DMS API Corrections and Improvements

Work Completed: June 16 - July 19, 2025

Executive Summary:

This document outlines the comprehensive refactoring and enhancements completed on the Document Management System (DMS) API's Finance module. The project involved breaking down a monolithic service architecture into specialised services, implementing standardised date filtering, and resolving critical business logic issues across all finance-related endpoints.

Tasks:

- *DMS – 757: Correct the Below the Line widget on the financial page under the This Month section.*
- *The widget is only showing deals that are marked as high caution. It needs to represent the pending deals as well as any deals marked as high caution for the current month.*
- *DMS – 758: Correct the Below the Line widget on the financial page under the This Year section.*
- *The widget is only showing deals that are marked as high caution. It needs to represent the pending deals as well as any deals marked as high caution for the current year.*
- *DMS – 759: Company Commission per Month currently has no data represented for January.*

Work completed:

API Consistency:

- Unified response formats across all finance endpoints
- Predictable date filtering behaviour using shared utility classes
- Consistent error handling and validation patterns
- Standardized decimal formatting and null handling

Key Methods and Changes:

- **GetAnnualUnitsSold:** Complete rewrite Fixed null values, improved date filtering
- **GetCommissionByMonth:** Complete rewrite Proper month formatting, comprehensive date logic
- **GetAgentCommissionByMonth:** Complete rewrite, fixed formatting and date filtering

- **GetDealsByStatusComparisonCount:** Major enhancements, corrected conveyancing status handling
- **GetAnnualRevenueAboveLine:** Significant updates with new filtering
- **GetAnnualRevenueBelowLine:** Significant updates with new filtering
- **GetAgentCommission:** Major enhancements, added comprehensive date filtering for bar graph.

Technical Success:

- 100% compilation success rate
- Zero breaking changes to existing functionality
- Comprehensive test coverage for all modified methods
- Successful integration with existing architecture

Business Success:

- Finance dashboard now fully functional with accurate data
- Date filtering works consistently across all finance endpoints
- Commission calculations reflect accurate, filtered results
- Improved user experience with reliable data visualization

Work Items status:

- ***DMS – 757:*** *Fixed, tested, and deployed.*
- ***DMS – 758:*** *Fixed, tested, and deployed.*
- ***DMS – 759:*** *Fixed, tested, and deployed.*

Estimated Hours Worked: Timeline Table

Week	Dates	Hours	Primary Focus
Week 1	June 16-22	4	Architecture planning and initial analysis
Week 2	June 23-29	14	Service separation and core implementation
Week 4	July 7-13	12	Business logic corrections and null value warnings
Week 5	July 14-19	4	Testing, debugging, deployment to QA

Total hours: 34