

# Voyager Senior Housing Prospect Lead Referral *Interface Specifications*



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## Documentation and Online Help

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# Prospect Lead Referral Interface Specifications

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This document specifies the requirements for the Senior Housing Prospect Lead Referral Interface. This interface can be used by third-party vendors to send prospect leads data into a Yardi Senior Living database.

## Interface Overview

The Senior Housing Prospect Lead Referral Interface is a Web service that uses SOAP messages conveyed over HTTPS. This Web service is available to Yardi Senior Living clients in their installation of the Voyager Senior Housing application. The URL and login information is different for every client, but the Web service message format is the same.



When sending prospect information to multiple Yardi Senior Living clients, ensure that clients have been mapped to the appropriate URL and login before sending the request.

## Web Methods

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The GuestCardSenior.asmx Web service has two methods: **Ping** and **ImportGuest**.

## Ping

The **Ping** Web method checks for connectivity and verifies that login credentials are valid.

### Message Request Format

The Ping message request requires the following five parameters:

Name	Description	Type
DbUserName	User Name	String
DbPassword	Password	String
DbName	Database Name	String
Server	Server Name	String
Platform	SQL Server	String

## ImportGuest

The **ImportGuest** Web method imports a new prospect record in to the system. The **ImportGuest** Web method requires a valid login and XML in the following format.

### Message Request Format

The **ImportGuest** message request requires the following six parameters:

Name	Description	Type
DbUserName	User Name	String
DbPassword	Password	String
DbName	Database Name	String
Server	Server Name	String
Platform	SQL Server	String
XmlDoc	XML document containing prospect information. See "XML Document Specification" on page 3.	String

## XML Document Specification

Note the required elements.

Data Element	Description	Type	Required	Comments
<b>SourceName</b>	Source Name	String(50)	<b>Yes</b>	Name of the Source configured in the client's Yardi database that represents your company.
<b>SecondarySourceName</b>	Secondary Source Name	String(50)	No	This value should be a valid Source configured in the client's Yardi database.
<b>ExtReference</b>	External Reference	String(20)	<b>Yes</b>	Unique identifier in your system. Each message should have its own unique ExtReference. If a message is received that has the same ExtReference as an existing record, that message will be rejected.
<b>ContactExtReference</b>	Contact External Reference	String(250)	<b>No</b>	Unique identifier in your system for the primary contact if they are not the actual prospect. This value should not match the ExtReference. If a message is received that has the same ContactExtReference as an existing record, that message will be rejected.
<b>PropertyCode</b>	Property Code	String(8)	<b>Yes</b>	This is the Yardi property code of the Community in which the Prospect is primarily interested. Every property in a client's Yardi database will have a unique alphanumeric code no longer than 8 characters.
<b>OtherCommunities</b>	Other Communities	String(500)	No	These are Yardi property codes representing a prospect's non-Primary Communities. Each property code is at most 8 characters and is separated by a caret (^) character.
<b>FirstName</b>	First Name	String(50)	<b>Yes</b>	Primary contact's name.
<b>MiddleInital</b>	Middle Initial	String(2)	No	
<b>LastName</b>	Last Name	String(100)	<b>Yes</b>	
<b>Gender</b>	Gender	String(50)	<b>Yes</b>	
<b>Salutation</b>	Salutation	String(50)	No	

Data Element	Description	Type	Required	Comments
<b>Address1</b>	Address Line 1	String(50)	No	Either a valid mailing address, phone number, or email address is required. If none of these three are provided, the prospect will not be imported.
<b>Address2</b>	Address Line 2	String(50)	No	
<b>Address3</b>	Address Line 3	String(50)	No	
<b>OfficePhone</b>	Phone - Office	String(14)	No	
<b>HomePhone</b>	Phone - Home	String(14)	No	
<b>CellPhone</b>	Phone - Cell	String(14)	No	
<b>Email</b>	Email Address	String(60)	No	
<b>City</b>	City	String(40)	No	
<b>State</b>	State/Province Code	String(2)	No	
<b>Zip</b>	Zip/Postal Code	String(10)	No	
<b>Country</b>	Country	String(8)	No	
<b>Fax</b>	Phone - Fax	String(14)	No	
<b>OKToMail</b>	OK To Mail	Boolean	No	For any of these OK To fields, the value 1 represents True, and 0 represents False. Blank values will be defaulted based on System Options.
<b>OKToMassMail</b>	OK To Mass Mail	Boolean	No	
<b>OKToEmail</b>	OK To Email	Boolean	No	
<b>CallStatus</b>	Call Status	String(16)	No	<p>Must be of one of the following:</p> <ul style="list-style-type: none"> <li>• OK to Call</li> <li>• Not OK to Call</li> <li>• As Per DNC Rules</li> </ul>
<b>PreferredMethodOfContact</b>	Preferred method of contact	String(50)	No	Must be one of the following: All, None, Call, Text, Email
<b>Relationship</b>	Primary contact's relation to the prospect, for example, brother, daughter, etc.	String(50)	No	If the primary contact is the actual prospect, then the Relationship value should be Self. Also, if no valid relationship is provided, then the value will default to Self.

Data Element	Description	Type	Required	Comments
<b>ProspectFirstName</b>	Prospect First Name	String(50)	No	<p>If the primary contact is someone other than the actual prospect, then provide the prospect's name information here. If the primary contact is the actual prospect (as defined through a Relationship value of Self), then these 3 prospect name fields will be ignored.</p> <p>In the event that the Relationship value is something other than Self but these prospect name fields are left blank, then a prospect record will be created with first name *None and last name the same as the primary contact's last name.</p>
<b>ProspectMiddleInitial</b>	Prospect Middle Initial	String(2)	No	
<b>ProspectLastName</b>	Prospect Last Name	String(100)	No	
<b>DOB</b>	Date of Birth	Date	No	Prospect's date of birth (mm/dd/yyyy format).
<b>CurrentResidence</b>	Current Residence	String(50)	No	Must be a valid current residence set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>PrefMoveInDate</b>	Expected Move In Date	Date	No	The expected or preferred move in date (mm/dd/yyyy format).
<b>PreferredBedrooms</b>	Number of Bedrooms	Integer	No	Number of bedrooms preferred.
<b>ScheduleTour</b>	Schedule a visit	Boolean	No	If the value is 1, a tour activity will be scheduled. If the value is 0 or blank, no tour activity will be scheduled.
<b>ScheduleTourDate</b>	Date for Tour	Date	No	If ScheduleTour has a value of 1, then a tour activity will be created for the prospect with the date specified in this field. If no date is specified, then the tour activity will be scheduled for the current date.
<b>ScheduleTourTime</b>	Schedule Tour Time	Time	No	If ScheduleTour has a value of 1, then a tour activity will be created for the prospect with the time specified in this field.
<b>Agent</b>	Sales Counselor	String(40)	No	Name of the sales counselor/agent who should be assigned to this prospect.
<b>LeadStatus</b>	Lead Status	String(200)	No	The value in this field must be a valid lead status that is set up in the client's Yardi database.
<b>InitialActivityType</b>	Type of Initial Activity	String(50)	No	If an initial activity will be created for this prospect, this field determines the type of activity. The values in this field must be the same as the activity type values in the Initial Contact category configured in the client's Yardi database.

Data Element	Description	Type	Required	Comments
<b>Notes</b>	Notes	String(6800)	No	General information about the prospect. This information will appear in the <b>Notes</b> field on the Prospect record.
<b>CareLevel</b>	Care Level	String(50)	No	The values in this field must be the same as the care level values that are set up in the client's Yardi database.
<b>Motivations</b>	Motivations	String(400)	No	Must be a valid motivations set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>Values</b>	Values	String(400)	No	Must be a valid values set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>FearsConcerns</b>	Fears and/or concerns	String(400)	No	Must be a valid fears/concerns set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>CurrentChallenges</b>	Current challenges	String(400)	No	Must be a valid current challenges set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>Interests</b>	Interests	String(400)	No	Must be a valid interests set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>CareNeeds</b>	Care Needs	String(400)	No	Must be a valid care needs set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>ResearchConducted</b>	Research Conducted	String(400)	No	Must be a valid research conducted set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>DesiredRent</b>	Desired Rent	String(50)	No	
<b>FinancialSituation</b>	Financial Situation	String(400)	No	Must be a valid financial situation set up in the client's Yardi Database. Can be multiple items separated by a caret (^) character.
<b>UpdateFlag</b>	Update Flag	Boolean	No	If the value is 1, prospects with duplicate external reference IDs are updated.  If the value is 0, prospects with duplicate external reference IDs are rejected.



Data Element	Description	Type	Required	Comments
UserDefinedLabel1	User Defined Label1	String(50)	No	These six user-defined fields can be used to send additional custom data that is not included in the standard XML fields. The label values (for example, UserDefinedLabel1) can be used to describe the custom data being sent, and the user-field values (for example, UserField01) contain the actual data that corresponds to each label.
UserField01	User Defined Field1	String(50)	No	
UserDefinedLabel2	User Defined Label2	String(50)	No	
UserField02	User Defined Field2	String(50)	No	
UserDefinedLabel3	User Defined Label3	String(50)	No	
UserField03	User Defined Field3	String(50)	No	
UserDefinedLabel4	User Defined Label4	String(50)	No	
UserField04	User Defined Field4	String(50)	No	
UserDefinedLabel5	User Defined Label5	String(50)	No	
UserField05	User Defined Field5	String(50)	No	
UserDefinedLabel6	User Defined Label6	String(50)	No	
UserField06	User Defined Field6	String(50)	No	

## Sample XML Document

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <ImportGuest xmlns="YSI.Portal.SeniorHousing.WebServices">
      <DbUserName>example</DbUserName>
      <DbPassword>example</DbPassword>
      <DbName>example</DbName>
      <Server>example</Server>
      <Platform>SQL Server</Platform>
      <XmlDoc>
        <Leads xmlns="">
          <Lead>
            <SourceName>Community Website</SourceName>
            <ExtReference>1-1</ExtReference>
            <PropertyCode>a10</PropertyCode>
            <FirstName>LeadTest1</FirstName>
            <LastName>Tews</LastName>
            <CellPhone>8051233333</CellPhone>
            <Email>test@test.com</Email>
            <InitialActivityType>Community Website</InitialActivityType>
            <Notes>Request more information</Notes>
            <UserDefinedLabel1>Source/Medium</UserDefinedLabel1>
            <UserField01>Paid</UserField01>
            <UserDefinedLabel2>Campaign</UserDefinedLabel2>
            <UserField02>Branded</UserField02>
          </Lead>
        </Leads>
      </XmlDoc>
    </ImportGuest>
  </soap:Body>
</soap:Envelope>
```

## XML Result Messages

Result Message	Message Description
Contact External Reference ID cannot be the same as the External Reference ID.	The contact external reference identification number cannot be the same as the external reference identification number.
Contact External Reference ID exists in the database. Duplicate contact records cannot be created.	The contact external reference identification number in the interface file already exists in the client's Yardi database.
Either a valid address, phone or email address is required.	Contact information for the primary contact is missing in the interface file.
External Reference ID exists in the database. An activity has been added to the existing record.	The external reference identification number in the interface file already exists in the client's Yardi database, and the Update Flag was set to 1.
External Reference ID exists in the database. Duplicate prospect records cannot be created.	The external reference identification number in the interface file already exists in the client's Yardi database, and the Update Flag was not set to 1.
External Reference ID exists in the database. Prospect activated. An activity has been added to the existing record.	The external reference identification number in the interface file already exists in the client's Yardi database for an inactive prospect, and the Update Flag was set to 1.
First Name or Last Name cannot be blank.	Either the primary contact first name or last name are missing in the interface file. Both fields are required.
Property Code is invalid.	The property code in the interface file does not match a valid property code in the client's Yardi database.
Property Code is required.	The property code is missing in the interface file.
Prospect already exists in the database. An activity has been added to the existing record. - I	The prospect name and one element of the contact information (address, telephone number, or email address) in the interface file matches a prospect in the client's Yardi database. System options are set to add an activity to the existing prospect.
Prospect already exists in the database. An activity has been added to the existing record. - II	The prospect name and one element of the contact information (address, telephone number, or email address) in the interface file matches a prospect in the client's Yardi database. System options are set to add an activity to the existing prospect.
Prospect already exists in the database. Duplicate prospect records cannot be created. - I	The prospect name and one element of the contact information (address, telephone number, or email address) in the interface file matches a prospect in the client's Yardi database. System options are set to reject this prospect.
Prospect already exists in the database. Duplicate prospect records cannot be created. - II	The primary contact name and one element of the contact information (address, telephone number, or email address) in the interface file, matches the contact information in the client's Yardi database. System options are set to reject this prospect.

Result Message	Message Description
Prospect already exists in the database. The duplicate record has been added. - I	The prospect name and one element of the contact information (address, telephone number, or email address) in the interface file matches a prospect in the client's Yardi database. System options are set to add the new prospect.
Prospect already exists in the database. The duplicate record has been added. - II	The prospect name and one element of the contact information (address, telephone number, or email address) in the interface file matches a prospect in the client's Yardi database. System options are set to add the new prospect.
Source Name cannot be blank.	The source name (referral name) is missing in the interface file.
Unique External Reference ID is required.	The external reference identification number is missing in the interface file.

## Sample XML Result Message

### Success

```
<Imports>
  <ResultStatus>Success</ResultStatus>
  <ResultMessage>Import Successful</ResultMessage>
</Imports>
```

### Failure

```
<Imports>
  <ResultStatus>Failure</ResultStatus>
  <ResultMessage>Unable to login. Invalid username /
  Password.</ResultMessage>
</Imports>
```