

opportunities.md

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Opportunity Form

Available Controls

Control	Type
primary_account	dynamic
primary_account_contact	dynamic
end_user	dynamic
suppliers_grid	dynamic
account_manager	dynamic
project_name	textbox/string
nature_of_service	dropdown/string
sale_action_name	dropdown/string
customer_status	dropdown/string
end_user_name	textbox/string
hardware_status	dropdown/string
region_name	textbox/string
account_manager_name	textbox/string
campaign_name	textbox/string
service_level_agreement_id	textbox/string
sale_unit_name	textbox/string

Control	Type
competition_name	textbox/string
drop_in	dropdown/string
lead_source_name	dropdown/string
opportunity_amount	textbox/numeric
opportunity_amount_currency_code	dropdown/numeric
purchase_price	textbox/numeric
purchase_price_currency_code	dropdown/numeric
list_price	textbox/numeric
list_price_currency_code	dropdown/numeric
estimated_upsell_amount	textbox/numeric
estimated_upsell_amount_currency_code	dropdown/numeric
margin_value	textbox/numeric
renewal_month	dropdown/integer (1-12)
renewal_year	dropdown/integer (positive)
opportunity_start_date	datepicker/string (y-m-d)
opportunity_end_date	datepicker/string (y-m-d)
opportunity_closing_date	datepicker/string (y-m-d)
expected_order_date	datepicker/string (y-m-d)
customer_order_date	datepicker/string (y-m-d)
purchase_order_date	datepicker/string (y-m-d)
supplier_order_date	datepicker/string (y-m-d)
supplier_order_transaction_date	datepicker/string (y-m-d)
supplier_order_confirmation_date	datepicker/string (y-m-d)
has_higher_sla	checkbox/boolean
is_multi_year	checkbox/boolean
has_additional_hardware	checkbox/boolean
has_service_credits	checkbox/boolean
personal_rating	dropdown/string
ranking	dropdown/float(0.0-1.0)
remarks	textbox/string

Show Opportunity Form Template

[GET] api/opportunity-template

Response:

[template schema in json format]

Update Opportunity Form Template

[PUT] api/opportunity-template

Payload:

```
{
  "form_data": [
    ...
  ]
}
```

Opportunity Management

Paginate Opportunities

[GET] api/opportunities

*Available Orders:

order_by_account_name=asc/desc
order_by_opportunity_start_date=asc/desc
order_by_opportunity_end_date=asc/desc
order_by_opportunity_closing_date=asc/desc
order_by_opportunity_amount=asc/desc
order_by_project_name=asc/desc
order_by_account_manager_name=asc/desc
order_by_sale_action_name=asc/desc
order_by_created_at=asc/desc

Response:

```
{
  "data": [
    "": {
      "id",
      "account_name",
      "account_manager_name",
      "project_name",
      "opportunity_amount",
      "opportunity_start_date",
      "opportunity_end_date",
      "opportunity_closing_date",
      "sale_action_name",
      "created_at",
    }
  ]
}
```

Paginate Lost Opportunities

[GET] api/opportunities/lost

*Available Orders:

```
order_by_account_name=asc/desc
order_by_opportunity_start_date=asc/desc
order_by_opportunity_end_date=asc/desc
order_by_opportunity_closing_date=asc/desc
order_by_opportunity_amount=asc/desc
order_by_project_name=asc/desc
order_by_account_manager_name=asc/desc
order_by_sale_action_name=asc/desc
order_by_created_at=asc/desc
```

Response:

```
{
  "data": [
    "**": {
      "id",
      "account_name",
      "account_manager_name",
      "project_name",
      "opportunity_amount",
      "opportunity_start_date",
      "opportunity_end_date",
      "opportunity_closing_date",
      "sale_action_name",
      "created_at",
    }
  ]
}
```

Batch Upload Opportunities

[POST] api/opportunities/upload

Payload:

```
{
  "file": {xlsx_format_file_max_10mb}
}
```

Response:

```
{
  "opportunities": [
    "**" : {
      "id",
      "opportunity_start_date",
      "opportunity_end_date",
      "opportunity_closing_date",
      ...
    }
  ],
  "errors": [
    ...
  ]
}
```

Batch Save Opportunities

[PATCH] api/opportunities/save

Payload:

```
{
  "opportunities": [
    {opportunity_uuid},
  ]
}
```

```

    ...
  ]
}

```

Create Opportunity

[POST] api/opportunities

```

{
  "primary_account_id"           : {company_uuid}
  "primary_account_contact_id"   : {contact_uuid}
  "end_user_id"                  : {company_uuid}
  "is_end_user_contact_data_missing" : {boolean}
  "account_manager_id"           : {user_uuid}
  "nature_of_service"            : {string_max_191_chars}
  "sale_action_name"             : {string_max_191_chars}
  "customer_status"              : {string_max_191_chars}
  "end_user_name"                : {string_max_191_chars}
  "hardware_status"              : {string_max_191_chars}
  "region_name"                  : {string_max_191_chars}

  "account_manager_name"         : {string_max_100_chars} // remove

  "project_name"                 : {string_max_191_chars}
  "campaign_name"                : {string_max_191_chars}
  "service_level_agreement_id"   : {string_max_191_chars}
  "sale_unit_name"               : {string_max_191_chars}
  "competition_name"             : {string_max_191_chars}
  "drop_in"                      : {string_max_191_chars}
  "lead_source_name"             : {string_max_191_chars}

  "opportunity_amount"           : {numeric}
  "opportunity_amount_currency_code" : {string_3_chars}
  "purchase_price"               : {numeric}
  "purchase_price_currency_code"  : {string_3_chars}
  "list_price"                   : {numeric}
  "list_price_currency_code"      : {string_3_chars}
  "estimated_upsell_amount"       : {numeric}
  "estimated_upsell_amount_currency_code" : {string_3_chars}
  "margin_value"                 : {numeric}

  "renewal_month"                : {integer_between_1-12}
  "renewal_year"                 : {positive_integer}
  "opportunity_start_date"        : {y-m-d}
  "is_opportunity_start_date_assumed" : {boolean}
  "opportunity_end_date"          : {y-m-d}
  "is_opportunity_end_date_assumed" : {boolean}
  "opportunity_closing_date"      : {y-m-d}
  "expected_order_date"           : {y-m-d}
  "customer_order_date"           : {y-m-d}
  "purchase_order_date"           : {y-m-d}
  "supplier_order_date"           : {y-m-d}
  "supplier_order_transaction_date" : {y-m-d}
  "supplier_order_confirmation_date" : {y-m-d}

  "has_higher_sla"                : {boolean}
  "is_multi_year"                 : {boolean}
  "has_additional_hardware"        : {boolean}
  "has_service_credits"            : {boolean}

  "personal_rating"               : {integer_between_1-5}
  "remarks"                       : {string_max_10000_chars}

  "suppliers_grid"                : [

```

```

    {
        "supplier_name" : {string_max_191_chars}
        "country_name" : {string_max_191_chars}
        "contact_name" : {string_max_191_chars}
        "contact_email" : {string_max_191_chars}
    },
    ...
]
}

```

Paginate Accounts

[GET] api/external-companies

*Available Orders:
order_by_created_at=asc/desc
order_by_name=asc/desc
order_by_vat=asc/desc
order_by_phone=asc/desc
order_by_website=asc/desc
order_by_email=asc/desc
order_by_category=asc/desc

Response:

```

{
    "data": [
        "": {
            "id",
            "name",
            "short_code",
            "category",
            "vat",
            "email",
            "phone",
            "website",
            "created_at",
            "activated_at"
        }
    ],
    "links": {
        "first",
        "last",
        "prev",
        "next"
    },
    "meta": {
        "current_page",
        "from",
        "last_page",
        "path",
        "to",
        "total"
    }
}

```

Show Account Contacts

[GET] api/companies/{account_uuid}

Response:

```

{
    "id",

```

```

"user_id",
"default_vendor_id",
"default_country_id",
"default_template_id",
"is_system",
"name",
"category",
"source",
"source_long",
"vat",
"email",
"phone",
"website",
"addresses": [
    ...
],
"contacts": [
    "": {
        "id",
        "image_id",
        "email",
        "first_name",
        "last_name",
        "phone",
        "mobile",
        "job_title",
        "is_verified",
        "created_at",
        "updated_at",
        "activated_at",
    }
],
"created_at",
"activated_at",
}

```

Update Opportunity

[POST] api/opportunities/{opportunity_uuid}

```

{
  "primary_account_id"           : {company_uuid}
  "primary_account_contact_id"   : {contact_uuid}
  "end_user_id"                  : {company_uuid}
  "is_end_user_contact_data_missing" : {boolean}
  "account_manager_id"           : {user_uuid}
  "nature_of_service"            : {string_max_191_chars}
  "sale_action_name"             : {string_max_191_chars}
  "customer_status"              : {string_max_191_chars}
  "end_user_name"                : {string_max_191_chars}
  "hardware_status"              : {string_max_191_chars}
  "region_name"                  : {string_max_191_chars}

  "account_manager_name"         : {string_max_100_chars} // remove

  "project_name"                 : {string_max_191_chars}
  "campaign_name"                : {string_max_191_chars}
  "service_level_agreement_id"   : {string_max_191_chars}
  "sale_unit_name"               : {string_max_191_chars}
  "competition_name"             : {string_max_191_chars}
  "drop_in"                      : {string_max_191_chars}
  "lead_source_name"             : {string_max_191_chars}

  "opportunity_amount"           : {numeric}

```

```

"opportunity_amount_currency_code"      : {string_3_chars}
"purchase_price"                        : {numeric}
"purchase_price_currency_code"          : {string_3_chars}
"list_price"                           : {numeric}
"list_price_currency_code"              : {string_3_chars}
"estimated_upsell_amount"                : {numeric}
"estimated_upsell_amount_currency_code" : {string_3_chars}
"margin_value"                          : {numeric}

"renewal_month"                         : {integer_between_1-12}
"renewal_year"                         : {positive_integer}
"opportunity_start_date"                 : {y-m-d}
"is_opportunity_start_date_assumed"      : {boolean}
"opportunity_end_date"                   : {y-m-d}
"is_opportunity_end_date_assumed"        : {boolean}
"opportunity_closing_date"                : {y-m-d}
"expected_order_date"                    : {y-m-d}
"customer_order_date"                    : {y-m-d}
"purchase_order_date"                    : {y-m-d}
"supplier_order_date"                    : {y-m-d}
"supplier_order_transaction_date"         : {y-m-d}
"supplier_order_confirmation_date"        : {y-m-d}

"has_higher_sla"                        : {boolean}
"is_multi_year"                         : {boolean}
"has_additional_hardware"                : {boolean}
"has_service_credits"                    : {boolean}

"personal_rating"                       : {integer_between_1-5}
"remarks"                               : {string_max_10000_chars}

"suppliers_grid"                        : [
  {
    "id"           : {supplier_uuid}, (if exists)
    "supplier_name" : {string_max_191_chars},
    "country_name"  : {string_max_191_chars},
    "contact_name"  : {string_max_191_chars},
    "contact_email" : {string_max_191_chars},
  },
  ...
]
}

```

Delete Opportunity

```
[DELETE] api/opportunities/{opportunity_uuid}
```

Mark Opportunity as Lost

```
[PATCH] api/opportunities/{opportunity_uuid}/lost
```

Payload:

```

{
  "status_reason": {string_max_500_chars} *
}

```

Restore Opportunity from Lost

[PATCH] api/opportunities/{opportunity_uuid}/restore-from-lost