

X

COLLAPSE ALL


GETTING STARTED

- Introduction
- Authentication with API keys
- Authentication with OAuth
- Specifying Filter Parameters
- Timezone Offsets
- Fields
- Updating Specific Fields
- Pagination
- Webhooks
- Rate Limits
- HTTP Response Codes
- API Clients

RESOURCES

- Advanced Filtering
- Leads
- Contacts
- Activities
  - Call
  - Created
  - Email
  - EmailThread
  - LeadStatusChange
  - Meeting
  - Note
  - OpportunityStatusChange
  - SMS
  - TaskCompleted
- Opportunities
- Tasks
- Memberships
- Users
- Organizations
- Roles
- Custom Fields
  - Lead Custom Fields
  - Contact Custom Fields
  - Opportunity Custom Fields
  - Activity Custom Fields
  - Shared Custom Fields
  - Custom Field Schemas
- Lead Statuses
- Opportunity Statuses
- Pipelines
- Groups
- Reporting
- Email Templates
- SMS Templates
- Connected Accounts
- Send As
- Sequences
- Dialer
- Smart Views
- Bulk Actions
- Integration Links
- Exports
- Phone Numbers
- Event Log
- List of Events
- Retrieve Events
- Webhook Subscriptions
- Webhook Filters
- Scheduling Links
  - User Scheduling Links
  - Shared Scheduling Links
  - Scheduling Link Associations
- Custom Activities
  - Custom Activity Types
  - Custom Activity Instances

CHANGELOG

- API Changelog
- Product Changelog 

QUICK LINKS

- Log in to Close 
- Visit our Homepage 
- Close Support Documentation 
- The Making of Close 

# List of Events

Here is the full list of events grouped by object type and action:

- Lead ([lead](#))
  - [created](#) - a lead is created in your organization (regardless of the method).
  - [updated](#) - an existing lead is updated. It's triggered when:
    - Any of the lead's basic fields change, e.g. [name](#), [description](#), [url](#), [status](#), etc.
    - A contact is added or removed (the [contact\\_ids](#) list of the lead changes).
    - Addresses ([addresses](#)) or custom field values ([custom](#)) are added, removed, or updated.
  - Note: Changes to a lead's activities, opportunities, tasks, and updates to existing contacts do not trigger this event (even though they may affect the lead's [date\\_updated](#)).
  - [deleted](#) - a lead is deleted. Note that deleting a lead will cause additional [deleted](#) events on child objects like activities, opportunities, tasks, and contacts.
  - [merged](#) - two leads are merged. [lead\\_id](#) and [data](#) contain the lead ID and data of the resulting (destination) lead. Note that you will also get [updated](#) and [deleted](#) events for the leads and any related objects involved in the merge. All events related to the merge contain [merge\\_source\\_lead\\_id](#) and [merge\\_destination\\_lead\\_id](#) in the [meta](#) field of the event, pointing to the source lead's and destination lead's ID, respectively (where the source lead merges into the destination lead).
- Contact ([contact](#))
  - [created](#) - a contact is created in your organization.
  - [updated](#) - a contact is updated. It's triggered when:
    - Any of the contact's basic fields change, e.g. [name](#), [title](#).
    - Any of the contact's nested fields change, e.g. when an email changes, a new phone number is added, or a URL is removed.
  - [deleted](#) - a contact is deleted.
- Opportunity ([opportunity](#))
  - [created](#) - an opportunity is created.
  - [updated](#) - an opportunity is updated. It's triggered when any of the opportunity's basic fields change, e.g. [status](#), [date\\_won](#), [value](#), [value\\_period](#), [confidence](#). It is not triggered when [value\\_currency](#) changes, since it's an organization-wide setting.
  - [deleted](#) - an opportunity is deleted.
- Tasks ([task.SUBTYPE](#), see the [Tasks](#) section for a list of possible subtypes, e.g. [task.lead](#))
  - [created](#) - a task is created.
  - [updated](#) - a task is updated. It's triggered when any of the basic fields on a task change. Depending on the task type, the fields can be different, but some examples are: [is\\_complete](#), [date](#), [text](#), [opportunity\\_value](#), [subject](#), [emails](#).
  - [deleted](#) - a task is deleted.
  - [completed](#) - a task is marked as done.
- Email ([activity.email](#))
  - [created](#) - an email is created. It can either be an incoming email that was synced, or an outgoing email (either scheduled to be sent via [status: "outbox"](#) or created with [status: "draft"](#) via the UI).
  - [updated](#) - an email is updated. It's triggered when any of the basic email fields change (e.g. [status](#), [subject](#), [body\\_text](#), [body\\_html](#), [opens](#), etc.). We generally discourage from using this event type because many updates happen when a user is drafting an email due to periodic auto-saves. Look at [created](#) or [sent](#) for useful (and less noisy) alternatives.
  - [deleted](#) - an email is deleted.
  - [sent](#) - an outgoing email is sent through our UI or API. Note that this event is triggered when the email is actually *sent*, not when the user clicks "send" (which only puts the email in the outbox and schedules the sending). Emails sent via your email provider, outside of Close, do not trigger this event. They do however trigger a [created](#) event when they are synced via IMAP.
- Email thread ([activity.email\\_thread](#))
  - [created](#) - an email thread is created. It can happen when an email is synced and it doesn't match any of the existing threads, or when a new email thread is created via the API or UI.
  - [updated](#) - an email thread is updated. It's triggered when a thread's fields change, e.g. [emails](#), [n\\_emails](#), [latest\\_normalized\\_subject](#), [participants](#).
  - [deleted](#) - an email thread is deleted. This happens when all of the emails are deleted from a thread (each triggering a separate [deleted](#)) or when the thread is merged into another one.
- Call ([activity.call](#))
  - [created](#) - a call is created. It can be triggered by:
    - A user initiating a call.
    - A user transferring a call.
    - An inbound call coming in.
    - A user manually logging a call (or a call being logged via the API).
  - [updated](#) - a call is updated. It's triggered when any of the basic call fields change (e.g. [note](#), [status](#), [duration](#), [recording\\_url](#), etc.). We generally discourage from using this event type because many updates happen when a user is writing a call note due to preiodic auto-saves. Look at [created](#) or [completed](#) for useful (and less noisy) alternatives.
  - [deleted](#) - a call is deleted.
  - [answered](#) - a call is answered. This event is not triggered for calls made outside of Close (e.g. manually logged calls).
  - [completed](#) - a call is completed. This event is not triggered for calls made outside of Close (e.g. manually logged calls).
- SMS ([activity.sms](#))
  - [created](#) - an SMS is created. It's triggered on either an inbound SMS that was sent to a Close phone number or the creation of an outbound SMS (either scheduled to be sent via [status: "outbox"](#) or created with [status: "draft"](#) via the UI).
  - [updated](#) - an SMS is updated. It's triggered when any of the basic SMS fields change (e.g. [status](#), [text](#), [remote\\_phone](#), [local\\_phone](#), etc.). We generally discourage from using this event type because many updates happen when a user is drafting an SMS. Look at [created](#) or [sent](#) for useful (and less noisy) alternatives.
  - [deleted](#) - an SMS is deleted.
  - [sent](#) - an outbound SMS is sent through our UI or API. Note that this event is triggered when the SMS is actually *sent*, not when the user clicks "send" (which moves the SMS into [outbox](#) status).
- Note ([activity.note](#))
  - [created](#) - a note is created.
  - [updated](#) - a note is updated. It's triggered periodically while a user is typing a note.
  - [deleted](#) - a note is deleted.
- Meeting ([activity.meeting](#))
  - [created](#) - a meeting is created.
  - [updated](#) - a meeting is updated.
  - [deleted](#) - a meeting is deleted.
  - [scheduled](#) - a meeting is scheduled. It's triggered when a meeting in the future is created, the start time of an upcoming meeting changes (a meeting is rescheduled), or a meeting moves to [status: "upcoming"](#).
  - [started](#) - a meeting has started. It's triggered when a meeting moves to [status: "in-progress"](#).
  - [completed](#) - a meeting is completed. It's triggered when a meeting moves to [status: "completed"](#).
  - [canceled](#) - a meeting is canceled. It's triggered when a meeting moves to [status: "canceled"](#).
- Lead status change ([activity.lead\\_status\\_change](#))
  - [created](#) - a lead status change activity is created. Note that changing the status of a lead also results in a [lead.updated](#) event (with the old status value being available in [previous\\_attributes](#)).
  - [updated](#) - a lead status change activity is updated. It's triggered when the same user/API client updates the status of the same lead more than once within a short time. To "unclutter" the activity stream, we don't create a new status change for the consecutive updates, but instead update an existing status change with the most recent status in [new\\_status](#).
  - [deleted](#) - a lead status change is deleted. This happens when the status change was done by mistake and reverted within a short time.
- Opportunity status change ([activity.opportunity\\_status\\_change](#))
  - [created](#) - an opportunity status change activity is created. Note that changing the status of an opportunity also results in an [opportunity.updated](#) event (with the old status value being available in [previous\\_attributes](#)).
  - [updated](#) - an opportunity status change activity is updated. It's triggered when the same user/API client updates the status of the same opportunity more than once within a short time. To "unclutter" the activity stream, we don't create a new status change for the consecutive updates, but instead update an existing status change with the most recent status in [new\\_status](#).
  - [deleted](#) - an opportunity status change is deleted. This happens when the status change was done by mistake and reverted within a short time.
- Task completed ([activity.task\\_completed](#))
  - [created](#) - a task completed activity is created, which occurs upon the completion of a "lead" task. Note that completing a lead's task will also result in [completed](#) and [updated](#) events on the task ([lead.task](#)), and in a [updated](#) event on the lead.
  - [deleted](#) - a task completed activity is deleted. This happens when a corresponding completed task is marked as incomplete again. Note that un-completing a task will also result in a [updated](#) event on the task ([task.lead](#)), and an [updated](#) event on the lead.
- Import ([import](#))
  - [created](#) - a CSV import is created. Note that you'll also get a [created](#) event for each lead that's created via this import.
  - [updated](#) - a CSV import is updated. It's triggered when any of the import's fields change, e.g. [status](#), [s3\\_url](#), [total\\_imported](#), [total\\_failed](#). This gets triggered frequently while the CSV import is processed and allows you to monitor the progress of an import. Look at [created](#) or [completed](#) for a useful (and less noisy) alternatives.
  - [completed](#) - an import is completed.
  - [reverting](#) - an import has begun the reversion process. Note that you'll also get events for changes made as a part of the revert process.
  - [reverted](#) - an import has been successfully reverted
- Export ([export.lead](#), [export.opportunity](#))
  - [created](#) - an export is created (i.e. when a new export was requested via the UI or the API).
  - [updated](#) - an export of your data is updated. It's triggered when any of the export's fields change, (e.g. [status](#), [n\\_docs\\_processed](#), [n\\_docs](#), [download\\_url](#), [fields](#)). This gets triggered frequently while the export is processed and allows you to monitor its progress. Look at [export.created](#) or [export.completed](#) as useful (and less noisy) alternatives.
  - [completed](#) - an export is completed.
- Bulk actions ([bulk\\_action.delete](#), [bulk\\_action.edit](#), [bulk\\_action.email](#), [bulk\\_action.sequence\\_subscription](#))
  - [created](#) - a bulk action is created.
  - [updated](#) - a bulk action is updated. It's triggered when any of the bulk action's basic fields change, e.g. [status](#), [n\\_docs\\_processed](#), [n\\_docs](#). This gets triggered frequently while the bulk action is processed and allows you to monitor its progress. Also see the [created](#) or [completed](#) actions for more useful (and less noisy) alternatives.
  - [completed](#) - a bulk action is completed.
  - [paused](#) - a bulk action is paused and requires the user's attention to resume (e.g. if you updated your email provider's credentials during a bulk email).
- Lead Custom fields ([custom\\_fields.lead](#))
  - [created](#) - a lead custom field is created for the first time.
  - [updated](#) - a lead custom field is updated. It's triggered when any of the basic attributes of a custom field change, i.e. [name](#), [type](#), or [choices](#).
  - [deleted](#) - a lead custom field is deleted.
- Contact Custom fields ([custom\\_fields.contact](#))
  - [created](#) - a contact custom field is created for the first time.
  - [updated](#) - a contact custom field is updated. It's triggered when any of the basic attributes of a custom field change, i.e. [name](#), [type](#), or [choices](#).
  - [deleted](#) - a contact custom field is deleted.
- Opportunity Custom fields ([custom\\_fields.opportunity](#))
  - [created](#) - an opportunity custom field is created for the first time.
  - [updated](#) - an opportunity custom field is updated. It's triggered when any of the basic attributes of a custom field change, i.e. [name](#), [type](#), or [choices](#).
  - [deleted](#) - an opportunity custom field is deleted.
- Activity Custom fields ([custom\\_fields.activity](#))
  - [created](#) - an Activity Custom Field is created for the first time.
  - [updated](#) - an Activity Custom Field is updated. It's triggered when any of the basic attributes of a custom field change, i.e. [name](#), [type](#), or [choices](#).
  - [deleted](#) - an Activity Custom Field is deleted, it can be triggered by:
    - The Activity Custom Field is deleted.
    - The Custom Activity Type this field belongs to is deleted.
- Shared Custom fields ([custom\\_fields.shared](#))
  - [created](#) - a Shared Custom Field is created for the first time.
  - [updated](#) - a Shared Custom Field is updated. It's triggered when any of the basic attributes a shared custom field change, i.e. [name](#), [description](#), or [choices](#).
  - [deleted](#) - a Shared Custom Field is deleted.
  - We do not currently offer events for when the Shared Field is associated/disassociated with a Lead/Contact/Custom Activity Type.
- Custom Activity Type ([custom\\_activity\\_type](#))
  - [created](#) - a Custom Activity Type is created for the first time.
  - [updated](#) - a Custom Activity Type is updated, it can be triggered by:
    - Any of the Custom Activity Type's basic fields change such as [name](#), [description](#), [api\\_create\\_only](#) etc.
    - The Activity Custom Field order is changed.
    - A new Activity Custom Field is added to the Custom Activity Type.
    - An deleted Activity Custom Field is removed from the Custom Activity Type.
  - [deleted](#) - a Custom Activity Type is deleted.
- Custom Activity ([activity.custom\\_activity](#))
  - [created](#) - A Custom Activity instance is created for the first time.
  - [updated](#) - A Custom Activity instance is updated. Note, changes to Custom Activity Type do not modify existing activities of that type or trigger [updated](#) events.
  - [deleted](#) - A Custom Activity instance is deleted.
- Custom Object ([custom\\_object](#))
  - [created](#) - A Custom Object is created.
  - [updated](#) - A Custom Object is updated.
  - [deleted](#) - A Custom Object is deleted.
- Custom Object Type ([custom\\_object\\_type](#))
  - [created](#) - A Custom Object Type is created.
  - [updated](#) - A Custom Object Type is updated.
  - [deleted](#) - A Custom Object Type is deleted.
- Lead and opportunity status ([status.lead](#), [status.opportunity](#))
  - [created](#) - a new lead or opportunity status is created.
  - [updated](#) - a lead or opportunity status is updated. It's triggered when the [label](#) of a status changes.
  - [deleted](#) - a lead or opportunity status is deleted.
- Membership ([membership](#))
  - [activated](#) - a membership is activated in your organization (e.g. when an invited user accepts the invitation or when you re-add a previously removed user). It contains the details of a membership along with embedded user data.
  - [deactivated](#) - a membership is deactivated in your organization (e.g. when you remove a user). It contains the details of a membership along with embedded user data.
- Group ([group](#))
  - [created](#) - a new group is created.
  - [updated](#) - a group is created or its members are added or removed.
  - [deleted](#) - a group is deleted.
- Saved search ([saved\\_search](#))
  - [created](#) - a smart view is created.
  - [updated](#) - a smart view is updated. It's triggered when any of the basic fields change on a smart view, e.g. [is\\_shared](#), [shared\\_with](#), [query](#), [name](#). It is not triggered when the lead results of the smart view change.
- Phone Number ([phone\\_number](#))
  - [created](#) - a new phone number is created.
  - [updated](#) - a phone number is updated. It's triggered when any of the basic fields change on a phone number, e.g. [forward\\_to\\_enabled](#), [participants](#), [voicemail\\_greeting\\_url](#).
  - [deleted](#) - a phone number is deleted.
- Email template ([email\\_template](#))
  - [created](#) - an email template is created.
  - [updated](#) - an email template is updated. It's triggered when any of the basic fields change, e.g. [is\\_shared](#), [name](#), [subject](#), [body](#), [attachments](#).
  - [deleted](#) - an email template is deleted.
- Sequence ([sequence](#))
  - [created](#) - a sequence is created.
  - [updated](#) - a sequence is updated. It's triggered when any of the fields change, including the fields of the embedded [steps](#).
  - [deleted](#) - a sequence is deleted.
- Sequence Subscription ([sequence\\_subscription](#))
  - [created](#) - a sequence subscription is created.
  - [updated](#) - a sequence subscription is updated. It's triggered when any of its fields change, e.g. [status](#) might change from [active](#) to [paused](#).
  - [deleted](#) - a sequence subscription is deleted. It's triggered when the lead, contact, or email address associated with the subscription is deleted.