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Quote Open API

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Overview

The current document describes a set of Quote Open API services, through which consumers can retrieve quote information from DealHub Revenue Amplification Platform.

NOTE: Header of each request described below must include DealHub Authentication Token, which is generated by the CPQ administrator and shared with consuming applications in advance. E.g.:

```
Authorization: Bearer <SECRET_TOKEN_PROVIDED_BY_CPQ_ADMIN>
```

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Get Quote v2

Retrieve the details of the existing quote.
To utilize this API an account should have an active version.
Unless a specific 'feature' is requested, the system will return only `"dealhub_quote_id"`, `"status"` and `"quote_upgrade_required"` of the requested quote.
When a quote upgrade is required (`"quote_upgrade_required"` = `true`) the system will not return any quote features (if requested) until the user will reevaluate and save this draft quote in the context of the active Version. <u>Note that this use case is relevant only for draft quotes.</u>

NOTE:
Date-type attributes and playbook questions are returned in the format yyyy-mm-dd hh:mm:ss date.

Request

Get quote based on DealHub quote ID

Request type: GET
URI: `/api/v2/quote/{quote_id}?feature=x&feature=y&feature=z`

Name	Type	Description	Valid values
quote_id	string	DealHub unique quote ID	max length 16 chars

Optional Request Parameters

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Name	Type	Description	Valid values

feature	string	Parameter specifies which quote information the consumer would like to retrieve.
		Note, if parameter is not specified, the system will return only quote status
			`"info"`
			`"summary"`
			`"deal_room_info"`
			`"line_items"`
			`"answers"`
			`"approvals"`
			`"all"`

external_identifier_flag	string	This flag would be used in case the consuming system would like to search for the quote based on CRM quote ID (aka `"external_quote_id"` - the value that was provided by CRM during quote generation). If not specified, or equals "false" - DealHub system will search for quote based on DealHub identifier If this parameter equals "true" - DealHub system will search for quote based on "external_quote_id"	`"true"` `"false"`

For more information on the retrieved data, see the below table with fields description.

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Response

Returns quote details if a valid identifier is provided.

Code: 200 (Success)
Response format: JSON

Response example:
Note that the result might differ, depending on the requested features.

```json
{
    "dealhub_quote_id": "12345zWIwGV12344",
    "status": "ReadyToBeSent",
    "quote_upgrade_required": false,
    "info": {
        "external_opportunity_id": "2077636",
        "external_quote_id": "",
        "external_customer_id": "101008",
        "customer_id": "6951040",
        "account_name": "Example Ltd",
        "contact_name": "",
        "contact_email": "",
        "dealhub_opportunity_id": "12345zWIwGV12345",
        "dealhub_quote_name": "3 year quote",
        "dealhub_quote_number": "Q_101",
        "primary_quote": false,
        "created_by": "antony@mydomain.com",
        "creation_date": "2022-04-11 07:08:59",
        "submitted_by": "antony@mydomain.com",
        "submission_date": "2022-04-11 07:19:16",
        "expiration_date": "2022-05-11 09:04:02",
        "geo_code": "EMEA",
        "currency": "USD",
        "playbook": "Playbook",
        "version_id": "12345zWIwGV12346"
    },
    "summary": {
        "currency": "USD",
        "total_list_price": 458154.42,
        "total_net_price": 238042.66,
        "total_discount": 48.04,
```

```
        "sales_discount": 0.0
    },
    "line_items": [
        {
            "id": "12345zWIwGV12347",
            "sku": "999451",
            "bundle_ref": "",
            "name": "Gold Shield Pack",
            "primary_tag": "PS",
            "msrp": 50000.04,
            "msrp_discount": 55.0,
            "list_price": 50.04,
            "user_price": 22.02,
            "net_per_unit": 22.02,
            "partner_discounts": [],
            "sales_discount": 55.0,
            "total_discount": 55.0,
            "net_price": 22500.02,
            "product_factors": {
                "duration": "1.0",
                "quantity": "1.0"
            },
            "attributes": {
                "ARR": "22.02",
                "Customer Discount": "49.07",
                "Item Status": "Active",
                "End Reseller Price": "-",
                "Inventory Category": "DEFAULT",
                "Product Line": "Professional Services"
            }
        }
    ],
    "answers": [
        {
            "system_id": "12345zWIwGV12349",
            "system_name": "3yr",
            "group_id": "SE_DISCOUNT",
            "group_name": "SE Discount",
            "question_id": "Distibrutor_Discount",
            "question": "      ▸ <font face=\"Arial\" color=#36749D>Distribution Discount</font>",
            "answer": "55"
        },
        {
```

```
        "system_id": "12345zWIwGV12349",
        "system_name": "3yr",
        "group_id": "SE_DISCOUNT",
        "group_name": "SE Discount",
        "question_id": "Special_discount",
        "question": "<font face=\"Arial\" color=#36749D>Advanced Options</font>",
        "answer": "\"No\""
    },
    {
        "system_id": "12345zWIwGV12349",
        "system_name": "3yr",
        "group_id": "Line",
        "group_name": "D-Line",
    "question_id": "Multimode",
        "question": "        ▸ Multimode",
        "answer": "0"
    }
 ],
 "approvals": []
}
```

Fields details:

Name	Description	Empty value	Format/Notes
dealhub_quote_id	DealHub unique quote ID	no	Will be always part of returned payload (regardless if 'features' parameter requested or not)
status	Status of the quote.	no	Will be always part of returned payload (regardless if 'features' parameter requested or not)

Name	Description		Empty value	Format/Notes
quote_upgrade_required	Indicates if the quote needs to be "upgraded". For the cases when this flag is 'true', the user should access this quote and evaluate its details in context of the new active *Version* and save the changes. Flag could be 'true' in case of DRAFT quote only		no	true, false Will always be part of returned payload (regardless if 'features' parameter requested or not)
info	Quote general information		yes	Data will be part of the response if explicitly requested or 'all' quote features requested.
	external_opportunity_id	External opportunity ID (CRM opportunity ID as provided during create quote call)	no	
	external_quote_id	External quote ID (as provided during create quote call)	yes	
	external_customer_id	External customer ID (CRM customer account ID)	no	
	customer_id	CPQ customer account ID	no	
	account_name	Account name (as provided during quote creation)	no	
	contact_name	Primary customer contact full name	yes	
	contact_email	Primary customer contact email	yes	
	dealhub_opportunity_id	DealHub opportunity ID	no	

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Name	Description	Empty value	Format/Notes
dealhub_quote_name	DealHub quote name	no	
dealhub_quote_number	Quote ID that is unique per account and presented to user in CPQ UI	yes	
primary_quote	Primary quote flag	no	"true", "false"
created_by	Login of the user who created the quote	no	
creation_date	GMT date&time of quote creation	no	yyyy-mm-dd hh:mm:ss E.g: 2021-10-22 09:34:44
submitted_by	Login of the user who submitted the quote (if specific quote is submitted)	yes	
submission_date	GMT date&time of quote submission (if specific quote is submitted)	yes	yyyy-mm-dd hh:mm:ss E.g: 2021-10-22 09:34:44
expiration_date	Quote expiration date	no	yyyy-mm-dd hh:mm:ss E.g: 2021-10-22 09:34:44
won_date	The date the quote was signed (all signers signed and quote status became 'won')	yes	yyyy-mm-dd hh:mm:ss E.g: 2021-10-22 09:34:44
geo_code	Geographic code	no	
currency	Quote currency	no	Currency format ISO-4217
playbook	Playbook name	no	
quote_url	Quote URL	no	

Name	Description		Empty value	Format/Notes
	version_id	ID of the version in which the quote is managed	no	If the account is using the continuous-version mode, the version in which the quote is signed might differ from the version in which the quote was created.
summary	Quote summary		yes	Data will be part of the response if explicitly requested or 'all' quote features requested.
	currency	Quote currency	no	Currency format ISO-4217
	total_list_price	Total list price of quote	no	
	total_net_price	Total net price of quote	no	
	total_discount	Total discount of quote	no	
	sales_discount	Total discount provided by seller	no	
deal_room_info	DealRoom information. Relevant for quotes in 'published' status. DealRoom information can be also retrieved for 'won' quotes if their signing process was managed via the DealRoom. In other scenarios the response for 'deal_room_info' will be empty		yes	Data will be part of the response if explicitly requested or 'all' quote features requested.
	url	DealRoom URL	no	

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Name	Description		Empty value	Format/Notes
line_items	List of the quote line items. Each line item contains the following data:		yes	Data will be part of the response if explicitly requested or 'all' quote features requested.
	id	Unique identifier of the line item instance in this quote	no	
	sku	Product catalog unique identifier	no	
	bundle_ref	Reference of the line item to its bundle (Bundle SKU). This field will have value if the line item is part of the bundle. For the bundle itself this field will be empty.	yes	
	name	Product catalog name	no	
	primary_tag	Product primary tag	yes	
	system_name	System name. Relevant in case of multi-system (aka multi-offer concept)	no	
	system_id	System ID. Relevant in case of multi-system (aka multi-offer concept)	no	
	system_ordinal	This parameter defines the system's position/order within the quote, relative to other systems in the same quote. Relevant for a case when a quote includes multiple systems.	no	

Name		Description	Empty value	Format/Notes
	group_name	Name of the group that triggered creation of the line item	no	
	ordinal	The position of the line item as displayed to the seller on the quote details screen. In a multi-system scenario, this indicates the line item's position within its respective system. Note: The ordinal values are not guaranteed to be sequential. Gaps between values may exist depending on conditions of product assignment rule/s. For example, the first line item may have an ordinal of 1, while the second may have 4, the third 10, and so on.	no	
	msrp	Line item MSRP	no	
	msrp_discount	MSRP discount	no	
	list_price	Line item list price	no	
	user_price	End user price. Relevant for indirect sale (partners).	no	
	user_discount	End user discount. Relevant for indirect sale (partners).	no	

Name	Description	Empty value	Format/Notes
net_per_unit	Unit net price	no	
net_price	Total net price of the line item (net per unit * product factors)	no	
partner_discounts	List of partner level discounts (indirect sale). Each element in the list have the following data:	yes	
	name	no	Partner program name
	discount	no	Discount percentage
	price	no	Price after partner discount
sales_discount	Sales discount	no	
total_discount	Total discount	no	
product_factors	List of all products factors (e.g. quantity, duration, etc) relevant for specific line item	yes	List is combined from key/value pair(s)
attributes	List of line item attributes (aka proposal attributes), which differ per each SKU.	yes	This list is combined from key/value pair(s). The 'Date' attribute will be returned in a format of yyyy-mm-dd hh:mm:ss

Name	Description		Empty value	Format/Notes
answers	List of playbook answers in context of the specific quote. In case answer is a textList with multi-selection, multiple values selected that were selected by user will be separated by semicolon ';' Each element in the list contains the following:		no	Data will be part of the response if explicitly requested or 'all' quote features requested.
	system_name	Name of the system. Relevant in case of multi-system (aka multi-offer concept)	no	
	system_id	System ID. Relevant in case of multi-system (aka multi-offer concept)	no	
	group_id	Group ID	no	
	group_name	Group name	no	
	question_id	Question ID	no	
	question	Question text	no	
	answer	The answer	yes	The response to a Date-type question will be provided in a format of yyyy-mm-dd hh:mm:ss
approvals	List of quote approval flows. If explicitly requested for the quote that didn't require any approval workflow - system will return empty list.		yes	Data will be part of the response if explicitly requested or 'all' quote features requested.
	reviewer	Login of the reviewer	no	
	step	Approval workflow step	no	

Name		Description	Empty value	Format/Notes
	reason	List of approval reasons	no	
	status	Status of the specific step within approval flow	no	"waiting", "rejected", "approved"
	impersonated_by	Login of the person who approved/rejected quote on behalf of approver	yes	
	review_date	Date of approval/rejection. Empty if status == "waiting"	yes	yyyy-mm-dd hh:mm:ss
	reviewer_comment	Note added by reviewer	yes	Mandatory in case of reject

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Get Quotes v2

Returns the list of quotes matching the provided search criteria.

Unless a specific `'feature'` is requested, the system will return only `"dealhub_quote_id"`, `"status"` and `"quote_upgrade_required"` for each quote.

In case no quote matches the requested criteria, the response will contain an empty list.

NOTE:

Date-type attributes and playbook questions are returned in the format yyyy-mm-dd hh:mm:ss date.

Request

type: GET
URI: `/api/v2/quotes`

Query examples:
Return quote summary information for all quotes of specific opportunity
`/api/v2/quotes?external_opportunity_id=4982749821HF&feature=summary`

Mandatory Request Parameters
N/A

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Optional Request Parameters

Name	Description	Valid values/Notes
external_opportunity_id	Search for quotes associated with the specific CRM opportunity ID.	max length 50 chars

feature	Specify which quote features to retrieve.
	If no value is provided in the request, for each quote in the response the system will return "info", "summary" and "line_items" features.
	
	Multiple features can be sent in the request. See above query example.
		`info`
		`summary`
		`deal_room_info`
		`line_items`
		`answers`
		`approvals`
		`all`

offset	Part of the offset-based pagination. Parameter helps the system to identify how many quotes should be skipped.	`0 - 10000`
limit	Part of the offset-based pagination. Parameter determines the maximum number of quotes returned by this API	`1 - 50`

Response

Code: 200 (Success)
In the response the system will return the list of quotes that match criteria provided in the request. Each element in the list match to the structure described in **Response of Get Quote** API **v2** (above)

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Response example for scenario when the consuming system searches for all quotes of a specified opportunity, while no explicit `'feature'` is requested:

```json
{
  "info": {
    "more_results_matching_the_request": true,
    "offset": "1",
    "limit": "25"
  },
  "quotes": [
    {
      "dealhub_quote_id": "12345zWIwGV12344",
      "status": "ReadyToBeSent",
      "quote_upgrade_required": false
    },
    {
      "dealhub_quote_id": "12345zWIwGV12347",
      "status": "Draft",
      "quote_upgrade_required": true
    },
    {
      "dealhub_quote_id": "12345zWIwGV12349",
      "status": "Draft",
      "quote_upgrade_required": false
    }
  ]
}
```

Create Opportunity v1
Utilize this API to create an opportunity within the DealHub system.
If an opportunity with specified `external_opportunity_id` already exists in the DealHub, the system will return error 400.

Request

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

Query body format: JSON

Mandatory Request Parameters

Name	Description		Mandatory	Valid values
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 if the quote in CPQ created by someone else, but not the opportunity owner		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	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
	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
currency	Opportunity currency (ISO code).		yes	max length 3 chars
external_customer_id	CMR customer ID (buyer account)		yes	max length 50 chars
customer_name	CRM customer name		yes	max length 256 chars

Optional Request Parameters - N/A

Query body example:

```
{
  "external_opportunity_id": "vadim-test-01",
  "external_opportunity_name": "vadim-test-01-opp",
  "opportunity_owner": {
    "login": "liotr",
    "external_user_id": "11",
    "email": "vadim@myDomain.io",
    "name": "Vadim T",
    "position": "Sales",
    "phone": "03-12345678",
    "mobile": "051-12345678",
    "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"
  },
  "currency": "USD",
  "external_customer_id": "br768",
  "customer_name": "Vadim Test1"
}
```

Response

Code: 200 (Success)

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Get quote document v1

The consuming system can retrieve the quote document by utilizing this service.
This service can be used for any submitted quote, whether it is pending approval or already won.

Notes:
- Document retrieval for the quote in draft status is not supported.
- The document retrieval is based on the template specified by the seller during the quote submission.

Request

type: GET
URI: `/api/v1/quote/{dealhub_quote_id}/document`

Mandatory Request Parameters

Name	Description	Valid values/Notes
dealhub_quote_id	ID of the *Quote*	max length 16 chars

Optional Request Parameters

Name	Description	Valid values/Notes
document_type	This attribute is relevant only for the quote that was submitted. The consuming system can specify which type of document should be retrieved (out of the types configured by the account administrator in CPQ) By default, if this parameter is not specified, the system will retrieve the document based on the file type chosen by the seller during quote generation.	PDF, WORD, EXCEL Note: Excel file could be retrieved only if during quote generation the seller has explicitly

		chosen Excel file for the quote.

Response

As a response the system will return the byte array that represents the quote document.

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Get DealRoom Signers v1

The current service allows the consuming system to retrieve information about contract signers.

To emphasize:
- This service should be used only if the signing process was handled via the DealRoom.
- Signer information can be retrieved only if the DealRoom instance has already been created (published) for the specified opportunity.
- The service returns only the actual signer information, meaning the DealRoom is either partially or fully signed.

Request

type: GET
URI: `/api/v1/dealroom/{opportunity_id}`

Mandatory Request Parameters

Name	Description	Valid values/Notes
opportunity_id	ID of the CRM opportunity	

Optional Request Parameters

N/A

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Response

Returns details of users who actually signed the contract via the DealRoom.

Code: 200 (Success)
Response format: JSON

Response example:

```
{
    "dealroom_state": "Partially signed",
    "buyer_signers": [
        {
            "company_name": "BBB Inc.",
            "signee_name": "John Brown",
            "signee_title": "CEO",
            "signature_date": "2024-02-06 16:41:29",
            "ordinal": 1
        }
    ],
    "seller_signers": []
}
```

Fields details:

Name	Description	Empty value	Format/Notes
dealhub_state	State of the DealRoom	no	Will be always part of returned payload (regardless if 'features' parameter requested or not)

Name	Description	Empty value	Format/Notes
buyer_signers	List of signers from the buyer side. Each element in the list is described in the "Signer details" table below.	yes	The list will be empty if no signers from the buyer side have signed the contract.
seller_signers	List of signers from the selling organization side. Each element in the list is described in the "Signer details" table below.	yes	The list will be empty if no signers from the selling organization side have signed the contract.

Signer details

Name	Description	Empty value	Format/Notes
company_name	Company name of the signer.	no	
signee_name	Name of the signer.	no	
signee_title	Title of the signer	no	
signature_date	Date when the user signed the contract via the DealRoom	no	Format: yyyy-mm-dd hh:mm:ss
ordinal	In case there is more than one person who should sign the contract, this parameter reflects the order of the signer in the list of signers.	no	

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Errors

HTTP code	Returned when	Error message
400	Request payload missing one or more mandatory fields	"Request payload missing mandatory field(s): <comma separated list of missing mandatory fields"
400	Parameter 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	System got request to fetch quote/opportunity with ID that does not exists in DealHub	Entity (ID = <entity ID>) not found.
400	Specified parameter received with invalid value	"<invalid value> is not supported in DealHub. Supported values: <list of supported value>"
400	Got request to create new opportunity, while opportunity with same ID already exists	Entity (opportunity ID = <entity ID>) already exists.
400	Invalid value sent for one of the parameters	<PARAMETER_NAME> - Invalid parameter value. Valid value(s): <VALID_VALUES>
400	The quote is in draft status.	Cannot retrieve the document for the quote in 'Draft' status.
400	The system got a request to retrieve a PDF/DOC file. But, during quote generation, the user explicitly specified an Excel file, thus no template defined on the quote.	The quote does not have a template specified (current quote file is Excel).

400	The quote is not yet submitted. Specified document type is not available (an admin didn't configure specific file type support during playbook definition)	<DOCUMENT_TYPE> is not supported by the quote playbook.
400	The quote is already submitted. The client system requested to receive a file type different from the type with which the quote was submitted.	Cannot generate <DOCUMENT_TYPE> for the submitted quote (quote submitted with <FILE_TYPE> file)
400	The system received Open API request while there is no active *Version* defined (all configured *Versions* are either in draft or deactivated state)	Cannot complete request execution as there is no active Version configured.
400	The system received a request to fetch signers information when no DealRoom was published yet for the specified opportunity.	No DealRoom instance found for the given opportunity ID