Opportunity Object

When you create a Salesforce opportunity with a contact role that's associated with a Account Engagement prospect, we create a read-only opportunity in Account Engagement. To use Account Engagement opportunities, first set up the Account Engagement-Salesforce connector. Learn more about opportunities in Salesforce Help.

Include the authentication header with every request. For information on how to authenticate, see Authentication.

Resource Name	Operation	Description
Opportunity Create	POST	Create an opportunity record. Available only in legacy accounts without a CRM connector.
Opportunity Delete	DELETE	Delete an opportunity. Available only in legacy accounts without a CRM connector.
Opportunity Read	GET	Request information for a single opportunity.
Opportunity Query	GET	Request information for the opportunities that match the specified criteria.
Opportunity Update	POST	Update an opportunity's information. Available only in legacy accounts without a CRM connector.
Opportunity Undelete	GET and POST	Restore a deleted opportunity. Available only in legacy accounts without a CRM connector.

Create an opportunity with the specified fields. Include either the prospect's email or the prospect's ID.

Replace `<prospect_email>` with the prospect's email address.

Replace `<prospect_id>` with the prospect's Account Engagement ID.

You can use the following parameters when creating an opportunity.

Parameter	Type	Possible Values	Description
name	string	Any string	The name of the opportunity.
value	integer	Any integer	The opportunity's value.
probability	integer	Any integer from 0 through 100	The probability of winning the opportunity.
prospect_email	string	The prospect's email address.	If you're creating the opportunity by prospect ID, you can also include the prospect's email address. If both `prospect_email` and `prospect_id` are specified, both must correspond to the same prospect. Otherwise, the API will return an error.
prospect_id	integer	Any valid prospect ID.	If you're creating the opportunity by prospect email, you can also include the prospect's ID. If both `prospect_email` and `prospect_id` are specified, both must correspond to the same prospect. Otherwise, the API will return an error.

Use a prospect's email address to create an opportunity with the name "Large Customer Opportunity", a value of 100, a probability of 70%. The prospect's email address is jdoe@company.com.

Delete the specified opportunity. This request doesn't delete the visitor activities or score changes for the prospect who is associated with the opportunity.

If this request is successful, it doesn't return a response.

Replace `<ID>` with the Account Engagement ID of the opportunity.

Delete the opportunity with Account Engagement ID 1234.

Request information for a single opportunity.

Replace `<ID>` with the Account Engagement ID of the opportunity.

Request information for the opportunity with Account Engagement ID 1234.

Request information about the opportunities that match the specified criteria. You can specify which opportunities and which fields to request. A maximum of 200 opportunities are returned, unless you specify the output as mobile. If you specify the output as mobile, then all opportunities are returned.

Note: To request information about a specific opportunity, use Opportunity Read.

Use these parameters to specify which opportunities are returned. Parameters can be used in any combination and in any order unless otherwise specified.

Notes:

Parameters must be URL-encoded.

Dates and times must use GNU Date Input Syntax (yyyy-mm-dd:hh:ss).

For a full listing of opportunity fields see Object Field References.

Parameter	Type	Possible Values	Description
`created_after`	`string`	`today`, `yesterday`, `last_7_days`, `this_month`, `last_month`, `<custom_time>`	Request opportunities created after the specified date and time. **Example:** To request forms created in 20 use `/api/opportunities/version/3/do/quer` `created_after=2019-12-31 24:59:59.`
`created_before`	`string`	`today`, `yesterday`, `last_7_days`, `this_month`, `last_month`, `<custom_time>`	Request opportunities created before the specified date and time. Doesn't include opportunities create the specified time. `<custom_time>` **Example**: to request opportunities created before today (but not created today), use `/api/opportunity/version/3/do/query` `created_before=today.`
`id_greater_than`	`integer`	Any positive integer	Request opportunities that have an Account Engagement ID greater than the specified number.
`id_less_than`	`integer`	Any positive integer	Request opportunities that have an Account Engagement ID less than the specified number.
`probability_greater_than`	`integer`	Any integer from 1 through 100	Request opportunities that have a probability greate than the specified number.
`probability_less_than`	`integer`	Any integer from 1 through 100	Request opportunities that have a probability less th the specified number.
`prospect_email`	`string`	Any valid prospect email	Request opportunities associated with the prospect having the specified email. **Note:** If you specify a prospect's email *and* a prospect's ID, ensure the er and ID belong to the same prospect. Otherwise, the request returns an error.
`prospect_id`	`integer`	Any valid prospect ID	Request opportunities associated with the prospect having the specified ID. **Note:** If you specify a prospect's email *and* a prospect's ID, ensure the er and ID belong to the same prospect. Otherwise, the request returns an error.
`value_greater_than`	`integer`	Any integer	Request opportunities that have a value greater than the specified number.
`value_less_than`	`integer`	Any integer	Request opportunities that have a value less than th specified number.

Use these parameters to specify which opportunity fields are returned, and how the opportunities are sorted.

Parameter	Type	Possible Values	Description
limit	integer	Any integer from 1 through 200.	The number of opportunities to return. Default value is 200.
offset	integer	Any positive integer	The number of opportunities to omit from the response (the number to "skip over"). **Example:** Retrieve a list of opportunities, omitting the 50 most recently updated opportunities. Sort the query by the `probability` field and use offset=50: `/api/opportunity/version/3/do/query?` `offset=50&sort_by=probability`
output	string	simple, mobile, full	Specify the level of detail in the XML response. For more information, see XML Response Format.
sort_by	string	created_at, id, probability, value	The field by which the results are sorted. See Sort Order.
sort_order	string	ascending, descending	The sort order. The default value depends on which `sort_by` value you specify. See Sort Order.

Use `sort_by` to specify which field Account Engagement uses to sort the results. Different fields have different default sort orders.

Value	Default Sort Order	Description
created_at	descending	Sort the results by the opportunities' `created_at` timestamps.
id	ascending	Sort the results by the opportunities' `id` fields.
probability	descending	Sort the results by the opportunities' `probability` fields.
value	descending	Sort the results by the opportunities' `value` fields.

Request a list of opportunities, sorted in ascending order by probability.

Restores the specified opportunity, which has been deleted. If this request is successful, it doesn't return a response.

Replace `<ID>` with the Account Engagement ID of the opportunity.

Restore the opportunity with Account Engagement ID 1234.

Update an opportunity's information. Fields that aren't specified in the request aren't changed. To clear a field, use a null value.

Replace `<ID>` with the Account Engagement ID of the opportunity.

You can use any editable opportunity field as a parameter. For a list of opportunity fields, see Object Field References.

To update an opportunity's name to "Large Opportunity", use the following command:

The XML response for a query request contains information about multiple opportunities. The XML response for a read request contains information about a single opportunity.

Tag	Description
`<result>`	Parent tag. Contains the opportunities that match the parameters specified in your query.
`<total_results>`	The number of opportunities selected by the query. **Note:** The query request returns a maximum of 200 opportunities. If your query matches more than 200 opportunities, you can make several requests to retrieve all matching records.
`<opportunity>`	The information for a single opportunity. For information about opportunity fields, see Opportunity.

For output=full:

For output=simple:

For output=mobile:

Tag	Description
`<opportunity>`	The information for a single opportunity. For information about opportunity fields, see Opportunity.
`<campaign>`	The Account Engagement ID and name of the campaign to which this opportunity has been assigned.
`<prospects>`	Contains all prospects associated with this opportunity.
`<opportunity_activities>`	Contains all visitor activities associated with this opportunity.
`<visitor_activity>`	Contains information for a visitor activity. For information about visitor activity fields, see Visitor Activity.