

## Lead Create & Update API Guide

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Date:	25 <sup>th</sup> January 2018
Version:	2.90 Release

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## 1. Introduction

Leads can be posted into the system or updated through a HTTP post of XML data to a specific URL. Up to 100 requests can be submitted at once.

### 1.1. XML Format

The expectation is for data to be wrapped in 2 hierarchical elements, 'Data' and 'Lead'. To submit multiple leads, repeat the last element (in this case 'Lead'). Therefore XML data would be expected in the format:

```
<DATA>
  <LEAD>
    . . .
  </LEAD>
</DATA>
```

Note: A common mistake when working with XML data is not encoding certain characters such as **&**, **<** and **>** into their XML character entities. For example, within data being sent, the **&** sign should be converted to the **&amp;** character entity.

Search the internet for 'XML Character Entities' for more details.

### 1.2. Posting URL

The posting URL can be generated through the 'Tools > Capture Leads' page.

If the service is accessed at the address 'domain.example.com', then the posting URL would be:

**<https://domain.example.com/api/APILeadCreateUpdate.php>**

### 1.3. Testing

As with all lead submission methods, submitting a lead with first name 'flg' and last name 'test' will validate the request without entering a lead into the database, returning a lead ID of '000000' if successful.

## 1.4. Creating Leads

To create leads, an access key is required. Provide the key in a 'key' element. Access keys can be created in 'Settings > Access Keys'.

To create a new lead, make a request without an 'id' element. The absence of this element tells the service that the request is to create a new lead.

A create request may look like this:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <lead>
    <key>Yrg32FoiRdSriLYEbLrzSvFmurBGsPiz</key>
    <leadgroup>10</leadgroup>
    <site>20</site>
    <introducer>30</introducer>
    <reference>Lead123</reference>
    <source>Google</source>
    <medium>PPC</medium>
    <term>Loans</term>
    <cost>10.00</cost>
    <value>100.00</value>
    <title>Mr</title>
    <firstname>John</firstname>
    <lastname>Smith</lastname>
    <company>ABC Ltd.</company>
    <jobtitle>Manager</jobtitle>
    <phone1>0161 123 1234</phone1>
    <phone2>07912 123 456</phone2>
    <fax>0161 123 1235</fax>
    <email>john@abc.com</email>
    <address>1 High Street</address>
    <address2>This Village</address2>
    <towncity>This Town</towncity>
    <postcode>BB12 6EG</postcode>
    <dobday>01</dobday>
    <dobmonth>01</dobmonth>
    <dobyear>1990</dobyear><
    <contacttime>Anytime</contacttime>
    <data1>Ford</data1>
    <data2>Mondeo</data2>
    <data3>2005</data3>
    <data4>4000</data4>
  </lead>
</data>
```

## 1.5. Updating Leads

To update leads, an access key is required. Provide the key in a 'key' element. Access keys can be created in 'Settings > Access Keys'.

Most of the same values that can be sent in a create lead request can be used to update leads. Those fields in section 2.1 marked with note 3 cannot.

An update request may look like this:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <lead>
    <key>Yrg32FoiRdSriLYEbLrzSvFmurBGsPiz</key>
    <id>1001150</id>
    <data1>Ford</data1>
    <data2>Mondeo</data2>
    <data3>2005</data3>
    <data4>4000</data4>
  </lead>
</data>
```

## 2. Post Format

### 2.1. Post Data Elements

Field	Type	Required <sup>1</sup>		Sample	Notes
		Create	Update		
Key	String	Yes	Yes	Yrg32FoiRdS...	Obtained from 'Access Keys'
Id	Integer		Yes	1001150	The lead ID to be updated
Leadgroup <sup>3</sup>	Integer	Yes		10	Provided by 'Capture Leads'
Site <sup>3</sup>	Integer			20	Provided by 'Capture Leads'
Introducer <sup>3</sup>	Integer			30	Provided by 'Capture Leads'
Buyer <sup>6</sup>	Integer			40	Preferred referral partner (see note)
Type <sup>2</sup>	String			Secured Loan	Sets the lead type
User <sup>2</sup>	String			Jane Smith	Sets the assigned user
Status <sup>2</sup>	String			New	Sets the status
Ipaddress <sup>3</sup>	String			192.168.0.1	Overrides detected IP address
Reference	String			Lead123	Introducer's lead reference
Source	String			Google	Marketing source
Medium	String			PPC	Marketing medium
Term	String			Loans	Marketing term
Cost	Decimal			10.00	Cost of lead
Value	Decimal			100.00	Value of lead
Title	String	User		Mr	See Title Values
Firstname	String	Yes		John	
Lastname	String	Yes		Smith	
Company	String	User		ABC Ltd.	
Jobtitle	String	User		Manager	
Phone1 <sup>4</sup>	Number	User		0161 123 1234	
Phone2 <sup>4</sup>	Number	User		07912 123 456	
Fax <sup>4</sup>	Number	User		0161 123 1235	
Email	String	User		john@abc.com	Must be valid email address
Address	String	User		1 High Street	

Address2	String			This Area	
Address3	String			This Village	
Towncity	String	User		This Town	
Postcode <sup>5</sup>	String	User		BB12 6EG	
Dob	String	User		01/01/1990	Overrides individual DOB fields
Dobday	Number			01	
Dobmonth	Number			01	
Dobyear	Number			1990	
Contacttime	String	User		Anytime	See Contact Time Values
Contactphone	String			Yes	See Contact Permission Values
Contactsms	String			Yes	See Contact Permission Values
Contactemail	String			Yes	See Contact Permission Values
Contactmail	String			Yes	See Contact Permission Values
Contactfax	String			Yes	See Contact Permission Values
Data1 – Data50	Varies	User		Anything	Lead group data field value

**Notes**

1. Fields marked 'User' can be set as required within the lead group's settings, so may be required. Fields marked 'Yes' are always required.
2. These are optional. If lead type is not specified, the lead type will be determined by lead type filters. If status is not specified, the first status with a 'New' conversion point will be set. If user is not specified, the lead will be unassigned.
3. These fields cannot be submitted in an update request.
4. Phone number validation level can be set within the lead group's settings. Either only valid UK formatted phone numbers will be accepted, or any value. If the field is set to accept any input, all non-numeric and whitespace characters will be stripped out.
5. Postcode validation level can be set within the lead group's settings. Either only valid UK postcodes will be accepted, or any value.
6. Specify a single preferred referral partner ID in 'buyer', or multiple preferred partner ID's in separate numbered fields such as 'buyer', 'buyer2', 'buyer3', ..., 'buyer10'.

If the lead is to be referred and the specified partner is eligible for the referral, the preferred referral partner will always be chosen. Likewise, if multiple preferred partners are specified, all of the partners will be preferred over others.

The effect is similar to setting the partner's lead type 'selection priority' higher than for other partners. Note that the partner must be eligible for the referral in the first place, otherwise the setting will have no effect.



## 2.2. Title Values

Value
Mr
Mrs
Ms
Miss
Dr
Rev

## 2.3. Contact Time Values

Value
Anytime
Morning
Afternoon
Evening

## 2.4. Contact Permission Values

This value indicates whether permission has been obtained to make contact by phone, fax, email or mail.

Value	Description
Unknown	Not known
Yes	Permission obtained
No	Do not contact using this medium

### 3. Response Format

The server will respond with XML data containing a parent element 'Result', and within it a single 'Status' element and 1 or more 'Item' elements.

If the post is successful, a single 'Item' element will enclose the new (or updated) lead ID. If unsuccessful, one or more item elements will contain the error(s) found.

#### 3.1. Response Data Elements

Field	Type	Sample	Notes
Status	Bit	0	Returns 0 on success and 1 if there are errors
Record	Integer	1	The sequential record number (if submitting multiple requests in 1 post)
Code	Integer	0	Error code (see table below)
Message	String	OK	Response message
Id	Integer	1001150	New/updated lead ID

#### 3.2. Error Codes

Code	Description
0	No errors
1	Validation error
2	Declined as duplicate
3	Declined as no lead type available (usually out of acceptance criteria)
4	XML format error or no XML provided

## 4. Create Lead Example

### 4.1. Post Data

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <lead>
    <key>Yrg32FoiRdSriLYEbLrzSvFmurBGsPiz</key>
    <leadgroup>10</leadgroup>
    <site>20</site>
    <introducer>30</introducer>
    <reference>Lead123</reference>
    <source>Google</source>
    <medium>PPC</medium>
    <term>Loans</term>
    <cost>10.00</cost>
    <value>100.00</value>
    <title>Mr</title>
    <firstname>John</firstname>
    <lastname>Smith</lastname>
    <company>ABC Ltd.</company>
    <jobtitle>Manager</jobtitle>
    <phone1>0161 123 1234</phone1>
    <phone2>07912 123 456</phone2>
    <fax>0161 123 1235</fax>
    <email>john@abc.com</email>
    <address>1 High Street</address>
    <address2>This Village</address2>
    <towncity>This Town</towncity>
    <postcode>BB12 6EG</postcode>
    <dobday>01</dobday>
    <dobmonth>01</dobmonth>
    <dobyear>1990</dobyear><
    <contacttime>Anytime</contacttime>
    <data1>Ford</data1>
    <data2>Mondeo</data2>
    <data3>2005</data3>
    <data4>4000</data4>
  </lead>
</data>
```

### 4.2. Response Data

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<result>
  <status>0</status>
  <item>
    <record>1</record>
    <code>0</code>
    <message>OK</message>
    <id>1001150</id>
  </item>
</result>
```