

## PUBLIC API DOCUMENT (V2)

### 1. Get country List

**URL:** /api/v2/countrylist

**Method:** GET

**CURL:** curl -X GET /api/v2/countrylist  
--header 'x-api-key: API\_KEY'  
--header 'Authorization: Bearer TOKEN'

### 2. Get Currency List

**URL:** /api/v2/currencylist

**Method:** GET

**CURL:** curl -X GET /api/v2/currencylist  
--header 'x-api-key: API\_KEY'  
--header 'Authorization: Bearer TOKEN'

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

**URL:** /api/v2/team\_members

**Method:** GET

**CURL:** curl -X GET /api/v2/team\_members  
--header 'x-api-key: API\_KEY'  
--header 'Authorization: Bearer TOKEN'

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

**URL:** /api/v2/teams

**Method:** GET

**CURL:** curl -X GET /api/v2/teams  
--header 'x-api-key: API\_KEY'  
--header 'Authorization: Bearer TOKEN'

### 5. Get Firm types

**URL:** /api/v2/firmtypes

**Method:** GET

**CURL:** curl -X GET /api/v2/firmtypes  
--header 'x-api-key: API\_KEY'  
--header 'Authorization: Bearer TOKEN'

### 6. Get Tags

**URL:** /api/v2/tags

**Method:** GET

**CURL:** curl -X GET /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

## 7. Get Strategies

**URL:** /api/v2/strategies

**Method:** GET

**CURL:** curl -X GET /api/v2/strategies  
--header 'x-api-key: API\_KEY'  
--header 'Authorization: Bearer TOKEN'

**Method:** POST

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

**Description:** Create new strategy/strategies

## 8. Firms

**URL:** /api/v2/firms

- **Method: POST**
- **Description:** Create new Firms.
- **Example Request:**

```
{  
    "source_type": 1,  
    "data": [  
        {  
            "source_id": "771234",  
            "name": "name771",  
            "domain": "www.firm772.com",  
            "primary_contact_email": "dv1@name771.com",  
            "metadata": {  
                "firm_type": "administrator",  
                "alternate_name": "firm771-1",  
                "secondary_contact_emails": [],  
                "location": [  
                    {  
                        "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"
}
}
]
}
}
```

- **CURL REQUEST:**

```

curl -X POST 'https://DV_API_URL/api/v2/firms' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9' -H 'Content-Type: application/json' --data-raw '{
    "source_type": 1,
    "data": [
        {
            "source_id": "771234",
            "name": "name771",
            "domain": "www.firm772.com",
            "metadata": {
                "firm_type": "administrator",
                "alternate_name": "firm771-1",
                "secondary_contact_emails": [],
                "location": [
                    {
                        "phone_1": "9710346888",
                        "street_2": "st24",
                        "zipcode": "360371",
                        "city": "city",
                        "is_headquarter": true,
                        "country": "norway",
                        "street_1": "st222",
                        "state": "st",
                        "fax": "998888"
                    }
                ]
            },
            "custom_fields": {
                "dept name":"music"
            }
        ],
        }
}'
```

- **Request Fields Explained:**
  - **mandatory fields:** source\_id, name, domain, primary\_contact\_email
  - **optional fields:**
    - every field in `metadata` is optional
    - every field in `location` is optional
    - `metadata`, `location`, `custom\_fields` can be empty
- **Fields Explained:**
  - source\_id: client's unique ID (string) (mandatory)
  - name: firm name (string) (mandatory)
  - domain: firm domain name (string) (mandatory)
  - primary\_contact\_email: primary contact email for firm (string) (mandatory) [either primary\_contact\_email or domain is required]
  - metadata - [details about firm]
  - firm\_type: type of firm: [Other, Administrator, Prime Broker, Custodian, Auditor, Marketer/Placement Agent, Board of Director, Asset Manager, Investor, Law Firm, Background Check Provider, Compliance Consultant, ODD Consultant]
  - alternate\_name: alternate name for firm (string)
  - secondary\_contact\_emails: secondary emails for firm
  - location - [contains multiple addresses for firm]
    - street\_1 - address line 1
    - street\_2 - address line 2
    - city - city
    - state - state
    - country - country
    - zipcode - zipcode
    - phone\_1 - phone number 1
    - phone\_2 - phone number 2
    - fax - fax number
    - is\_headquarter - is this address headquarter or not
  - custom\_fields - [contains `fieldname` and the value of field]
    - { `fieldname`: `value of the field`,  
`fieldname`: [multiple values] }

- **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
  - 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 `secondary\_contact\_emails` and
      - `custom\_fields` but firm is inserted;
      - `dv\_id` would be not null
- **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' -H 'Content-Type: application/json' --data-binary '{
    "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 POST call
  - address\_id: unique ID for address returned in POST call
- rest of the fields are same as POST 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` but firm in inserted;
    - `dv\_id` would be not null
  - Fail:
    - error found, message will be in `error` key, in case of `fail` ;
    - `dv\_id` would be null

## 9. PRODUCTS

**Endpoint:** /v2/products

- **Method:** POST
- **Description:** Create new Products.
- **Example Request:**

```

{
  "data": [
    {
      "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 POST 'https://DV_API_URL/api/v2/products' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer token' -H 'Content-Type: application/json' --data-raw '{  
    "data": [  
        {  
            "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:**
  - source\_id, name, strategy\_id, associated\_firm\_id
- **optional fields:**
  - every field in `metadata` is optional
  - `metadata`, `custom\_fields` can be empty

- **Fields Explained:**

- source\_id: client's unique ID (string) (mandatory)
- name: product name (string) (mandatory)
- strategy\_id: strategy ID for product (string) (mandatory) [strategy id can be fetched from GET STRATEGY API]
- associated\_firm\_id: firm id with this product is associated with (string) (mandatory)

- metadata - [details about firm]
- alternate\_name: alternate name for product (string)
- description: description about product (string)
- associated\_primary\_email: primary email for product
- secondary\_contact\_emails: secondary emails for product
- tag\_id: tags id [tag id can be fetched from GET TAGS API]
- relationship\_status\_id:
- custom\_fields - [contains `fieldname` and the value of field]
  - { `fieldname`: `value of the field`,  
`fieldname`: [multiple values] }

- **Output:**

```
[
  {
    "source_type": 1,
    "dv_id": 47731,
    "source_id": "771234",
    "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
  - Partial\_success:
    - error found `custom\_fields` but product is inserted;
    - `dv\_id` would be not null
  - fail: error found, message will be in `error` key, in case of `fail` ;
    - `dv\_id` would be null

- **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.eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZW M5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX NoIjpmYWxzZSwidHlwZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOj MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJBcnRoYW5jZSBMTEMgMyIsInVzZXJ fdHlwZSI6OTM2LCJhY2Nlc3N0eXBlaWQiOjkyNSwicGVybWlzc2lvbnMiOiJmdW5k 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
}'
```

```

        "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 POST call
- rest of the fields are same as POST 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 `custom\_fields` but product in inserted;
    - `dv\_id` would be not null

## 10. Contacts

- **Endpoint: /v2/contacts**
  - **Method: POST**
  - **Description: Create new contacts.**
  - **Example Request:**

```
{
    "source_type": 1,
    "data": [
        {
            "source_id": "8801",

```

```

    "email": "con8801@diligencevault.com",
    "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` }
}
]
}

```

- **CURL REQUEST:**

○

```

curl -X POST 'https://DV_API_URL/api/v2/contacts' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwianRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZWM5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZXNoIjpmYWxzZSwidHlwZSI6ImFjY2VzcyIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjMyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOiJ BcnRoYW5jZSBMTEMgMyIsInVzZXJfdHlwZSI6OTM2LCJhY2Nlc3N0eXB1aWQiOjkyNSwigVybWlzc2lvbnMiOiJmdW5kOnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-j-l5qwDEG6g43usf5ug' -H 'Content-Type: application/json' --data-raw '{
    "source_type":1,
    "data": [
        {
            "source_id": "8801",
            "email": "con8801@diligencevault.com",
            "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:**
  - source\_id, email, associated\_firm\_id
- **optional fields:**
  - every field in `metadata` is optional
  - `metadata`, `custom\_fields` can be empty
  -

- **Fields Explained:**

- source\_id: client's unique ID (string) (mandatory)
- email: email ID of the contact (string) (mandatory)
- associated\_firm\_id: firm id this contact is associated with (string) (mandatory)
- custom\_fields - [contains `fieldname` and the value of field]
  - { `fieldname`: `value of the field`,  
`fieldname`: [ `multiple values` ]  
}
- metadata - [details about firm]
  - first\_name: first name of contact
  - last\_name: last name of contact
  - title: title for contact [Ms,Mr,Mrs]
  - address: [multiple/single addresses for this contact]
    - street\_1 - street address line 1
    - street\_2 - street address line 2
    - city - city
    - state - state
    - country - country
    - zipcode - zipcode
    - phone\_1 - phone number 1
    - phone\_2 - phone number 2

- fax - fax
- **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
    - Partial\_success:
      - `custom\_fields` but contact inserted;
      - `dv\_id` would be not null
    - fail:
      - error found, message will be in `error` key, in case of `fail` ;
      - `dv\_id` would be null
- **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
  - **Email address cannot be updated once contacts is created successfully**
- **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 eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwanRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZW M5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX NoIjmpYWxzZSwidHlwZSI6ImFjY2VzceylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOj MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOjBcnRoYW5jZSBMTEMgMyIsInVzZXJ fdHlwZSI6OTM2LCJhY2Nlc3N0eXBlawQjOjkyNSwicGVybWlzc2lvbnMiOjJmdW5k OnJIYWQifX0.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 POST call
  - rest of the fields are same as POST 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: `custom\_fields` but contact is inserted;
    - `dv\_id` would be not null

## 11. VEHICLE

- **Endpoint:** /v2/vehicles

- **Method: POST**
- **Description: Create new vehicle**
- **Example Request:**

```
    {
      "data": [
        {
          "source_id": "67890",
          "name": "vehi67890",
          "associated_fund_id": 4,
          "currency": "USD",
          "metadata": {
            "alternate_name": "vehic11",
            "inception_date": "2018-01-01",
            "internal_key": "VEHIC11"
          },
          "custom_fields": { `fieldname` : }
        }
      ],
      "source_type": 1
    }
```

- **CURL REQUEST:**

○

```
curl -X POST 'https://DV_API_URL/api/v2/vehicles' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYwMzM4ODkyOSwanRpIjoiMmJmMmYxZDktODNIYy00YmMzLTgyMTYtZW M5NzA5MzYyMmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZX NoIjpmYWxzZSwidHlwZSI6ImFjY2VzeyIsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOj MyLCJmaXJtX2lkIjoxLCJmaXJtX25hbWUiOjBcnRoYW5jZSBMTEMgMyIsInVzZXJ fdHlwZSI6OTM2LCJhY2Nlc3N0eXBlawQjOjkyNSwigCVybWlzc2lvbnMiOjJmdW5k OnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-j-15qwDEG6g43usf5ug' -H 'Content-Type: application/json'  
--data-raw '{  
  "data": [  
    {  
      "source_id": "67890",  
      "name": "vehi67890",  
      "associated_fund_id": 4,  
      "currency": "USD",  
      "metadata": {  
        "alternate_name": "vehic11",  
        "inception_date": "2018-01-01",  
      }  
    }  
  ]  
}
```

```

        "internal_key": "VEHIC11"
    },
    "custom_fields": { `fieldname` : }
}
],
"source_type": 1
}'

```

- **Request Fields Explained:**
  - **mandatory fields:**
    - source\_id, name, associated\_fund\_id, currency
  - **optional fields:**
    - every field in `metadata` is optional
    - `metadata`, `custom\_fields` can be empty
- **Fields Explained:**
  - source\_id: client's unique ID (string) (mandatory)
  - name: name of the vehicle (string) (mandatory)
  - associated\_fund\_id: product id this vehicle is associated with (string) (mandatory)
  - currency: Currency Name
  - custom\_fields - [contains `fieldname` and the value of field]
 

```
{ `fieldname` : `value of the field` , `fieldname` : [ multiple values ] }
```
  - metadata - [details about firm]
    - alternate\_name: alternate name for this vehicle
    - inception\_date: date of inception for this vehicle
    - internal\_key: any unique key you want to provide
- **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
    - partial\_success: `custom\_fields` but vehicle not inserted;
   
`dv\_id` would be not null
    - fail: error found, message will be in `error` key, in case of `fail` ;

`dv\_id` would be null

- **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": "USD",
    - "metadata": {
    - "alternate\_name": "vehic11",
    - "inception\_date": "2018-01-01",
    - "internal\_key": "VEHIC11"
    - },
    - "custom\_fields": { `fieldname` : }
    - }
    - ],
    - "source\_type": 1
    - }

- **CURL REQUEST:**

```
curl -X PUT 'https://DV_API_URL/api/v2/vehicles' -H 'X-API-KEY: d659f024d31645b1a1a5e29ed6661aa2' -H 'Authorization: Bearer eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpYXQiOjE2MDMzM0Dg5MjksIm5iZiI6MTYw MzM4ODkyOSwanRpIjoiMmJmMmYxZDktODN1Yy00YmMzLTgyMTYtZWM5NzA5MzYy MmZjIwiZXhwIjoxNjAzMzkwNzI5LCJpZGVudGl0eSI6MzIsImZyZXNoIjpmYWxzZSwidHI wZSI6ImFjY2VzcylsInVzZXJfY2xhaW1zIjp7InVzZXJfaWQiOjMyLCJmaXJtX2lkIjoxLCJmaX JtX25hbWUiOjBcnRoYW5jZSBMTEMgMyIsInVzZXJfdHlwZSI6OTM2LCJhY2Nlc3N0eXB1 aWQiOjkyNSwicGVybWlzc2lvbnMiOiJmdW5kOnJIYWQifX0.S5MUssccpKczdD2bfnyLORY-j-l5qwDEG6g43usf5ug' -H 'Content-Type: application/json' --data-raw '{ "data": [ { "dv_id": 8502, "source_id": "67890", "name": "vehi67890", "currency": "USD", "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 POST call
- rest of the fields are same as POST 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: `custom\_fields` but vehicle inserted; `dv\_id` would be not null

## CUSTOM FIELDS

- **Custom Fields:**

- **Description:** Input/Output of custom fields in firm/product/contact/vehicle POST/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 POST/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 ", "text2"]}}
  - **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 int, 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