

Lead API Guide

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Introduction

This API allows the reading or deletion of leads. The request is made by making a HTTP POST of an XML message containing an access key, request type and other elements.

To create or update leads, please see the 'Lead Create & Update API Guide'.

The Request

To use this API, an access key is required. Provide the key in a 'key' element within the request. Access keys can be created in 'Settings > Access Keys'.

For each request, a 'request' element must also be given containing either 'search', 'read' or 'delete'. More details of how to make each request type are given further on in this guide.

If the main service is accessed at the address 'domain.example.com', then a POST request should be made to the corresponding API URL:

<https://domain.example.com/api/APILead.php>

An XML message should be sent as the POST data:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <key>Yrg32FoiRdSriLYEbLrzSvFmurBGsPiz</key>
  <request>create</request>
  . . .
</data>
```

The Response

The server will respond with XML data. The response will always contain 'Code' (error code) and 'Message' (response message) elements. If there are several messages, there may be multiple 'Message' elements. If successful, other response elements will also be returned.

A successful response may look like this:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<result>
  <code>0</code>
  <message>OK</message>
  . . .
</result>
```

Search

```
<request>search</request>
```

Parameters

Required parameters are highlighted in bold.

startdate	The start date for the search period. e.g. '01/01/2014'.																				
enddate	The end date for the search period. e.g. '31/01/2014'.																				
page	Page number (starts at 1).																				
perpage	Number of results per page (10, 25, 50, 100 or 1000).																				
search	Keyword search term to filter on.																				
leadtypeid	<p>The lead group or lead type to filter on.</p> <p>To filter by lead group, use only the lead group ID. For example, to filter on lead group ID 15263, use '15263'.</p> <p>To filter by lead type, use the group and type ID's concatenated with a hyphen. For example, to filter on lead type ID 9263 in group 15263, use '15263-9263'.</p>																				
userid	<p>The user or user group to filter on.</p> <p>To filter by user ID, prefix the user's ID with 'u-'. For example, to search for user ID 2536, use 'u-2536'.</p> <p>To filter by user group ID, prefix the user group's ID with 'g-'. For example, to search for user group ID 81526, use 'g-81526'.</p> <p>To filter for all unassigned leads, simple use 'Unassigned'.</p>																				
status	<p>The status or progress point to filter on.</p> <p>To filter on a status, prefix the exact string representation of the status with 's-'. For example, to search for the status 'Validated', use 's-Validated'.</p> <p>To filter for leads with no status set, use the value 'n'.</p> <p>To filter on the progress point, use the progress point (see the table below) prefixed with 'p-'. For example, to search for the progress point 1 (All New), use 'p-1'.</p> <p>Progress Point ID</p> <table> <tr><td>1</td><td>All New</td></tr> <tr><td>2</td><td>All Validated</td></tr> <tr><td>6</td><td>All Contacted</td></tr> <tr><td>8</td><td>All Qualified</td></tr> <tr><td>9</td><td>All Converted</td></tr> <tr><td>o</td><td>All Open</td></tr> <tr><td>oc</td><td>All Open/Closed</td></tr> <tr><td>10</td><td>All Closed</td></tr> <tr><td>c</td><td>All Closed/Invalidated</td></tr> <tr><td>3</td><td>All Invalidated</td></tr> </table>	1	All New	2	All Validated	6	All Contacted	8	All Qualified	9	All Converted	o	All Open	oc	All Open/Closed	10	All Closed	c	All Closed/Invalidated	3	All Invalidated
1	All New																				
2	All Validated																				
6	All Contacted																				
8	All Qualified																				
9	All Converted																				
o	All Open																				
oc	All Open/Closed																				
10	All Closed																				
c	All Closed/Invalidated																				
3	All Invalidated																				

Response

A collection of leads that match the search criteria. Each lead returned includes the following data:

id	ID of the lead.
subid	Sub ID of the lead.
received	Date/time that the lead was received. e.g. '2011-01-01 12:00:00'.
leadgroupid	ID of the lead group that the lead belongs to.
leadgroupname	Name of the lead group that the lead belongs to.
leadtype	Lead's type.
status	Lead's status.
user	Name of the lead's assigned user.
buyer	Name of the partner who has been referred the lead.
introducer	Name of the partner who introduced the lead.
fullname	The full name on the lead.
company	Company name.
phone1	Phone number.
phone2	Alternative phone number.
email	Email address.
address	Address line 1.
towncity	Town or city.
postcode	Postcode

Error Codes

0	No errors
1	Validation or authentication error
2	XML format error or no XML provided

Read

```
<request>read</request>
```

Parameters

Required parameters are highlighted in bold.

id	The ID of the lead to read.
subid	The sub ID of the lead to read.

Response

id	ID of the lead.
subid	Sub ID of the lead.
ipaddress	Originating IP address.
received	Date/time that the lead was received. e.g. '2011-01-01 12:00:00'.
leadgroupid	ID of the lead group that the lead belongs to.
leadgroupname	Name of the lead group that the lead belongs to.
leadtype	Lead's type.
status	Lead's status.
progress	Billing point. e.g. 'Converted'.
siteid	ID of the site that the lead belongs to.
sitename	Name of the site that the lead belongs to.
userid	ID of the lead's assigned user.
username	Name of the lead's assigned user.
buyerid	ID of the partner who has been referred the lead.
buyer	Name of the partner who has been referred the lead.
buyerreference	Reference supplied by the partner who has been referred the lead.
introducerid	ID of the partner who introduced the lead.
introducename	Name of the partner who introduced the lead.
reference	Source/introducer reference.
source	Marketing source.
medium	Marketing medium.
term	Marketing term.
cost	Lead cost.
value	Lead value.
transferdatetime	Date/time that the lead was referred. e.g. '2011-01-01 12:00:00'.

transfersuccessful	Successful telephone transfer: <ul style="list-style-type: none"> • Yes • No
xmldatetime	Date/time of internet delivery. e.g. '2011-01-01 12:00:00'.
xmlfails	Number of failed internet delivery attempts.
xmlresult	Internet delivery result.
xmlreference	Internet delivery return reference.
appointmentdatetime	Date/time of appointment. e.g. '2011-01-01 12:00:00'.
appointmentnotes	Appointment notes.
lastnotedatetime	Date/time of last note/call. e.g. '2011-01-01 12:00:00'.
lastnote	Details of last note/call.
taskexists	Does the lead have an outstanding task?: <ul style="list-style-type: none"> • Yes • No
workflowexists	Does the lead have a workflow?: <ul style="list-style-type: none"> • Yes • No
dropbox	The lead's email dropbox address.
fullname	The full name on the lead.
title	Person's title: <ul style="list-style-type: none"> • Mr. • Mrs. • Ms. • Miss • Dr. • Rev.
firstname	First name.
lastname	Last name.
company	Company name.
jobtitle	Job title.
phone1	Phone number.
phone2	Alternative phone number.
fax	Fax number.
email	Email address.
address	Address line 1.
address2	Address line 2.
address3	Address line 3.
towncity	Town or city.
postcode	Postcode
dob	Full date of birth. e.g. '1990-01-01'.
dobday	Day of birth. e.g. '01'.
dobmonth	Month of birth. e.g. '01'.
dobyear	Year of birth. e.g. '1990'.

contacttime	Preferred contact time: <ul style="list-style-type: none"> • Anytime • Morning • Afternoon • Evening
contactphone	Phone contact permission: <ul style="list-style-type: none"> • Yes • No • Unknown
contactsms	Text message contact permission: <ul style="list-style-type: none"> • Yes • No • Unknown
contactemail	Email contact permission: <ul style="list-style-type: none"> • Yes • No • Unknown
contactmail	Mail contact permission: <ul style="list-style-type: none"> • Yes • No • Unknown
contactfax	Fax contact permission: <ul style="list-style-type: none"> • Yes • No • Unknown
data1 - data50	Additional information fields.
type1 - type50	Descriptions of additional information fields.

Error Codes

0	No errors
1	Validation or authentication error
2	XML format error or no XML provided

Delete

```
<request>delete</request>
```

Parameters

Required parameters are highlighted in bold.

id	The ID of the lead to delete.
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Response

If the delete succeeds, the code will be '0' with the message 'OK'.

Error Codes

0	No errors
1	Validation or authentication error
2	XML format error or no XML provided