

HubSpot Conversica Fields and Statuses

Review the information on the next pages to understand the different Conversica properties that will be updated as we receive, process, and message your Contacts. These property fields can be used for both reporting purposes and for increased visibility to your reps on a specific Contact in HubSpot.

Custom Properties for HubSpot Contacts

Display Name	Data Type	API Field Name	Data Example
Conversica Action Required	Check Box	conversica_action_required	true, false
Conversica Action Required Date	Date Picker	conversica_action_required_date	1553302909000
Conversica Conversation Stage	Single Line Text Box	conversica_conversation_stage	"Messaging"
Conversica Conversation Stage Date	Date Picker	conversica_conversation_stage_date	1553302909000
Conversica Conversation Status	Single Line Text Box	conversica_conversation_status	"Sent Message"
Conversica Conversation Status Date	Date Picker	conversica_conversation_status_date	1553302909000
Conversica Date Added	Date Picker	conversica_date_added	1553302909000
Conversica Discovered Email 1	Single Line Text Box	conversica_discovered_email_1	testemail@gmail.com
Conversica Discovered Email 2	Single Line Text Box	conversica_discovered_email_2	testemail@gmail.com
Conversica Discovered Name	Single Line Text Box	conversica_discovered_name	"John"
Conversica Do Not Contact	Check Box	conversica_do_not_contact	true, false
Conversica First Message Date	Date Picker	conversica_first_message_date	1553302909000
Conversica Found Phone Number	Single Line Text Box	conversica_found_phone_number	5555555555
Conversica Found Phone Number 2	Single Line Text Box	conversica_found_phone_number_2	5555555555
Conversica Further Action	Check Box	conversica_further_action	true, false
Conversica Further Action Date	Date Picker	conversica_further_action_date	1553302909000
Conversica History	Multi-Line Text Box	conversica_history	
Conversica Hot Lead	Check Box	conversica_hot_lead	true, false
Conversica Hot Lead Date	Date Picker	conversica_hot_lead_date	1553302909000
Conversica Last Message Date	Date Picker	conversica_last_message_date	1553302909000
Conversica Last Response Date	Date Picker	conversica_last_response_date	1553302909000
Conversica Lead At Risk	Check Box	conversica_lead_at_risk	true, false
Conversica Lead At Risk Date	Date Picker	conversica_lead_at_risk_date	1553302909000
Conversica Lead Profile	Single Line Text Box	conversica_lead_profile	https://my.conversica.com/lead/profile/
Conversica Lead Status	Single Line Text Box	conversica_lead_status	"None"
Conversica Lead Status Date	Date Picker	conversica_lead_status_date	1553302909000
Conversica SMS Opt Out	Check Box	conversica_sms_opt_out	true, false
Conversica Stop Messaging	Check Box	conversica_stop_messaging	true, false
Last Conversica Response	Multi-Line Text Box	conversica_last_response	"yes, it is"
Conversica Skip to Follow Up	Check Box	conversica_stop_messaging	true, false

Conversation Stage and Conversation Status Definitions

Below is a breakdown of our two fields that outline where the Contact is in messaging. These fields will help you understand if your Assistant is messaging the Contact, or why they are not—for example, if your Assistant completed a conversation with the Contact or if the Contact was excluded and not messaged.

Conversation Stage	Conversation Status	Definition
Preparing Lead	<ul style="list-style-type: none"> Preparing Lead 	Lead has been received by Conversica and has not been scheduled for first message.
	<ul style="list-style-type: none"> First Message Scheduled 	Lead has its first message scheduled, but not sent.
Messaging	<ul style="list-style-type: none"> Sent Message 	Lead has been sent at least one message and no response to the current series has been received.
	<ul style="list-style-type: none"> Out of Office 	Received out of office message. Lead will remain in this status until the next message is sent (based on date extracted).
	<ul style="list-style-type: none"> 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.
	<ul style="list-style-type: none"> Received Response 	System is reviewing response.
	<ul style="list-style-type: none"> Message Scheduled 	Next message is scheduled but not yet sent (typically due to worktimes). Status changes to Sent Message once the next message has been sent.
Excluded (Client requested Lead not be worked)	<ul style="list-style-type: none"> Excluded (Lead Source) 	Client requested specific Lead source not be worked.
	<ul style="list-style-type: none"> Excluded (Rep) 	Client requested specific rep's Leads not be worked.
	<ul style="list-style-type: none"> Excluded (Lead Status) 	Client requested specific Lead status not be worked.
	<ul style="list-style-type: none"> Excluded (Rule) 	Other reasons for exclusion (typically a client rule).
Unworkable	<ul style="list-style-type: none"> No Rep Assignment 	System is missing rep and no primary rep is set.
	<ul style="list-style-type: none"> 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 used 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.
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 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 system cannot continue messaging, but Lead did not request stop. Closely related to Review Response (formerly Action Required), but separate status.
	• Service Not Active	Service for Lead is not active. Lead has not been messaged.

Conversica Lead Status Definitions (New)

The Lead Status field will tell you the current state of the Lead, such as if they are ready to contact or if they need to be followed up with.

Value	Description
Hot Lead	Lead has expressed interest and is ready for contact. Use this field to run reports to see what Leads are currently Hot and ready for contact. A Lead will remain Hot until we follow-up and hear if they have any additional questions.
Lead to Review	Lead's reply needs to be reviewed to determine your rep's next action. Conversica will no longer message this Lead. Lead to Review could include Leads that have notified you of a better contact or that have asked a question the AI does not continue on.
Further Action	Lead responded that they have further questions or that they are waiting on actions from their assigned contact.
Satisfied (New)	Lead responded positively, indicating completion of the Conversation's objective.
Disqualified	Lead responded to the follow-up message, indicating they do not need help and have not met the Conversation's objective.
No Further Action	Lead responded positively to the follow-up message, indicating they no longer require assistance. Unclear if the Conversation's objective was met.

Conversica Lead Status Definitions (Old)

The following values are to be replaced with the new ones listed above. Existing values for previous leads will not be changed as a result of this transition.

Value	Description
Hot Lead	Lead has expressed interest and is ready for contact. Use this field to run reports to see what Leads are currently Hot and ready for contact. A Lead will remain Hot until we follow-up and hear if they have any additional questions.
Review Response	Lead's reply needs to be reviewed to determine your rep's next action. Conversica will no longer message this Lead. Review Response could include Leads that have notified you of a better contact or that have asked a question the AI does not continue on.
Lead at Risk	Lead has indicated they were not contacted after turning hot, and/or has additional questions they would like answered.
Satisfied	Lead has indicated they were contacted and have no open questions.