Invoice Creation Documentation - MonkTechLabs API

Overview

This documentation provides a comprehensive guide for creating invoices using the MonkTechLabs (MTL) API system. The process follows a sequential approach where each step builds upon the previous one to successfully generate invoices.

Step-by-Step Invoice Creation Process

Step 1: Fetch the List of Homes

Purpose: Retrieve available homes/contracts to identify the target home for invoice creation.

Endpoint: GET /api/home

Query Parameters:
• limit (optional): Number of results (10, 15, 20, 30, 60) - Default: 30
• page (optional): Pagination - Default: 1
• q (optional): Search query string
• status (optional): Home status (active, inactive) - Default: active

Example Request:
GET https://dashboard.thehousemonk.com/api/home?limit=10&page=1&q=ci&status=active

Response Structure:
```
{
  "count": 25,
  "rows": [
   {
     "_id": "634e82639e427c64cd4aa4e3",
     "uid": 92,
     "status": "active",
     "project": "654399ed01def87096915750",
     "listing": "654399ed01def87096915867",
     "tenants: ["654399435343f8709691586s","5673dfs23fgdgd324ss3"]
     …
   }
  ]
}
```

Step 2: Fetch Products and Services for a particular project(s)

Purpose: Retrieve available products/services belonging to the project to which contract is tagged (project id can be found in the contract schema), that can be billed in invoices.

Endpoint: GET /api/product-and-service

Query Parameters:
• projects (required): Project ID for filtering products/services
• limit (optional): Number of results - Default: 9007199254740991

Example Request:
GET
https://dashboard.thehousemonk.com/api/product-and-service?projects=654399ed01def870969 15750

Response Structure:
```
{
  "count": 5,
  "rows": [
    {
      "_id": "654399ec01def870969156ad",
      "name": "Monthly Rent",
      "type": "recurring",
      "rate": 260,
      "unit": "unit",
      "status": "active",
      "projects": ["654399ed01def87096915750"]
    }
  ]
}
```

Step 3: Fetch Tax Codes

Purpose: Retrieve available tax codes for applying taxes to invoice items.

Endpoint: GET /api/tax

Query Parameters:
• projects (required): Project ID for filtering tax codes

Example Request:
GET https://dashboard.thehousemonk.com/api/tax?projects=655f41de004adb014ac00953

Response Structure:

```
{
  "count": 3,
  "rows": [
    {
      "_id": "654bd2b6e84d136764a5c824",
      "name": "GST",
      "taxCode": "GST001",
      "taxRate": 8.0,
      "active": true,
      "projects": ["655f41de004adb014ac00953"]
    }
  ]
}
```

Step 4: Fetch Tenants

Purpose: Retrieve tenant information for invoice creation.

Endpoint: GET /api/user

Query Parameters:
• projects (optional): Project ID for filtering tenants
• limit (optional): Number of results (5, 10, 15, 20, 30, 60) - Default: 10
• page (optional): Pagination - Default: 1
• q (optional): Search query
• status (optional): Tenant status (active, inactive) - Default: active

Example Request:
GET
https://dashboard.thehousemonk.com/api/user?projects=655f41de004adb014ac00953&limit=10&page=1&status=active

Response Structure:
```
{
  "count": 15,
  "rows": [
    {
      "_id": "654399ed01def8709691581b",
      "firstName": "John",
      "lastName": "Doe",
      "email": "john@example.com",
      "phoneNumber": "+1234567890",
      "status": "active",
```

```
      "projects": ["655f41de004adb014ac00953"]
    }
  ]
}
```

Step 5: Create Invoice

Purpose: Create a new invoice with the collected information.

Endpoint: POST /api/transaction

Request Body Structure:
```
{
  "users": ["654399ed01def8709691581b"],
  "type": "Invoice",
  "transactionBelongsTo": "Home",
  "home": "654399ed01def8709691574b",
  "project": "654399ed01def87096915750",
  "listing": "654399ed01def87096915867",
  "source": "api_external",
  "status": "draft",
  "dueDate": "2023-01-08",
  "invoiceDate": "2023-01-08",
  "taxable": true,
  "totalAmount": 280.8,
  "openingBalance": 280.8,
  "itemDetails": [
   {
     "amount": 260,
     "taxable": true,
     "taxAmount": 20.8,
     "netAmount": 280.8,
     "description": "Rent (01-Jan-2023 to 31-Jan-2023)",
     "quantity": 1,
     "billedAt": "none",
     "addConvenienceFee": false,
     "convenienceFee": 0,
     "convenienceFeeType": "fixed",
     "recurringFor": {
      "pattern": "monthly",
      "startInterval": "2023-01-01",
      "endInterval": "2023-01-31"
     },
```

          "product": "654399ec01def870969156ad",
          "rate": 260,
          "unit": "unit",
          "taxCode": "654bd2b6e84d136764a5c824"
        }
    ]
}