

Dialer - CRM Integration

API Document



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Document Revision History

This table holds record of signification changes made to the document.

Versio n	Date	Author	Description of change
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1. User will be created/updated in CRM & It should get created/updated in Dialer

- When we create user in CRM same user will be gets created in Dialer with same username and password.
- For This we are using Dialer add_user api. Below is details for API,

add_user - adds a user to the system

NOTE: api user for this function must have user_level set to 8 or higher and "modify users" enabled

REQUIRED FIELDS :

function - add_user
source - 2-20 characters
user - API user's username
pass - API user's password
agent_user - 2-20 characters
agent_pass - 1-20 characters
agent_user_level - 1 through 9, one digit only
agent_full_name - 1-50 characters
agent_user_group - 1-20 characters, must be a valid user group

OPTIONAL FIELDS :

phone_login - 1-20 characters
phone_pass - 1-20 characters
voicemail_id - 1-10 digits
email - 1-100 characters

Example URL strings for API calls:

[http://ServerIP/dialer/elision_api.php?
source=test&user=api&pass=1234&function=add_user&agent_user=1000&agent_pass=9999&agent_user_level=1&agent_full_name=Testing+Person&agent_user_group=AGENTS](http://ServerIP/dialer/elision_api.php?source=test&user=api&pass=1234&function=add_user&agent_user=1000&agent_pass=9999&agent_user_level=1&agent_full_name=Testing+Person&agent_user_group=AGENTS)

Example responses:

ERROR Responses :

ERROR: add_user USER DOES NOT HAVE PERMISSION TO ADD USERS - api|0
ERROR: add_user YOU MUST USE ALL REQUIRED FIELDS - api|1000|

ERROR: add_user USER DOES NOT HAVE PERMISSION TO ADD USERS IN THIS
USER LEVEL - api|8
ERROR: add_user USER GROUP DOES NOT EXIST - api|ADFHR
ERROR: add_user USER ALREADY EXISTS - api|api

SUCCESS Response:

SUCCESS: add_user USER HAS BEEN ADDED - api|10000|9999|1|Testing Person|
AGENTS

- When we edit user in CRM then also we are able to update the edited information into Dialer .
- For This we are using dialer update_user api.Below is details for API,

update_user - updates or deletes a user entry already in the system

REQUIRED FIELDS :

function - update_user
source - 2-20 characters
ser - API user's username
pass - API user's password
agent_user - 2-20 characters

OPTIONAL FIELDS :

agent_pass - 1-20 characters
agent_user_level - 1 through 9, one digit only
agent_full_name - 1-50 characters
agent_user_group - 1-20 characters, must be a valid user group
phone_login - 1-20 characters
phone_pass - 1-20 characters
voicemail_id - 1-10 digits
email - 1-100 characters
active - 'Y' or 'N'

Example URL strings for API calls:

[http://ServerIP/dialer/elision_api.php?
source=test&user=api&pass=1234&function=update_user&agent_user=1000&agent_pa
ss=9876&agent_user_level=5&agent_full_name=Testing+Person&agent_user_group=A
GENTS](http://ServerIP/dialer/elision_api.php?source=test&user=api&pass=1234&function=update_user&agent_user=1000&agent_pass=9876&agent_user_level=5&agent_full_name=Testing+Person&agent_user_group=AGENTS)

Example responses:

ERROR Responses :

ERROR: update_user USER DOES NOT HAVE PERMISSION TO UPDATE USERS - api|0

ERROR: update_user YOU MUST USE ALL REQUIRED FIELDS - api||

ERROR: update_user USER DOES NOT EXIST - api|78789

ERROR: update_user USER DOES NOT HAVE PERMISSION TO UPDATE THIS USER - api|7878

ERROR: update_user YOU MUST USE A VALID FULL NAME, THIS IS AN OPTIONAL FIELD - api|

ERROR: update_user YOU MUST USE A VALID USER LEVEL, THIS IS AN OPTIONAL FIELD - api|0|9|1

ERROR: update_user YOU MUST USE A VALID USER GROUP, THIS IS AN OPTIONAL FIELD - api|FAKEGROUP|0

ERROR: update_user YOU MUST USE A VALID PHONE LOGIN, THIS IS AN OPTIONAL FIELD - api|fakephone|0|0

ERROR: update_user YOU MUST USE A VALID PHONE PASSWORD, THIS IS AN OPTIONAL FIELD - api|0

ERROR: update_user YOU MUST USE A VALID VOICEMAIL ID, THIS IS AN OPTIONAL FIELD - api

ERROR: update_user YOU MUST USE A VALID EMAIL, THIS IS AN OPTIONAL FIELD - api

ERROR: update_user ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - api

SUCCESS Response :

SUCCESS: update_user USER HAS BEEN UPDATED - api|1000

2. List will be created in CRM & it should get created in Dialer

- When we create list in crm it should created in dialer
- For This we are using add_list api. Below is details for API,

add_list - adds a list to the system

NOTE: api user for this function must have user_level set to 8 or higher and "modify lists" enabled

REQUIRED FIELDS :

function - add_list

source - 2-20 characters

user - API user's username

pass - API user's password

list_id - 2-14 digits

list_name - 6-30 characters

campaign_id - 2-8 characters, must be a valid campaign_id

OPTIONAL FIELDS :

active - Must be one of these: 'Y','N', will default to 'N'

Example URL strings for API calls:

[http://ServerIP/dialer/elision_api.php?
source=test&user=api&pass=1234&function=add_list&list_id=1101&list_name=T
est+API+list&campaign_id=TESTCAMP](http://ServerIP/dialer/elision_api.php?source=test&user=api&pass=1234&function=add_list&list_id=1101&list_name=Test+API+list&campaign_id=TESTCAMP)

Example responses:

ERROR Responses :

```
{"success":false,"message":"api User does not have permission to add list in the system","data":{"user":"api","password":"1234"}}
```

```
{"success":false,"message":"Please send list id , campaign id and list name","data":{"list_id":"","list_name":"Test API list","campaign_id":"TESTCAMP"}}
```

```
{"success":false,"message":"TESTCAMP campaign does not exist","data":{"list_id":"1101","list_name":"Test API list","campaign_id":"TESTCAMP"}}
```

```
{"success":false,"message":"1101 list already exist","data":{"list_id":"1101","list_name":"Test API list","campaign_id":"TESTCAMP"}}
```

SUCCESS Response :

```
{"success":true,"message":"1101 list created","data":  
{"list_id":"1101","list_name":"Test API list","campaign_id":"TESTCAMP"}}
```


3. Data to be uploaded in CRM screen and then it can be pushed to Dialer via Export To Dialer function Export To Dialer from CRM to Dialer

- Data will be export into dialer form crm via export to dialer button. We are exporting data in 2 cases
 - In Existing List ID
 - In New List ID

1) For Existing List ID

- For Exporting Leads in Existing List we are fetching existing list id details form dialer through API
- For this We are using active_lists API. Below is API details,

Active_lists - Brings all active lists form dialer

REQUIRED FIELDS :

function - active_lists
source - 2-20 characters
user - API user's username
pass - API user's password

Example URL strings for API calls:

[http://ServerIP/dialer/elision_api.php?
source=test&user=api&pass=1234&function=active_lists](http://ServerIP/dialer/elision_api.php?source=test&user=api&pass=1234&function=active_lists)

Example responses:

SUCCESS Response :

```
{"success":true,"message":"lists are listed successfully","data":["NIKHIL-1101-Test API list","kartik-2018-kartik jagani","TESTING-20042018-20042018-hardik","NIKHIL-26042018-26042018_custom-form","TESTING-6547-testA","radhika-522018-522018","testcmp-1652018-1652018","Elision-2352018-2352018","test_plk-260518-260518 test"]}
```

- For Exporting lead in that list id we are using add_multi_lead API, Below is details for API,

Add_multi_lead - Add Multiple leads to dialer

REQUIRED FIELDS :

function - add_multi_lead

source - 2-20 characters
 user - API user's username
 pass - API user's password
 multi_leads - json_encode of Multileads array
 Multileads = array Of Multi_leads
 Multi_leads =
 array('city'=>'Ahmedabad','email'=>','phone_number'=>1234567893,'first_name'=>'test','last_name'=>'test','vendor_lead_code'=>1236,'list_id'=>'1101','postal_code'=>91);

In this array 'phone_number' and 'list_id' fields are require.

Example URL strings for API calls:

http://ServerIP/dialer/elision_api.php?
 source=test&user=api&pass=1234&function=add_multi_lead&multi_leads=[{"city":"Ahmedabad","email":"","phone_number":1234567893,"first_name":"test","last_name":"test","vendor_lead_code":1236,"list_id":"1101","postal_code":91}]

Example responses:

```
["ERROR","add_multi_lead YOU MUST USE ALL REQUIRED FIELDS","api",""]
```

```
{"lead 1":{"success":false,"message":"Invalid phone number","data":"1293"}}
```

SUCCESS Response :

```
{"lead 1":{"success":true,"message":"Record(s) Created","data":"1234567893|1101|1036||NEW|"}}
```

2) In New List ID :

- For Upload Lead In New list id first off all create new list id using add_list API.API details are given in 2 point.
- After creating list id Use add_multi_lead API

JAVASCRIPT Functions :

LOGIN :

- When we login in crm user also get login in widget for that we are using below function at a time of login in crm

Function :

```
parent.postMessage({'action': 'login', 'username': 'crm username', 'password':  
'crm password','extension':'crm phone extension','phone_pass':'crm phone  
extension'}, '*');
```

LOGOUT :

- When we logout from crm user also get logout from widget for that we are using below function at a time of logout from crm

Function :

```
parent.postMessage({'action': 'logout'}, '*');
```

CLICK2CALL :

- When we click on any button for doing click 2 call from crm to dialer widget we have to use below function for click 2 call

Function :

```
parent.postMessage({'action': 'click_to_call', 'phone_code': '1', 'phone_number':  
phone number of field on which we click for click 2 call}, '*');
```

Products

- Call Center Dialer
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