

Frontend Project Details

Last updated by | Polane Mahloko | Feb 24, 2026 at 4:13 PM GMT+2

Final Details for specification

[Department of Informatics - Proposal 1 Sales Automation.pdf](#)

Sales Automation API — Use Cases & Endpoints

Base URL: <https://sales-automation-bmdqg9b6a0d3ffem.southafricanorth-01.azurewebsites.net>

All endpoints require: Authorization: Bearer <token> (except Login and Register)

Authentication

Use Case: Log in and get a JWT token

POST /api/auth/login

Body: { "email": "admin@salesautomation.com", "password": "Admin@123" }

Response: { "token": "...", "userId": "...", "email": "...", "firstName": "...", "lastName": "...", "roles": [

Use Case: Register a new user

POST /api/auth/register

Body: { "email": "user@company.com", "password": "Pass@123", "firstName": "John", "lastName": "Doe" }

Response: { "token": "...", ...user info }

Use Case: Get current logged-in user info

GET /api/auth/me

Response: current user details and roles

Clients

Use Case: List all clients (with search and filter)



```
GET /api/clients?pageNumber=1&pageSize=10&searchTerm=Acme&industry=Tech&isActive=true
```

Response: { items: [...], totalCount, totalPages, ... }

Use Case: Get a single client



```
GET /api/clients/{id}
```

Response: client details

Use Case: Get client statistics (opportunities, contracts count)



```
GET /api/clients/{id}/stats
```

Response: { opportunitiesCount, contractsCount, totalContractValue, ... }

Use Case: Create a new client



```
POST /api/clients
```

Body: { "name": "Acme Corp", "industry": "Technology", "clientType": 1, "website": "https://acme.com" }

Response: created client (201)

Use Case: Update a client



```
PUT /api/clients/{id}
```

Body: { "name": "Acme Corp Updated", "isActive": true, ... }

Response: updated client

Use Case: Delete a client (soft delete) — Admin/SalesManager only



```
DELETE /api/clients/{id}
```

Response: 204 No Content

Contacts

Use Case: List contacts (filter by client)



GET /api/contacts?clientId={id}&searchTerm=John&pageNumber=1&pageSize=10

Response: paged list of contacts

Use Case: Get all contacts for a specific client



GET /api/contacts/by-client/{clientId}

Response: array of contacts

Use Case: Create a contact linked to a client



POST /api/contacts

Body: { "clientId": "...", "firstName": "Jane", "lastName": "Doe", "email": "jane@acme.com", "phone": "..." }

Response: created contact (201)



Use Case: Set a contact as primary for their client



PUT /api/contacts/{id}/set-primary

Response: 200 OK

Opportunities

Use Case: List all opportunities (with filters)



GET /api/opportunities?clientId=...&stage=2&searchTerm=Deal&pageNumber=1&pageSize=10

Response: paged list of opportunities

Use Case: Get my own opportunities



GET /api/opportunities/my-opportunities?stage=1&pageNumber=1&pageSize=10

Response: paged list of opportunities assigned to current user

Use Case: Get pipeline metrics



GET /api/opportunities/pipeline?ownerId=...

Response: { stages: [...], conversionRate, weightedPipelineValue }

Use Case: Get stage history for an opportunity



GET /api/opportunities/{id}/stage-history

Response: array of stage change history

Use Case: Create an opportunity



POST /api/opportunities

Body: { "title": "Big Deal", "clientId": "...", "estimatedValue": 50000, "currency": "ZAR", "stage": 1, "proba

Response: created opportunity (201)



Use Case: Move opportunity to next stage



PUT /api/opportunities/{id}/stage

Body: { "stage": 3, "reason": "Proposal sent" }

Response: updated opportunity

Use Case: Assign opportunity to a sales rep — Admin/SalesManager only



POST /api/opportunities/{id}/assign

Body: { "userId": "..." }

Response: updated opportunity

Proposals

Use Case: List proposals (filter by client, status)



```
GET /api/proposals?clientId=...&status=1&pageNumber=1&pageSize=10
```

Response: paged list of proposals

Status values: 1=Draft, 2=Submitted, 3=Rejected, 4=Approved

Use Case: Get a proposal with all line items



```
GET /api/proposals/{id}
```

Response: proposal + line items with calculated totals

Use Case: Create a proposal with line items



```
POST /api/proposals
```

Body: {

```
  "opportunityId": "...", "title": "Q1 Proposal", "currency": "ZAR", "validUntil": "2026-03-31",
  "lineItems": [{ "description": "Service A", "quantity": 10, "unitPrice": 500, "discount": 5, "taxRate": 15 }]
}
```

Response: proposal with line items (201)



Use Case: Add a line item to an existing draft proposal



```
POST /api/proposals/{proposalId}/line-items
```

Body: { "description": "Add-on Service", "quantity": 5, "unitPrice": 200, "taxRate": 15 }

Response: created line item (201)

Use Case: Submit proposal for approval



PUT /api/proposals/{id}/submit

Response: proposal with status=Submitted

Use Case: Approve a proposal — Admin/SalesManager only



PUT /api/proposals/{id}/approve

Response: proposal with status=Approved

Use Case: Reject a proposal — Admin/SalesManager only



PUT /api/proposals/{id}/reject

Response: proposal with status=Rejected

Pricing Requests

Use Case: List all pricing requests



GET /api/pricingrequests?status=1&priority=3&pageNumber=1&pageSize=10

Response: paged list of pricing requests

Status: 1=Pending, 2=InProgress, 3=Completed

Priority: 1=Low, 2=Medium, 3=High, 4=Urgent

Use Case: Get pending (unassigned) pricing requests — Admin/SalesManager only



GET /api/pricingrequests/pending

Response: paged list of unassigned pricing requests

Use Case: Get pricing requests assigned to me



GET /api/pricingrequests/my-requests

Response: paged list

Use Case: Assign a pricing request to a user — Admin/SalesManager only



POST /api/pricingrequests/{id}/assign

Body: { "userId": "..." }

Response: pricing request with status=InProgress

Use Case: Mark pricing request as complete



PUT /api/pricingrequests/{id}/complete

Response: pricing request with status=Completed

Contracts

Use Case: List contracts (filter by client, status)



GET /api/contracts?clientId=...&status=2&pageNumber=1&pageSize=10

Response: paged list of contracts

Status: 1=Draft, 2=Active, 3=Expired, 4=Renewed, 5=Cancelled

Use Case: Get contracts expiring soon



GET /api/contracts/expiring?daysUntilExpiry=30

Response: paged list of contracts expiring within 30 days

Use Case: Get all contracts for a specific client



GET /api/contracts/client/{clientId}

Response: paged list

Use Case: Create a contract



POST /api/contracts

Body: {

```
"clientId": "...", "title": "Annual SLA", "contractValue": 120000, "currency": "ZAR",
"startDate": "2026-01-01", "endDate": "2026-12-31", "ownerId": "...",
"renewalNoticePeriod": 90, "autoRenew": false
```

}

Response: created contract (201)

Use Case: Activate a draft contract — Admin/SalesManager only



PUT /api/contracts/{id}/activate

Response: contract with status=Active

Use Case: Cancel a contract — Admin/SalesManager only



PUT /api/contracts/{id}/cancel

Response: contract with status=Cancelled

Use Case: Create a renewal for a contract



POST /api/contracts/{contractId}/renewals

Body: { "proposedStartDate": "2027-01-01", "proposedEndDate": "2027-12-31", "proposedValue": 130000, "notes": "

Response: renewal record (201)



Use Case: Complete a renewal — Admin/SalesManager only



PUT /api/contracts/renewals/{renewalId}/complete

Response: renewal with status=Renewed, contract status=Renewed

Activities

Use Case: List activities (filter by assignee, type, status)



GET /api/activities?assignedToId=...&type=1&status=1&pageNumber=1&pageSize=10

Response: paged list of activities

Type: 1=Meeting, 2=Call, 3=Email, 4=Task, 5=Presentation, 6=Other

Status: 1=Scheduled, 2=Completed, 3=Cancelled

Priority: 1=Low, 2=Medium, 3=High, 4=Urgent

Use Case: Get upcoming activities



GET /api/activities/upcoming?daysAhead=7

Response: activities due in next 7 days

Use Case: Get overdue activities



GET /api/activities/overdue

Response: activities past due date that are still Scheduled

Use Case: Get my activities



GET /api/activities/my-activities

Response: paged list assigned to current user

Use Case: Create an activity linked to an opportunity/client



POST /api/activities

Body: {

```
"type": 1, "subject": "Demo call", "priority": 2,  
"dueDate": "2026-03-01T10:00:00", "assignedToId": "...",  
"relatedToType": 2, "relatedToId": "opportunity-id",  
"duration": 60, "location": "Teams"  
}
```

Response: created activity (201)

relatedToType: 1=Client, 2=Opportunity, 3=Proposal, 4=Contract

Use Case: Complete an activity with outcome notes



PUT /api/activities/{id}/complete

Body: { "outcome": "Client interested, follow-up scheduled" }

Response: activity with status=Completed, completedDate set

Use Case: Cancel an activity



PUT /api/activities/{id}/cancel

Response: activity with status=Cancelled

Documents

Use Case: List all documents



GET /api/documents?pageNumber=1&pageSize=10&relatedToType=1&relatedToId=...&category=1

Response: paged list of documents

Category: 1=Contract, 2=Proposal, 3=Presentation, 4=Quote, 5=Report, 6=Other

relatedToType: 1=Client, 2=Opportunity, 3=Proposal, 4=Contract

Use Case: Upload a document



POST /api/documents/upload

Content-Type: multipart/form-data

Fields: file (required), documentCategory (number), relatedToType, relatedToId, description

Max file size: 50MB

Response: created document record (201)

Use Case: Download a document



GET /api/documents/{id}/download

Response: file bytes with correct Content-Type header

Use Case: Delete a document (soft delete) — Admin/SalesManager only



DELETE /api/documents/{id}

Response: 204 No Content

Notes

Use Case: Get notes for a specific entity (client, opportunity, etc.)



GET /api/notes?relatedToType=2&relatedToId={opportunityId}&pageNumber=1&pageSize=10

Response: paged list of notes

relatedToType: 1=Client, 2=Opportunity, 3=Proposal, 4=Contract, 5=Activity

Use Case: Add a note to an entity



POST /api/notes

Body: { "content": "Client requested revised pricing", "relatedToType": 2, "relatedToId": "...", "isPrivate": false }

Response: created note (201)

Use Case: Update a note



PUT /api/notes/{id}

Body: { "content": "Updated note text", "isPrivate": true }

Response: updated note

Dashboard

Use Case: Load dashboard overview (metrics summary)



GET /api/dashboard/overview

Response: {

```
opportunities: { totalCount, wonCount, winRate, pipelineValue, ... },
pipeline: { stages: [...], weightedPipelineValue },
activities: { upcomingCount, overdueCount, completedTodayCount },
contracts: { totalActiveCount, expiringThisMonthCount, totalContractValue },
revenue: { thisMonth, thisQuarter, thisYear, monthlyTrend: [...] }
```

}

Use Case: Get pipeline metrics for charts



GET /api/dashboard/pipeline-metrics

Response: pipeline stage breakdown with counts and values

Use Case: Get sales performance leaderboard



GET /api/dashboard/sales-performance?topCount=5

Response: top 5 sales reps by performance

Use Case: Get activities summary



GET /api/dashboard/activities-summary

Response: activity counts by type and status

Use Case: Get contracts expiring soon (dashboard widget)



GET /api/dashboard/contracts-expiring?days=30

Response: contracts expiring in the next 30 days

Reports — Admin/SalesManager only

Use Case: Opportunities report for a date range



GET /api/reports/opportunities?startDate=2026-01-01&endDate=2026-03-31&stage=4&ownerId=...

Response: opportunities report data

Use Case: Sales by period report



GET /api/reports/sales-by-period?startDate=2026-01-01&endDate=2026-12-31&groupBy=month

Response: sales grouped by month or week