

API Endpoints Usage

This document categorizes all API endpoints in the tallyNative codebase by how they are used:

- **(i)** Called from user interaction (button press, form submit, etc.)
- **(ii)** Called in background (screen load, useEffect, useFocusEffect)
- **(iii)** Not called (defined but never invoked)

(i) Called from User Interaction

These endpoints are triggered by explicit user actions (button press, form submit, menu action, etc.).

Endpoint	Method	Trigger
/api/auth/bootstrap-owner	POST	Sign up form submit
/api/auth/invites/:id/accept	POST	Accept invite form submit
/api/auth/claims/refresh	POST	Part of sign-in/refresh flow
/api/business-context	POST	Save business context (onboarding, settings)
/api/business-context/vat-status	PATCH	Save VAT status in settings
/api/businesses/:id/bank-accounts	POST	Add bank account
/api/businesses/:id/credit-cards	POST	Add credit card
/api/businesses/:id/subscription/confirm-payment	POST	Confirm payment on PaymentScreen
/api/businesses/:id/customers	POST	Create customer
/authenticated/transactions2/api/bank-statements/rules	POST	Create bank statement rule
/authenticated/transactions2/api/bank-statements/rules/:id	PATCH	Update bank statement rule
/authenticated/transactions2/api/credit-card-statements/rules	POST	Create credit card rule
/authenticated/transactions2/api/credit-card-statements/rules/:id	PATCH	Update credit card rule
/authenticated/transactions2/api/actions/reconcile-clicked	POST	Reconcile button in ScaffoldViewAllScreen
/authenticated/transactions3/api/sales/manual	POST	Create invoice form submit
/authenticated/transactions3/api/transactions/:id/verify	PATCH	Verify transaction

/authenticated/transactions3/api/transactions/:id	PATCH	Update verified purchase (item list, payment method)
/authenticated/transactions3/api/transactions/:id/mark-paid	PATCH	Mark invoice as paid
/authenticated/transactions3/api/sales/:id/generate-pdf	POST	Generate invoice PDF
/authenticated/transactions3/api/inventory-items	POST	Save inventory items on verify
/authenticated/transactions3/api/purchases/manual	POST	Manual purchase entry form submit
/authenticated/transactions3/api/purchases/ocr	POST	Receipt OCR (after user selects file)
/authenticated/transactions3/api/sales/ocr	POST	Sales invoice OCR (after user selects file)
/authenticated/transactions3/api/bank-statements/upload	POST	Bank statement upload (after user selects file)
/authenticated/transactions3/api/credit-card-statements/upload	POST	Credit card statement upload (after user selects file)
/authenticated/transactions2/api/transactions	POST	Fallback create transaction (UploadProcessingScreen)
/authenticated/transactions3/api/reconcile/bank	POST	Reconcile bank / credit card button
/authenticated/transactions3/api/sales/pos	POST	POS confirm payment
/authenticated/transactions3/api/inventory-items/:id	PATCH	Mark item as received
/authenticated/transactions3/api/inventory-items/group	POST	Group items (drag-drop)
/authenticated/transactions3/api/inventory-items/stock-take	POST	Submit stock take
/authenticated/transactions3/api/inventory-items/re-order	POST	Add re-order
/authenticated/transactions3/api/inventory-items/:id/pos-product	PATCH	Save POS product name/price
/authenticated/transactions3/api/products	POST	Create product
/authenticated/transactions3/api/products/:id	PATCH	Update product
/authenticated/transactions3/api/products/:id/manufacture	POST	Manufacture product
/authenticated/transactions3/api/products/:id/skus	POST	Save SKUs

/authenticated/transactions3/api/products/:id/skus/:id/add-stock	POST	Add stock to SKU
/authenticated/transactions3/api/compliance/alerts/:id/dismiss	POST	Dismiss compliance alert
/authenticated/transactions3/api/operational/alerts/:id/dismiss	POST	Dismiss operational alert
/api/oversight/alerts/:id/dismiss	POST	Dismiss oversight alert

(ii) Called in Background (Screen Load, Focus, etc.)

These endpoints run on mount, focus, or as part of data load/refresh, not directly from a user tap.

Endpoint	Method	Trigger
/api/business-context	GET	Load context on settings / form screens
/api/business-context/vat-status	GET	Load VAT status on settings screens
/api/businesses/:id/bank-accounts	GET	Load bank accounts (Statements, Settings, Accounts)
/api/businesses/:id/credit-cards	GET	Load credit cards (Statements, Settings, Accounts)
/api/businesses/:id/chart-accounts	GET	Load chart accounts for reports and forms
/api/businesses/:id/cashflow-statement	GET	Load cashflow on Reports and Cashflow screens
/api/businesses/:id/customers	GET	Load customers on AddCustomer, SalesPipeline
/api/businesses/:id/payment-methods	GET	Load payment methods on TransactionDetail (mount + picker)
/api/businesses/:id/metadata/plan	GET	Load current plan (PlansSelection, SettingsPlan, Settings)
/api/oversight/check	POST	Check oversight (OversightAlertsCard)
/api/oversight/alerts	GET	Load oversight alerts (OversightAlertsCard, OversightAlertsInitializer)
/authenticated/transactions2/api/bank-statements/rules	GET	Load bank rules on BankStatementRulesListScreen
/authenticated/transactions3/api/transactions	GET	Load transactions (various screens)

/authenticated/transactions3/api/transactions/:id	GET	Load single transaction (TransactionDetail, ManageStock, CreateInvoice)
/authenticated/transactions3/api/kpis	GET	Load health score (Home, CurrentRatio, RevenueGrowth, CashFlow, NetProfit)
/authenticated/transactions3/api/kpis/insights	POST	Load insights (MotivationalCard, InsightsScreen)
/authenticated/transactions3/api/inventory-items	GET	Load inventory items (Inventory, POS, Production, etc.)
/authenticated/transactions3/api/products	GET	Load products (CreateInvoice, POS, Production, Manufacture)
/authenticated/transactions3/api/products/:id/skus	GET	Load product SKUs (CreateInvoice, POS, CreateSku, SkusScreen)
/authenticated/transactions3/api/packaging/extract	POST	Extract packaging on ManageStock (mount + focus)
/authenticated/transactions3/api/compliance/check	POST	Check compliance (ComplianceAlertsCard)
/authenticated/transactions3/api/compliance/alerts	GET	Load compliance alerts
/authenticated/transactions3/api/operational/check	POST	Check operational (OperationalAlertsCard)
/authenticated/transactions3/api/operational/alerts	GET	Load operational alerts

(iii) Not Called

These API functions/endpoints are defined in the codebase but never invoked.

Endpoint	Method	API Module
/api/auth/businesses	POST	authApi.createBusiness
/api/auth/invites	POST	authApi.createInvite
/api/businesses/:id/metadata/plan	POST	plansApi.updatePlan
/authenticated/transactions2/api/credit-card-statements/rules	GET	creditCardRulesApi.getRules
/authenticated/transactions2/api/receipts	POST	transactions2Api.processReceipt
/authenticated/transactions2/api/transactions/:id	PATCH	transactions2Api.updateItemDebit
/authenticated/transactions2/api/transactions/:id	PATCH	transactions2Api.updatePayment

/authenticated/transactions3/api/transactions/:id	PATCH	transactions2Api.splitExpenseItem
/authenticated/transactions3/api/transactions/:id	PATCH	transactions2Api.unsplitExpenseItem
/api/oversight/alerts/:id	GET	oversightApi.getAlertDetails
/authenticated/transactions3/api/compliance/alerts/:id	GET	complianceApi.getAlertDetails
/authenticated/transactions3/api/operational/alerts/:id	GET	operationalApi.getAlertDetails

Notes

1. **UploadProcessingScreen**: `createPurchaseOcr` , `createSalesInvoiceOcr` , `uploadBankStatement` , `uploadCreditCardStatement` , and `createTransaction` run inside a `useEffect` after the user has selected a file—categorized as user-initiated since they follow an explicit file selection.
2. **TransactionDetailScreen** uses `verifyTransaction` and `updateTransactions3VerifiedPurchase` to apply item and payment method edits in a single call; the legacy `updateItemDebitAccount` and `updatePaymentMethod` endpoints are unused.
3. **creditCardRulesApi.getRules** is never called; there is no CreditCardRulesListScreen equivalent to the bank rules flow.
4. **plansApi.updatePlan** is never called; the "Update plan" button only navigates to PlansSelectionScreen.
5. **authApi.createBusiness** and **authApi.createInvite** are defined for onboarding/invite flows but have no current callers.