

**webMethods CloudStreams Provider for AGILE CRM**

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# Document Change History

|  |  |
| --- | --- |
| **Document revision date** | **Summary of changes** |
| 30 January 2022 | First release of this document. |

# What is webMethods CloudStreams Provider for AgileCRM?

AgileCRM is a way to manage a company's interaction with its customers and prospects. This CRM allows you to analyze data about your contacts to improve business relationships, and specifically to keep them happy over the long term to ensure customer retention and drive sales growth. Agile CRM software was designed to automate customer relationship management, sales, marketing, and service. It allows you to streamline the storage and management of all your prospects and customers’ data. You can also leverage it for email marketing, lead scoring, lead generation and nurturing, social media monitoring, online appointment scheduling, receiving and processing customer support tickets, and tracking all of your efforts to gain insight into what’s working and what’s not. Agile CRM delivers all these solutions on a single platform. Everyone in your system—sales reps, marketers, customer support reps—has access to all the data from their colleagues, all contained on a single page with a 360-degree view. Everyone shares the same insight, from one source of data truth.

AgileCRM also provides all its major functionalities in the form of various API like REST API, Python API, Javascript API, etc. Using WM v10.11 CloudStreams we are leveraging the AgileCRM REST API to build a SaaS connector that can be used in any SAG Cloud Teanant.

# Steps to create the connector connection

Below are the steps followed to create connector application.

1. Login to SAG cloud tenant – [wmioconnectorsdev](https://idm-az-us.softwareag.cloud/auth/realms/wmioconnectorsdev/protocol/openid-connect/auth?response_type=code&client_id=webmethodsioint&redirect_uri=https%3A%2F%2Fwmioconnectorsdev.int-az-us.webmethods.io%2Fintegration%2Fsagcloud%2F&state=f5378379-d57d-43df-88e6-a1ce9f8075c0&login=true&scope=openid) and navigate to projects - ***TeamZ***
2. Click on “Connectors” tab and choose “AgileCRM” connector from the list of connectors available.
3. Now please provide the below details to create a new AgileCRM account.

Account Name : <<choose your desired friendly name>> Eg: AgileCRM\_1

Server URL: <https://softwareag.agilecrm.com/dev/api>

Username/Password: ragadeepika.reddy@softwareag.com/at3ed6cqomhakjok3tt4pilmgl

NOTE: Password is the API Key of that user. Rest all fields are either auto populated or can be left blank.

1. Click “Save”.

# webMethods CloudStreams Provider for <SaaS name> Connector

## Connector Details

The connector details include:

* **SaaS Provider**: AgileCRM
* **API Version**: NA
* **API Type**: REST
* **Developer**: Raga Deepika & Kartik Medavarapu
* **Group**: NA
* **CloudStreams Minimum Version Compatibility**: IS v10.11
* **Provider Package Name**: AgileCRMRESTProvider

### Supported Resources

List down resources supported by the provider:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Service: Bundle** | | | | |
|  | **Name** | **Path**  **https://softwareag.agilecrm.com/dev/api/** | **Method** | **Description** |
| 1 | contacts | /contacts | GET | returns list of contacts in domain which are ordered by creation time. |
| 2 | filterTasks | /tasks/based | get the list of tasks based on given filters |
| 3 | getContactById | /contacts/{id} | Returns contact object which is associated with given id |
| 4 | getDealById | /opportunity/{id} | Gets the deal with the given ID |
| 5 | getDealsByMilestone | /opportunity/byMilestone | Fetches list of deals from the default track grouped by milestones. |
| 6 | listDeals | /opportunity | Returns list of all "Deals" in the domain in JSON format, which are ordered by created time. Paging can be applied using the page\_size and cursor query parameters. Count of the deals will be in the first deal and the cursor for the next page will be in the last deal of the list. If there is no cursor, it means that it is the end of the list. |
| 7 | listTasks | /tasks | Creates a new task |
| 8 | searchContactByEmail | /contacts/search/email/{email} | Returns contact object which is associated with given email |
| 9 | updateContact | /contacts/edit-properties | PUT | We can update required property fields of the company using this call. It is used to add the new property or update the existing property. |
| 10 | updateContactLeadScore | /contacts/edit/lead-score | We can update lead score of a contact using this call. It accepts lead score and contact id of contact with valid parameter. We need to send the Contact-Id of the contact to identify it. This will not affect other fields. |
| 11 | updateContactStarValue | /contacts/edit/add-star | We can update star value of a contact using this call. It accepts star value and contact id of contact with valid parameter. We need to send the Contact-Id of the contact to identify it. This will not affect other fields. |
| 12 | updateDeal | /opportunity/partial-update | We can update deal using this call. It accepts Deal JSON. Id parameter of the deal should be specified. It indicates the deal to be updated with the new data sent. |
| 13 | updateTask | /tasks/partial-update | We can update task using this call. It accepts task JSON. Id parameter of the task should be specified. This will not affect other fields. |
| 14 | createContact | /contacts | POST | * Accepts company JSON as post data along with the credentials of domain User (User name and API Key). * Each field is case sensitive. * Please don't pass null value. * If you don't know value of field then either don't pass that field or pass empty data to a field. |
| 15 | createDeal | /opportunity | Returns list of all "Deals" in the domain in JSON format, which are ordered by created time. Paging can be applied using the page\_size and cursor query parameters. Count of the deals will be in the first deal and the cursor for the next page will be in the last deal of the list. If there is no cursor, it means that it is the end of the list. |
| 16 | createEvent | /events | Fetches the list of events happened in particular time. The start time and end time have to be sent in epoch format as query parameters. |
| 17 | createTask | /tasks | - Creates a new task.  - Acceptable value for below field :  progress (0 to 100), is\_complete (true or false), type (CALL, EMAIL, FOLLOW\_UP, MEETING, MILESTONE, SEND, TWEET, OTHER),  priority\_type (HIGH, NORMAL, LOW), status (YET\_TO\_START, IN\_PROGRESS, COMPLETED) |
| 18 | listCompanies | /contacts/companies/list | Fetches list of companies. Page\_size,global\_sort\_key and cursor should be sent as a form parameter (Content-Type: application/x-www-form-urlencoded ).Paging can be applied using the page\_size and cursor form parameters. Cursor for the next page will be in the last company of the list. If there is no cursor, it means that it is the end of list. |
| 19 | createNotes | /notes | Creates a note and relates it to contacts, which are sent in the note JSON contact field. |
| 20 | deleteContact | /contacts/{id} | DELETE | Returns contact object which is associated with given id |
| 21 | deleteDeal | /opportunity/{id} | Deletes the deal based on the id specified in the url. |

### Usage Notes

AgileCRMTest package can be used to test in local Integration Server by creating a connection in Cloudstreams Provider.