How to approve an order as provider

Order status transition flow

An order within EduMS is mainly touched by three different parties, being the accounts, the providers and the invoicing system. The order flow is designed to cater for many different scenarios, but comes down to this simplified version:

Post Order > Pending Validation > Pending Account > Pending Provider > Accepted by Provider > Pending Invoice > Invoiced

> ℹ️ For the complete flow please refer to our order status transition flow which can be found in the EduMS developers portal at the **Order API - POST order status transition** endpoint.

The main idea is that first accounts approve the order on their side (e.g. the manager approves the request from the student), the providers review and approve the order and then the order gets invoiced. For you as a provider, the Pending Provider status is important to take into account. This is the status when your action is required to review the order.

How to approve an order

When an order is in the status "PendingProvider" your action is required. You have two choices, either accepting or rejecting the order. They are both explained below.

- **You want to accept an order for the first startmoment**
  - Accept the first startmoment to approve the order, no patches needed on the startmoment.
  - This can be done only in the status **Pending Provider**.
  - The order needs to be in a **valid** state.
  - To update the information, you can use the **PATCH** order endpoint.
  - Please, refer to the "Example request payloads" at the end of this document.
- **You want to accept an order for the second startmoment**
  - Accept the second startmoment to approve the order, you save this on the order and we save it as the first startmoment and inform the student.
  - This can be done only in the status **PendingProvider**.
  - The order needs to be in a **valid** state.
  - To update the information, you can use the **PATCH** order endpoint.
  - Please, refer to the "Example request payloads" at the end of this document.
- **You want to accept an order for another startmoment**
  - ***First align with the student.***
  - This can be done when the status is **PendingProvider** and **ApprovedProvider**.
  - Accept the new proposed startmoment to approve the order, save this on the order.
  - EduMS will save it as the first startmoment and inform the student.
  - The order needs to be in a **valid** state.
  - To update the information, you can use the **PATCH** order endpoint.
  - Please, refer to the "Example request payloads" at the end of this document.
- **NOTE:**
  - Changing the first and/or second choice start moment WILL trigger a slow validation.
  - If the patched accepted start moment is one of the current start moments (first or second choice), slow validation WILL NOT be triggered.
- **You accept the order**
  - Awesome, you want to approve the order! Before you can accept the order, you will need to provide EduMS with the relevant financial information used for invoicing. This has to be done per invoice item on the order (you can find them at the order lines) where you need to update the following properties:
    - `invoiceOnBehalfOfVatNumber`
    - `invoiceOnBehalfOfName`
  - The properties can be updated via the **PATCH order lines** endpoint . Please refer to the "Example request payloads" at the end of this document for an example body payload
  - After the properties have been updated per order line, you are ready to accept the order. You can do so via the **POST order status transition endpoint**. If you want to accept the order you need to send a request to the endpoint with the new status "AcceptedByProvider". Please refer to the "Example request payloads" at the end of this document for an example body payload.
  - Congrats, you have accepted the order! The order will now be ready for invoicing in due time. There are a few exceptions to take into account at this status:
    - An account can change the startmoment of an order when it's on the order status "AcceptedByProvider", making that the order will go back to "PendingProvider". You then need to review the order again.
    - An admin can cancel the order at any given status in the flow, which will result in the status "CancelledByAdmin"
- **You reject the order**
  - When you want to reject the order a similar flow comes into play when accepting, only you do not need to update the invoice items of the order before you can do. You can simply use the **POST order status transition** endpoint and send a request with the status "RejectedProvider". You do need to provide a cancellation reason in your request. The possible options can be found in the enum file located at the **POST order status transition** endpoint at the EduMS developers portal. Please refer to the "Example request payloads" at the end of this document for an example body payload.

Legal companies

When accepting the order, you will need to update the invoice items of the order with the invoice of behalf of name and VAT number. This information can be stored within EduMS if you want to. If you do so, you can use it when updating your order.

- You can create a legal company via the **POST legal company** endpoint located in the provider API. You can find detailed information about the endpoint, the required properties and the payload at the EduMS developers portal (Provider API > Post legal company)
- The properties you can use to update the order invoice items are "name" and "vatNumber".

Example payloads

Patching the order invoice items with the invoicing information

```
[{
    "value": "EduMS B.V.",
    "path": "invoiceOnBehalfOfName",
    "op": "replace"
}]
```

and

```
[{
    "value": "123456",
    "path": "invoiceOnBehalfOfVatNumber",
    "op": "replace"
}]
```

Patching first and/or second start moment(s)

```
[{
    "value": "123456",
    "path": "customAttributes/firstChoiceStartMomentId",
    "op": "replace"
},
{
    "value": "654321",
    "path": "customAttributes/secondChoiceStartMomentId",
    "op": "replace"
}]
```

Patching accepted start moment

```
[{
    "value": "123456",
    "path": "acceptedStartMomentId",
    "op": "replace"
}]
```

Accepting an order

```
{
    "status": "AcceptedProvider          ",
}
```

Rejecting an order

```
{
    "status": "RejectedProvider",
    "cancellationReason": "PriceDoesNotMatch",
    "message": "Test Rejected",
}
```