

opportunities.md

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Opportunity Form

Available Controls

primary_account	: {dynamic}
primary_account_contact	: {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
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}
  "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}
  "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
```