



TM Forum Specification

Customer Management API REST Specification

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Customer Management API REST Specification



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N/A



INTRODUCTION

The following document is the specification of the REST API for Customer Management. It includes the model definition as well as all available operations.

It provides a standardized mechanism for customer and customer account management such as creation, update, retrieval, deletion and notification of events.

Customer can be a person, an organization or another service provider who buys products from an enterprise. Customer management API allows management of identification and financial information about him.

Customer management API manages the following data resources:

- Customer

- Customer represents a person or organization that buys products and services from the enterprise or receives free offers or services. Customers can also be other service providers who resell the enterprises products, other service providers that lease the enterprise's resources for utilization by the other service provider's products and services, and so forth.
- Customer resource contains information about the customer. Main attributes are its identifier, name, status and validity, description, characteristics, contact medium, related customer account, related party, customer credit profile information

The customer management API performs the following operation on customer:

Retrieval, creation, full or partial update and deletion of customers.

API Dependencies

This API assumes that the information regarding customer *accounts* and *payment means* is obtained by accessing the *Account Management API*.

This API assumes that the information regarding related parties is obtained by accessing the *Party Management API*.



SAMPLE USE CASES



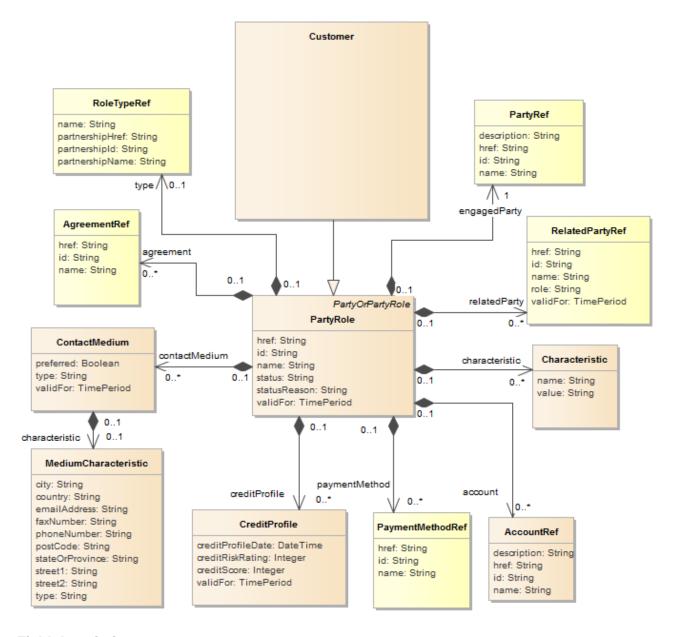
RESOURCE MODEL

Managed Entity and Task Resource Models

CUSTOMER RESOURCE

A Customer resource ...

Resource model



Field descriptions

Customer fields



href A string. Url used to reference the party role.

id A string. Unique identifier for PartyRoles.

name A string. A word, term, or phrase by which the PartyRole is known and

distinguished from other PartyRoles.

status A string. Used to track the lifecycle status of the party role.

statusReason A string. A string providing an explanation on the value of the status lifecycle.

For instance if the status is Rejected, statusReason will provide the reason for

rejection.

validFor A time period. The time period that the PartyRole is valid for.

engagedParty A party reference (PartyRef). A party represents an organization or an

individual.

type A role type reference (RoleTypeRef).

account A list of account references (AccountRef [*]). A account may be a party account

or an account receivable.

paymentMethod A list of payment method references (PaymentMethodRef [*]). A payment

method defines a specific mean of payment (e.g direct debit).

contactMedium A list of contact mediums (ContactMedium [*]). Indicates the contact medium

that could be used to contact the party.

characteristic A list of characteristics (Characteristic [*]). Describes a given characteristic of

an object or entity through a name/value pair.

creditProfile A list of credit profiles (CreditProfile [*]). Credit profile for the party (containing

credit scoring, ...). By default only the current credit profile is retrieved. It can be used as a list to give the party credit profiles history, the first one in the list

will be the current one.

agreement A list of agreement references (AgreementRef [*]). An agreement represents a

contract or arrangement, either written or verbal and sometimes enforceable by law, such as a service level agreement or a customer price agreement. An agreement involves a number of other business entities, such as products,

services, and resources and/or their specifications.

relatedParty A list of related party references (RelatedPartyRef [*]). A related party defines

party or party role linked to a specific entity.

Characteristic sub-resource

Describes a given characteristic of an object or entity through a name/value pair.

name A string. Name of the characteristic.



value A string. Value of the characteristic.

ContactMedium sub-resource

Indicates the contact medium that could be used to contact the party.

preferred A boolean. If true, indicates that is the preferred contact medium.

type A string. Type of the contact medium, such as: email address, telephone

number, postal address.

validFor A time period. The time period that the contact medium is valid for.

characteristic A medium characteristic (MediumCharacteristic). Describes the contact

medium characteristics that could be used to contact a party (an individual or

an organization).

CreditProfile sub-resource

Credit profile for the party (containing credit scoring, ...). By default only the current credit profile is retrieved. It can be used as a list to give the party credit profiles history, the first one in the list will be the current one.

creditProfileDate A date time (DateTime). The date the profile was established.

creditRiskRating An integer. This is an integer whose value is used to rate the risk.

creditScore An integer. A measure of a person's or an organization's creditworthiness

calculated on the basis of a combination of factors such as their income and

credit history.

validFor A time period. The period for which the profile is valid.

MediumCharacteristic sub-resource

Describes the contact medium characteristics that could be used to contact a party (an individual or an organization).

city A string. The city.

country A string. The country.

emailAddress A string. Full email address in standard format.

faxNumber A string. The fax number of the contact.

phoneNumber A string. The primary phone number of the contact.

postCode A string. Postcode.

stateOrProvince A string. State or province.

street1 A string. Describes the street.

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street2 A string. Complementary street description.

type A string. Type of medium (fax, mobile phone...).

AccountRef relationship

Account reference. A account may be a party account or an account receivable.

description A string. Detailed description of the account.

href A string. Reference of the account.

id A string. Unique identifier of the account.

name A string. Name of the account.

AgreementRef relationship

Agreement reference. An agreement represents a contract or arrangement, either written or verbal and sometimes enforceable by law, such as a service level agreement or a customer price agreement. An agreement involves a number of other business entities, such as products, services, and resources and/or their specifications.

href A string. Reference of the agreement.

id A string. Identifier of the agreement.

name A string. Name of the agreement.

PartyRef relationship

Party reference. A party represents an organization or an individual.

description A string. Text describing the referred party.

href A string. Reference of the referred party (such as a partner or any other party

role).

id A string. Unique identifier of the referred party.

name A string. Name of the referred party (such as a partner or any other party role).

PaymentMethodRef relationship

PaymentMethod reference. A payment method defines a specific mean of payment (e.g direct debit).

href A string. Reference of the payment mean.

id A string. Unique identifier of the payment mean.

name A string. Name of the payment mean.

RelatedPartyRef relationship

RelatedParty reference. A related party defines party or party role linked to a specific entity.



href A string. Reference of the related party, could be a party reference or a party

role reference.

id A string. Unique identifier of a related party.

name A string. Name of the related party.

role A string. Role of the related party.

validFor A time period. Validity period of the related party.

RoleTypeRef relationship

RoleType reference.

name A string. The name of the role type. It uniquely identifies the role type within the

partnership type.

partnershipHref A string. Reference url of the partnership type containing the role type.

partnershipId A string. The identifier of the partnership type containing the role type.

partnershipName A string. The name of the partnership type defining this role type.

Json representation sample

We provide below the json representation of an example of a 'Customer' resource object

```
"href": "https://host:port/customer/customer/7489",
"id": "7489",
"name": "Moon Football Club",
"status": "Active",
"statusReason": ""
"validFor": {
  "startDateTime": "2017-03-26T00:00",
  "endDateTime": "2017-10-23T00:00"
},
"engagedParty": {
  "description": "This party ...",
  "href": "https://host:port/party/party/6610",
  "id": "6610".
  "name": "Booking Corporation"
},
"type": {
  "name": "a string ...",
  "partnershipHref": "a string ...",
  "partnershipId": "405",
  "partnershipName": "a string ..."
},
"account": [
    "description": "This account ...",
    "href": "https://host:port/accounts/account/4600",
    "id": "4600",
```



```
"name": "Paradise Account"
  }
"paymentMethod": [
    "href": "https://host:port/onboardingManagement/paymentMethod/8157",
    "id": "8157",
    "name": "professional payment"
  }
],
"contactMedium": [
    "preferred": true,
    "type": "TelephoneNumber",
    "validFor": {
      "startDateTime": "2017-03-23T00:00",
      "endDateTime": "2017-10-23T00:00"
    },
    "characteristic": [
      {
         "name": "Colour",
         "value": "white"
      },
        "name": "Memory",
         "value": "64"
    ]
  }
],
"characteristic": [
      "name": "Colour",
      "value": "pink"
    },
      "name": "Memory",
      "value": "32"
  ]
],
"creditProfile": [
    "creditProfileDate": "2017-03-27T00:00",
    "creditRiskRating": 3,
    "creditScore": 3,
    "validFor": {
      "startDateTime": "2017-03-29T00:00",
      "endDateTime": "2017-10-23T00:00"
],
"agreement": [
    "href": "https://host:port/onboardingManagement/agreement/1632",
```



```
"id": "1632",
    "name": "Winter Contract Agreement"
}

],

"relatedParty": [
{
    "href": "https://host:port/partyManagement/organization/4804",
    "id": "4804",
    "name": "John Doe",
    "role": "bill responsible",
    "validFor": {
        "startDateTime": "2017-03-24T00:00",
        "endDateTime": "2017-10-23T00:00"
      }
    }
}
```

Notification Resource Models

4 notifications are defined for this API

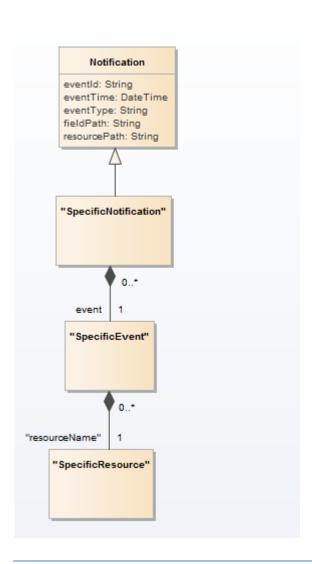
Notifications related to Customer:

- CustomerCreationNotification
- CustomerAttributeValueChangeNotification
- CustomerStateChangeNotification
- CustomerRemoveNotification

The notification structure for all notifications in this API follow the pattern depicted by the figure below. A notification resource (depicted by "SpecificNotification" placeholder) is a sub class of a generic Notification structure containing an id of the event occurrence (eventId), an event timestamp (eventTime), and the name of the notification resource (eventType).

This notification structure owns an event structure ("SpecificEvent" placeholder) linked to the resource concerned by the notification using the resource name as access field ("resourceName" placeholder).





CUSTOMER CREATION NOTIFICATION

Notification sent when a new Customer resource is created.

Json representation sample

We provide below the json representation of an example of a 'CustomerCreationNotification' notification object

CUSTOMER ATTRIBUTE VALUE CHANGE NOTIFICATION



Notification sent when changing an attribute of a Customer resource.

Json representation sample

We provide below the json representation of an example of a 'CustomerAttributeValueChangeNotification' notification object

CUSTOMER STATE CHANGE NOTIFICATION

Notification sent when changing the state of a Customer resource.

Json representation sample

We provide below the json representation of an example of a 'CustomerStateChangeNotification' notification object

CUSTOMER REMOVE NOTIFICATION

Notification sent when removing a Customer resource.

Json representation sample

We provide below the json representation of an example of a 'CustomerRemoveNotification' notification object



}



API OPERATIONS

Remember the following Uniform Contract:

Operation on Entities	Uniform API Operation	Description
Query Entities	GET Resource	GET must be used to retrieve a representation of a resource.
Create Entity	POST Resource	POST must be used to create a new resource
Partial Update of an Entity	PATCH Resource	PATCH must be used to partially update a resource
Complete Update of an Entity	PUT Resource	PUT must be used to completely update a resource identified by its resource URI
Remove an Entity	DELETE Resource	DELETE must be used to remove a resource
Execute an Action on an Entity	POST on TASK Resource	POST must be used to execute Task Resources
Other Request Methods	POST on TASK Resource	GET and POST must not be used to tunnel other request methods.

Filtering and attribute selection rules are described in the TMF REST Design Guidelines.

Notifications are also described in a subsequent section.

OPERATIONS ON CUSTOMER

LIST CUSTOMERS

GET /customer?fields=...&{filtering}



Description

This operation list customer entities.

Attribute selection is enabled for all first level attributes.

Filtering may be available depending on the compliance level supported by an implementation.

Usage Samples

Here's an example of a request for retrieving Customer resources.

Request

GET /customerManagement/customer Accept: application/json

Response

```
200
  "href": "https://host:port/customer/customer/7489",
  "id": "7489",
  "name": "Moon Football Club",
  "status": "Active",
  "statusReason": "",
  "validFor": {
    "startDateTime": "2017-03-26T00:00",
    "endDateTime": "2017-10-23T00:00"
  "engagedParty": {
    "description": "This party ...",
    "href": "https://host:port/party/6610",
    "id": "6610",
    "name": "Booking Corporation"
  },
  "type": {
    "name": "a string ...",
    "partnershipHref": "a string ...",
    "partnershipId": "405",
    "partnershipName": "a string ..."
  },
  "account": [
      "description": "This account ...",
      "href": "https://host:port/accounts/account/4600",
      "id": "4600",
      "name": "Paradise Account"
    }
```



```
"paymentMethod": [
    "href": "https://host:port/onboardingManagement/paymentMethod/8157",
    "name": "professional payment"
],
"contactMedium": [
    "preferred": true,
    "type": "TelephoneNumber",
    "validFor": {
      "startDateTime": "2017-03-23T00:00",
      "endDateTime": "2017-10-23T00:00"
    "characteristic": [
        "name": "Colour",
        "value": "white"
        "name": "Memory",
        "value": "64"
    ]
"characteristic": [
  [
      "name": "Colour",
      "value": "pink"
      "name": "Memory",
      "value": "32"
],
"creditProfile": [
    "creditProfileDate": "2017-03-27T00:00",
    "creditRiskRating": 3,
    "creditScore": 3,
    "validFor": {
      "startDateTime": "2017-03-29T00:00",
      "endDateTime": "2017-10-23T00:00"
    }
],
"agreement": [
    "href": "https://host:port/onboardingManagement/agreement/1632",
    "id": "1632",
    "name": "Winter Contract Agreement"
```



RETRIEVE CUSTOMER

```
GET /customer/{id}?fields=...&{filtering}
```

Description

This operation retrieves a customer entity.

Attribute selection is enabled for all first level attributes.

Filtering on sub-resources may be available depending on the compliance level supported by an implementation.

Usage Samples

Here's an example of a request for retrieving a Customer resource.

Request GET /customerManagement/customer/7489 Accept: application/json Response 200 { "href": "https://host:port/customer/customer/7489", "id": "7489", "name": "Moon Football Club", "status": "Active", "statusReason": "", "validFor": {



```
"startDateTime": "2017-03-26T00:00",
  "endDateTime": "2017-10-23T00:00"
"engagedParty": {
  "description": "This party ...",
  "href": "https://host:port/party/6610",
  "id": "6610",
  "name": "Booking Corporation"
"type": {
  "name": "a string ...",
  "partnershipHref": "a string ...",
  "partnershipId": "405",
  "partnershipName": "a string ..."
},
"account": [
    "description": "This account ...",
    "href": "https://host:port/accounts/account/4600",
    "id": "4600",
    "name": "Paradise Account"
  }
],
"paymentMethod": [
    "href": "https://host:port/onboardingManagement/paymentMethod/8157",
    "id": "8157",
    "name": "professional payment"
  }
],
"contactMedium": [
    "preferred": true,
    "type": "TelephoneNumber",
    "validFor": {
      "startDateTime": "2017-03-23T00:00",
      "endDateTime": "2017-10-23T00:00"
    "characteristic": [
      {
        "name": "Colour",
        "value": "white"
      },
        "name": "Memory",
        "value": "64"
    ]
],
"characteristic": [
      "name": "Colour",
      "value": "pink"
```



```
"name": "Memory",
      "value": "32"
"creditProfile": [
    "creditProfileDate": "2017-03-27T00:00",
    "creditRiskRating": 3,
    "creditScore": 3,
    "validFor": {
      "startDateTime": "2017-03-29T00:00",
      "endDateTime": "2017-10-23T00:00"
  }
],
"agreement": [
    "href": "https://host:port/onboardingManagement/agreement/1632",
    "id": "1632",
    "name": "Winter Contract Agreement"
  }
],
"relatedParty": [
    "href": "https://host:port/partyManagement/organization/4804",
    "id": "4804",
    "name": "John Doe",
    "role": "bill responsible",
    "validFor": {
      "startDateTime": "2017-03-24T00:00",
      "endDateTime": "2017-10-23T00:00"
    }
]
```

CREATE CUSTOMER

POST /customer

Description

This operation creates a customer entity.

Mandatory and Non Mandatory Attributes

The following tables provides the list of mandatory and non mandatory attributes when creating a Customer, including any possible rule conditions and applicable default values. Notice that it is up to an implementer to add additional mandatory attributes.

Mandata	
Iviandato	orv Attributes

Rule



name	
type	

Non Mandatory Attributes	Default Value	Rule
status		
statusReason		
validFor		
engagedParty	Automatically	
	generated	
account		
paymentMethod		
contactMedium		
characteristic		
creditProfile		
agreement		
relatedParty		

Additional Rules

The following table provides additional rules indicating mandatory fields in sub-resources or relationships when creating a Customer resource.

Context	Mandatory Sub-Attributes
engagedParty	id
characteristic	name, value
contactMedium	type, medium
partyAccount	id, name, status
creditProfile	creditProfileDate, validFor
paymentMean	id, href

Default Values Summary

When creating the resource, the following table summarizes the default values applicable to optional attributes of the resource (or sub-resources).

Attributes	Default Value
id	Automatically generated
engagedParty	Automatically generated

Usage Samples

Here's an example of a request for creating a Customer resource. In this example the request only passes mandatory attributes.

Request
POST /customerManagement/customer
Content-Type: application/json



```
{
    "name": "Moon Football Club",
    "type": {
        "name": "a string ...",
        "partnershipHref": "a string ...",
        "partnershipId": "405",
        "partnershipName": "a string ..."
    }
}
```

Response

```
201
  "href": "https://host:port/customer/customer/7489",
  "id": "7489",
  "name": "Moon Football Club",
  "engagedParty": {
    "description": "This party ...",
    "href": "https://host:port/party/6610",
    "id": "6610",
    "name": "Booking Corporation"
  },
  "type": {
    "name": "a string ...",
    "partnershipHref": "a string ...",
    "partnershipId": "405",
    "partnershipName": "a string ..."
  }
}
```

PATCH CUSTOMER

PATCH /customer/{id}

Description

This operation allows partial updates of a customer entity. Support of json/merge (https://tools.ietf.org/html/rfc7386) is mandatory, support of json/patch (http://tools.ietf.org/html/rfc5789) is optional.

Note: If the update operation yields to the creation of sub-resources or relationships, the same rules concerning mandatory sub-resource attributes and default value settings in the POST operation applies to the PATCH operation. Hence these tables are not repeated here.

Patchable and Non Patchable Attributes



The tables below provide the list of patchable and non patchable attributes, including constraint rules on their usage.

Patchable Attributes	Rule
name	
status	
statusReason	
validFor	
engagedParty	
type	
account	
paymentMethod	
contactMedium	
characteristic	
creditProfile	
agreement	
relatedParty	

Non Patchable Attributes	Rule
id	
href	
name	
status	
statusReason	
validFor	
engagedParty	
type	
account	
paymentMethod	
contactMedium	
characteristic	
creditProfile	
agreement	
relatedParty	

Usage Samples

Here's an example of a request for patching a Customer resource.

```
PATCH /customerManagement/customer/7489
Content-Type: application/merge-patch+json

{
    "name": "new name"
}
```



Response

```
201
  "href": "https://host:port/customer/customer/7489",
  "id": "7489",
  "name": "new name",
  "status": "Active",
  "statusReason": "",
  "validFor": {
    "startDateTime": "2017-03-26T00:00",
    "endDateTime": "2017-10-23T00:00"
  "engagedParty": {
    "description": "This party ...",
    "href": "https://host:port/party/6610",
    "id": "6610",
    "name": "Booking Corporation"
  "type": {
    "name": "a string ...",
    "partnershipHref": "a string ...",
    "partnershipId": "405",
    "partnershipName": "a string ..."
  },
  "account": [
      "description": "This account ...",
      "href": "https://host:port/accounts/account/4600",
      "id": "4600",
      "name": "Paradise Account"
    }
  ],
  "paymentMethod": [
      "href": "https://host:port/onboardingManagement/paymentMethod/8157",
      "id": "8157",
      "name": "professional payment"
    }
  ],
  "contactMedium": [
      "preferred": true,
      "type": "TelephoneNumber",
      "validFor": {
        "startDateTime": "2017-03-23T00:00",
        "endDateTime": "2017-10-23T00:00"
      },
      "characteristic": [
           "name": "Colour",
           "value": "white"
```



```
"name": "Memory",
        "value": "64"
],
"characteristic": [
  [
      "name": "Colour",
      "value": "pink"
      "name": "Memory",
      "value": "32"
],
"creditProfile": [
    "creditProfileDate": "2017-03-27T00:00",
    "creditRiskRating": 3,
    "creditScore": 3,
    "validFor": {
      "startDateTime": "2017-03-29T00:00",
      "endDateTime": "2017-10-23T00:00"
  }
],
"agreement": [
    "href": "https://host:port/onboardingManagement/agreement/1632",
    "id": "1632",
    "name": "Winter Contract Agreement"
  }
],
"relatedParty": [
    "href": "https://host:port/partyManagement/organization/4804",
    "id": "4804",
    "name": "John Doe",
    "role": "bill responsible",
    "validFor": {
      "startDateTime": "2017-03-24T00:00",
      "endDateTime": "2017-10-23T00:00"
    }
  }
```

DELETE CUSTOMER

DELETE /customer/{id}



Description

This operation deletes a customer entity.

Usage Samples

Here's an example of a request for deleting a Customer resource.

Request
DELETE /customerManagement/customer/42
Response
204



API NOTIFICATIONS

For every single of operation on the entities use the following templates and provide sample REST notification POST calls.

It is assumed that the Pub/Sub uses the Register and UnRegister mechanisms described in the REST Guidelines reproduced below.

REGISTER LISTENER

POST /hub

Description

Sets the communication endpoint address the service instance must use to deliver information about its health state, execution state, failures and metrics. Subsequent POST calls will be rejected by the service if it does not support multiple listeners. In this case DELETE /api/hub/{id} must be called before an endpoint can be created again.

Behavior

Returns HTTP/1.1 status code 204 if the request was successful.

Returns HTTP/1.1 status code 409 if request is not successful.

Usage Samples

Here's an example of a request for registering a listener.

Request

POST /api/hub

Accept: application/json

{"callback": "http://in.listener.com"}

Response

201

Content-Type: application/json

Location: /api/hub/42

{"id":"42","callback":"http://in.listener.com","query":null}

UNREGISTER LISTENER



DELETE /hub/{id}

Description

Clears the communication endpoint address that was set by creating the Hub..

Behavior

Returns HTTP/1.1 status code 204 if the request was successful.

Returns HTTP/1.1 status code 404 if the resource is not found.

Usage Samples

Here's an example of a request for un-registering a listener.

Request		
DELETE /api/hub/42		
Accept: application/json		
Response		
204		

PUBLISH EVENT TO LISTENER

POST /client/listener

Description

Clears the communication endpoint address that was set by creating the Hub.

Provides to a registered listener the description of the event that was raised. The /client/listener url is the callback url passed when registering the listener.

Behavior

Returns HTTP/1.1 status code 201 if the service is able to set the configuration.

Usage Samples

Here's an example of a notification received by the listener. In this example "EVENT TYPE" should be replaced by one of the notification types supported by this API (see Notification resources Models section) and EVENT BODY refers to the data structure of the given notification type.

Request	
POST /client/listener	



```
Accept: application/json

{
    "event": {
        EVENT BODY
      },
      "eventType": "EVENT_TYPE"
}

Response

201
```

For detailed examples on the general TM Forum notification mechanism, see the TMF REST Design Guidelines.



ACKNOWLEDGMENTS

RELEASE HISTORY

Release Number	Date	Release led by:	Description
0.a	28/11/2013	Arindam Basu (Ericsson) Sudipta Dutta (Ericsson) Brinda Santh M (IBM) Hemant Gour (IBM) Shashank Singh (IBM) Vishal Aggarwal (IBM) Nitish Jaisoor (Infosys) Rajesh Gannaprapu (Infosys) Srinivasan Duraiswamy (Infosys) Veeramani K (Infosys)	Initial Spec prepared in the TMF Conference held at Bangalore, India (Nov 26 to Nov 28)
0.b	5/03/2014	Christian Traxler (Infonova) Alexander Sturn (Infonova) Gilbert Scheiblhofer (A1) Josh Salomon (Amdocs) Véronique Mauneau (Orange) Maxime Delon (Orange)	Extension of customer API mgmt. during Spec Jam held in Vienna, Austria
2.0	15/04/2016	Pierre Gauthier (TM Forum) Mariano Belaunde (Orange)	Regenerated from API Data Model and re-branded. Does not include any more accounting and payment mean resources since this is provided through the Accounting API.
3.0.0	19/06/2017	Pierre Gauthier	Updated for Fx17
Release 17.0.1 Version 3.0.1	10/11/2017	Adrienne Walcott	Updated to reflect TM Forum Approved Status

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