

Deal restructure tech discovery

- **Project Name :** Deal Restructure tech discovery
- **Document Title:** Backend Design Document
- **Author(s) :** Mayank Jain
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- **Collaborators:** Mayank Jain

1. Purpose

The purpose of this document is to outline the need for improvements in deal restructuring and pre-vetting processes within the Deal Creation Tool (DCT). Currently, the system supports only the unhappy path, but a substantial number of deals require reopening and editing post-submission. This document identifies the use cases, proposes enhancements, and details the integration requirements to streamline the approval process and synchronization with Salesforce (SF).

Why

At present, DCT handles unhappy paths; however, many deals must be reopened and edited after submission. Key use cases include:

1. **Deal Restructure** - Modifying deals based on additional information or updated terms.
2. **Pre-vetting** - Validating deals before submission to avoid rework and enhance efficiency.

External and Internal Flow Workflow

When we submit the deal from DCT, we change the status of draft deal internally in metro from IN_DRAFT to IN_REVIEW, we call DMAPI v1, which pushes the data to SF, with the following data

External Flow:

- Deal ID: cad7f444-3202-46cb-8a62-dd4fbc11e8ca
- Stage Name: CLOSED_WON
- Deal Strength: REP_GETTING_INFO
- Transition: Deal Strength Can move directly to **RECOMMENDED**

Internal Flow:

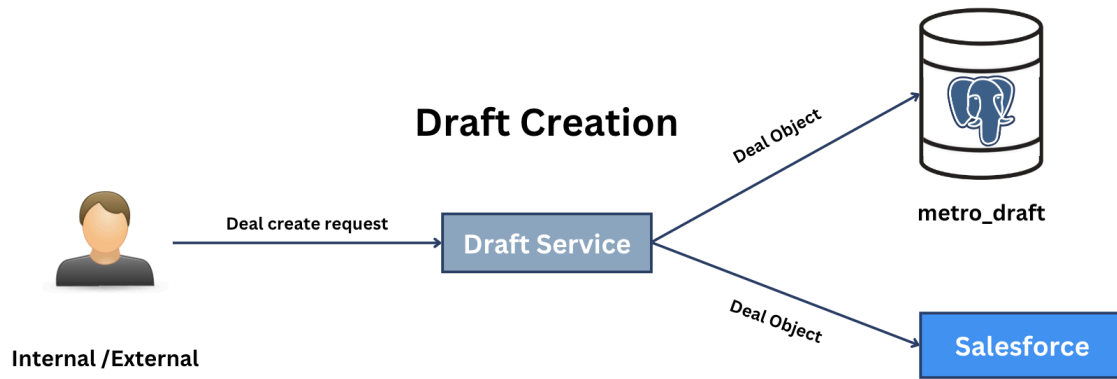
- Deal ID: 54d74e86-69d9-46ad-b1de-26998a733363
- Stage Name: PROSPECTING
- Deal Strength: REP_GETTING_INFO
- Transition: Stage Name Must traverse from **PROSPECTING** through **CONTRACT_SENT** and **PAPER_CONTRACT_ATTACHED** before transitioning Deal Strength to **RECOMMENDED**

Once the deal is **RECOMMENDED** , only then the deal is imported in Deal Estate

If we want to enable editing in pre-vetting, we need to consider the following points in mind

1. Deal is in SF , and not yet pushed to platform (DC) and it is yet to be imported by DE
2. So, any changes made in Pre-vetting , will be pushed to SF.
3. Changes wrt redemption location(if allowed), we have to update place service
4. Relevant permission will be injected via DCT-RBAC workflow, we have to create new flow and add respective permissions

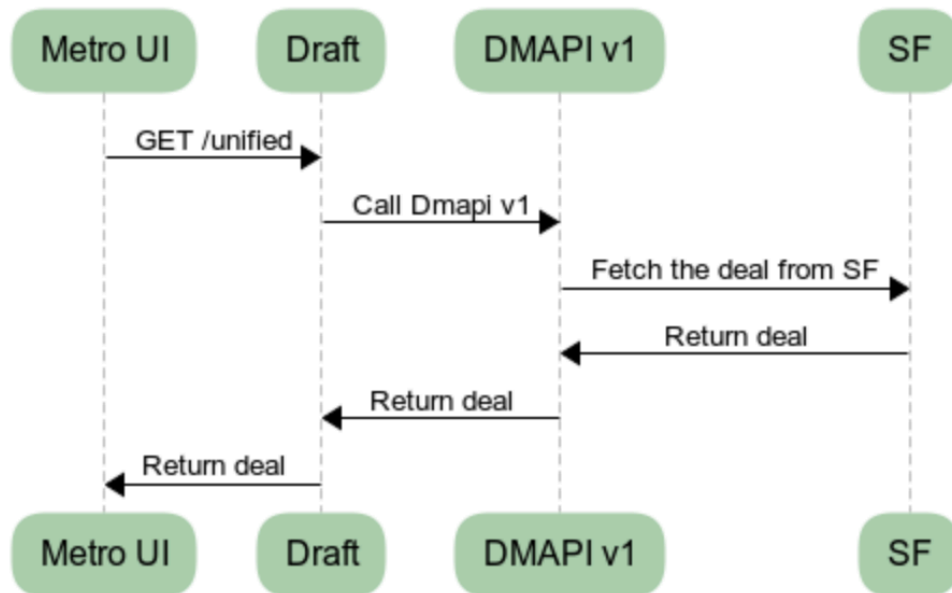
Deal submission



Deal Editing in Pre-vetting

GET call

/GET deal



Update deal

/PUT deal

