaXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX
NoIjpmYWxzZSwidHlwZSI6ImFjY2VzcyIsInVzZXJfY2xhaW1zIjpw7InVzZXJfaWQiOj
MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJBcnRoYW5jZSBMTEMgMyIsInVzZXJ
fdHlwZSI6OTM2LCJhY2Nlc3N0eXBlaWQiOjkyNSwicGVybWlzc2lvdnMiOiJmdW5k
OnJlYWQifX0.S5MUssccpKczdD2bfnyLORY-j-l5qwDEG6g43usf5ug' -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": [
    8343
```



```

    ],
    "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": [
          {
            "addressss_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
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOiJlMjMMDmZODg5MjksIm5iZiI6
MTYwMzY0ODkyOSwianRpIjoiMmMmYxZDktODNlYy00YmMzLTgyMTYtZW
M5NzA5MzYyMmZjliwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX
NoIjpmYWxzZSwidHlwZSI6ImFjY2VzcyIsInVzZXJfY2xhaW1zIjpw7InVzZXJfaWQiOiJ
MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJBenRoYW5jZSBMTEMgMyIsInVzZXJ
fdHlwZSI6OTM2LCJhY2Nlc3N0eXBlaWQiOiJkyNSwicGVybWlzc2lvbnMiOiJmdW5k
OnJlYWQifX0.S5MUssccpKczdD2bfnyLORY-j-15qwDEG6g43usf5ug' -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
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOiJlE2MDMzMzODg5MjksIm5iZiI6MTYw
MzM4ODkyOSwianRpIjoibmMmYxZDktODNIYy00YmMzLTgyMTYtZWZWM5NzA5MzYy
MmZjIiwiaXhwaWJoxNjAzMzkwNzI5LCJpZGVudGl0eSI6ImZsImZyZXNoIjpmYWxzZSwidHl
wZSI6ImFjY2V2cyIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOiMyLCJmaXJtX2lkIjoxLCJmaX
JtX25hbWUiOiJBcnRoYW5jZSBMTEMgMyIsInVzZXJfdHlwZSI6OTM2LCJhY2Nlc3N0eXB1
aWQiOiJkyNSwicGVybWlzc2lvbnMiOiJmdW5kOnJlYWQifX0.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
    }
  ],
  "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
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOiJlNzA0ODc4ODUsIm5iZiI6MTU3MDQ4Nzg4
4NSwianRpljoimGU2ZmU5OGQtZDlkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjliwiZXhwIjoxNTc4
wNDg4Nzg1LCJpZGVudGl0eSI6MTAsImZyZXNoljpmYWxzZSwidHlwZSI6ImFjY2VzcyIsInVzZXJfY
2xhaW1zIjpb7InVzZXJfaWQiOiJlcjE1c2VzX3R5cGUiOiJkzNSwiYWNjZXNzdHlwZ
WkljpuWxsLCJwZXJtaXNzaW9ucyl6ImZ1bmQ6cmVhZCJ9fQ.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  
eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpYXQiOiE1NzA0ODc0ODUsIm5iZil6MTU3MDQ4Nzg4NSwia  
nRpljoiMGU2ZmU5OGQtZDIkYi00Njc3LWI4NTYtYzQxZTNjZWVlODNjIiwiaXNjaWwlcjoxNTcwNDg4Nzg1LCJ  
pZGVudGl0eSI6MTAsImZyZXNoIjpmaWxzZSwidHlwZSI6ImFjY2VzcyIsInVzZXJfY2xhaW1zlp7lnVzZXJfa  
WQiOiJEWLCjmaXtX2lkjoyLCJ1c2VyX3R5cGUOiJkzNSwiYWVjZWNjZXRzdHlwZWklipudWxsLCJwZXJtaXNzaW  
9ucyl6lmZ1bmQ6cmVhZCJ9fQ.VqHfIED55pT3L81NvMSqsRFodkX04dun4f3h57auA_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>"}}
    - Multiple: {"custom\_fields": {"fieldname":["<https://www.random.org>", "<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