

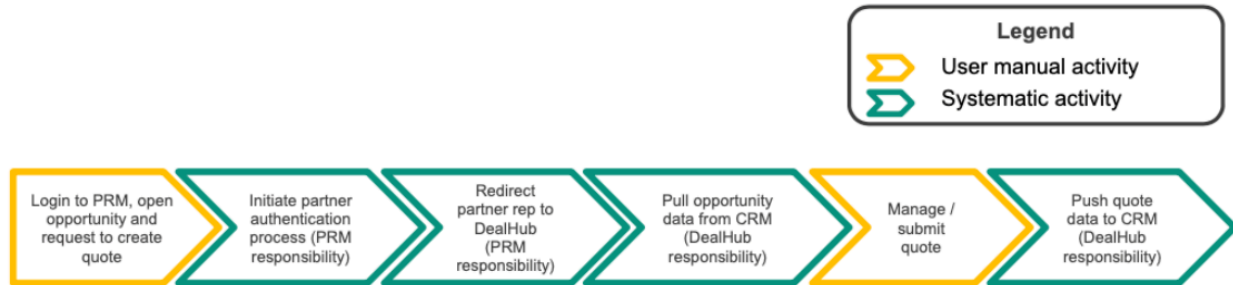
# Partner API

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## Overview

DealHub Authenticator is our ability to allow users' login from PRMs and partner portals into DealHub, in order to standardize the selling procedure and streamline CPQ process of partner users. The solution is based on a request/response in JSON format.

On a high level the process of partner users working with DealHub platform will look as follows:

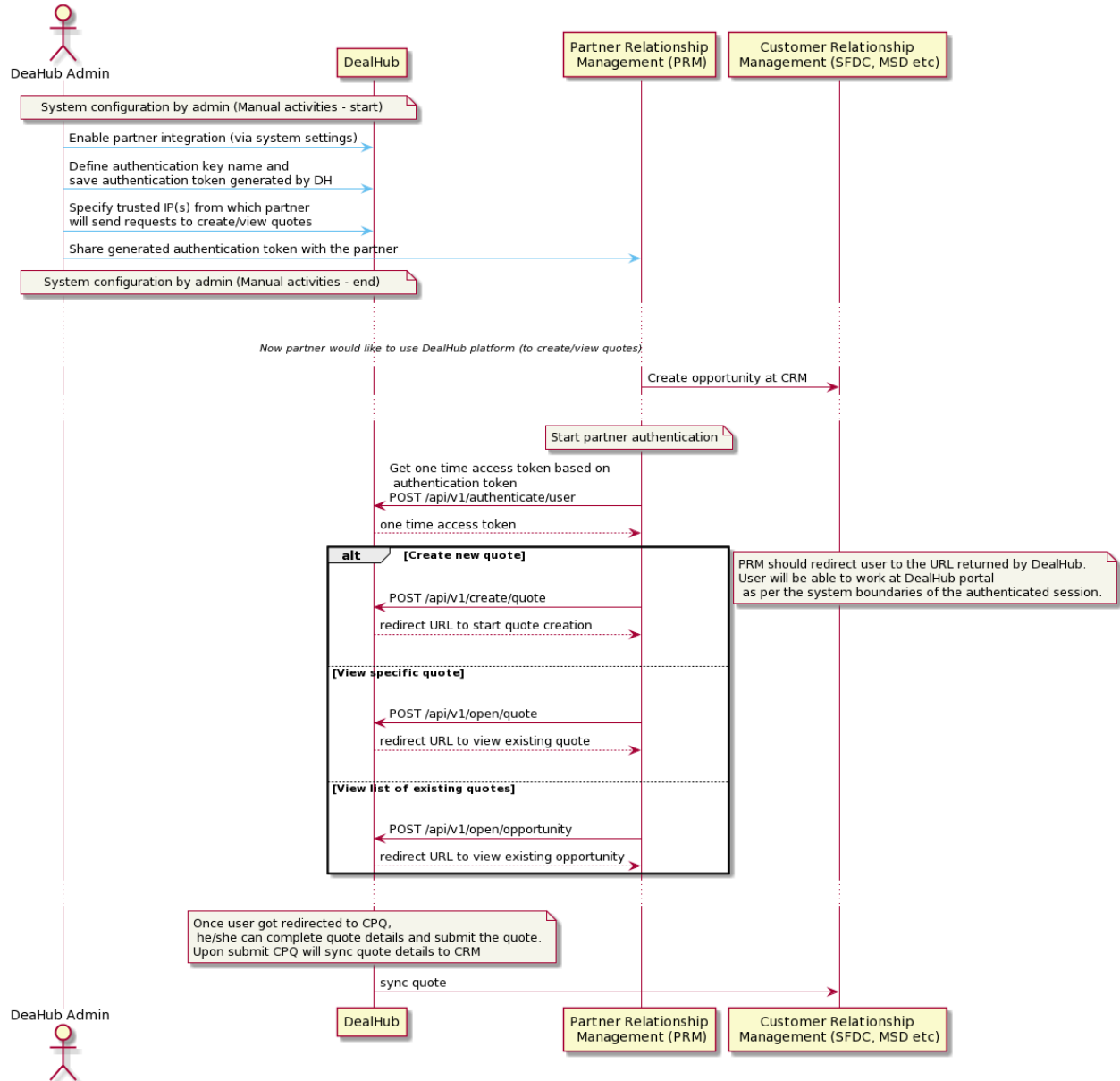


## Scope

1. Current solution provides services for PRM systems of account that uses SFDC or Microsoft Dynamics as its CRM.
2. Partner user(s) that will be working via the current Partner API do not login directly to DealHub CPQ but will use authentication API as described further.
3. Based on the configuration of the selling organization account within CPQ, requests can be received only from allowed IPs. If IPs are not configured for a specific partner, the system will allow calls from any IP.
4. Synchronization of quote data from CPQ to CRM upon submit
  - a. In case of Salesforce – synchronization is done on behalf of the opportunity owner.
  - b. In the case of Microsoft Dynamics – integration user at Dynamics.

## Architecture

Below diagram describes the E2E process that involves administrator configuration steps and PRM integration calls with DealHub:



## Partner API Setup

Enablement of partner integration and generation of authentication key is done by CPQ administrator via System Settings screen:

The screenshot shows the DealHub System Settings interface. At the top, there is a navigation bar with the DealHub logo, a breadcrumb trail 'C... > System Settings', and buttons for 'Discard' and 'Save'. A notification icon with a red '5' and a green '0' is also present. Below the navigation bar, there are two tabs: 'System Settings' and 'API Settings'. The 'API Settings' tab is active. Under this tab, there is a section titled 'DealHub Authentication Tokens'. This section contains a checkbox labeled 'Enable DealHub Authenticator' with a help icon. Below this, there is a 'Key Management' section with a text input field labeled 'New Key Name' and an 'Add' button.

The administrator should generate an authentication key. Note that the actual value of this secret key will be shown to the administrator only once during key generation. This key must be shared with the consuming system in order to pass the 'authenticate' request described below.

For each authentication key, the administrator may specify IP(s) from which the partner will send API requests. If no IPs are specified, the system will allow calls from any IP.



## Authenticate - Request #1

The request will contain the partner user information required for authentication into DealHub.

Request type: POST

/api/v1/authenticate/user

Query body format: JSON

Query body example:

```
{
  "authentication": "480zZQNXR8zoTicG.7MIkom0ETwBjYWzi",
  "user_information": {
    "type": "partner",
    "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",
    "profile_img": "https://domain.com/img.png"
  }
}
```

Query body explanation:

Name	Description	Mandatory
authentication	A DealHub authentication key generated in the system settings screen	Yes
user_information	A list of fields required to create a user in DealHub. Mandatory fields: <ul style="list-style-type: none"><li>• type = “partner”</li><li>• user_id - external id of the user</li><li>• login - login of the user</li><li>• email - The user’s email to receive notifications.</li></ul>	Yes



Name	Description	Mandatory
	<ul style="list-style-type: none"><li>• name - The user's first and last name.</li></ul> <p>The rest of properties are optional</p>	

## Response

The response you will receive includes a token to approve the user's login into DealHub. This access token will expire after 60 seconds.

Expected response example:

```
{
  "access_token": "4D114DAD97361C84B154A828FF991",
  "errors": [
  ]
}
```



## Open DealHub CPQ - Request #2

Header for all requests described below must include the one-time access token that was received from the DealHub system upon successful authentication request (described above)

Authorization: Bearer 4D114DAD97361C84B154A828FF991

Requests described below are responsible for redirecting users to the relevant DealHub page. The response to such a request will be a link that the consuming system should direct the user to.

---

This request will lead the user to the My Proposals page, for a specific opportunity.

Request type: POST

/api/v1/open/opportunity

Query body format: JSON

Query body example:

```
{
  "opportunity_id": "lkdash231hr2jkk2"
}
```

---

This request will lead the user to an existing quote.

Request type: POST

/api/v1/open/quote

Query body format: JSON

Query body example:

```
{
  "opportunity_id": "lkdash231hr2jkk2",
  "quote_id": "urhnvfkjsfdfdgrfdnbkg"
}
```

---

This request will allow the user to create a new quote.

Request type: POST

/api/v1/create/quote

Query body format: JSON

Query body example:

```
{
```



```
{  "opportunity_id": "x444sh23lhr2jkk2"}
```

Query body explanation:

Name	Description	Mandatory
opportunity_id	This is the CRM's Opportunity ID. It is required when viewing an opportunity and when viewing a quote.	Yes
quote_id	This is the CRM's Quote ID. It is required when entering a specific quote.	Yes

## Response

The response you will receive includes a complete DealHub URL, to which the consuming system should redirect the user to.

Expected response example:

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