

STAKT - OPEN API DOCUMENTATION - PROJECTS

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Process

Our standard procedure for the API connection is to have data transferred any time there is a change to a project, not just when a project is created. This means that your system is the source of truth for all project data and STAKT is used for building comp plans and tracking the commissions. The project information area in STAKT becomes locked so that updates and changes can only be made in your CRM software and will be transferred to STAKT through the API call.

STAKT's open API uses the Project ID as the primary key. If you change the Project ID in your application then STAKT will create a new project.

If you are not using the Project ID then we use the Project Name and Address Line 1. Again if you change either of these then a new project will be created.

API Fields

The STAKT open API for projects allows users to send to STAKT current project information from their application. All fields are varchar(255). As shown in the sample code, the following fields are available to populate:

- * Name (Customer/Project Name)
- * Address Line 1
- Address Line 2
- City
- * State (Full name or 2 character eg. AZ for Arizona)
- Zip Code
- * Contract Signed Date (format must be YYYY-MM-DD eg. 2023-12-25)
- * System Size (In units and formatted ##### eg. 15000 no decimals)
- * NPPU (Net Price Per Unit, format #####.#### eg. 3.9525 or 250.5050)
- Project ID
- Project Status
- * Supplier (EPC/Installer/Product)
- * Closer
- * Lead Source
- Setter

*Note: Fields with an asterisk are mandatory for STAKT to calculate commissions.
If Project ID is populated this will be used to identify the Project, if not the Name and Address Line 1 will be used.*

Endpoints

There are currently two endpoints available. One for transmitting live project data and one for testing transmitting project data:

Transmitting live project data use:

<https://api.stakt.io/api/openapi/import>

Transmitting test project data use:

<https://api.stakt.io/api/openapi/import?reconcile=true>

With the test data that is transmitted you can go to the Stake website and under the 'Admin' menu select the button 'Project API Testing'. This will open a form that will show the projects that have been transmitted. This will not affect live data and you can delete all or some as you wish.

PHP Example

```
<?php

$endpoint = "https://api.stakt.io/api/openapi/import";
$authToken = "YOUR_OPEN_API_KEY";

$data = [
    "apName" => "Project311",
    "apAddressLine1" => "123 Main Street",
    "apAddressLine2" => "Apt 456",
    "apCity" => "My Town",
    "apState" => "AZ",
    "apZipCode" => "82828",
    "apContractSigned" => "2023-07-31",
    "apSystemSize" => "8000",
    "apNPPU" => "3.9123",
    "apProjectID" => "TTF98203",
    "apStatus" => "Design Phase",
    "apSupplier" => "Solar Installer",
    "apCloser" => "John Doe",
    "apLeadSource" => "Leads Unlimited",
    "apSetter" => "Mary Smith"
];

$headers = [
    "Content-Type: application/json",
    "Authorization: Bearer $authToken",
];

$ch = curl_init($endpoint);
curl_setopt($ch, CURLOPT_RETURNTRANSFER, true);
curl_setopt($ch, CURLOPT_POST, true);
curl_setopt($ch, CURLOPT_POSTFIELDS, json_encode($data));
curl_setopt($ch, CURLOPT_HTTPHEADER, $headers);

$result = curl_exec($ch);

if ($result === FALSE) {
    // Handle error
    echo "Error making the request: " . curl_error($ch);
} else {
    // Process the response
    echo $result;
}

curl_close($ch);

?>
```

Javascript Example

```
const endpoint = "https://api.stakt.io/api/openapi/import";
const authToken = "YOUR_OPEN_API_KEY";

const data = {
  apName: "Project311",
  apAddressLine1: "123 Main Street",
  apAddressLine2: "Apt 456",
  apCity: "My Town",
  apState: "AZ",
  apZipCode: "82828",
  apContractSigned: "2023-07-31",
  apSystemSize: "8000",
  apNPPU: "3.9123",
  apProjectID: "TTF98203",
  apStatus: "Design Phase",
  apSupplier: "Solar Installer",
  apCloser: "John Doe",
  apLeadSource: "Leads Unlimited",
  apSetter: "Mary Smith"
};

fetch(endpoint, {
  method: 'POST',
  headers: {
    'Content-Type': 'application/json',
    'Authorization': `Bearer ${authToken}`
  },
  body: JSON.stringify(data),
})
.then(response => response.json())
.then(result => {
  // Process the response
  console.log(result);
})
.catch(error => {
  // Handle error
  console.error('Error making the request:', error);
});
```

Response Codes

200 Successful
404 Company Not Found