**dealhub**

CRM API

Overview

This document aims to explain integration to the CPQ system via DealHub CRM Open API. The main consumers of the below API are the accounts that use CRM other than SFDC or Microsoft Dynamics CRM.

Methods described in the current document should be utilized when users need to be redirected to the CPQ system in order to create, edit or view quotes. To allow users to access CPQ the consuming system should complete an Authentication request first.

Upon successful authentication, the consuming system will trigger an API to create, edit or view quotes, which will end up with the HTTP-300 response code. These HTTP requests should be triggered from the client application of the consuming system. Upon the successful response, it should redirect the user to the URL provided within the response payload.

Flow Of Events

The below diagram describes the high-level e2e process on how CRM users can access DealHub CPQ. This process includes administrator configuration steps and CRM integration calls to DealHub:

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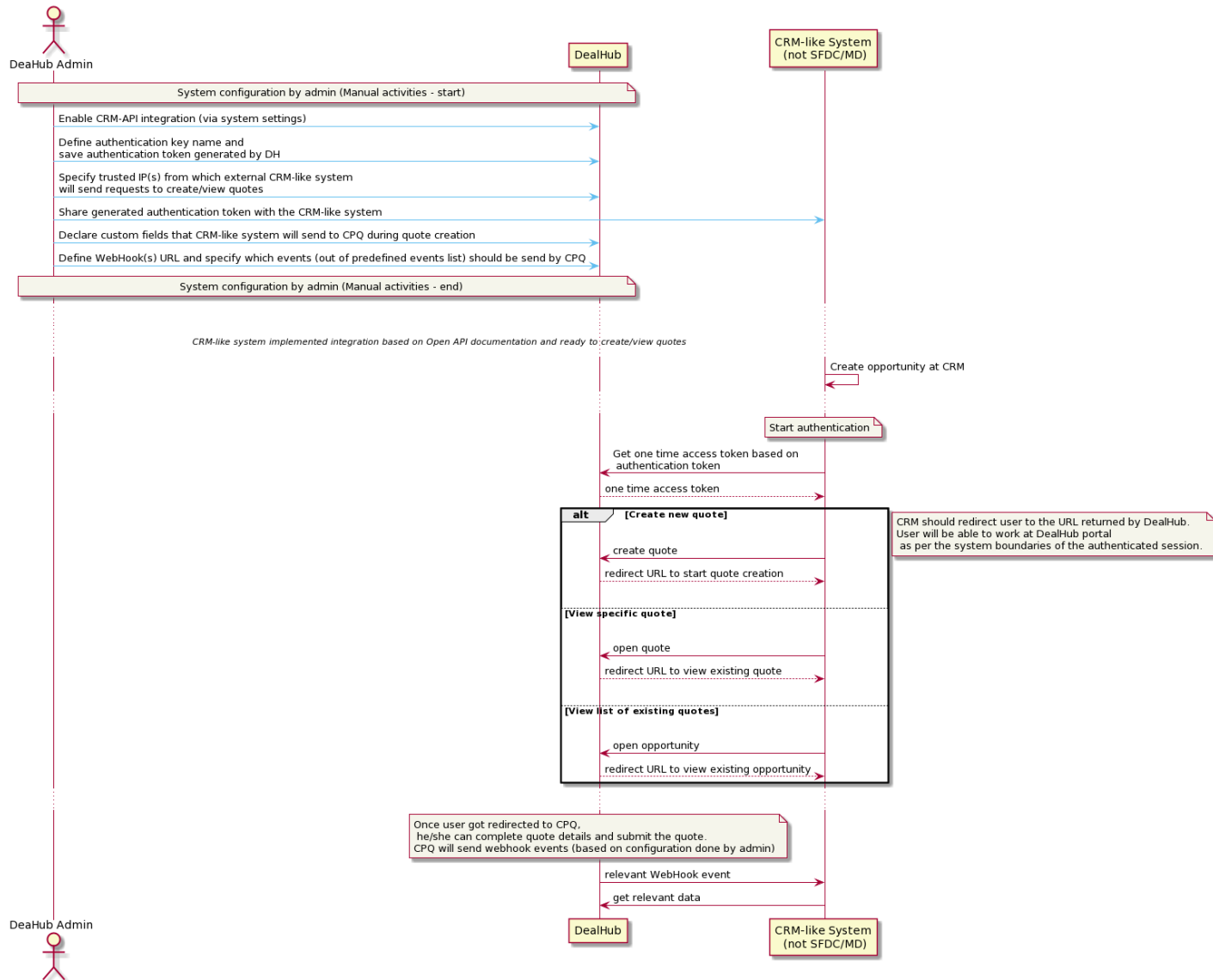
External Data Types (CRM custom fields)

There is a data set common to all accounts (like geo-code, currency, etc.), and it's explicitly described below per relevant API request. Besides those fields, an account might need to push additional data (aka custom field) that is essential for quote generation.
To allow the transfer of such data fields via the Open API, the CPQ administrator will need to define them during version configuration. For each external data field, the administrator should specify the exact name (as will appear in the Open API request) and its type.

System supports the following types of external data:

Type	Description
Numeric	Single numeric value. If an empty value is received in the request, it will be treated as 0
Text	The value will be captured and presented to the seller exactly as received within the request payload
Text list	A custom field can have 1 or more values. Text list could be used in 2 modes: ● Single-select: only 1 value can be chosen out of all available ● Multi-select: more than 1 value in the list can be selected The client-side will need to specify which elements in the list are selected
UTC Date	Format: yyyy-mm-dd If an empty value is sent in the request, CPQ will treat it as NULL

Assumptions

1. Administrators can send API requests that can refer to any version.
   Sales reps can only work with an active version.
2. API assumes working with a single playbook.
3. If the request payload contains custom fields that are not defined in CPQ, the system will ignore them. No error should be returned in such a case. The system will audit such cases in the log.
4. Request payload might contain only a subset of custom fields defined in CPQ.
5. The value of the custom field in the request payload can be empty.
6. CPQ does not have any default value(s) for custom field(s).
7. Custom field names are case-insensitive.
8. All users created via Authenticate API will be of the type "Sales" ("Sales" role).
9. The explicitly specified opportunity owner, if not existing in the system, will be created with the "Sales" role.
10. The creation of admins should be done via the CPQ UI.

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Authentication v1

DealHub authentication requests must contain user information.

Note that if provided user login does not exist in the DealHub system, the system will create a new user entity based on the information of the request payload.

NOTE: The header of the authentication request must include a DealHub secret token. This token should be generated by the CPQ administrator and shared with the consuming application in advance.

```
Authorization: Bearer <TOKEN_THAT_WAS_PROVIDED_BY_CPQ_ADMIN>
```

Request

Type: POST

```
/api/v1/user/authenticate
```

Query body format: JSON

Query body example:

```
{
  "user_information": {
      "external_user_id": "qwerty1234356",
      "login": "david.s@domain.com",
      "email": "david.s@domain.com",
      "name": "David Solomon",
      "position": "Sales",
      "phone": "03-12345678",
      "mobile": "058-12345678",
      "fax": "03-12345679",
      "company": "Acme Partner1",
      "street": "12nd Broadway",
      "city": "New York",
      "state": "NY",
      "country": "USA",
      "postal_code": "1234567",
      "user_manager_login": "manager@domain.com"
  }
}
```

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Query body explanation:

Name	Description		Mandatory	Valid values
user_information	A list of fields required to create a user in DealHub:		yes	
	external_user_id	CRM user ID (employee of the organization that integrates with DealHub)	yes	max length 200 chars
	login	Login of the user. If user is not registered in the system yet and login is not provided, system will create user and use email as login	no	max length 100 chars
	email	Primary email of the user.	yes	max length 100 chars
	name	User full name	yes	max length 300 chars
	position	The role of the user in the organization (job title)	no	max length 300 chars
	phone	User phone number	no	max length 50 chars
	mobile	User mobile phone number	no	max length 100 chars
	fax	User fax number	no	max length 100 chars

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Name		Description	Mandatory	Valid values
	company	User company name	no	max length 100 chars
	street	Street name	no	max length 128 chars
	city	City name	no	max length 32 chars
	state	State name	no	max length 32 chars
	country	Country name	no	max length 32 chars
	postal_code	Postal code	no	max length 16 chars
	user_manager_login	Login of the manager	no	max length 100 chars

Response

The response you will receive includes a token to approve the user's login into DealHub.

Note that this is a one-time access token, which expires after 60 seconds.

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Expected response example:

```
{

  "access_token": "4D114DAD97361C84B154A828FF991",
  "dealhub_user_id": "555455484454",
  "errors": [
  ]
}
```

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Create Quote v1.1

Request

This request will create a new quote on the DealHub platform. The response to this request will be a URL to the DealHub CPQ system. The calling system should redirect the user to the DealHub so he/she could continue configuring the newly created quote.

Current v1.1 is supporting subscription renewals. See the new "repeatable_groups" parameter for more details on the structure.
The system will attempt to render the data into the playbook implemented by an account. Items within the "repeatable_groups" parameter, which could not be rendered, will be ignored. No error will be returned in such a case.

NOTE: The header of a request must include a one-time access token, which is received from the 'authenticate' request.
```
Authorization: Bearer 4D114DAD97361C84B154A828FF991
```

Request type: POST
URL: `/api/v1.1/quote/create`

Query body format: JSON

Query body example:
```
{
        "dealhub_user_id": 111.0,
        "external_opportunity_id": "gdfg123",
        "external_opportunity_name": "sisco321",
        "opportunity_owner": {
            "external_user_id": "qwerty1234356",
            "login": "david.s@domain.com",
            "email": "david.s@domain.com",
            "name": "David Solomon",
            "position": "Sales",
            "phone": "03-12345678",
            "mobile": "058-12345678",
            "fax": "03-12345679",
            "company": "Acme Partner1",
            "street": "12nd Broadway",
            "city": "New York",
            "state": "NY",
            "country": "USA",
            "postal_code": "1234567",
            "user_manager_login": "manager@domain.com"
        },
        "external_quote_id": "qr564",
        "external_customer_id": "br768",
        "customer_name": "aviv alush",
```

```
"customer_shipping_address": {
        "street": "balfur",
        "city": "tel aviv",
        "state": "israel",
        "country": "israel",
        "postal_code": "bdfje34"
},
"customer_billing_address": {
        "street": "harokmim",
        "city": "holon",
        "state": "israel",
        "country": "israel",
        "postal_code": "2345sd"
},
"customer_contacts": [{
        "salutation": "Mr",
        "first_name": "Eyal",
        "last_name": "Meshulam",
        "title": "CTO",
        "email": "email@gmail.com",
        "phone": "+9725684242",
        "account_name": "12345",
        "mailing_address": "123 Heirloom ST",
        "primary_contact": true
}],
"geo_code": "geo",
"currency": "USD",
"custom_fields": [{
        "name": "custom_field_a",
        "value": [
                "5",
                "10"
        ]}
],
"repeatable_groups": [
  {
    "group_id": "qg1",
    "questions": [
      {
        "id1": "id1_val",
        "id2": "id2_val1;id2_val2;id2_val3",
        "id3": "id3_val"
      },
      {
        "id1": "id1_val",
        "id2": "id2_valA;valB;val2",
        "id3": "id3_val"
      }
    ]
  },
  {
    "group_id": "qg2",
    "questions": [
```

```
          {
            "id1": "id1_val",
            "id2": "A;B;C",
            "id3": "some_val"
          },
          {
            "id1": "id1_val",
            "id2": "A,D,N",
            "id3": "another_val"
          }
        ]
      }
    ]

  }
```

Query body explanation:

Name	Description	Mandatory	Valid values
dealhub_user_id	ID of user in the DealHub system (as returned from Authentication request)	yes	max length 16 chars
external_opportunity_id	CRM opportunity ID	yes	max length 50 chars
external_opportunity_name	CRM opportunity name	yes	max length 200 chars
opportunity_owner	Details of opportunity owner. Relevant when the quote in CPQ is being created by someone else rather than the opportunity owner.	no	
	external_user_id CRM user ID (employee of the organization that integrates with DealHub)	yes	max length 200 chars
	login Login of the user	no	max length 100 chars

dealhub

Name		Description	Mandatory	Valid values
	email	Primary email of the user	yes	max length 100 chars
	name	User full name	yes	max length 300 chars
	position	The role of the user in the organization (job title)	no	max length 300 chars
	phone	User phone number	no	max length 50 chars
	mobile	User mobile phone number	no	max length 100 chars
	fax	User fax number	no	max length 100 chars
	company	User company name	no	max length 100 chars
	street	Street name	no	max length 128 chars
	city	City name	no	max length 32 chars
	state	State name	no	max length 32 chars

Name	Description		Mandatory	Valid values
	country	Country name	no	max length 32 chars
	postal_code	Postal code	no	max length 16 chars
	user_manager_login	Login of user manager	no	max length 100 chars
external_quote_id	CRM quote ID		no	max length 50 chars
external_customer_id	CRM customer ID (buyer account)		yes	max length 50 chars
customer_name	CRM customer name		yes	max length 256 chars
customer_shipping_address	Customer shipping address object:		no	
	street	Street name	no	max length 128 chars
	city	City name	no	max length 32 chars
	state	State name	no	max length 32 chars

Name	Description		Mandatory	Valid values
	country	Country name	no	max length 32 chars
	postal_code	Postal code	no	max length 16 chars
customer_billing_address	Customer billing address object:		no	
	street	Street name	no	max length 128 chars
	city	City name	no	max length 32 chars
	state	State name	no	max length 32 chars
	country	Country name	no	max length 32 chars
	postal_code	Postal code	no	max length 16 chars
customer_contacts	List of customer contacts. Each contact contains the following fields:		no	
	salutation	Mr., Ms. etc.	no	max length 50 chars
	first_name	First name	yes	max length 128 chars

Name	Description		Mandatory	Valid values
	last_name	Last name	yes	max length 128 chars
	title	Job title	no	max length 400 chars
	email	Primary email of the contact person	yes	max length 100 chars
	phone	Phone number	no	max length 50 chars
	account_name	Name of contact's company	no	max length 100 chars
	mailing_address	Postal address of the contact person	no	max length 250 chars
	primary_contact	flag: true/false	no	
version_id	For admin use only. DealHub version ID. If no value specified the system will refer to an active version.		no	max length 16 chars
geo_code	Geographic code		yes	max length 100 chars
currency	The currency ISO code to evaluate the rules upon. Currency is immutable, i.e. once opportunity/quote created with specific currency, it cannot be modified.		yes	max length 3 chars
custom_fields	List of additional fields, each element in the list consists of key/value pairs. For information about external data types supported by DealHub refer to **External Data Types** section above		no	
	name	Group name	yes	max length 200 chars

Name		Description	Mandatory	Valid values
	value	Answers	yes	max length 8192 chars
repeatable_groups		List of line items for renewal	no	
	Group id		yes	max length 50 chars
	Questions		yes	

Response

The response (HTTP300) includes a complete DealHub URL. Redirect the user to this URL to continue configuring the quote.

Expected response example:
```
{
  "url": "https://service-eu1.dealhub.io/..../",
  "errors": [
  ]
}
```

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Open Quote v2

Request

This request will open the quote in the DealHub platform. The response to this request will be a link to the DealHub CPQ system. The calling system should redirect the user to the DealHub so he/she could continue configuring the quote.

If within the request the consuming application will send additional information under the `"opportunity_info"` property, this info will be captured within the DealHub system on the opportunity level

NOTE: This updated information will be reflected in the quote only if this quote is still in the 'draft' status. Once the user submits the quote, this quote will capture the latest opportunity info available in CPQ. Once a quote is submitted it becomes read-only. If a sales rep will modify opportunity information in the CRM system and then will view an already submitted quote (via the 'open quote' API), the quote will reflect the opportunity information that was available in the system at the moment of the quote submission.

If the specified quote ID does not exist, the system will return an error.

NOTE: The header of a request must include an access token, which is received from the 'authenticate' request.
```
Authorization: Bearer 4D114DAD97361C84B154A828FF991
```

Request type: POST
URL: `/api/`**`v2`**`/quote/open`

Query body format: JSON

Query body example:
```
{
        "dealhub_user_id": 111.0,
        "dealhub_quote_id": "87948759384759",
        "external_opportunity_id": "gdfg123"
}
```

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Query body example with update of opportunity name and customer contact:

```
{
        "dealhub_user_id": 111.0,
        "dealhub_quote_id": "87948759384759",
        "external_opportunity_id": "gdfg123",
        "opportunity_info" : {
                "external_opportunity_name": "system321",
                "external_customer_id": "br768",
                "customer_name": "Vadim Test1",
                "customer_contacts": [{
                        "first_name": "Eyal",
                        "last_name": "Meshulam",
                        "email": "email@gmail.com",
                        "primary_contact": true
                }],
        "geo_code": "geo",
        "currency": "USD"
        }
}
```

Query body explanation:

Name	Description	Mandatory	Valid values
dealhub_user_id	ID of user in the DealHub system (as returned from Authentication request)	yes	max length 16 chars
dealhub_quote_id	DealHub quote ID	yes	max length 16 chars
external_opportunity_id	CRM opportunity ID	yes	max length 50 chars
opportunity_info	The following information can be provided within the request if information in CPQ need to be updated	no	
	external_opportunity_name CRM opportunity name	yes	max length 200 chars

Name		Description	Mandatory	Valid values
	opportunity_owner	Details of opportunity owner. Relevant if quote in CPQ created by someone else, but not the opportunity owner	no	
		external_user_id	CRM user ID (employee of the organization that integrates with DealHub)	yes	max length 200 chars
		login	Login of the user	no	max length 100 chars
		email	Primary email of the user	yes	max length 100 chars
		name	User full name	yes	max length 300 chars
		position	The role of the user in the organization (job title)	no	max length 300 chars
		phone	User phone number	no	max length 50 chars
		mobile	User mobile phone number	no	max length 100 chars
		fax	User fax number	no	max length 100 chars
		company	User company name	no	max length 100 chars

Name			Description	Mandatory	Valid values
		street	Street name	no	max length 128 chars
		city	City name	no	max length 32 chars
		state	State name	no	max length 32 chars
		country	Country name	no	max length 32 chars
		postal_code	Postal code	no	max length 16 chars
		user_manager_login	Login of user manager	no	max length 100 chars
	external_quote_id		CRM quote ID	no	max length 50 chars
	external_customer_id		CMR customer ID (buyer account)	yes	max length 50 chars
	customer_name		CRM customer name	yes	max length 256 chars
	customer_shipping_address		Customer shipping address object:	no	

Name		Description		Mandatory	Valid values
		street	Street name	no	max length 128 chars
		city	City name	no	max length 32 chars
		state	State name	no	max length 32 chars
		country	Country name	no	max length 32 chars
		postal_code	Postal code	no	max length 16 chars
	customer_billing_address	Customer billing address object:		no	
		street	Street name	no	max length 128 chars
		city	City name	no	max length 32 chars
		state	State name	no	max length 32 chars
		country	Country name	no	max length 32 chars

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Name			Description	Mandatory	Valid values
		postal_code	Postal code	no	max length 16 chars
	customer_contacts		List of customer contacts. Each contact contains the following fields:	no	
		salutation	Mr, Ms etc	no	max length 50 chars
		first_name	First name	yes	max length 128 chars
		last_name	Last name	yes	max length 128 chars
		title	Job title	no	max length 400 chars
		email	Primary email of the contact person	yes	max length 100 chars
		phone	Phone number	no	max length 50 chars
		account_name	Name of contact's company	no	max length 100 chars
		mailing_address	Postal address of the contact person	no	max length 250 chars
		primary_contact	flag: true/false	no	

Name		Description		Mandatory	Valid values
	geo_code	Geographic code		yes	max length 100 chars
	currency	In context of 'open quote' the currency should be the same as was specified in 'create quote' request		yes	max length 3 chars
	custom_fields	List of additional fields, each element in the list consists of key/value pairs. For information about external data types supported by DealHub refer to **External Data Types** section above		no	
		name	Group name	yes	max length 200 chars
		value	Answers	yes	max length 8192 chars
	repeatable_groups	List of line items for renewal		no	
		Group id		yes	max length 50 chars
		Questions		yes	

Response

The response (HTTP300) includes a complete DealHub URL. Redirect the user to this URL to continue configuring the quote.

Expected response example:

```
{
  "url": "https://service-eu1.dealhub.io/..../",
  "errors": [
  ]
}
```

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View Quotes v2

Request

This request will lead the user to the `My Proposals` page in the context of a specific opportunity ID. The response to this request will be a link to the DealHub CPQ system. The calling system should redirect the user to the DealHub so he/she can view all quotes created for the specified opportunity in the DealHub platform.

If within the request the consuming application will send additional information under the `"opportunity_info"` property, this info will be captured within the DealHub system on the opportunity level

NOTE: Updated opportunity information will be reflected only in 'draft' quotes. Once the user will submit the quote, this quote will capture the latest opportunity info available in CPQ. Submitted quote becomes read-only. If a sales rep will modify opportunity information in the CRM system and then will view an already submitted quote (via 'view quotes' API), the quote will reflect the opportunity information that was available in the system at the moment of the quote submission.

If the specified opportunity ID does not exist, the system will return an error.

NOTE: The header of a request must include an access token, which is received from the 'authenticate' request.
`Authorization: Bearer 4D114DAD97361C84B154A828FF991`

Request type: POST
URL: `/api/`**`v2`**`/quotes`

Query body format: JSON

Query body example:
```
{
        "dealhub_user_id": "387483488378",
        "external_opportunity_id": "lkdash23lhr2jkk2"
}
```

Query body example with update of opportunity name and customer contact:

```
{
        "dealhub_user_id": "387483488378",
        "external_opportunity_id": "lkdash23lhr2jkk2",
        "opportunity_info" : {
                "external_opportunity_name": "sis321",
                "external_customer_id": "br768",
                "customer_name": "Vadim Test1",
                "customer_contacts": [{
                        "first_name": "Eyal",
                        "last_name": "Meshulam",
                        "email": "email@gmail.com",
                        "primary_contact": true
                }],
                "geo_code": "geo",
                "currency": "USD"
        }
}
```

Query body explanation:

Name	Description		Mandatory	Valid values
dealhub_user_id	ID of user in the DealHub system (as returned from Authentication request)		yes	max length 16 chars
external_opportunity_id	CRM opportunity ID		yes	max length 50 chars
opportunity_info	The following information can be provided within the request if information in CPQ need to be updated		no	
	external_opportunity_name	CRM opportunity name	yes	max length 200 chars
	opportunity_owner	Details of opportunity owner. Relevant if quote in CPQ created by someone else, but not the opportunity owner	no	

Name				Description	Mandatory	Valid values
		external_user_id		CRM user ID (employee of the organization that integrates with DealHub)	yes	max length 200 chars
		login		Login of the user	no	max length 100 chars
		email		Primary email of the user	yes	max length 100 chars
		name		User full name	yes	max length 300 chars
		position		The role of the user in the organization (job title)	no	max length 300 chars
		phone		User phone number	no	max length 50 chars
		mobile		User mobile phone number	no	max length 100 chars
		fax		User fax number	no	max length 100 chars

Name				Description	Mandatory	Valid values
		company		User company name	no	max length 100 chars
		street		Street name	no	max length 128 chars
		city		City name	no	max length 32 chars
		state		State name	no	max length 32 chars
		country		Country name	no	max length 32 chars
		postal_code		Postal code	no	max length 16 chars
		user_manager_login		Login of user manager	no	max length 100 chars
	external_customer_id		CMR customer ID (buyer account)		yes	max length 50 chars

Name		Description		Mandatory	Valid values
	customer_name	CRM customer name		yes	max length 256 chars
	customer_shipping_address	Customer shipping address object:		no	
		street	Street name	no	max length 128 chars
		city	City name	no	max length 32 chars
		state	State name	no	max length 32 chars
		country	Country name	no	max length 32 chars
		postal_code	Postal code	no	max length 16 chars
	customer_billing_address	Customer billing address object:		no	
		street	Street name	no	max length 128 chars

Name			Description	Mandatory	Valid values
		city	City name	no	max length 32 chars
		state	State name	no	max length 32 chars
		country	Country name	no	max length 32 chars
		postal_code	Postal code	no	max length 16 chars
	customer_contacts		List of customer contacts. Each contact contains the following fields:	no	
		salutation	Mr, Ms etc	no	max length 50 chars
		first_name	First name	yes	max length 128 chars
		last_name	Last name	yes	max length 128 chars

Name			Description	Mand atory	Valid values
		title	Job title	no	max length 400 chars
		email	Primary email of the contact person	yes	max length 100 chars
		phone	Phone number	no	max length 50 chars
		account_name	Name of contact's company	no	max length 100 chars
		mailing_address	Postal address of the contact person	no	max length 250 chars
		primary_contact	flag: true/false	no	
	geo_code		Geographic code	yes	max length 100 chars
	currency		In the context of 'view quote' the currency should be the same as was specified in 'create quote' request. Note: if given opportunity does not have any quotes yet, the system will allow changing opportunity currency from what was initially defined.	yes	max length 3 chars
	custom_fields		List of additional fields, each element in the list consists of key/value pairs. For information about external data types supported by DealHub refer to **External Data Types** section above	no	

Name			Description	Mand atory	Valid values
		name	Group name	yes	max length 200 chars
		value	Answers	yes	max length 8192 chars
	repeatable_groups		List of line items for renewal	no	
		Group id		yes	max length 50 chars
		Questions		yes	

Response

The response (HTTP300) you will receive includes a complete DealHub URL. Redirect the user to this URL to view the list of quotes associated with the specific opportunity ID.

Expected response example:
```
{
  "url": "https://service-eu1.dealhub.io/..../",
  "errors": [
  ]
}
```

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View my opportunities v1

This request will lead the user to the `My Opportunities` page.
The response to this request will be a link to the DealHub CPQ system. The calling system should redirect the user to the DealHub so he/she can view a list of his/her opportunities in the CPQ.

NOTE: The header of a request must include an access token, which is received from the 'authenticate' request.
`Authorization: Bearer 4D114DAD97361C84B154A828FF991`

Request

type: POST
URI: `/api/v1/opportunities`

Query body format: JSON

Query body example:
```
{
        "dealhub_user_id": "387483488378",
}
```

Name	Description	Mandatory	Valid values
dealhub_user_id	ID of user in the DealHub system (as returned from Authentication request)	yes	max length 16 chars

Response

The response (HTTP300) you will receive includes a complete DealHub URL. Redirect the user to this URL to view the list of opportunities in CPQ.

Expected response example:
```
{
  "url": "https://service-eu1.dealhub.io/..../",
  "errors": [
  ]
}
```

Errors

HTTP code	Returned When	Error Message
400	Invalid payload format	"Invalid payload format. Supported format: JSON"
400	Parameter(s) within request payload exceed its limit(s)	The request parameter <PARAM_NAME> exceeds its limits. Allowed maximum length: <MAX_LENGTH>
400	Unrecognized parameter received in the request payload	"Unrecognized parameter: <PARAM_NAME>"
400	Request payload missing one or more mandatory fields	"Request payload missing mandatory field(s): <comma separated list of missing mandatory fields"
400	When type of custom field within request does not correspond to the type of custom field defined in DealHub version	"Type mismatch: custom field (<custom_field_name>) type does not match to the type defined in version <version_id>"
400	If the currency provided is not in the list of the currencies defined for an account in DealHub	"Currency <currency> is not supported in DealHub. Supported currencies: <list of defined currencies>"
400	Authenticated user is seller while create quote request refers to non-active version	"Sellers can create quotes only in the context of the active version. Request should either omit version ID or specify ID of an active version"
400	Multiple occurrences of custom field in custom_fields list	Parameter <custom_field_name> specified more than once in custom_fields list.
400	System got request to open quote with ID that does not exist in DealHub	Entity (ID = <dealhub_quote_id>) not found.
400	System got request to view quotes for specific opportunity ID that does not exist in DealHub	Entity (ID = <external_opportunity_id>) not found.
400	System got request from authenticated administrator to create quote for specific version ID that does not exist in DealHub	Entity (ID = <version_id>) not found.
400	Specified quote does not belong to specified opportunity	Mismatch between quote ID <dealhub_quote_id> and opportunity <external_opportunity_id>.

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HTTP code	Returned When	Error Message
400	CPQ got a request to create a quote for opportunity that already exists in CPQ and the currency in the new request is different from the currency defined within opportunity.	Currency mismatch. Received <currency received within request> currency, while specified opportunity <external_opportunity_id> already configured with <currency of opportunity in CPQ>.
403	If the request is not authenticated. Could occur in one of the following scenarios: - access token is missing - access token is invalid - mismatch between access token and dealhub_user_id for which access token was issued - 'native' CRM account attempts to use CRM API for quote creation or quote opening	"Unauthenticated"