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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 

Reporting

These endpoints return aggregated and per-user data used by the Reporting features of Close. Any fields related to revenue are returned in cents. Any duration values are returned in seconds.

List the predefined metrics used in activity reports.

GET /report/activity/metrics/

These metrics are available to use in the report API below.

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Example Request/Response

Get an activity report.

POST /report/activity/

The activity report returns the organization's metrics per time period (**overview** report) or user (**comparison** report).

Every report accepts the following parameters:

- datetime_range**: a time range to fetch data for. Either this field or **relative_range** needs to be specified.
- relative_range**: a relative time range to fetch data for. The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**. Either this field or **datetime_range** needs to be specified.
- query**: a query to apply to the report to filter out data. The value of the field is a dictionary with the key **type** and any type-specific keys. For now only the type **saved_search** is allowed which takes the extra key **saved_search_id** to specify the ID of a saved search. This parameter is *optional*.
- users**: a list of user IDs to limit the report results to. This parameter is *optional*.
- type**: the type of the report. The available values are **overview** and **comparison**. This parameter is *mandatory*.
- metrics**: a list of metrics (see [above](#)) to fetch for the report. This parameter is *mandatory*.

The report can be requested either in a JSON format or in a CSV file. The format can be specified with the **accept** header.

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Example Request/Response

Get a report about sent emails grouped by template.

GET /report/sent_emails/(ORGANIZATION_ID)/(?user_id, date_start, date_end)

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Example Request/Response

Get a lead status change report.

GET /report/statuses/lead/(ORGANIZATION_ID)/(?date_start, date_end, query)

The date range is optional. A report may be requested for a specific time period or overall. You can specify either a **query** or **smart_view_id** (but not both) to filter leads included in the report.

The following fields are returned (when requesting an overall report, some inapplicable fields will not be returned):

- status_overview**: A list of all lead statuses with the following fields:
 - status_id**, **status_label**, **status_is_deleted**: The ID and label of the status, and whether it was deleted.
 - started**: Number of leads in this status at the start of the period.
 - ended**: Number of leads in this status at the end of the period.
 - change**: The net change of the number of leads during the period (**ended** minus **started**).
 - change_percent**: The net change of leads in percent.
 - gained**: Number of leads that were not in this status at the beginning of the period, but were in this status at the end of the period, i.e. leads that transitioned into this status at some point during the period and stayed in this status at the end of the period.
 - lost**: Number of leads that were in this status at the beginning of the period, but were not in this status at the end of the period, i.e. leads that transitioned out of this status at some point during the period and stayed in some other status at the end of the period.
 - entered**: Number of leads that entered this status at some point during the period.
 - left**: Number of leads that left this status at some point during the period.
 - _queries**: A dictionary containing search queries which list the leads for the different states (**started**, **ended**, **gained**, **lost**, **entered**, **left**)
 - _leads_page_urls**: A dictionary similar to **_queries** containing paths to the lead search UI page for the different states.
- status_transitions**: A list of all status transitions (aggregated by start/end status) for the given period with the following fields:
 - from_status_id**, **from_status_label**, **from_status_is_deleted**: The ID and label of the starting status, and whether it was deleted. For created leads, these fields are all null.
 - to_status_id**, **to_status_label**, **to_status_is_deleted**: The ID and label of the ending status, and whether it was deleted.
 - count**: The amount of leads that ever transitioned from the starting status to the ending status during the period.
 - _query**: The search query which lists the leads.
 - _leads_page_url**: The path to the lead search UI page which lists the leads.
- status_transitions_summary**: A list of status transitions (aggregated by start/end status), summarized for the given period. For example, a lead that went from status A to status B, and then from status B to status C in the given period will be counted in the transition from A to C. The fields are the same as those returned in **status_transitions**.

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Example Request/Response

Get an opportunity status change report.

GET /report/statuses/opportunity/(ORGANIZATION_ID)/(?user_id, date_start, date_end, smart_view_id, query)

The arguments and returned fields are similar to the lead status report (see above), with the following differences:

- Any returned numbers refer to the number of opportunities instead of leads.
- The opportunity status report may optionally be filtered by the opportunity user.
- The returned search queries in the **_queries** field are wrapped in a nested opportunity query (**opportunity(...)**) and can be used as a query for the leads API endpoint. To pass the query to the opportunities API endpoint, only the query within the nested clause (in the parentheses) may be supplied.
- In addition to returning paths to the lead search UI page, paths to the opportunity UI page are returned in the **_opportunities_page_urls** and **_opportunities_page_url** fields.

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Example Request/Response

Get a custom report for just about any object in Close.

GET /report/custom/(ORGANIZATION_ID)/(?query, x, y, interval, transform_y, group_by, start, end)

This endpoint returns data that allows graphing of arbitrary metrics and is what powers "Explorer" in the UI.

- query** is an optional search query filter. When reporting on leads, any regular lead search query may be used. When reporting on activities or opportunities, only properties of the chosen object type may be used. For example, **direction:incoming** may be used if **x** starts with **email..**. Defaults to *****, which includes all objects.
- y** is made up of the object type and field which is reported on the Y axis. For example the value **lead.count** (used by default) may be used to graph the number of leads, or a numeric field may be used. Examples: **call.duration** (for call length), **opportunity.value** (for value of opportunities).
- x** is the field which is reported on the X axis, for example "lead.custom.MRR" or "opportunity.date_created".
 - interval**: Graph interval, i.e. the precision of the X axis. For time based graphs (**x** is a date field), one of **auto**, **hour**, **day**, **week**, **month**, **quarter**, **year** (defaults to **auto**, which is chosen based on **start** and **end**). For graphs with a numeric X axis, an integer number can be specified to indicate the histogram interval (**auto** by default).
- group_by**: Optional field name by which the report will be grouped. When grouping, a separate series will be returned for each group. By default no grouping is applied.
- transform_y**: Transformation function that gets applied to the **y** parameter. One of **sum** (default), **avg**, **min**, or **max**. Does not apply for **_count y** values if **x** is of the same object type.
- start**: Date or integer of the start of the X axis range. For dates, defaults to the date of creation of your organization.
- end**: Date or integer of the end of the X axis range. For dates, defaults to now.

To get a full list of fields that can be used, do a GET to **/report/custom/fields/**. Only the **number** data type can be used for the **y** parameter.

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Example Request/Response

Get a funnel report (totals).

POST /report/funnel/opportunity/totals/

The opportunity funnel "totals" report returns the pipeline funnel's metrics for the selected opportunities, aggregated (JSON format only) and per-user (JSON and CSV formats).

Every report accepts the following parameters:

- pipeline**: ID of the pipeline defining the funnel statuses.
- type**: the type of the report. The available values are **created-cohort** and **active-stage-cohort**.
- report_relative_range**: a relative time range to fetch data for. The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**.
- report_datetime_range**: a time range to fetch data for.
- cohort_relative_range**: a relative time range defining the cohort of created opportunities to fetch data for, by date of creation of those opportunities. The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**. Either this field or **cohort_datetime_range** needs to be specified for **created-cohort** reports. Its value will be ignored for **active-stage-cohort** reports.
- cohort_datetime_range**: a time range defining the cohort of created opportunities to fetch data for, by date of creation of those opportunities. Either this field or **cohort_relative_range** needs to be specified for **created-cohort** reports. Its value will be ignored for **active-stage-cohort** reports.
- compared_relative_range**: a relative time range to fetch comparison data for. Only allowed in combination with **report_relative_range** (for **active-stage-cohort** reports) or **cohort_relative_range** (for **created-cohort** reports). The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**.
- compared_datetime_range**: a relative time range to fetch comparison data for. Only allowed in combination with **report_datetime_range** (for **active-stage-cohort** reports) or **cohort_datetime_range** (for **created-cohort** reports). The allowed values are: **same-days-last-week**, **same-days-last-month**, **same-days-last-quarter**, **same-days-last-year**.
- compared_custom_range**: a time range to fetch comparison data for.
- query**: a query to apply to the report to filter out data. The value of the field is a dictionary with the key **type** and any type-specific keys. For now only the type **saved_search** is allowed which takes the extra key **saved_search_id** to specify the ID of a saved search. This parameter is *optional*.
- users**: a list of user IDs or group IDs to limit the report results to. When it's empty, the report will include all the available users. This parameter is *optional*.

The report can be requested either in JSON format or in CSV format. The format can be specified with the **accept** header.

In JSON format, it includes aggregated and per-user data. When requested in CSV format, it includes only per-user data.

When **compared_datetime_range**, **compared_relative_range**, or **compared_custom_range** are used, the report returned is the compared one, not the base one.

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Example Request/Response

Get a funnel report (stages).

POST /report/funnel/opportunity/stages/

The opportunity funnel "stages" report returns the pipeline funnel's metrics for the selected opportunities, aggregated (JSON format only) and per-user (JSON and CSV formats).

Every report accepts the following parameters:

- pipeline**: ID of the pipeline defining the funnel statuses.
- type**: the type of the report. The available values are **created-cohort** and **active-stage-cohort**.
- report_relative_range**: a relative time range to fetch data for. The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**.
- report_datetime_range**: a time range to fetch data for.
- cohort_relative_range**: a relative time range defining the cohort of created opportunities to fetch data for, by date of creation of those opportunities. The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**. Either this field or **cohort_datetime_range** needs to be specified for **created-cohort** reports. Its value will be ignored for **active-stage-cohort** reports.
- cohort_datetime_range**: a time range defining the cohort of created opportunities to fetch data for, by date of creation of those opportunities. Either this field or **cohort_relative_range** needs to be specified for **created-cohort** reports. Its value will be ignored for **active-stage-cohort** reports.
- compared_relative_range**: a relative time range to fetch comparison data for. Only allowed in combination with **report_relative_range** (for **active-stage-cohort** reports) or **cohort_relative_range** (for **created-cohort** reports). The allowed values are: **today**, **this-week**, **this-month**, **this-quarter**, **this-year**, **yesterday**, **last-week**, **last-month**, **last-quarter**, **last-year**, and **all-time**.
- compared_datetime_range**: a relative time range to fetch comparison data for. Only allowed in combination with **report_datetime_range** (for **active-stage-cohort** reports) or **cohort_datetime_range** (for **created-cohort** reports). The allowed values are: **same-days-last-week**, **same-days-last-month**, **same-days-last-quarter**, **same-days-last-year**.
- compared_custom_range**: a time range to fetch comparison data for.
- query**: a query to apply to the report to filter out data. The value of the field is a dictionary with the key **type** and any type-specific keys. For now only the type **saved_search** is allowed which takes the extra key **saved_search_id** to specify the ID of a saved search. This parameter is *optional*.
- users**: a list of user IDs or group IDs to limit the report results to. When it's empty, the report will include all the available users. This parameter is *optional*.

The report can be requested either in JSON format or in CSV format. The format can be specified with the **accept** header.

In JSON format, it includes aggregated and per-user data. When requested in CSV format, it includes only per-user data.

When **compared_datetime_range**, **compared_relative_range**, or **compared_custom_range** are used, the report returned is the compared one, not the base one.

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Example Request/Response