

**webMethods CloudStreams Provider for SALESFLARE**

Version <IS version> | January 2022

Contents

[1 Document Change History 3](#_Toc92778028)

[2 What is webMethods CloudStreams Provider for Salesflare? 4](#_Toc92778029)

[3 Steps to create the connector connection 5](#_Toc92778030)

[4 webMethods CloudStreams Provider for Salesflare Connector 6](#_Toc92778031)

[4.1 Connector Details 6](#_Toc92778032)

[4.1.1 Supported Resources 6](#_Toc92778033)

[4.1.2 Usage Notes 6](#_Toc92778034)

# Document Change History

|  |  |
| --- | --- |
| **Document revision date** | **Summary of changes** |
| January 2022 | First release of this document. |

# What is webMethods CloudStreams Provider for Salesflare?

Salesflare is the smarter, modern-day CRM for small business. If you’re tired of manually entering customer data and spending time navigating a complex system, Salesflare will ease it. Learn more about what Salesflare does differently below.

Its very intuitive,automated and intelligent sales CRM. Its provides a very good insight dashboards inbuilt. Its provides integration with Zapier which enables complete automation.

# Steps to create the connector connection

* Create a custom action by clicking '+' for this connector.

Graphical user interface, text, application, email

Description automatically generated

* Create a connection by clicking '+' for this custom action.

A picture containing graphical user interface

Description automatically generated

· Enter below values.

o Account Name : Salesflare

o Server URL : https://api.salesflare.com/

o Authorization: The Bearer API Key needs to be given.

o Keep rest all values as default.

Graphical user interface, text, application, email

Description automatically generated

After creating connection, select the operation and click Next. Then Done.

# webMethods CloudStreams Provider for Salesflare Connector

## Connector Details

The connector details include:

* **SaaS Provider**: Salesflare
* **API Version**: 1.0
* **API Type**: REST
* **Developer**: Avudai Selvi
* **Group**: <SaaS group name>
* **CloudStreams Minimum Version Compatibility**: 10.11
* **Provider Package Name**: WmSalesflareProvider

### Supported Resources

List down resources supported by the provider:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Service: Salesflare** | | | | |
|  | **Name** | **Path** | **Method** | **Description** |
| 1 | Get account details | /accounts/:account\_id | GET |  |
| 2 | Update an account | /accounts/:account\_id | PUT |  |
| 3 | Delete an account | /accounts/:account\_id | DELETE |  |
| 4 | List an account's messages | /accounts/:account\_id/messages | GET |  |
| 5 | List accounts | /accounts | GET |  |
| 6 | Create an account | /accounts?update\_if\_exists=false | POST |  |
| 7 | Update an account's users | /accounts/:account\_id/users | POST |  |
| 8 | Update an account's users | /accounts/:account\_id/users | PUT |  |
| 9 | Update an account's contacts | /accounts/:account\_id/contacts | POST |  |
| 10 | Update an account's contacts | /accounts/:account\_id/contacts | PUT |  |
| 11 | Get contact details | /contacts/:contact\_id | GET |  |
| 12 | Update a contact | /contacts/:contact\_id?force=true | PUT |  |
| 13 | Delete a contact | /contacts/:contact\_id | DELETE |  |
| 14 | List contacts | /contacts | GET |  |
| 15 | Create a contact | /contacts | POST |  |
| 16 | List groups | /groups | GET |  |
| 17 | Get a group | /groups/:id | GET |  |
| 18 | Get current user's details | /me | GET |  |
| 19 | List current user's contacts | /me/contacts | GET |  |
| 20 | Get opportunity details | /opportunities/:id | GET |  |
| 21 | Update an opportunity | /opportunities/:id | PUT |  |
| 22 | Delete an opportunity | /opportunities/:id | DELETE |  |
| 23 | List opportunities | /opportunities | GET |  |
| 24 | Create an opportunity | /opportunities | POST |  |
| 25 | List stages | /stages | GET |  |
| 26 | Get stage details | /stages/:stage\_id | GET |  |
| 27 | List tags | /tags | GET |  |
| 28 | Get tag details | /tags/:tag\_id | GET |  |
| 29 | Update a task | /tasks/:id | PUT |  |
| 30 | Delete a task | /tasks/:id | DELETE |  |
| 31 | List tasks | /tasks?id=<number>&id=<number>&search=<string>&assignees=<number>&assignees=<number>&type=<number>&type=<number>&account=<number>&account=<number>&order\_by=<string>&order\_by=<string>&limit=<number>&offset=<number>&q=<string> | GET |  |
| 32 | Create a task | /tasks | POST |  |
| 33 | List users | /users?id=<string>&name=<string>&email=<string>&search=<string>&limit=<number>&offset=<number>&order\_by=<string>&order\_by=<string>&onlyEnabled=<boolean> | GET |  |
| 34 | Get user details | /users/:id | GET |  |
| 35 | Get workflow details | /workflows/:id | GET |  |
| 36 | Update a workflow | /workflows/:id | PUT |  |
| 37 | Exit an entity from a workflow | /workflows/:id/audience/:record\_id | PUT |  |
| 38 | List workflows | /workflows | GET |  |
| 39 | Create a workflow | /workflows | POST |  |
| 40 | Get custom field details | /customfields/:itemClass/:id | GET |  |
| 41 | Update a custom field | /customfields/:itemClass/:id | PUT |  |
| 42 | Delete a custom field | /customfields/:itemClass/:id | DELETE |  |
| 43 | List custom fields of a type | /customfields/:itemClass | GET |  |
| 44 | Create a custom field of a type | /customfields/:itemClass | POST |  |
| 45 | List a custom field's options | /customfields/:itemClass/:customFieldName/options | GET |  |
| 46 | List custom field types | /customfields/types | GET |  |
| 47 | List email data sources | /datasources/email | GET |  |
| 48 | Update an email data source | /datasources/email/:id | PUT |  |
| 49 | Get meeting details | /meetings/:meeting\_id | GET |  |
| 50 | Update a meeting | /meetings/:meeting\_id | PUT |  |
| 51 | Delete a meeting | /meetings/:meeting\_id | DELETE |  |
| 52 | Create a meeting | /meetings | POST |  |
| 53 | Create a call | /calls | POST |  |
| 54 | Update a call | /calls/:meeting\_id | PUT |  |
| 55 | Update an internal note | /messages/:message\_id | PUT |  |
| 56 | Delete an internal note | /messages/:message\_id | DELETE |  |
| 57 | Create an internal note | /messages | POST |  |
| 58 | List supported currencies | /currencies | GET |  |
| 59 | List persons | /persons?id=<number>&name=<string>&email=<string>&search=<string> | GET |  |
| 60 | List pipelines | /pipelines?search=<string>&order\_by=<string>&q=<string> | GET |  |
| 61 | Get a workflow's merge fields | /campaigns/mergefields | GET |  |
| 62 | Get meeting details by conference id | /conferences/:conference\_id | GET |  |
| 63 | List filter fields for an entity | /filterfields/:entity?pipeline=<number>&includePipelineSpecificPredefinedFilterFields=true | GET |  |

### Usage Notes

Any special notes