

Soshogle CRM - Complete API Documentation



Base URL

Development: <http://localhost:3000>

Production: <https://go-high-or-show-goog-8dv76n.abacusai.app>



Authentication

All API endpoints (except `/api/auth/*` and `/api/signup`) require authentication via NextAuth session cookies.

Headers:

- Cookie: `next-auth.session-token=<token>`

Unauthenticated Response:

```
{
  "error": "Unauthorized",
  "status": 401
}
```



Authentication Endpoints

Sign Up

```
POST /api/signup
Content-Type: application/json

{
  "name": "John Doe",
  "email": "john@example.com",
  "password": "securePassword123",
  "businessName": "Acme Corp",
  "industry": "Technology"
}
```

Response (200 OK):

```
{
  "success": true,
  "userId": "clx1234567890",
  "message": "Account created successfully"
}
```

Error (400 Bad Request):

```
{
  "error": "Email already exists"
}
```

Sign In

```
POST /api/auth/signin
Content-Type: application/json

{
  "email": "john@example.com",
  "password": "securePassword123"
}
```

(Handled by NextAuth - redirects to `/dashboard` on success)

Get Session

```
GET /api/auth/session
```

Response (200 OK):

```
{
  "user": {
    "id": "clx1234567890",
    "email": "john@example.com",
    "name": "John Doe",
    "role": "USER"
  },
  "expires": "2025-12-31T23:59:59.999Z"
}
```

Contacts API

List Contacts

```
GET /api/contacts?page=1&limit=20&search=john&tags=VIP,Customer
```

Query Parameters:

- `page` (optional): Page number (default: 1)
- `limit` (optional): Results per page (default: 20)
- `search` (optional): Search by name, email, or phone
- `tags` (optional): Comma-separated tag names

Response (200 OK):

```
{
  "contacts": [
    {
      "id": "clx9876543210",
      "firstName": "Jane",
      "lastName": "Smith",
      "email": "jane@example.com",
      "phone": "+15551234567",
      "company": "Tech Inc",
      "tags": ["VIP", "Customer"],
      "source": "import",
      "createdAt": "2025-10-15T10:30:00.000Z",
      "updatedAt": "2025-11-13T14:20:00.000Z"
    }
  ],
  "total": 147,
  "page": 1,
  "totalPages": 8
}
```

Create Contact

`POST /api/contacts`
`Content-Type: application/json`

```
{
  "firstName": "Alice",
  "lastName": "Johnson",
  "email": "alice@example.com",
  "phone": "+15559876543",
  "company": "Design Studio",
  "tags": ["Prospect"],
  "customFields": {},
  "birthday": "1990-05-20",
  "preferredContact": "email"
}
```

Response (201 Created):

```
{
  "id": "clx1111111111",
  "firstName": "Alice",
  "lastName": "Johnson",
  "email": "alice@example.com",
  "phone": "+15559876543",
  "company": "Design Studio",
  "tags": ["Prospect"],
  "customFields": {
    "birthday": "1990-05-20",
    "preferredContact": "email"
  },
  "userId": "clx1234567890",
  "createdAt": "2025-11-13T15:00:00.000Z",
  "updatedAt": "2025-11-13T15:00:00.000Z"
}
```

Get Contact

```
GET /api/contacts/clx1111111111
```

Response (200 OK):

```
{
  "id": "clx1111111111",
  "firstName": "Alice",
  "lastName": "Johnson",
  "email": "alice@example.com",
  "phone": "+15559876543",
  "company": "Design Studio",
  "tags": ["Prospect"],
  "messages": [
    {
      "id": "msg123",
      "content": "Hello Alice!",
      "direction": "OUTBOUND",
      "createdAt": "2025-11-13T14:00:00.000Z"
    }
  ],
  "appointments": [],
  "notes": []
}
```

Update Contact

```
PUT /api/contacts/clx1111111111
Content-Type: application/json
```

```
{
  "tags": ["Prospect", "Hot Lead"],
  "customFields": {
    "birthday": "1990-05-20",
    "preferredContact": "phone"
  }
}
```

Response (200 OK):

```
{
  "id": "clx1111111111",
  "firstName": "Alice",
  "lastName": "Johnson",
  "email": "alice@example.com",
  "phone": "+15559876543",
  "company": "Design Studio",
  "tags": ["Prospect", "Hot Lead"],
  "updatedAt": "2025-11-13T16:00:00.000Z"
}
```

Delete Contact

```
DELETE /api/contacts/clx1111111111
```

Response (200 OK):

```
{
  "success": true,
  "message": "Contact deleted"
}
```

Import Contacts (CSV)

```
POST /api/contacts/import
Content-Type: multipart/form-data

file: contacts.csv
tagAll: VIP
```

CSV Format:

```
firstName,lastName,email,phone,company
John,Doe,john@example.com,+15551234567,Acme Corp
Jane,Smith,jane@example.com,+15559876543,Tech Inc
```

Response (200 OK):

```
{
  "success": true,
  "imported": 150,
  "failed": 3,
  "errors": [
    {
      "row": 25,
      "error": "Invalid email format"
    }
  ]
}
```

Leads API

List Leads

```
GET /api/leads?status=NEW&category=dentist&city=Miami
```

Query Parameters:

- `status` (optional): NEW | CONTACTED | QUALIFIED | CONVERTED

- category (optional): Business category
- city (optional): City filter

Response (200 OK):

```
{
  "leads": [
    {
      "id": "lead123",
      "businessName": "Sunshine Dental",
      "address": "123 Ocean Dr",
      "city": "Miami",
      "state": "FL",
      "zipCode": "33139",
      "phone": "+13055551234",
      "website": "https://sunshinedental.com",
      "rating": 4.5,
      "category": "dentist",
      "status": "NEW",
      "googlePlaceId": "ChIJ...",
      "source": "google_places",
      "createdAt": "2025-11-13T10:00:00.000Z"
    }
  ],
  "total": 42
}
```

Create Lead

```
POST /api/leads
Content-Type: application/json

{
  "businessName": "Ocean View Restaurant",
  "address": "456 Beach Blvd",
  "city": "San Diego",
  "state": "CA",
  "zipCode": "92101",
  "phone": "+16195551234",
  "website": "https://oceanviewsd.com",
  "category": "restaurant",
  "status": "NEW",
  "source": "manual"
}
```

Response (201 Created):

```
{
  "id": "lead456",
  "businessName": "Ocean View Restaurant",
  "status": "NEW",
  "createdAt": "2025-11-13T16:30:00.000Z"
}
```

Convert Lead to Contact

```
POST /api/leads/lead123/convert
Content-Type: application/json

{
  "contactData": {
    "firstName": "Maria",
    "lastName": "Garcia",
    "email": "maria@sunshinedental.com",
    "phone": "+13055551234"
  }
}
```

Response (200 OK):

```
{
  "success": true,
  "contactId": "clx2222222222",
  "message": "Lead converted to contact"
}
```

Deals API (Pipeline)

List Deals

```
GET /api/deals?stage=QUALIFIED
```

Query Parameters:

- stage (optional): LEAD | QUALIFIED | PROPOSAL | NEGOTIATION | CLOSED_WON | CLOSED_LOST

Response (200 OK):

```
{
  "deals": [
    {
      "id": "deal123",
      "title": "Website Redesign",
      "value": 15000,
      "stage": "PROPOSAL",
      "probability": 60,
      "expectedCloseDate": "2025-12-15T00:00:00.000Z",
      "contacts": [
        {
          "id": "clx1111111111",
          "firstName": "Alice",
          "lastName": "Johnson"
        }
      ],
      "createdAt": "2025-10-20T09:00:00.000Z",
      "updatedAt": "2025-11-13T11:00:00.000Z"
    }
  ],
  "total": 23
}
```

Create Deal

```
POST /api/deals
Content-Type: application/json

{
  "title": "Mobile App Development",
  "value": 50000,
  "stage": "QUALIFIED",
  "probability": 40,
  "expectedCloseDate": "2026-02-01",
  "contactIds": ["clx1111111111"]
}
```

Response (201 Created):

```
{
  "id": "deal789",
  "title": "Mobile App Development",
  "value": 50000,
  "stage": "QUALIFIED",
  "createdAt": "2025-11-13T17:00:00.000Z"
}
```

Move Deal Stage

```
PATCH /api/deals/deal123/stage
Content-Type: application/json
```

```
{
  "stage": "NEGOTIATION",
  "probability": 80
}
```

Response (200 OK):

```
{
  "id": "deal123",
  "stage": "NEGOTIATION",
  "probability": 80,
  "updatedAt": "2025-11-13T18:00:00.000Z"
}
```

Voice Agents API

List Voice Agents

```
GET /api/voice-agents
```

Response (200 OK):

```
{
  "agents": [
    {
      "id": "va123",
      "name": "Florida Dentist Receptionist",
      "elevenLabsAgentId": "VrXPNbWYnVdyJLBrcuGp",
      "phoneNumberId": "phnum_6401k9z292a7fbs9bae8k5qs6jce",
      "twilioPhoneNumber": "+19048170321",
      "firstMessage": "Hi! Thanks for calling Sunshine Dental. How can I help you today?",
      "status": "ACTIVE",
      "createdAt": "2025-11-10T10:00:00.000Z"
    }
  ]
}
```

Create Voice Agent

```
POST /api/voice-agents
Content-Type: application/json

{
  "name": "Sales Assistant",
  "twilioPhoneNumber": "+15551234567",
  "firstMessage": "Hello! Thanks for calling Acme Corp. How may I assist you?",
  "systemPrompt": "You are a helpful sales assistant for Acme Corp, a technology company."
}
```

Response (201 Created):

```
{
  "id": "va456",
  "name": "Sales Assistant",
  "elevenLabsAgentId": "abc123xyz456",
  "phoneNumberId": "phnum_789xyz",
  "twilioPhoneNumber": "+15551234567",
  "status": "ACTIVE",
  "createdAt": "2025-11-13T19:00:00.000Z"
}
```

Auto-Configure Voice Agent

```
POST /api/voice-agents/va456/auto-configure
```

Response (200 OK):

```
{
  "success": true,
  "agentId": "abc123xyz456",
  "phoneNumberId": "phnum_789xyz",
  "message": "Agent configured successfully. Phone number assigned."
}
```

Error (400 Bad Request):

```
{
  "error": "Phone number not imported to ElevenLabs",
  "details": "Run sync to import Twilio numbers first"
}
```

Initiate Test Call

```
POST /api/outbound-calls
Content-Type: application/json

{
  "agentId": "va123",
  "toPhoneNumber": "+15149928774"
}
```

Response (200 OK):

```
{
  "success": true,
  "callSid": "CA1234567890abcdef",
  "status": "queued",
  "message": "Call initiated successfully"
}
```

Error (404 Not Found):

```
{
  "error": "Agent not found or not properly configured",
  "details": "Phone number may not be assigned. Run auto-configure."
}
```

Twilio Integration API

List Owned Phone Numbers

```
GET /api/twilio/phone-numbers/owned
```

Response (200 OK):

```
{
  "success": true,
  "numbers": [
    {
      "phoneNumber": "+19048170321",
      "friendlyName": "US (Florida)",
      "sid": "PN1234567890abcdef"
    },
    {
      "phoneNumber": "+15551234567",
      "friendlyName": "US (New York)",
      "sid": "PN9876543210zyxwvu"
    }
  ]
}
```

Purchase Phone Number

```
POST /api/twilio/phone-numbers/purchase
Content-Type: application/json
```

```
{  
  "areaCode": "305",  
  "country": "US"  
}
```

Response (200 OK):

```
{  
  "success": true,  
  "phoneNumber": "+13055559999",  
  "sid": "PNabcdef123456",  
  "monthlyCost": "$1.00"  
}
```

Sync Phone Numbers

```
POST /api/twilio/phone-numbers/sync
```

Response (200 OK):

```
{  
  "success": true,  
  "importedToElevenLabs": 2,  
  "message": "Phone numbers synced successfully"  
}
```

Error (402 Payment Required):

```
{  
  "error": "ElevenLabs plan does not support phone numbers",  
  "upgradeRequired": true,  
  "upgradeUrl": "https://elevenlabs.io/app/subscription"  
}
```

Twilio Voice Callback (Webhook)

```
POST /api/twilio/voice-callback
Content-Type: application/x-www-form-urlencoded
```

```
CallSid=CA1234567890abcdef  
From=+15149928774  
To=+19048170321  
CallStatus=ringing
```

Response (200 OK - TwiML):

```
<?xml version="1.0" encoding="UTF-8"?>
<Response>
  <Pause length="1"/>
  <Connect>
    <Stream url="wss://api.elevenlabs.io/v1/convai/conversation?
agent_id=VrXPNbWYnVdyJLBrcuGp"/>
  </Connect>
</Response>
```

ElevenLabs Validation API

Validate Setup

`GET /api/elevenlabs/validate`

Response (200 OK):

```
{
  "success": true,
  "checks": [
    {
      "name": "ElevenLabs API Key",
      "status": "✓ Valid",
      "pass": true
    },
    {
      "name": "Subscription Plan",
      "status": "✓ Creator Plan",
      "pass": true
    },
    {
      "name": "Twilio Credentials",
      "status": "✓ Valid",
      "pass": true
    },
    {
      "name": "Twilio Phone Numbers",
      "status": "✓ 2 numbers available",
      "pass": true
    },
    {
      "name": "ElevenLabs Phone Numbers",
      "status": "⚠ 0 imported",
      "pass": false
    }
  ],
  "errors": [],
  "warnings": [
    "No phone numbers imported to ElevenLabs. Run sync to import."
  ]
}
```

💬 Messages API

List Conversations

```
GET /api/messages?channel=SMS
```

Query Parameters:

- channel (optional): SMS | EMAIL | WHATSAPP

Response (200 OK):

```
{  
  "conversations": [  
    {  
      "id": "conv123",  
      "contactId": "clx1111111111",  
      "contact": {  
        "firstName": "Alice",  
        "lastName": "Johnson",  
        "phone": "+15559876543"  
      },  
      "lastMessage": {  
        "content": "Thanks for your help!",  
        "direction": "INBOUND",  
        "createdAt": "2025-11-13T14:30:00.000Z"  
      },  
      "unreadCount": 0,  
      "channel": "SMS"  
    }  
  ]  
}
```

Get Conversation Messages

```
GET /api/messages/conv123
```

Response (200 OK):

```
{
  "messages": [
    {
      "id": "msg456",
      "content": "Hello! How can I help you?",
      "direction": "OUTBOUND",
      "channel": "SMS",
      "status": "DELIVERED",
      "createdAt": "2025-11-13T14:00:00.000Z"
    },
    {
      "id": "msg789",
      "content": "I need info about your services",
      "direction": "INBOUND",
      "channel": "SMS",
      "createdAt": "2025-11-13T14:15:00.000Z"
    }
  ]
}
```

Send Message

POST /api/messages
Content-Type: application/json

```
{
  "contactId": "clx1111111111",
  "content": "Thanks for reaching out! Our team will contact you soon.",
  "channel": "SMS"
}
```

Response (200 OK):

```
{
  "id": "msg999",
  "content": "Thanks for reaching out! Our team will contact you soon.",
  "direction": "OUTBOUND",
  "channel": "SMS",
  "status": "SENT",
  "createdAt": "2025-11-13T20:00:00.000Z"
}
```

Generate AI Message

POST /api/messages/generate
Content-Type: application/json

```
{
  "contactId": "clx1111111111",
  "context": "Follow up after initial consultation",
  "tone": "professional"
}
```

Response (200 OK):

```
{
  "generatedMessage": "Hi Alice, I wanted to follow up on our consultation last week.  
Do you have any questions about the services we discussed? I'm here to help!",  
  "model": "gpt-4.1-mini"
}
```

July
17

Appointments API

List Appointments

```
GET /api/appointments?startDate=2025-11-15&endDate=2025-11-30
```

Response (200 OK):

```
{
  "appointments": [
    {
      "id": "apt123",
      "title": "Consultation Call",
      "startTime": "2025-11-18T14:00:00.000Z",
      "endTime": "2025-11-18T15:00:00.000Z",
      "contactId": "clx1111111111",
      "contact": {
        "firstName": "Alice",
        "lastName": "Johnson"
      },
      "location": "Zoom",
      "notes": "Discuss project requirements",
      "status": "SCHEDULED",
      "createdAt": "2025-11-13T09:00:00.000Z"
    }
  ]
}
```

Create Appointment

```
POST /api/appointments
Content-Type: application/json

{
  "title": "Discovery Meeting",
  "startTime": "2025-11-20T10:00:00.000Z",
  "endTime": "2025-11-20T11:00:00.000Z",
  "contactId": "clx1111111111",
  "location": "Office - Room 3",
  "notes": "Bring project brief"
}
```

Response (201 Created):

```
{
  "id": "apt456",
  "title": "Discovery Meeting",
  "startTime": "2025-11-20T10:00:00.000Z",
  "status": "SCHEDULED",
  "createdAt": "2025-11-13T21:00:00.000Z"
}
```

Campaigns API

List Campaigns

GET /api/campaigns?type=SMS&status=ACTIVE

Response (200 OK):

```
{
  "campaigns": [
    {
      "id": "camp123",
      "name": "Holiday Promotion",
      "type": "SMS",
      "status": "ACTIVE",
      "targetTags": ["Customer", "VIP"],
      "message": "🎉 Special holiday offer! Get 20% off. Reply YES to claim.",
      "scheduledAt": "2025-12-01T09:00:00.000Z",
      "sentCount": 0,
      "openRate": 0,
      "clickRate": 0,
      "createdAt": "2025-11-13T10:00:00.000Z"
    }
  ]
}
```

Create Campaign

POST /api/campaigns
Content-Type: application/json

```
{
  "name": "New Product Launch",
  "type": "EMAIL",
  "targetTags": ["Prospect"],
  "subject": "Introducing Our New Service",
  "message": "<p>We're excited to announce...</p>",
  "scheduledAt": "2025-11-20T10:00:00.000Z"
}
```

Response (201 Created):

```
{  
  "id": "camp456",  
  "name": "New Product Launch",  
  "type": "EMAIL",  
  "status": "SCHEDULED",  
  "createdAt": "2025-11-13T22:00:00.000Z"  
}
```

Send Campaign

```
POST /api/campaigns/camp456/send
```

Response (200 OK):

```
{  
  "success": true,  
  "sentCount": 147,  
  "failedCount": 3,  
  "message": "Campaign executed successfully"  
}
```

⚙️ Workflows API

List Workflows

```
GET /api/workflows?status=ACTIVE
```

Response (200 OK):

```
{
  "workflows": [
    {
      "id": "wf123",
      "name": "Welcome New Contacts",
      "trigger": "CONTACT_CREATED",
      "conditions": [],
      "actions": [
        {
          "type": "SEND_SMS",
          "config": {
            "message": "Welcome! Thanks for joining us."
          }
        },
        {
          "type": "ADD_TAG",
          "config": {
            "tag": "New Contact"
          }
        }
      ],
      "status": "ACTIVE",
      "executionCount": 245,
      "createdAt": "2025-10-01T09:00:00.000Z"
    }
  ]
}
```

Create Workflow

POST /api/workflows
Content-Type: application/json

```
{
  "name": "VIP Contact Notification",
  "trigger": "TAG ADDED",
  "conditions": [
    {
      "field": "tags",
      "operator": "contains",
      "value": "VIP"
    }
  ],
  "actions": [
    {
      "type": "SEND_EMAIL",
      "config": {
        "to": "admin@acmecorp.com",
        "subject": "New VIP Contact",
        "body": "A new VIP contact was added: {{contact.name}}"
      }
    }
  ],
  "status": "ACTIVE"
}
```

Response (201 Created):

```
{
  "id": "wf456",
  "name": "VIP Contact Notification",
  "status": "ACTIVE",
  "createdAt": "2025-11-13T23:00:00.000Z"
}
```

Analytics API

Dashboard Overview

```
GET /api/analytics/overview?startDate=2025-11-01&endDate=2025-11-13
```

Response (200 OK):

```
{
  "metrics": {
    "totalContacts": 1247,
    "newContactsThisMonth": 89,
    "totalLeads": 342,
    "newLeadsThisMonth": 45,
    "activeDeals": 67,
    "dealsValue": 1250000,
    "appointmentsScheduled": 34,
    "messagesExchanged": 1890,
    "campaignsSent": 12,
    "callsMade": 156
  },
  "charts": {
    "contactsGrowth": [
      { "date": "2025-11-01", "count": 1158 },
      { "date": "2025-11-13", "count": 1247 }
    ],
    "dealsByStage": [
      { "stage": "QUALIFIED", "count": 23, "value": 450000 },
      { "stage": "PROPOSAL", "count": 18, "value": 380000 },
      { "stage": "NEGOTIATION", "count": 15, "value": 320000 },
      { "stage": "CLOSED_WON", "count": 11, "value": 100000 }
    ]
  }
}
```

AI Assistant API

Chat with Soshogle Agent

```
POST /api/ai-assistant
Content-Type: application/json

{
  "message": "How many contacts do I have tagged as VIP?",
  "conversationHistory": []
}
```

Response (200 OK):

```
{
  "reply": "You currently have 23 contacts tagged as VIP. Would you like me to show
you their details or help you with anything else?",
  "model": "gpt-4.1-mini",
  "timestamp": "2025-11-13T23:30:00.000Z"
}
```

Admin API

List All Users (Admin Only)

```
GET /api/admin/users
```

Response (200 OK):

```
{
  "users": [
    {
      "id": "clx1234567890",
      "email": "john@example.com",
      "name": "John Doe",
      "role": "USER",
      "createdAt": "2025-09-01T10:00:00.000Z",
      "stats": {
        "contacts": 147,
        "leads": 42,
        "deals": 23
      }
    },
    {
      "total": 8
    }
  ]
}
```

Error Responses

Standard Error Format

```
{
  "error": "Resource not found",
  "code": "NOT_FOUND",
  "details": "Voice agent with ID 'va999' does not exist",
  "timestamp": "2025-11-13T23:45:00.000Z"
}
```

HTTP Status Codes

- 200 OK - Success
- 201 Created - Resource created
- 400 Bad Request - Invalid input
- 401 Unauthorized - Authentication required
- 402 Payment Required - Subscription upgrade needed
- 403 Forbidden - Insufficient permissions
- 404 Not Found - Resource not found
- 422 Unprocessable Entity - Validation error
- 500 Internal Server Error - Server error

Webhook Endpoints

Twilio Voice Callback

URL: <https://yourdomain.com/api/twilio/voice-callback>

Method: POST

Content-Type: application/x-www-form-urlencoded

Twilio SMS Webhook

URL: <https://yourdomain.com/api/twilio/sms-webhook>

Method: POST

Content-Type: application/x-www-form-urlencoded

Stripe Payment Webhook

URL: <https://yourdomain.com/api/payments/stripe/webhook>

Method: POST

Content-Type: application/json

Last Updated: November 2025

API Version: 2.0