API Integration Manual

Version 7.2 │ Updated October 8, 2024

API Terms of Service

Your access to and use of Conversica APIs are governed by our [API Terms of Service](#).

Overview

The Conversica Platform is a cloud-based SaaS platform powered by a proprietary conversational artificial intelligence (AI) system and provides Customers with the ability to follow up on Leads by engaging them in real language conversation. The Conversica Platform supports a number of Revenue Digital Assistants ("RDAs") for different business purposes. For example, once the Sales RDA establishes a determined level of interest from a Lead, the Lead is escalated and handed off to the Customer's sales team for human follow up.

The Conversica API allows Customers to:

- Transport Lead data between the Customer System and the Conversica Platform
- Receive Lead Update data from the Conversica Platform
- Receive Message data for associated Leads from the Conversica Platform

Before utilizing your Application, you agree to cooperate with us by testing the Application as we designate for quality assurance and approval, and you agree to not use nor enable an Application prior to our approval.

Terms & Definitions

- Lead: The data containing relevant information for communication by the RDA with a Customer's prospects. Depending on the Conversation and RDA in use, a Lead may be a lead, contact, customer, account, prospect, or other related entity.

- Message: The communication between the RDA and the Lead. This includes communication both sent to and received from the Lead.

- Conversation: The conversational skill employed by the RDA when messaging a Lead, and with a specific objective to meet. For example, "Engage Demand" for real-time or inbound Leads.

- Conversation ID: For a particular Conversation, a list or filtered set of Leads (e.g. "campaign" in some CRMs) for the purpose of tailoring messaging to a more specific audience or use case.

- RDA: The Conversica artificial intelligence persona that engages in two-way conversations with a Customer's Leads.

- Salesperson: The "Lead owner" or representative that will be contacting or otherwise interacting with the Lead on behalf of the Customer once prompted by their RDA.

- Customer: The authorized party responsible for posting Leads to Conversica and then receiving data back from Conversica to be utilized or displayed within their System.
- Customer System: The system used by the Customer to manage Leads and their associated data (e.g. a CRM or marketing automation system).

Data Flow

Summary

The Conversica API facilitates the flow of Lead data from the Customer System to the Conversica Platform, as well as the flow of Lead Update and Message object data from the Conversica Platform back to the Customer System. This is all performed using JSON-encoded POST requests.

Diagram
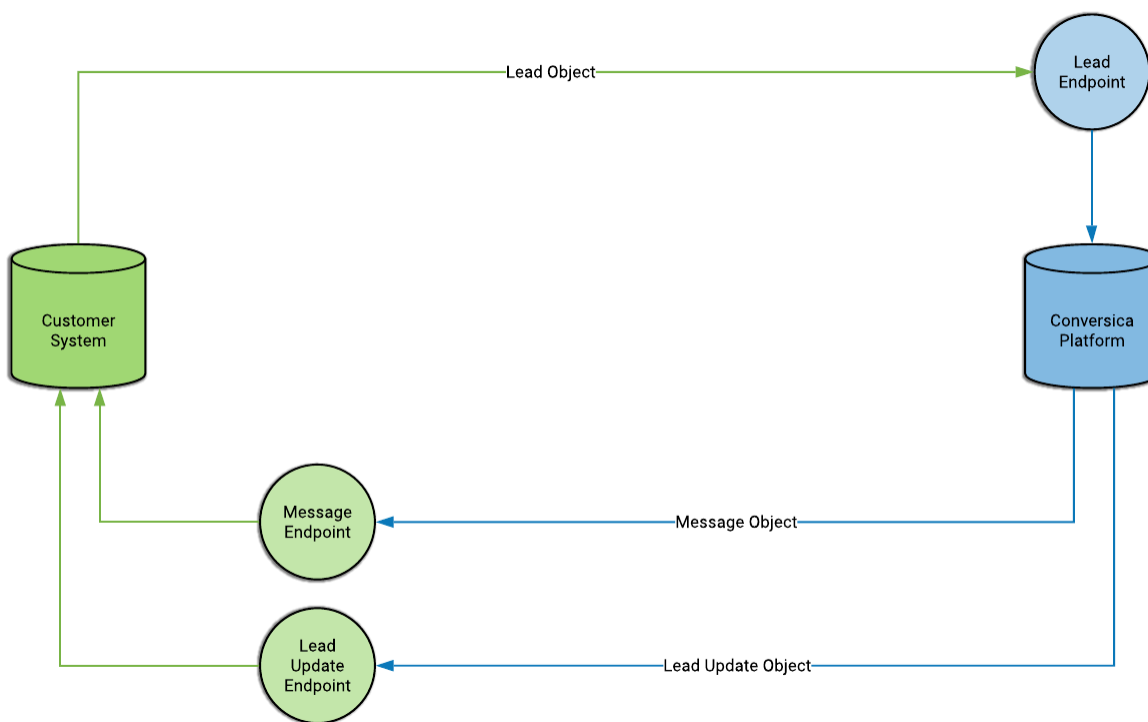
Key Types & Values

- All keys with a "datetime" type must contain UTC values following the RFC 3339 standard; e.g. `2019-05-10T05:57:44+00:00`
- All keys with a "**boolean**" type must contain values `true` or `false`

Authentication

Method

The Conversica API uses HTTPS [basic access authentication](#) for the secure transmission of data between the Customer System and the Conversica Platform endpoints.

Conversica & Customer Endpoints

Endpoints provided both by the Customer and Conversica must use HTTPS basic access authentication:

- Conversica will provide a username and password for the Customer to use when connecting to the Conversica endpoints
- Customer will provide Conversica with a single username and password set for connecting to the Customer's endpoints

Conversica will provide one endpoint (see below) for receiving Lead object data. Customer will provide two endpoints, one for Message object data and one for Lead Update object data. To reiterate, both Customer endpoints should share the same username and password for HTTPS basic access authentication.

Conversica Endpoint

```
https://integrations-api.conversica.com/json/
```

Example Customer Endpoints

```
https://api.customername.com/conversicaMessage/
```

```
https://api.customername.com/conversicaLead/
```

API Username & Password

When ready for development, the Customer may contact their Conversica technical account manager to receive a username and password for authentication to the Conversica endpoint.

Connection Testing

Curl & PHP Example

The following connection test will return a status code and results:

```php
<?php
//Set payload and other params for Conversica API Request
$data =
    [
        'apiVersion'    => '7.2',
        'id'            => '123456789',
        'conversationId' => '123',
        'firstName'     => 'Sally',
        'email'         => 'sally@email.com',
        'leadSource'    => 'My Big Event 2019',
        'repName'       => 'John',
    ];

$url        = 'https://integrations-api.conversica.com/json/';
$header = ['Content-type: application/json'];
$user       = 'valid_username';
$pass       = 'valid_password';

$data = json_encode($data);
$ch = curl_init();
curl_setopt($ch, CURLOPT_USERPWD, $user . ":" . $pass);
curl_setopt($ch, CURLOPT_URL, $url);
curl_setopt($ch, CURLOPT_HTTPHEADER, $header);
curl_setopt($ch, CURLOPT_POSTFIELDS, $data);
curl_setopt($ch, CURLOPT_RETURNTRANSFER, 1);

//Execute request
$result_string = curl_exec($ch);
$status_code   = curl_getinfo($ch, CURLINFO_HTTP_CODE);
```

Status Codes

Code	Title	Description
200	OK	The request was successful
400	Bad Request	The request could not be understood due to an error
401	Unauthorized	The request could not be processed due to authentication

Objects

Lead Object

Overview

The Lead object includes data relevant for communication between the RDA and the Customer's Leads. Some keys listed below are optional. However, Conversica recommends including as much information as possible for each Lead, in order to enhance the performance of your RDA.

Keys & Values

Key	Type	Description	Required
apiVersion	string	Version number of the Conversica API in use	Yes
id	string	The Lead's unique ID in the Customer's System	Yes
conversationId	string	For a particular Conversation, a list or filtered set of Leads (e.g. "campaign" in some CRMs) for the purpose of tailoring messaging to a more specific audience or use case	Yes
firstName	string	The Lead's first name, used in messaging	Yes
email	string	The Lead's primary email address for messaging	Yes
leadSource	string	The source of the Lead, as indicated in the Customer's System and as used by Conversica for either reporting on Lead Source performance or other customizations	Yes
leadStatus	string	The status of the Lead, as indicated in the Customer's System and as used by Conversica for intelligent Conversation management (e.g. "New," "Sold," or "Lost")	No
optOut	boolean	Indicates whether or not the Lead has opted out of all methods of marketing and contact ("global" opt-out)	No
repId	string	The Salesperson's (Lead owner) unique ID in the Customer's System	No
repName	string	The Salesperson's (Lead owner) name, used in messaging	No
clientId	string	Unique ID for the Customer in the Customer's System (Required if the API integration will be used for multiple Conversica Customers)	No
lastName	string	The Lead's last name	No
homePhone	string	The Lead's primary phone number	No
workPhone	string	The Lead's work phone number	No
cellPhone	string	The Lead's cell phone number (Required for SMS)	No

address	string	The Lead's street address	No
city	string	The Lead's city	No
state	string	The Lead's state	No
zip	string	The Lead's zip code	No
leadType	string	The type of the Lead, as indicated in the Customer's System (e.g. "Internet," "Web Form," or "Phone-In")	No
date	datetime	The date and time the Lead was created in the Customer's System (UTC RFC 3339 format)	No
smsOptOut	boolean	Indicates whether or not the Lead has opted out of being contacted by SMS text messaging (Required for SMS Conversations)	No
stopMessaging	boolean	If set to "true," the RDA will stop listening for responses and will no longer message the Lead	No
skipToFollowup	boolean	If set to "true," the RDA will wait a few days before sending a follow-up message	No
repEmail	string	The Salesperson's (Lead owner) email address	No
smsOptIn	boolean	If set to 'true,' indicates the Lead has accepted being contacted by SMS text messaging (Required for SMS Conversations)	No

Code Example (JSON)

```
{
"apiVersion": "7.2",
"id": "12345",
"conversationId": "My Big Event 2019",
"firstName": "Sally",
"email": "sally@email.com",
"leadSource": "Big Events",
"leadStatus": "New",
"optOut": false,
"repId": "98765",
"repName": "John"
}
```

Message Object

Overview

The Message object includes data pertaining to the messages and responses between the RDA.

Keys & Values

Key	Type	Description	Required
apiVersion	string	Version number of the Conversica API in use	Yes
id	string	The Lead's unique ID in the Customer's System	Yes
clientId	string	Unique ID for the Customer in the Customer's System (Required if the API integration will be used for multiple Conversica Customers)	No
action	string	Indicates whether the message was "sent" (by the RDA) or "received" (from the Lead)	Yes
date	datetime	The date and time the message was sent or received	Yes
subject	string	The subject of the message sent or received	Yes
body	string	The body of the message sent or received	Yes

Code Examples (JSON)

```
{
"apiVersion": "7.2",
"id": "12345",
"clientId": "67890",
"action": "sent",
"date": "2019-05-10T05:57:44+00:00",
"subject": "Your online request",
"body": "Hi Sally, \nThanks for reaching out to us online. Would you like to schedule a demo
with one of our representatives to learn more about our product? \nSincerely, \nJohn"
}
```

```
{
"apiVersion": "7.2",
"id": "12345",
"clientId": "67890",
"action": "received",
"date": "2019-05-10T05:57:44+00:00",
"subject": "Re: Your online request",
```

```
"body": "Hi John \nSure, I have some time tomorrow after 3 pm Pacific, if that works? \nThanks,
\nSally"
}
```

Lead Update Object

Overview

The Lead Update object includes data containing updates about the Lead and Conversation. Other than "apiVersion," "id," and "clientId," only keys with updated values will be sent per request. This data can be used by the Customer to represent the current status of a Lead or Conversation.

Keys & Values

Key	Type	Description	Required
apiVersion	string	Version number of the Conversica API in use	Yes
id	string	The Lead's unique ID in the Customer's System	Yes
clientId	string	Unique ID for the Customer in the Customer's System (Required if the API integration will be used for multiple Conversica Customers)	No
dateAdded	datetime	The date and time the Lead was added to Conversica	No
firstMessageDate	datetime	The date and time the RDA sent their first message to the Lead	No
lastMessageDate	datetime	The date and time the RDA last sent a message to the Lead	No
lastResponseDate	datetime	The date and time the RDA last received a response from the Lead	No
hotLead	boolean	If set to "true," indicates the Lead has expressed interest and is ready to be contacted by the Salesperson	No
hotLeadDate	datetime	The date and time the Lead became a Hot Lead	No
leadAtRisk	boolean	If set to "true," indicates the Lead was interested but has yet to be contacted by the Salesperson	No
leadAtRiskDate	datetime	The date and time the Lead became a Lead at Risk	No
actionRequired	boolean	If set to "true," indicates the Lead's response requires review by the Salesperson, and the RDA has stopped messaging	No
actionRequiredDate	datetime	The date and time the Lead was set as Action Required	No
discoveredPhone1	string	A new and unique phone number detected by the RDA while messaging the Lead	No
discoveredPhone2	string	A new and unique phone number detected by the RDA while messaging the Lead	No
leadStatus	string	Indicates an actionable Status for the Lead, either during or after engagement with the RDA	No

leadStatusDate	datetime	The date and time the Lead entered into the current Conversica Lead Status	No
conversationStage	string	Indicates the current Stage of the Conversation	No
conversationStageDate	datetime	The date and time the Conversation entered into the current Conversica Conversation Stage	No
conversationStatus	string	Indicates the current Status of the Conversation	No
conversationStatusDate	datetime	The date and time the Conversation entered into the current Conversica Conversation Status	No
doNotEmail	boolean	If set to "true," indicates the Lead has requested to no longer be contacted by email	No
smsOptIn	boolean	If set to 'true,' indicates the Lead has accepted being contacted by SMS text messaging	No
smsOptOut	boolean	If set to 'true,' indicates the Lead has requested to not be contacted by SMS/text messaging	No
discoveredEmail1	string	A new email address detected by the RDA while messaging the Lead	No
discoveredEmail2	string	A new email address detected by the RDA while messaging the Lead	No

Code Examples (JSON)

```json
{
"apiVersion": "7.2",
"Id": "12345",
"clientId": "67890",
"dateAdded": "2019-05-24T19:14:55+00:00",
"firstMessageDate": "2019-05-24T19:24:55+00:00",
"lastMessageDate": "2019-05-24T19:27:55+00:00",
"lastResponseDate": "2019-05-25T12:06:55+00:00",
"hotLead": true,
"hotLeadDate": "2019-05-25T12:06:55+00:00",
"discoveredPhone1": "5558675309",
"doNotEmail": false,
"smsOptIn": true
}
```

```json
{
"apiVersion": "7.2",
"Id": "12345",
"clientId": "67890",
"leadStatus": "None",
```

```
"leadStatusDate": "2019-05-24T19:24:30+00:00",
"conversationStage": "Messaging",
"conversationStageDate": "2019-05-24T19:24:30+00:00",
"conversationStatus": "Sent Message",
"conversationStatusDate": "2019-05-24T19:24:30+00:00"
}
```

Changelog

2019-08-22 (API Version 7.1)

- Redesigned integration manual layout and content

2023-02-08 (API Version 7.2)

- Added field smsOptIn in Lead Object
- Added fields smsOptIn, smsOptOut, discoveredEmail1, and discoveredEmail2 in Lead Update Object

2024-10-08 (API Version 7.2)

- Made all fields except apiVersion and id in Lead Update Object optional for client's webhook endpoint

Conversica Support

For additional support, including questions related to the Conversica API or the details provided in this manual, please contact your Conversica technical account manager. If you do not yet have a technical account manager assigned, feel free to contact the team at apisupport@conversica.com.

Appendix

Conversica Lead Status

Conversica Lead Status values indicate an actionable Status for the Lead, either during or after initial engagement with the RDA. The values are best understood in the context of the "objective" of the Conversation, or the "goal" of the RDA. For example, if the Status value is `"Satisfied"`, this indicates the objective of the Conversation has been successfully met, as confirmed by the Lead's response to follow up.

Lead Status Values & Descriptions (New)

Value	Description
Hot Lead	Indicates the Lead expressed interest and is ready for next steps (e.g. transition to the human Salesperson, scheduling an appointment/demo, etc.)
Lead to Review	Indicates the Lead's reply requires human review to determine the Salesperson's next action. In this Status, the RDA will no longer message the Lead
Further Action	Indicates the Lead is still interested and has requested assistance with open questions or actions from their assigned Salesperson
Satisfied (New)	Indicates the Lead responded positively to follow up (e.g. "Did you get what you requested?"), and the objective of the Conversation has been met
Disqualified	Indicates the Lead responded to follow up such that they no longer require assistance (i.e. the objective of the Conversation has not been met, but they do not desire continued engagement)
No Further Action	Indicates the Lead responded positively to follow up, such that they no longer require contact or assistance, though it is unclear if the objective of the Conversation has been met

Lead Status Values & Descriptions (Old)

The following Lead Status values are associated with a legacy version of the Conversica proprietary artificial intelligence platform, and will be deprecated in a future release of this API manual.

Value	Description
Hot Lead	Indicates the Lead expressed interest and is ready for next steps (e.g. transition to the human Salesperson, scheduling an appointment/demo, etc.)
Review Response	Indicates the Lead's reply requires human review to determine the Salesperson's next action. In this Status, the RDA will no longer message the Lead
Lead at Risk	Indicates the Lead is still interested and has requested assistance with open questions or actions from their assigned Salesperson
Satisfied	Indicates the Lead responded positively to follow up (e.g. "Did you get what you requested?"), and the objective of the Conversation has been met

Conversica Conversation Stage & Status

Conversica Conversation Stage and Status values are keys/fields useful for understanding where the Lead is currently in the flow of messaging or engagement with the RDA.

Conversation Stage	Conversation Status	Description
Preparing Lead	Preparing Lead	Lead has been received by Conversica and has not been scheduled for first message
	First Message Scheduled	Lead has its first message scheduled, but not sent
Messaging	Sent Message	Lead has been sent at least one message and no response to the current series has been received
	Out of Office	Received out of office message; Lead will remain in this status until the next message is sent (based on date extracted)
	Checking Back Later	Received message asking to check back later; Lead will remain in this status until follow-up check back later message is sent
	Received Response	System is reviewing response
	Message Scheduled	Next message is scheduled but not yet sent; Typically due to worktimes; Status changes to "Sent Message" on sending
Excluded	Excluded (Lead Source)	Client requested specific lead source not be worked
	Excluded (Rep)	Client requested specific rep's leads not be worked
	Excluded (Lead Status)	Client requested specific lead status not be worked
	Excluded (Rule)	Other reasons for exclusion, typically a client rule
Unworkable	No Rep Assignment	System is missing rep and no primary rep is set
	Duplicate (Internal)	Lead is a duplicate of earlier lead from client
	Duplicate (CRM)	Client CRM marked lead as duplicate
	Duplicate (External)	Lead is a duplicate of earlier lead from another client
	Invalid Email	Lead is invalidated by email verification system
	Malformed Email	Lead does not have correct email address format
	No Email	Lead does not have an email address
	Bounced	Message could not be delivered to mailbox due to three soft bounces (e.g. mailbox is full) or one hard bounce (e.g. domain does not exist)
Lead Stopped	Unsubscribed	Lead clicked unsubscribe link in message

	Marked Spam	Lead marked message as Spam
	Do Not Email	Lead was marked as Do Not Email by Conversica system
	Lead Requested Stop	Conversica system interprets that lead wants messaging to stop for whatever reason
	No Longer at Company	Conversica system interprets from response that the lead can no longer be contacted at the provided email address
Client Stopped	Manager Stopped	Rep's Manager stopped messaging
	Rep Stopped	Rep stopped messaging
	Admin Stopped	Client Admin stopped messaging
	Inactive Service	Lead deactivated due to an inactive (terminated) Service
	CRM Stopped	Client's CRM stopped messaging through the Conversica Options field
	Client Requested Stop	Conversica Customer Success stopped messaging (on request from Client)
Conversica Stopped	Listening	Leads that do not respond within seven days after the last message in Series; Lead could move to Messaging / Response Received if a response is received
	Pause Limit Exceeded	Paused leads that have passed the limit for being worked
	Marked Sold	Lead marked as having already purchased
	Conversation Complete	Conversation with lead is complete; System is not expecting any further responses
	System Stopped	Response is such that the system cannot continue messaging, but the lead did not request stop; Closely related to Review Response (formerly Action Required)
	Service Not Active	Service for lead is not active; Lead has not been messaged

Automotive Industry-specific Keys & Values (Lead Object)

Overview

The Lead object includes data relevant for communication between the RDA and the Customer's Leads. The following keys are specifically for Automotive industry use, and are designed to function uniquely with those RDAs and related services. Some keys listed below are optional. However, Conversica recommends including as much information as possible for each Lead, in order to enhance the performance of your RDA.

Keys & Values

Key	Type	Description	Required
leadSubStatus	string	The sub-status of the Lead, as indicated in the Customer's System and as used by Conversica for intelligent Conversation management	No
appointmentStatus	string	Indicates the current appointment status/stage for the Lead in the Customer's System (e.g. "Scheduled")	No
appointmentDate	datetime	The date and time the Lead entered into the current appointment status	No
bdcRepId	string	The BDC representative's unique ID in the Customer's System	No
bdcRepName	string	The BDC representative's name, used in messaging	Yes
bdcRepEmail	string	The BDC representative's email address	Yes
serviceRepId	string	The service advisor's unique ID in the Customer's System	No
serviceRepName	string	The service advisor's name, used in messaging	No
serviceRepEmail	string	The service advisor's email address	No
year	string	The year of either the vehicle of interest or the primary vehicle associated with the Lead (e.g. "2019")	Yes
make	string	The make of either the vehicle of interest or the primary vehicle associated with the Lead (e.g. "Volkswagen")	Yes
model	string	The model of either the vehicle of interest or the primary vehicle associated with the Lead (e.g. "Atlas SEL")	Yes
vin	string	The vehicle identification number of either the vehicle of interest or the primary vehicle associated with the Lead (e.g. "1N4AL2APXBC154449")	No

Code Example (JSON)

```json
{
"apiVersion": "7.2",
"id": "12345",
"clientId": "67890",
"firstName": "Sally",
"lastName": "Jones",
"email": "sally@email.com",
"homePhone": "3609483728",
"leadType": "Internet",
"leadStatus": "New",
"leadSource": "www.leadsource.com",
"date": "2017-01-10T15:19:21+00:00",
"repName": "John Doe",
"repId": "23254",
"repEmail": "john@dealershipname.com",
"bdcRepName": "Sheila Smith",
"bdcRepId": "20582",
"bdcRepEmail": "sheila@dealershipname.com",
"serviceRepName": "Billy Brown",
"serviceRepId": "20143",
"serviceRepEmail": "billy@dealershipname.com",
"year": "2019",
"make": "Volkswagen",
"model": "Atlas SEL",
"vin": "1N4AL2APXBC154449",
"appointmentStatus": "Scheduled",
"appointmentDate": "2017-01-10T15:19:21+00:00",
"optOut": false,
"smsOptOut": true,
"stopMessaging": false,
"skipToFollowup": true
}
```