

Crawler Import Service

Description

This service is used to simplify importing data to ATOLLON. In ATOLLON, it's possible to add more complex business logic based on request type and it's parameters. External developers are let go of understanding ATOLLON's blackbox.

Request

POST https://<HOST>/svc/crawler/<request_type>?params...

Contact

Create contact (person or company) with (optionally) contact folder identified by context category (FPATypeCategory).

Request

POST <https://<HOST>/svc/crawler/contact>

Data in JSON format:

```
{
  "person": {
    "firstName": "<name>",
    "lastName": "<surname>",
    "prefixTitle": "<prefixTitle>",
    "postfixTitle": "<postfixTitle>",
    "companyPersonRelation": [{
      "companyExternalId": [{
        "system": "<system1>",
        "id": "<Company contact external ID>"
      }],
      "positionDesc": "<Position of person in company>",
      "companyName": "<Name of the related company>",
      "departmentName": "<Name of department>"
    }
  ]
}
```

```

    []]
  },
  'company': {
    'companyName': "<company name>",
    'companyCompanyRelation': [{
      'companyExternalId': [{
        'system': "<system1>",
        'id': "<Company contact external ID>"
      }],
      'relationType': "<Relation type Mother company>"
    }]
  },
  'address': [{
    'street': "<street + number>",
    'city': "<city name>",
    'zip': "<zip text>",
    'region': "<region name>",
    'country': "<country name>",
    'addressType': "<address type1>"
  }],
  {
    'street': "<street + number>",
    'city': "<city name>",
    'zip': "<zip text>",
    'region': "<region name>",
    'country': "<country name>",
    'addressType': "<address type2>"
  }
],
  'contacts': {
    'email': [{
      'contact': "<email1>",
      'contactInfoTypeName': ""
    }], {
      'contact': "<email2>",
      'contactInfoTypeName': ""
    }],
    'phone': [{
      'contact': "<telefon1>",
      'contactInfoTypeName': ""
    }],

```

```
    }, {
      'contact': "<telefon2>",
      'contactInfoTypeName': ""
    }],
    'mobile': [{
      'contact': "<mobil1>",
      'contactInfoTypeName': ""
    }, {
      'contact': "<mobil2>",
      'contactInfoTypeName': ""
    }],
    'web': [{
      'contact': "<web1>",
      'contactInfoTypeName': ""
    }, {
      'contact': "<web2>",
      'contactInfoTypeName': ""
    }
  ]
},
'description': "<Contact text field>",
'contactGroup': [{
  'name': "<Group 1>",
  'description': "<description>"
}, {
  'name': "<Group 2>",
  'description': "<descriptipion>"
}],
'contactFolder': [{
  'category': "<string1>",
  'refId': "",
  'parentFolder': {
    'category': "<string1>",
    'refId': "<string>",
    'contactExternalId': [{
      'system': "<system1>",
      'id': "<Company contact external ID>"
    }
  ]
},
  'responsibleUser': [{
    'userName': "<user@workspace>",
```

```

        "userRoleName": "<User Role>",
        "primary": true
    }
  ],
  "externalId": [
    {
      "system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",
      "id": "<Contact old id>"
    }
  ],
  "regNo": "<registered number of business>",
  "vatNo": "<VAT number>",
  "trackingCode": "<string>",
  "source": "<original - your system ident>",
  "industries": [
    {
      "name": "<industry name>",
      "description": "<industry description>"
    }
  ]
}

```

Response

on SUCCESS

- contactId
- folderId
- contact.externalId

Function progress

- Person is filled? => contact is "**Person contact**" (and the person is representative of the company), otherwise it's "**Company contact**" (either company or person surname is required)

Company contact

- Check whether company is existing (company name matches some record in DB) // see: <https://help.atollon.com/books/backend-development/page/modcontact#bkmrk-%C2%A0>
- If company does not exist, create new contact (company)
- Contact info and address is stored with company contact
- With company contact id, check whether contact has the **desired contact folder**. Desired contact folder is folder with FPATypeCategory (see list below)c. If the lead folder

does not exist, it is created.

- If contactFolderCategory is not filled-in, the contact folder is not created.
- contactGroup - find the contact group with the same name. If the contact group does not exist, create it. Assign the contact to the group

Person contact

- Check whether person is existing (based on e-mail, mobile / if these are not filled-in, the person is created anyway). E-mail and mobile is stored with person contact
- Contact info and address is stored with person contact
- With person contact id, check whether contact has the **desired contact folder**. Desired contact folder is folder with FPATypeCategory of the client, lead, supplier, partner, etc. folder types. If the lead folder does not exist, it is created.
- If contactFolderCategory is not filled-in, the contact folder is not created.
- contactGroup - find the contact group with the same name. If the contact group does not exist, create it. Assign the contact to the group
- employer - if company oldId is found in companyPersonRelation, make binding, otherwise if companyName is filled-in in companyPersonRelation, company based on it's name or create new company contact and create binding

After the request is imported successfully, change the TIF status to "2".

Creating contact folder (client, supplier, etc.)

Contact folders is main building block in contact relations (ATOLLON's context).

Some useful context categories for contact folders used:

Client	com.atollon.project.fpatypecategory.client
Supplier	com.atollon.project.fpatypecategory.supplier
Lead (potential client)	com.atollon.leads.fpatypecategory.lead
Partner	com.atollon.project.fpatypecategory.partner

ExternalId

Please note that within Contact service, the system + externalId must be unique key.

Product

`https://<HOST>/svc/crawler/product?instance=<instance_name>`

POST data in JSON format:

```

{
  "name": "<Product name>",
  "refId": "<Product code>",
  "description": "<Product description>",
  "typeName": "<Product typee = Product, Service, Technology ...>",
  "defaultQuantity": 1.0000,
  "unitPrice": 4990.00,
  "unitPriceCurrencyName": "<CZK, USD, etc.>",
  "statusName": "<Product status = Active, Inactive>",
  "unitsName": "<Product units = ks, md, hrs>",
  "vatRateName": "<15 %, 21%, etc.>",
  "openingBalanceQty": 0.0000,
  "openingBalanceDate": "<2022-09-09T10:10>" // <now> datetime is default, if not provided,
  "externalId": [
    {
      "system": "<system1>",
      "id": "<ABCD-EFGH-ijkl-...>"
    }, {
      "system": "<sytem2>",
      "id": "<ABCD-EFGH-ijkl-...>"
    }
  ]
}

```

Response

on SUCCESS

- productId
- productName
- productRefid
- product.externalId

Function progress

- Find product based on it's externalId OR code + product name, if this does not match, create product
- If existing product is found, values are updated, ie openingBalanceQty

Billing

To export service activities that include billing items, get the following resource:

Request

GET <https://<HOST>/svc/crawler/billing?billingStatus=ToBeInvoiced>

Response

```
[{
  "activity": {
    "id": "0123000",
    "name": "<Activity name>",
    "refId": "<Activity REF ID>",
    "statusName": "<Activity custom status name>",
    "description": "<Activity notes>",
    "created": "<2022-09-01T00:00>",
    "modified": "<2022-09-14T10:00>"
  },
  "project": {
    "id": "<project id>",
    "name": "<Project name>",
    "refId": "<Project REF ID>",
    "statusName": "<Activity custom status name>",
    "description": "<Activity notes>",
    "created": "<2022-09-01T00:00>",
    "modified": "<2022-09-14T10:00>"
  },
  "folder": {
    "name": "<Folder name>",
    "refId": "<Folder REF ID>"
  },
  "contact": {
    "person": {
      "firstName": "<name>",
      "lastName": "<surname>"
    },
    "company": {
      "companyName": "<company name>"
    }
  },
  "externalId": [{
```

```
    [{"system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",
      "id": "<Contact old id>"
    }],
    "regNo": "<registered number of business>",
    "vatNo": "<VAT number>"
  },
  "customer": {
    "name": "<Folder name>",
    "refId": "<Folder REF ID>"
  },
  "customerContact": {
    "person": {
      "firstName": "<name>",
      "lastName": "<surname>"
    },
    "company": {
      "companyName": "<company name>"
    },
    "externalId": [{
      "system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",
      "id": "<Contact old id>"
    }],
    "regNo": "<registered number of business>",
    "vatNo": "<VAT number>"
  },
  "billingItems": [{
    "id": "123456",
    "productName": "<Product name1>",
    "productRefid": "<Product code>",
    "name": "<Billing item text>",
    "description": "<Billing item description>",
    "quantity": 1.0000,
    "unitPrice": 1000.00,
    "currency": "<EUR, CZK, ...>"
  }]
```

```
    "billingDate": "<2022-09-14T10:00>",
      "billingStatus": "ToBeInvoiced",
      "billingType": 1,
    "productExternalId": [{
      "system": "<system1>",
      "id": "<Product old id>"
    }, {
      "system": "<system2>",
      "id": "<Product old id>"
    }
  ], {
    "id": "123457",
    "productName": "<Product name2>",
    "productRefid": "<Product code>",
    "name": "<Billing item text>",
    "description": "<Billing item description>",
    "quantity": 1.0000,
    "unitPrice": 1000.00,
    "currency": "<EUR, CZK, ...>",
    "billingDate": "<2022-09-14T10:00>",
      "billingStatus": "ToBeInvoiced",
      "billingType": 2,
    "productExternalId": [{
      "system": "<system1>",
      "id": "<Product old id>"
    }, {
      "system": "<system2>",
      "id": "<Product old id>"
    }
  ],
  "documents": [{
    "name": "<Document name>",
    "id": "123"
  }, {
    "name": "<Document name2>",
    "id": "456"
  }
}]
}]
```

Update billing status of billing items

Run after you have processed the billing items from activity.

You can change status of each of the billing items. If billing items are marked as Invoiced, you can change either activity or project status. Activity status will be changed only if there are no remaining billing items to be invoiced.

Request

PUT <https://<HOST>/svc/crawler/billing>

DATA:

```
[{
  "activity": {
    "id": "0123000",
    "statusName": "<Activity custom status name>"
  },
  "project": {
    "id": "<project id>",
    "statusName": "<Project custom status name>"
  },
  "billingItems": [{
    "id": "123456",
    "billingStatus": "Billed"
  }, {
    "id": "123457",
    "billingStatus": "Cancelled"
  }
}]
```

Billing states:

0	SalesItems
1	Pending
2	ForApproval
3	ToBelInvoiced
4	Billed
5	ApprovedByClient
6	Postponed

7	Cancelled
---	-----------

Billing types:

1	BillingItems
2	TimeSheetItems

Documents

Download Documents

GET https://<HOST>/svc/crawler/download_document?docId=123123

You get file in response.

Documents Upload

POST

https://<HOST>/svc/crawler/upload_document

Request body:

```
{
  "body": "<BASE64_BYTES>",
  "treeNode": "TREE000000216556",
  "documentCategory": "Customer invoice",
  "fileName": "INV-2025-00981.pdf",
  "mimeType": "application/pdf",
  "description": "Autogenerated by ERP"
}
```

Responses

201 Created

```
{
  "document": {
    "id": 123456789,
    "name": "INV-2025-00981.pdf",
    "mimeType": "application/pdf",
    "size": 238944,
    "checksum": "sha256:9f7b...d2",
    "treeNode": "TREE000000216556",
    "documentCategory": "Customer invoice",
    "created": "2025-09-10T12:03:15Z",
    "status": "created"
  }
}
```

400 Bad Request

```
{
  "error": "bad_request",
  "message": "bodyBase64 is not valid base64."
}
```

401 Unauthorized

```
{
  "error": "unauthorized",
  "message": "Invalid or missing token."
}
```

404 Not Found

```
{
  "error": "not_found",
  "message": "treeNode TREE000000216556 not found."
}
```

413 Payload Too Large

```
{
  "error": "payload_too_large",
  "message": "File size exceeds limit of 25 MB."
}
```

Validation Rules

- `bodyBase64` must decode successfully to bytes.
- If provided, `fileName` must include an extension; if omitted, server infers from `mimeType`.
- `treeNode` must reference a valid node the caller can write to.
- `documentCategory` is a free string (recommend ≤ 128 chars).

Folder

Request

GET

```
https://api.atollon.com/api/folders?contextCategory=com.atollon.leads.fpatypecategory.lead&limit=10
```

Parameters

Parameter	Type	Description
<code>contextCategory</code>	string	Optional. Filters folders by type category (e.g., <code>com.atollon.leads.fpatypecategory.lead</code>)
<code>limit</code>	integer	Optional. Number of results per page (default: 50)
<code>offset</code>	integer	Optional. Results offset for pagination
<code>search</code>	string	Optional. Search by folder name, contact name, or externalId

Response

```
{
  "folders": [
    {
      "folder": {
        "refId": "F12345",
        "name": "New Website Inquiry",
        "typeName": "Klient"
      },
      "contact": {
        "contactId": "C67890",
```

```
    "externalId": [
      {
        "system": "test",
        "id": "123"
      }
    ],
    "company": {
      "name": "ABC studio 2 s.r.o.",
      "regNumber": "",
      "VATNumber": ""
    },
    "form": {
      "Budget": "10000",
      "Interested Service": "Web Development"
    }
  }
},
"total": 1,
"limit": 50,
"offset": 0
}
```

Request

GET https://<HOST>/svc/crawler/folder_sample?id=<folder_id>

Response

```
{
  "folder": {
    "refId": "<folder refid>",
    "name": "<folder name>",
    "typeName": "<folde type name> Klient, ...",
  },
  "contact": {
    "externalId": [
      {
        "system": "test",
        "id": "123"
      }
    ]
  }
}
```

```
    }
  ],
  "company": {
    "name": "ABC studio 2 s.r.o.",
    "regNumber": "",
    "VATNumber": ""
  }
  "form": {
    "<formitemname1>": "<formitemvalue1>",
    "<formitemname2>": "<formitemvalue2>"
  }
}
```

Request

Create new folder:

POST <https://<HOST>/svc/crawler/folder>

```
{
  "folder": {
    "refId": "<folder refid>",
    "name": "<folder name>",
    "typeName": "<folde type name> Klient, ...",
  },
  "contact": {
    "externalId": [
      {
        "system": "test",
        "id": "123"
      }
    ],
  },
  "company": {
    "name": "ABC studio 2 s.r.o.",
    "regNumber": "",
    "VATNumber": ""
  }
  "form": {
    "<formitemname1>": "<formitemvalue1>",
    "<formitemname2>": "<formitemvalue2>"
  }
}
```

```
}  
}
```

Folder Status Update

POST <https://<HOST>/svc/crawler/folder/status>

Request

Update folder status:

```
{  
  "folder": 12345678101,  
  "stateName": "Processed"  
}
```

Response

```
{  
  "status": "success",  
  "message": "Folder status updated successfully.",  
  "updatedAt": "2025-08-14T10:23:46Z"  
}
```

Project

Request

GET https://<HOST>/svc/crawler/project?id=<project_id>

GET https://<HOST>/svc/crawler/project?&externalSystem=<external_system>&externalId=<external_id>

Response

```
{  
  "project": {  
    "acLh": "TREE000000216556",  
    "created": "2023-01-25T12:47:34.678428",
```

```

    "createdByName": "admin@pioneer",
    "customState": 132541101,
    "defaultMessageContainer": 723389101,
    "defaultMessageContainerPath": "Root > pioneer > Pioneer CRM Demo > ABC studio 2
s.r.o. > project test 1 > Activity > Unsorted",
    "defaultMessageGroup": 723388101,
    "folder": 673304101,
    "folderName": "ABC studio 2 s.r.o.",
    "folderTypeName": "Klient",
    "formValues": 723392101,
    "id": 723387101,
    "isMasterProject": true,
    "modified": "2023-01-25T14:42:04.329141",
    "name": "project test 1",
    "projectType": 149482101,
    "provider": 132307101,
    "providerName": "Pioneer CRM Demo",
    "refId": "00005 - SUPPORT",
    "state": 2,
    "priority": 1.0,
    "externalId": [
      {
        "externalSystem": "test",
        "externalId": "project_test_1"
      }
    ]
  },
  "contact": {
    "person": {
      "firstName": "<name>",
      "lastName": "<surname>"
    },
    "company": {
      "companyName": "<company name>"
    },
    "externalId": [{
      "system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",

```

```
    "id": "<Contact old id>"
  ]
}
```

Request

Create new project and add technology items:

POST <https://<HOST>/svc/crawler/project>

```
{
  "project": {
    "id": "<project id>",
    "name": "<Project name>",
    "refId": "<Project REF ID>",
    "statusName": "<Activity custom status name>",
    "description": "<Activity notes>",
    "created": "<2022-09-01T00:00>",
    "modified": "<2022-09-14T10:00>",
    "category": "anyProjectCategory",
    "externalId": [{
      "system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",
      "id": "<Contact old id>"
    }],
    "dimension1Name": "<dimension1Name>",
    "dimension2Name": "<dimension2Name>",
    "dimension3Name": "<dimension3Name>",
    "customer": {
      "contactExternalId": [{
        "system": "<system1>",
        "id": "<customer contact externalid>"
      }],
      "contextCategory": "anyFolderCategory"
    }
  },
}
```

```
  "folder": {
    "name": "<Folder name>",
    "refId": "<Folder REF ID>",
    "typeName": "<folder type name>",
    "category": "anyFolderCategory"
  },
  "contact": {
    "person": {
      "firstName": "<name>",
      "lastName": "<surname>"
    },
    "company": {
      "companyName": "<company name>"
    },
    "externalId": [{
      "system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",
      "id": "<Contact old id>"
    }],
    "regNo": "<registered number of business>",
    "vatNo": "<VAT number>"
  },
  "technologyItems": [{
    "id": "123456",
    "productName": "<Product name1>",
    "productRefid": "<Product code>",
    "name": "<Technology item text>",
    "description": "<Technology item description>",
    "quantity": 1.0000,
    "unitPrice": 1000.00,
    "currency": "<EUR, CZK, ...>",
    "billingDate": "<2022-09-14T10:00>",
    "refId": "<Serial number>",
    "externalId": [{
      "system": "<system1>",
      "id": "<Product old id>"
    }, {
      "system": "<system2>",
```

```

    "id": "<Product old id>"
  ],
  "supplier": {
    "contactExternalId": [{
      "system": "test",
      "id": "123"
    }]
  },
  {
    "id": "123457",
    "productName": "<Product name2>",
    "productRefid": "<Product code>",
    "name": "<Technology item text>",
    "description": "<Technology item description>",
    "quantity": 1.0000,
    "unitPrice": 1000.00,
    "currency": "<EUR, CZK, ...>",
    "billingDate": "<2022-09-14T10:00>",
    "refId": "<Serial number>",
    "externalId": [{
      "system": "<system1>",
      "id": "<Product old id>"
    }, {
      "system": "<system2>",
      "id": "<Product old id>"
    }]
  },
  "formValues": {
    "<textFormItemName>": "hello",
    "<numberFormItemName>": 22,
    "<dateFormItemName>": "2023-05-23T00:00:00"
  }
}

```

Internal Procedure

- Based on given contact external id, find existing contact, if no contact is found, say ERR
- Based on folder.category, find whether folder for given contact is found, if not, create new contact folder
- Create new project into given category

- Load new technologyItems into the new project (technology items are projectItems with type = 3)

Request

Update project status:

PUT <https://<HOST>/svc/crawler/project>

```
{
  "project": {
    "id": "<project id>",
    "name": "<Project name>",
    "refId": "<Project REF ID>",
    "statusName": "<Activity custom status name>",
    "description": "<Activity notes>",
    "created": "<2022-09-01T00:00>",
    "modified": "<2022-09-14T10:00>",
    "category": "anyProjectCategory",
    "externalId": [{
      "system": "<system1>",
      "id": "<Contact old id>"
    }, {
      "system": "<system2>",
      "id": "<Contact old id>"
    }],
    "dimension1Name": "<dimension1Name>",
    "dimension2Name": "<dimension2Name>",
    "dimension3Name": "<dimension3Name>",
    "customer": {
      "contactExternalId": [{
        "system": "<system1>",
        "id": "<customer contact externalid>"
      }],
      "contextCategory": "anyFolderCategory"
    }
  },
  "technologyItems": [],
  "formValues": {}
}
```

Activity

GetActivity

Request

GET https://<HOST>/svc/crawler/activity?id=<activity_id>

Optional url param [billingStatus](#) for activity including billing items

Response

```
{
  "acl": "TREE000000228302",
  "aclh": "TREE000000228302",
  "activityType": 449312101,
  "activityTypeName": "Pravideln\u00fd servis",
  "created": "2023-08-01T16:53:14.198186",
  "createdByName": "admin@pioneer",
  "customState": 132412101,
  "defaultMessageContainer": 773533101,
  "defaultMessageContainerPath": "ABC DESIGN Branch > Servisn\u00edd projekt > Activity > Pravideln\u00fd servis",
  "defaultMessageGroup": 773226101,
  "folder": 773157101,
  "folderName": "ABC DESIGN Branch",
  "folderTypeName": "Company Branch",
  "customer": {
    "contactExternalId": [
      {
        "system": "<system1>",
        "id": "<customer contact externalid>"
      }
    ]
  },
  "supplier": {
    "contactExternalId": [
      {
```

```
        "system": "<system1>",
        "id": "<customer contact externalid>"
    }
]
},
"formId": 449320101,
"formName": "Service Activity",
"formValues": 773535101,
"id": 773533101,
"modified": "2023-08-01T17:30:14.828457",
"modifiedByName": "admin@pioneer",
"name": "Pravideln\u00fd servis",
"project": 773225101,
"projectName": "Servisn\u00ed projekt",
'projectExternalId': [
    {
        "system": "<system1>",
        "id": "<project externalid>"
    }
],
"refId": "0348",
"state": 1,
"requestHash": "NULL",
"startDate": "2024-09-01T00:00:00.000000",
"finalDate": "2026-01-31T00:00:00.000000",
"dimension1Name": "China",
"dimension2Name": "Mobile",
"dimension3Name": "Internal",
"EXTERNAL_CONTACTS": {
    "count": 0,
    "EXTERNAL_CONTACT": []
}
'documents': [{
  'name': "<Document name>",
  'id': "123"
}, {
  'name': "<Document name2>",
  'id': "456"
```

```
}]  
}
```

ListActivity

Request

GET

```
https://<HOST>/svc/crawler/activity?category=<fpatypecategory>&createdFrom=<created_from>&statusName="Initial"&dimension1Name="Organization Unit A"
```

Response

```
[  
  {  
    "id": 773460101,  
    "name": "Pravide\n\u00fd servis",  
    "type": 449312101,  
    "typeName": "Pravide\n\u00fd servis",  
    "state": 3,  
    "customState": 132416101,  
    "customStateName": "Closed",  
    "created": "2023-08-01T15:55:56.385675",  
    "createdBy": 131750101,  
    "createdByName": "admin@pioneer",  
    "modified": "2023-08-01T16:53:11.718562",  
    "modifiedBy": 131750101,  
    "modifiedByName": "admin@pioneer",  
    "organization": 130946101,  
    "folder": 773157101,  
    "folderName": "ABC DESIGN Branch",  
    "folderParentId": 700827101,  
    "folderParentName": "ABC DESIGN",  
    "project": 773225101,  
    "projectName": "Servis\n\u00f0ed projekt",  
    "refId": "0347",  
    "requestHash": "NULL",  
    "defaultMessageContainer": 773460101,  
    "defaultMessageGroup": 773226101,  
  }  
]
```

```
"formId": 449320101,
"formValues": 773462101,
"startDate": "2023-04-01T00:00:00.000000",
"finalDate": "2024-08-31T00:00:00.000000",
"dimension1Name": "China",
"dimension2Name": "Mobile",
"dimension3Name": "Internal",
},
{
  "id": 773533101,
  "name": "Pravideln\u00fd servis",
  "type": 449312101,
  "typeName": "Pravideln\u00fd servis",
  "state": 1,
  "customState": 132412101,
  "customStateName": "Initial",
  "created": "2023-08-01T16:53:14.198186",
  "createdBy": 131750101,
  "createdByName": "admin@pioneer",
  "modified": "2023-08-01T17:30:14.828457",
  "modifiedBy": 131750101,
  "modifiedByName": "admin@pioneer",
  "organization": 130946101,
  "folder": 773157101,
  "folderName": "ABC DESIGN Branch",
  "folderParentId": 700827101,
  "folderParentName": "ABC DESIGN",
  "project": 773225101,
  "projectName": "Servisn\u00eded projekt",
  "refId": "0348",
  "requestHash": "NULL",
  "defaultMessageContainer": 773533101,
  "defaultMessageGroup": 773226101,
  "formId": 449320101,
  "formValues": 773535101,
  "startDate": "2024-09-01T00:00:00.000000",
  "finalDate": "2026-01-31T00:00:00.000000",
  "dimension1Name": "China",
  "dimension2Name": "Mobile",
```

```
    "dimension3Name": "Internal",  
  }  
]
```

CreateActivity

Request

POST <https://<HOST>/svc/crawler/activity>

```
{  
  "activity": {  
    "name": "Pravidelný servis",  
    "refId": "0348",  
    "category": "<Activity category>",  
    "typeName": "Pravidelný servis",  
    "statusName": "In Progress",  
    "requestHash": "NULL",  
    "startDate": "2024-09-01T00:00:00.000000",  
    "finalDate": "2026-01-31T00:00:00.000000"  
  },  
  "project": {  
    "id": "<project id>",  
    "name": "<Project name>",  
    "refId": "<Project REF ID>",  
    "typeName": "<Project type name>",  
    "externalId": [  
      {  
        "system": "<system1>",  
        "id": "<Contact old id>"  
      }, {  
        "system": "<system2>",  
        "id": "<Contact old id>"  
      }  
    ]  
  },  
  "servicedItems": [  
    {
```

```
"productName": "<Product name1>",
"productRefid": "<Product code>",
"name": "<Billing item text>",
"refId": "<Billing item refid text>",
"description": "<Billing item description>",
"quantity": 1.0000,
"unitPrice": 1000.00,
"vatValue": 21.0,
"currency": "<EUR, CZK, ...>",
"billingDate": "<2022-09-14T10:00>",
"productExternalId": [
  {
    "system": "<system1>",
    "id": "<Product old id>"
  }, {
    "system": "<system2>",
    "id": "<Product old id>"
  }
]
}, {
  "productName": "<Product name2>",
  "productRefid": "<Product code>",
  "name": "<Billing item text>",
  "refId": "<Billing item refid text>",
  "description": "<Billing item description>",
  "quantity": 1.0000,
  "unitPrice": 1000.00,
  "vatValue": 21.0,
  "currency": "<EUR, CZK, ...>",
  "billingDate": "<2022-09-14T10:00>",
  "productExternalId": [
    {
      "system": "<system1>",
      "id": "<Product old id>"
    }, {
      "system": "<system2>",
      "id": "<Product old id>"
    }
  ]
}
```

```
    }
  ],
  "formValues": {}
}
```

UpdateActivity

Request

PUT <https://<HOST>/svc/crawler/activity>

```
{
  "activity": {
    "id": "<activity_id>",
    "name": "Pravideln\u00fd servis",
    "refId": "0348",
    "statusName": "In Progress",
    "requestHash": "NULL",
    "startDate": "2024-09-01T00:00:00.000000",
    "finalDate": "2026-01-31T00:00:00.000000",
    "EXTERNAL_CONTACTS": {
      "count": 0,
      "EXTERNAL_CONTACT": []
    }
  },
  "billingItems": [{
    "id": "123456",
    "productName": "<Product name1>",
    "productRefid": "<Product code>",
    "name": "<Billing item text>",
    "refId": "<Billing item refid text>",
    "description": "<Billing item description>",
    "quantity": 1.0000,
    "unitPrice": 1000.00,
    "vatValue": 21.0,
    "currency": "<EUR, CZK, ...>",
    "billingDate": "<2022-09-14T10:00>",
```

```
        "billingStatus": "ToBeInvoiced",
    []productExternalId": [{
        []system": "<system1>",
        []id": "<Product old id>"
    }], {
        []system": "<system2>",
        []id": "<Product old id>"
    }]
    ], {
        "id": "123457",
    []productName": "<Product name2>",
    []productRefid": "<Product code>",
    []name": "<Billing item text>",
        "refId": "<Billing item refid text>",
    []description": "<Billing item description>",
    []quantity": 1.0000,
    []unitPrice": 1000.00,
        "vatValue": 21.0,
    []currency": "<EUR, CZK, ...>",
    []billingDate": "<2022-09-14T10:00>",
        "billingStatus": "ToBeInvoiced",
    []productExternalId": [{
        []system": "<system1>",
        []id": "<Product old id>"
    }], {
        []system": "<system2>",
        []id": "<Product old id>"
    }]
    ],
    "servicedItems": [
        {
            "productName": "<Product name1>",
            "productRefid": "<Product code>",
            "name": "<Billing item text>",
            "refId": "<Billing item refid text>",
            "description": "<Billing item description>",
            "quantity": 1.0000,
            "unitPrice": 1000.00,
            "vatValue": 21.0,
```

```
    "currency": "<EUR, CZK, ...>",
    "billingDate": "<2022-09-14T10:00>",
    "productExternalId": [
      {
        "system": "<system1>",
        "id": "<Product old id>"
      }, {
        "system": "<system2>",
        "id": "<Product old id>"
      }
    ]
  }
}
]
```

Tracking code

Request

POST https://<HOST>/svc/crawler/tracking_code

```
{
  "code": "ABC",
  "userName": "<-- username@workspace -->",
  "trackingCodeTypeName": "<-- Dealer -->",
  "contactFolder": {
    "id": "<Folder id>",
    "name": "<Folder name>",
    "refId": "<Folder REF ID>",
    "category": "anyFolderCategory",
    "contact": {
      "person": {
        "firstName": "<name>",
        "lastName": "<surname>"
      },
      "company": {
        "companyName": "<company name>"
      }
    }
  }
}
```

```
{
  "externalId": [
    {
      "system": "<system1>",
      "id": "<Contact old id>"
    },
    {
      "system": "<system2>",
      "id": "<Contact old id>"
    }
  ]
}
```

Internal process

The service calls service for creating tracking code.

The aim is to file new trackingCode with type "Dealer" or "Partner" with rereference to folderId having contact's externalId previously entered by **contact** service.

Sales Order and Invoice Received

Get Sales Order

Request

GET https://<HOST>/svc/crawler/order-received?&id=<order-received_id>

Response

```
{
  "created": "2024-04-26T00:00:00",
  "createdBy": 131841101,
  "createdByName": "admin@cime",
  "externalNumber": null,
  "externalReferenceNumber": null,
  "id": 133683101,
  "internalDescription": null,
  "invoiceNumber": "232410001",
  "issuedDate": "2024-04-26",
```

```
"journal": "132877101",
"journalName": "Sales Order",
"journalTreeHandle": null,
"modified": "2024-04-26T00:00:00",
"modifiedBy": 131841101,
"modifiedByName": "admin@cime",
"state": 132606101,
"stateName": "Schv\u00e9llo",
"taxationDate": "2024-04-26",
"treeHandle": 131252101,
"dateTransaction": "26.04.2024",
"customId": null,
"supplier": {
  "provider": 132419101,
  "providerCity": null,
  "providerCountry": null,
  "providerName": "CIME, s.r.o.",
  "providerRegion": null,
  "providerStreet": null,
  "providerZIP": null,
  "userId": 131841101,
  "userName": "admin@cime",
  "providerExternalId": [
    {
      "system": "<system1>",
      "id": "<Contact old id>"
    },
    {
      "system": "<system2>",
      "id": "<Contact old id>"
    }
  ]
},
"customer": {
  "customer": 133349101,
  "customerCity": null,
  "customerContact": 133634101,
  "customerContactName": "Nov\u00e9k Jind\u00ed\u00e1\u00e1",
  "customerCountry": null,
```

```
"customerName": "AGRO s.r.o.",
"customerRegId": "0",
"customerRegion": null,
"customerStreet": null,
"customerVATId": "0",
"customerZIP": null,
"customerExternalId": [
  {
    "system": "<system1>",
    "id": "<Contact old id>"
  },
  {
    "system": "<system2>",
    "id": "<Contact old id>"
  }
],
"contactExternalId": [
  {
    "system": "<system1>",
    "id": "<Contact old id>"
  },
  {
    "system": "<system2>",
    "id": "<Contact old id>"
  }
]
},
"shipTo": {
  "shipTo": null,
  "shipToCity": null,
  "shipToCountry": null,
  "shipToCustomer": true,
  "shipToName": null,
  "shipToRegion": null,
  "shipToStreet": null,
  "shipToZIP": null,
  "shipToExternalId": [
    {
      "system": "<system1>",
```

```
        "id": "<Contact old id>"
      },
      {
        "system": "<system2>",
        "id": "<Contact old id>"
      }
    ]
  },
  "rows": [
    {
      "account": 132855101,
      "accountCode": "602000",
      "accountName": "Sales",
      "created": "2024-04-26T00:00:00",
      "createdBy": 131841101,
      "createdByName": "admin@cime",
      "customId": null,
      "transactionDate": "26.04.2024",
      "description": "Nejv\u00eddc vychytan\u00fd popis \nk traktoru Lindner Geotrac.",
      "childKey": null,
      "id": 133685101,
      "modified": "2024-04-26T00:00:00",
      "modifiedBy": 131841101,
      "modifiedByName": "admin@cime",
      "parent": null,
      "parentId": null,
      "parentKey": null,
      "recordId": null,
      "treeHandle": 131244101,
      "userId": 131841101,
      "userName": "admin@cime",
      "voucher": null,
      "orderIndex": 0,
      "value": {
        "netTotal": 650000,
        "currency": "CZK",
        "unitPrice": 650000,
        "unitQuantity": 1,
        "VAT": "DPH 21%",
```

```
    "VATPercent": 21,
    "VATValue": 136500
  },
  "product": {
    "catalogPrice": 800000,
    "item": 133445101,
    "itemName": "Lindner Geotrac",
    "itemcat": null,
    "itemcat_name": null,
    "itemDescription": "1. Lindner Geotrac",
    "itemSerial": null,
    "productExternalId": [
      {
        "system": "<system1>",
        "id": "<ABCD-EFGH-ijkl-...>"
      },
      {
        "system": "<system2>",
        "id": "<ABCD-EFGH-ijkl-...>"
      }
    ]
  },
  "attributes": {
    "attrib0": null,
    "attrib0_id": null,
    "attrib1": null,
    "attrib1_id": null,
    "attrib2": null,
    "attrib2_id": null,
    "attrib3": null,
    "attrib3_id": null,
    "attrib4": null,
    "attrib4_id": null,
    "attrib5": null,
    "attrib5_id": null,
    "attrib6": null,
    "attrib6_id": null,
    "attrib7": null,
    "attrib7_id": null,
  }
}
```

```
"attrib8": null,
"attrib8_id": null,
"attrib9": null,
"attrib9_id": null
},
"context": {
  "folder": 133349101,
  "folderName": "AGRO s.r.o.",
  "folderContactExternalId": [
    {
      "system": "<system1>",
      "id": "<Contact old id>"
    },
    {
      "system": "<system2>",
      "id": "<Contact old id>"
    }
  ],
  "project": 133621101,
  "projectName": "Prodej Merlo Turbofarmer",
  "projectExternalId": [
    {
      "system": "<system1>",
      "id": "<Contact old id>"
    },
    {
      "system": "<system2>",
      "id": "<Contact old id>"
    }
  ],
  "activity": null,
  "activityExternalId": [] # NOT SUPPORTED
},
"trackingCategories": {
  "dimension1": null,
  "dimension1Name": null,
  "dimension2": null,
  "dimension2Name": null,
  "dimension3": null,
```

```
    "dimension3Name": null
  },
  "SHARES": [
    {
      "id": 133708101,
      "recordId": null,
      "share": null,
      "userId": 131841101,
      "userName": "admin@cime",
      "folder": 133349101,
      "folderContactExternalId": [
        {
          "system": "<system1>",
          "id": "<Contact old id>"
        },
        {
          "system": "<system2>",
          "id": "<Contact old id>"
        }
      ],
      "project": 133621101,
      "projectExternalId": [
        {
          "system": "<system1>",
          "id": "<Contact old id>"
        },
        {
          "system": "<system2>",
          "id": "<Contact old id>"
        }
      ],
      "activity": null,
      "activityExternalId": [
        {
          "system": "<system1>",
          "id": "<Contact old id>"
        },
        {
          "system": "<system2>",
```

```
        "id": "<Contact old id>"
      }
    ],
    "isRemaining": 1,
    "units": 1,
    "shareUnits": 0,
    "percentage": 100,
    "total": 650000,
    "dimension1": null,
    "dimension2": null,
    "dimension3": null,
    "dimension1Name": null,
    "dimension2Name": null,
    "dimension3Name": null
  }
]
}
],
"totals": {
  "currency": "CZK",
  "currencyRate": 1,
  "total": 786500,
  "totalWithVAT": 786500
},
"payment": {
  "bankAccount": null,
  "bankCode": null,
  "bankIBAN": null,
  "bankBic": null,
  "bankNoteDomestic": null,
  "bankNoteForeign": null,
  "constantSymbol": null,
  "dueDate": "10.05.2024",
  "overdue": null,
  "paidSync": 0,
  "paidManual": 0,
  "paymentMethod": null,
  "paymentMethodName": null,
  "paymentReference": null,
```

```
    "paymentStatus": 8,
    "toBePaid": 786500,
    "toBePaidDate": "01.01.1",
    "valueRestraint": null,
    "valueAuthorized": null
  },
  "customFields": {
    "field0": null,
    "field0Id": null,
    "field0Txt": null,
    "field1": null,
    "field1Id": null,
    "field1Txt": null,
    "field2": null,
    "field2Id": null,
    "field2Txt": null,
    "field3": null,
    "field3Id": null,
    "field3Txt": null,
    "field4": null,
    "field4Id": null,
    "field4Txt": null,
    "field5": null,
    "field5Id": null,
    "field5Txt": null,
    "field6": null,
    "field6Id": null,
    "field6Txt": null,
    "field7": null,
    "field7Id": null,
    "field7Txt": null,
    "field8": null,
    "field8Id": null,
    "field8Txt": null,
    "field9": null,
    "field9Id": null,
    "field9Txt": null
  },
  "context": {
```

```
"folder": 133349101,
"folderName": "AGRO s.r.o.",
"folderRefId": "UF1",
"folderContactExternalId": [
  {
    "system": "<system1>",
    "id": "<Contact old id>"
  },
  {
    "system": "<system2>",
    "id": "<Contact old id>"
  }
],
"project": 133621101,
"projectName": "Prodej Merlo Turbofarmer",
"projectRefId": null,
"projectExternalId": [
  {
    "system": "<system1>",
    "id": "<Contact old id>"
  },
  {
    "system": "<system2>",
    "id": "<Contact old id>"
  }
],
"activity": null,
"activityName": null,
"activityRefId": null,
"activityExternalId": [] # NOT SUPPORTED
},
"documents": [],
"texts": {
  "description": null,
  "headerText": null,
  "footerText": null,
  "summaryText": null,
  "periodFrom": "2024-04-26",
  "periodTo": null
}
```

```
    },
    "trackingCategories": {
      "dimension1": null,
      "dimension1Name": null,
      "dimension2": null,
      "dimension2Name": null,
      "dimension3": null,
      "dimension3Name": null
    }
  }
}
```

Create Invoice

Request

// Structure is the same as Sales Order example above

POST <https://<HOST>/svc/crawler/invoice-issued>

Update Invoice

Request

// Structure is the same as Sales Order example above

PUT https://<HOST>/svc/crawler/invoice-issued?id=<invoice_id>

List Invoice Status

Service for listing invoice states.

Request

GET https://<HOST>/svc/crawler/invoice_status

Success Response

```
[
  {
    "stateId": "89342000",
```

```
    "name": "Issued",
    "priority": 99,
    "enabled": 3,
    "acl": "INVS000000002410",
    "treeHandle": "60430000"
  },
  {
    "stateId": "89342001",
    "name": "Pending",
    "priority": 50,
    "enabled": 12,
    "acl": "INVS000000002411",
    "treeHandle": "60430001"
  },
  {
    "stateId": "89342002",
    "name": "Paid",
    "priority": 10,
    "enabled": 1,
    "acl": "INVS000000002412",
    "treeHandle": "60430002"
  }
]
```

Error Response

```
{
  "result": "FAIL",
  "message": "<error message>"
}
```

Timeline

Listing timeline data

Request

```
GET /timeline
```

Sample

```
GET /api/timeline?contextId=59759502000&contextType=folder&moduleName=WEB&limit=20
```

Request Parameters

Parameter	Type	Required	Description
<code>contextId</code>	string	No	ID of the context (folderId, projectId, etc.)
<code>contextType</code>	string	No	Type of context: <code>folder</code> , <code>project</code> , <code>activity</code> , <code>contact</code> , etc.
<code>objectType</code>	string	No	Filter by object name (e.g. <code>MAIL-OPEN</code> , <code>MASSMAIL</code> , <code>FOLDER</code>)
<code>moduleName</code>	string	No	Filter by module (e.g. <code>WEB</code> , <code>MESSAGING</code>)
<code>changeType</code>	string	No	Filter by change type (<code>CREATED</code> , <code>UPDATED</code> , <code>DELETED</code>)
<code>createdBy</code>	string	No	Filter by user ID
<code>contactId</code>	string	No	Filter by related contact ID
<code>fromDate</code>	datetime	No	Filter changes created after this date
<code>toDate</code>	datetime	No	Filter changes created before this date
<code>limit</code>	int	No	Max number of results (default: 30)
<code>offset</code>	int	No	Pagination offset
<code>order</code>	string	No	Order by field (<code>created</code> by default)
<code>desc</code>	bool	No	Descending order (default: <code>true</code>)

Response

```
{
  "total": 4,
  "limit": 20,
```

```
"offset": 0,
"changes": [
  {
    "id": "125453031000",
    "created": "2025-07-01T17:43:45.47226",
    "createdBy": {
      "id": "105704465000",
      "name": "Robot Atollon"
    },
    "module": "WEB",
    "object": "MAIL-OPEN",
    "changeType": "CREATED",
    "description": "Message 'AI a budoucnost CRM' opened 1x",
    "objectId": "125453030000",
    "context": {
      "id": "59759502000",
      "type": "folder",
      "name": "2HHOLINGER s.r.o."
    },
    "contactId": "59759494000",
    "items": [
      {
        "name": "numberOfVisits",
        "valueNew": "1"
      }
    ]
  }
]
```

Call Task

Create or update call task for contact folder (lead)

Request

```
POST /callTask
```

Request Payload Example

```
{
  "userName": "john.doe",           // Required: Username of person to assign task to
  "contextId": "101280664000",      // Required: ID of the folder, project, or activity
  "contextType": "folder",          // Required: One of: folder, project, activity
  "subject": "Contact new lead",     // Required: Task title
  "description": "This lead has been active on the following topics...", // Required
  "avoidDuplicates": true,          // Optional: Avoid creating duplicate task (default
false)
  "priority": "high"                // Optional: Increase task priority (-1 is high)
}
```

Behaviour

- Creates a **task of system type** `com.atollon.tasks.typeofwork.call`.
- Sets task metadata (`userId`, `contextId`, `title`, `description`, `priority = -1`, etc.).
- Optionally checks if a similar task (e.g., same user + subject + context) already exists, and **skips** or **updates** instead of duplicating. (update description, priority, dateFrom (now, dateTo +2h))
- Resolves `userName` to `userId` using Atollon's identity mapping.
- Sets default task timing to now + 2 hours (unless system-defined elsewhere).
- Notifies the assigned user if `notify = true`.

Response 201

```
{
  "status": "created",
  "taskId": "125233377000",
  "message": "Call task created successfully for user john.doe"
}
```

Response 200 (if deduplication avoids creating new task)

```
{
  "status": "skipped",
  "existingTaskId": "125233377000",
  "message": "Similar call task already exists. Skipped creation."
}
```

Error 404: User not found

```
{
  "error": "User 'john.doe' not found"
}
```

```
}
```

Error 400: Bad request

```
{  
  "error": "Missing required field: contextId"  
}
```

Deduplication Logic (if `avoidDuplicates = true`)

Checks if a task with:

- same `userName` (or resolved `userId`)
- same `contextId` and `contextType`
- same `subject` (optional fuzzy match)
- and not completed

...already exists within last X days (configurable). If so, return existing task.

New Message

```
POST /message
```

Example Request

```
{  
  "created": "2025-08-08T10:00:00Z",  
  "priority": 1,  
  "customType": "E-mail",  
  "type": "email",  
  "mailFrom": "user@acme.com",  
  "treeHandle": 1001,  
  "parent": 2001,  
  "mobile": "+420123456789",  
  "doNotMoveThread": 1,  
  "star": false,  
  "threadId": 3001,  
  "contextId": 4001,  
  "remoteId": 5001,  
}
```

```
"schedulerId": 6001,
"invoiceId": 7001,
"INCLUDEMSG": {
  "includeMessage": 8001,
  "includeMsgText": "See previous discussion below"
},
"subject": "Monthly Invoice Available",
"to": [
  {
    "name": "Alice Example",
    "salutation": "Hi Alice,",
    "contact": "alice@example.com"
  }
],
"cc": [
  {
    "name": "Bob Example",
    "salutation": "Hi Bob,",
    "contact": "bob@example.com"
  }
],
"bcc": [
  {
    "name": "Finance Dept.",
    "salutation": "",
    "contact": "finance@example.com"
  }
],
"users": [
  {
    "userName": "grunt"
  },
  {
    "userName": "admin"
  }
],
"comment": "Sent automatically by billing system.",
"html": "<p>Dear customer,</p><p>Your invoice is attached.</p>",
"documents": [
```

```
{
  "id": 9001,
  "name": "Invoice- August- 2025. pdf"
},
"items": [
  {
    "id": 9101,
    "name": "Attachment"
  }
]
```

Create Draft E-mail

POST /messageTemplate

Request Example

```
{
  "messageTemplate": {
    "forUser": "grunt",
    "templateName": "Test mail",
    "subject": "Test mail",
    "isDraft": true,
    "isHtml": false,
    "type": "email",
    "created": "2025-08-08T14:24:44Z",
    "recipients": {
      "to": [
        {
          "content": "lukess@acme.com",
          "contact": "",
          "id": ""
        }
      ],
      "cc": [],
      "bcc": []
    }
  }
}
```

```
},  
"body": "",  
"documents": [],  
"isDefault": false,  
"description": null,  
"language": "en",  
"folderId": null,  
"projectId": null,  
"activityId": null  
}  
}
```

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