Enerflo Leads API

Allows integration partners to push leads into enerflo on behalf of enerflo clients and supports enerflo redirect functionality when performed in a browser.

Authentication

An api key is granted for each enerflo customer that can be used either as a query parameter or a header element. In addition, the endpoint contains a partner name that tells enerflo which integration partner to associate the lead to.

Type	Parameter name	Value
header key	api-key	11595ee3c3ad592e52.31523696
query parameter	api_key	11595ee3c3ad592e52.31523696

Supported Methods

GET : Parameters sent as query parameters and allows for redirects over a browser. Note, the user must be logged into Enerflo for the redirect to work properly.

POST: Parameters must be sent in a raw JSON body, inside a "lead" object.

Endpoint
The same endpoint should be used for adding all leads:
https://enerflo.io/api/v1/partner/action/lead/add

Properties

The following properties can be added in a request for a Lead

Parameter Name	Description	Required	Format
integration_record_id	The name of the local id from the integration partner	Yes	string
first_name	First name of the lead	No	string
last_name	Last name of the lead	No	string
full_name	Full name of the lead. Enerflo will split the name into first and last name.	No	string
fullAddress	Full address of the lead. Enerflo geocodes all addresses and will store broken out address.	Yes, when no other address params are sent.	string
address	House number and street name of lead	Yes, when fullAddress isn't supplied	string

city	The city of the lead	Yes, when full address isn't supplied	string
state	The 2-character state representation	Yes, when full address isn't supplied	string
zip	The 5 digit postal code	Yes, when full address and city are missing	numeric
email	The email address of the lead, used for email notifications and messaging	No	string
mobile	The mobile phone number of the lead, used for SMS notifications and messaging	No	numeric (no country codes or dashes)
creator	The email of the creator of the lead. Enerflo will attempt to find matching user_id	No	string
assign_to_email	The email of the currently assigned sales rep to the lead. If not supplied, no sales reps will be assigned.	No	string
setter_email	The email of the user in enerflo that should be assigned as the setter of the lead.	No	string
lead_status	An initial lead status. Does not need to match an company-specific enerflo lead status	No	string
browser_redirect	"profile" will redirect the user to the new leads profile page. "scheduling" will redirect the user to schedule an apt based on the "calendar" or "calendar_id" field. "deal" will redirect them to the created deal.	No	string
calendar	The slug name of the calendar if the browser_redirect parameter is set to "scheduling". Example: solar_consultation	No	string
calendar_id	The appointment type number if the browser_redirect parameter is set to "scheduling".	No	integer
createDeal	The internal id of a deal template if a deal should be automatically created when the deal is created.	No	integer
office_name	The name of the sales territory to assign the lead to. If not supplied, enerflo will automatically assign the lead to the office closest based on geography.	No	string
add_note	Will automatically add a note to the created customer	No	string
ignore_validation	If added, we will not validate any data nor require an address	No	boolean (1/0)

The following properties can be added in a request for survey data

Parameter Name	Description	Required	Format
survey_data	Data to be added to a survey (when passing createDeal in the lead)	No	object
survey_data.files	A list of files to be attached to the survey	No	Array of

			objects
survey_data.files[].name	The file name of the file to be added to the survey	Yes	string
survey_data.files[].data	The image data (must be base64 encoded)	Yes	Base64 encoded image
survey_data.files[].type	The survey question type that this file belongs to	Yes	string

The following properties can be added in a request for an appointment

Parameter Name	Description	Required	Format
appointment	Creates an appointment on the target customer	No	object
appointment.apt_type_id	The Enerflo ID of the apt template you are creating	Yes	integer
appointment.date_time	A string containing the date time of the apt	Yes	string
appointment.date_format	If you are passing a unix string, this should be set to "U":	No	string: "U"
appointment.assigned_user	The email address of the user that should be assigned to the apt. If blank, the assigned sales rep will be used.	No	string
appointment.name	The name of the apt that will show up in enerflo	Yes	string
appointment.minutes	The length of the appointment, in minutes	No (defaults to 60)	integer

Example requests:

For "createDeal" you will use the following ID's based on deal type:
- **1Up Solar - Advanced Deal Type : 5686**
- **1Up Solar - Aurora API : 5569**
- **1Up Solar - HelioQuote Deal : 5611**
- **1UP Solar - SOLO Deal : 5571**

For "appointment_type_id" go here to see the ID:
- **https://enerflo.io/company/settings/apt-types**

GET
Endpoint:
https://enerflo.io/api/v1/partner/action/lead/add?integration_record_id=yj3Shbi2&full_name=Ferris+Bueller&fullAddress=2214+N+Honeydew+Dr+Saratoga+Springs,+UT+84045&email=custy@enerflo.io&mobile=8015554444&office_name=Utah+Office&creator=api@enerf

lo.io&assign_to_email=api@enerflo.io&lead_status=Needs+Contact&createDeal=101
2

POST
Endpoint: https://enerflo.io/api/v1/partner/action/lead/add
Request Body:

```
{
  "lead" : {
    "integration_record_id": "yj3Shbi2",
    "full_name": "Ferris Bueller",
    "address": "2214 N Honeydew Dr",
    "city": "Saratoga Springs",
    "state": "UT",
    "zip": "92646",
    "email": "custy@enerflo.io",
    "mobile": "8015554444",
    "office_name": "Utah Office",
    "creator": "api@enerflo.io",
    "assign_to_email":"api@enerflo.io",
    "lead_status" : "Needs Contact",
    "createDeal" : [see above]
  },
  "survey_data": {
    "files": [
      {
        "name": "image_name.jpg",
        "data": "data:image/jpeg;base64,/9j/4AAQSkZJRgABAQEASABIAAD/4R...",
        "type": "img_exterior_house"
      }
    ]
  },
  "appointment" : {
    "appointment_type_id" : [ask Enerflo],
    "date_time" : "2020-03-12 21:59:14",
    "timezone" : "utc",
    "name" : "Solar Consultation",
    "Minutes" : 60
  }
}
```


Example responses

```
Code: 200
{
```

```json
    "result": "success",
    "data": {
        "msg": "Lead Created",
        "lead": {
            "id": 55555,
            "company_id": 1089,
            "office_id": 1000,
            "creator_id": 456,
            "agent_id": 314,
            "first_name": "Ferris",
            "last_name": "Bueller",
            "email": "custy@enerflo.io",
            "mobile": "8015554444",
            "address": "2214 N Honeydew Dr",
            "city": "Saratoga Springs",
            "state": "UT",
            "zip": "84045",
            "lat": "46.60165100",
            "lng": "-120.49035650",
            "timezone": "America/Los_Angeles",
            "details": "",
            "external_id": null,
            "lead_source": "Facebook",
            "meta_data": null,
            "created_at": "2019-12-07 05:42:33",
            "updated_at": "2020-01-11 00:12:38"
        }
    }
}
```

Additional Notes

All responses will be in 2XX range with descriptive information whether the lead was created or couldn't save.

If any duplicates are detected, ie integration_record_id already exists for that company, then the lead will be updated with the latest information.

If the creator or lead owner aren't found, their assignment will simply be NULL.