CRM LIST INTEGRATION API

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Contents

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. For proper integration of the CRM service, the CRM services provider needs to provide URL endpoints for service 1, service 2, and service 3 (if being implemented.)

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

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

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

Contact List Response JSON Schema

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

Figure 7: 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

Contact List Export Response JSON Schema

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

Figure 11: Contact List Export JSON Schema