



CRM LIST INTEGRATION API

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1. Service Authentication

Xpressdocs' (XD) system will authenticate to CRM services via HTTP Basic Authentication over SSL. The CRM services provider needs to provide Xpressdocs' with appropriate username and password.

2. Service 1: Retrieve Contact List Name(s) from your CRM

This is a RESTful service that retrieves the contact list name(s) from your CRM for a given user. To accomplish this, Xpressdocs will POST a JSON-based request to a specified service URL to retrieve the names and IDs of the contact lists for the given user.

Note: The CRM services provider needs to provide Xpressdocs' with the service URL.

Contact List Name(s) Request JSON Schema

```
{
"<company_id>": "<Company ID>",
"<user_id>": "<User Email or User Link ID>"
}
```

Figure 1: Contact List Name(s) Request JSON Schema

Field	Description	Type (Max Size)	Required
Company ID	CRM Company Identifier	int(11)	Yes
User ID	CRM User Identifier (Can be configured by XD to be User Email or User's CRM identifier)	varchar(40)	Yes

Figure 2: Contact List Name(s) Response JSON Schema Details

Contact List Name(s) Response JSON Schema

```
{
"<CRM List Id>": "<CRM List Name>",
"<CRM List Id>": "<CRM List Name>",
"<CRM List Id>": "<CRM List Name>",
...
}
```

Figure 3: Contact List Name(s) Response JSON Schema

Field	Description	Type (Max Size)	Required
CRM List ID	CRM List Identifier	int(11)	Yes
CRM List Name	The Name of the List as it appears in the CRM	varchar(50)	Yes

Figure 4: Contact List Name(s) Response JSON Schema Details

3. Service 2: Retrieve Contacts from Contact List(s) in your CRM

This is a RESTful service that retrieves the contacts from a given contact list from your CRM for a given agent. To accomplish this, Xpressdocs will POST a JSON-based request to a specified service URL to retrieve the contacts for a given list for a given user.

Note: The CRM services provider needs to provide Xpressdocs' with the service URL.

Contact List Request JSON Schema

```
{
"<crm_company_id>": "<company id>",
"<crm_user_id>": "<user email or user link id>"
"<crm_list_id>": "<crm list id>"
}
```

Figure 5: Contact List Request JSON Schema

Field	Description	Type (Max Size)	Required
crm_company_id	CRM Company Identifier	int(11)	Yes
crm_user_id	CRM User Identifier (Can be configured by XD to be User Email or User's CRM identifier)	varchar(40)	Yes
crm_list_id	CRM List Identifier	int(11)	Yes

Figure 6: Contact List Request JSON Schema Details

Contact List Response JSON Schema

```
{
  "<crmcontactId1>": {
    "name": "<name>",
    "company": "<name2>",
    "address": "<address>",
    "address2": "<address2>",
    "city": "<city>",
    "state": "<abbr state>",
    "zip": "<postal code>"
  },
  "<crmcontactId2>": {
    "name": "<name>",
    "company": "<name2>",
    "address": "<address>",
    "address2": "<address2>",
    "city": "<city>",
    "state": "<abbr state>",
    "zip": "<postal code>"
  },
  ...
}
```

```
}

```

Figure 7: Contact List Name(s) Response JSON Schema Details

Field	Description	Type (Max Size)	Required
CRM Contact Id	CRM Contact Identifier	varchar(60)	Yes
Name	Contact name	varchar(50)	Yes
Company	Contact Company	varchar(50)	No
Address	Contact Address	varchar(50)	Yes
Address2	Contact Address2	varchar(50)	No
City	Contact City	varchar(50)	Yes
State	Contact State	varchar(2)	Yes
Zip	Contact Zip	varchar(12)	Yes

Figure 8: Contact List Name(s) Response JSON Schema Details

4. Service 3: Update Contacts after Validation

Once we have downloaded your contact list(s) and validated them, we offer the option to export the updated contact list data back to your CRM. To accomplish this, Xpressdocs will POST a JSON-based request to a specified service URL to send the contacts for a given list for a given user.

Contact List Export JSON Schema

```
{
  "<crm_user_id>" : "<crm user id>",
  "contacts": {
    "<crmcontactId1>": {
      "name": "<name>",
      "company": "<name2>",
      "address": "<address>",
      "address2": "<address2>",
      "city": "<city>",
      "state": "<abbr state>",
      "zip": "<postal code>",
      "plus4": "<plus 4>",
      "delivery_point": "<delivery point>",
      "check_digit": "<check digit>",
      "error_message": {
        "<ncoa/cass error message 1>",
        "<ncoa/cass error message 2>",
        "<ncoa/cass error message 3>"
      },
    },
    "<crmcontactId2>": {
      "name": "<name>",
      "company": "<name2>",
      "address": "<address>",
      "address2": "<address2>",
      "city": "<city>",
      "state": "<abbr state>",
      "zip": "<postal code>",
      "plus4": "<plus 4>",
      "delivery_point": "<delivery point>",
      "check_digit": "<check digit>",
      "error_messages": {
        "<ncoa/cass error message 1>",
        "<ncoa/cass error message 2>",
        "<ncoa/cass error message 3>"
      }
    },
    ...
  }
}
```

Figure 9: Contact List Export JSON Schema

Field	Description	Type(Max Size)	Required
CRM User ID	CRM User Identifier (Can be configured by XD to be User Email or User’s CRM identifier)	varchar(40)	Yes
CRM Contact ID	CRM Contact Identifier	varchar(40)	Yes
Name	Contact name	varchar(50)	Yes
Company	Contact Company	varchar(50)	No
Address	Contact Address	varchar(50)	Yes
Address2	Contact Address2	varchar(50)	No
City	Contact City	varchar(50)	Yes
State	Contact State	varchar(2)	Yes
Zip	Contact Zip	varchar(12)	Yes
Plus4	Contact Plus 4	varchar(4)	No
Delivery_Point	Contact Delivery Point	varchar(2)	No
Check_Digit	Contact Check Digit	varchar(1)	No
Error_Messages	CASS/NCOA Error Messages	text	No

Figure 10: Contact List Export JSON Schema Details

Contact List Export Response JSON Schema

```
{
"<contactId>",
"<status>"
}
```

Figure 11: Contact List Export JSON Schema

Field	Description	Type(Max Size)	Required
Contact ID	CRM Contact Identifier	varchar(40)	Yes
Status	“Success” or “Failed”	varchar(40)	Yes

Figure 12: Contact List Export JSON Schema Details