

API Guidelines

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Developer API

What is it?

The Apptivo Developer API is an HTTP-based programming interface that allows developers to interact with the Apptivo platform to extend and enhance its functionality. The API allows for any application to both read and write in your Apptivo firm. It is RESTful and uses JSON(JavaScript Object Notation) as the exchange format. SSL is mandatory and used for all communication.

What can it do?

- Create new sales leads
- Modify marketing targets & target lists
- Manage jobs & candidates
- Manage company events & news stories
- Create support tickets logged by customers.

Who is it for?

This guide is designed for developers with basic knowledge of web services & XML, in addition to a programming language of your choice.

HTTP methods

GET and POST methods are for request-response action, these two methods are mainly used for object retrieval, creation and the actions performed.

GET

Used for object retrieval only

POST

Used for object creation and object actions

Formats

The JSON standard is followed with the API. This means that the API can only receive JSON lists or objects. JSON values must be of the correct type. IDs and numbers in general must be integers, not strings. The output also displayed in JSON format.

Sample Format

The sample format of requesting URL for creating a contact in Apptivo Contacts App:

https://www.apptivo.com/app/dao/v6/contacts?a=save&contactData={CONTACT_DATA}&;apiKey=API_KEY&accesKey=ACCESS_KEY

The slash followed by method with case data collection, API key and Access key. The output of the above JSON request URL receives output with the same JSON format.

Steps to Create an API Integration

Below are the steps to generate the API in various functionalities:

1. Under 'Business Settings' check for your "API Key" & "Access Key" from the API Access.

Business Set	
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Manage Your Background	Account Jobs

BUSINESS SETTINGS	
🖵 General 🗸	API Access The API Key is not changeable by you and is sort of like the User ID. The Access key can be changed as and when you need. Keep this information safe. does not
Business Information	assume any responsibility for unauthorized access that results from lost access keys.
Customize Home	API Key uDxzzQzKVBtQ-BulrPUYtUYPqQr-a89bc062-1c8f-460d-b7fc-edd17f947ab4
Collaboration	
Auto Copy Email	Access Key 421E9G8H5d19B9A0
Currencies	Regenerate
Installable Demos	What happens when you regenerate the Key?
Partners	You have to immediately include the new key in your API calls. All your API calls with the old access key will not be executed.
G Suite Integration	
API Access	

Create Contact API

2. Log in and access 'Contacts' App from your universal navigation menu bar.



3. Now, you will be navigated to the 'Create page' of Contacts App. Even before creating a contact using 'Create' option on the left side menu, click on "F12" key (or) right click the mouse for the "Inspect" option to navigate into the 'Inspect View' that will be displayed at the bottom of the Apptivo page as shown below:

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4. Click on 'Clear Console' option as highlighted to clear the cache before you navigate into the 'Network' section.

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XHR finished loading: POST " <u>https://checkin.purechat.com/api/checkin</u> ".	firebug-lite.js:18994

5. Now, select for the 'Network' option, before you start with the contact creation.

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checkin	OPTIONS	200	xhr	firebug-lite.js:18994	380 B	293 ms	1				
- checkin	POST	200	vhr	Other	478 R	293 mr	1				-
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6. Start creating the contact keeping the 'Inspect page' opened at the bottom of the Apptivo page.

1 CONTACTS				search contacts	✓ Q
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7. You can also have this 'Inspect page' docked to right side of the page as below:

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8. Fill in the mandatory fields and click on 'Create' button at the bottom of the page.

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9. Once a contact is created with the 'Inspect page' open at the bottom, the necessary API's will be generated accordingly. Now search and select for the "Contact?a=save" from the Name section. After clicking on it you will be displayed with the "Request URL" under the headers tab as shown below:

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checkin	Remote Address: 65.49.23.2:443					
checkin	▼ Response Headers view source					
h?a=4254687683&u=447081	Access-Control-Allow-Origin: *					
checkin	Connection: keep-alive					
checkin	Content-Length: 811					
contacts?a=save	Date: Fri, 08 Dec 2017 11:13:54 GMT Server: nginx					

10. Scroll down to check for the 'Form data' under the headers tab as shown below.

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	rce User", "contactType":22153, "accounter", "customerNumber": ", "accountId":null, "customerNumberId":null, "supplierName": ", "supplierName": ", "supplierName": ", "accountId":null, "supplierName": ", "supplierName: ", "supplierName": ", "supplierName: ", "supplierName: ", "supplierName: ", "supplierName: ", "supplierName: ", ", ", supplierName: ", ", "supplierName: ", ", ", supplierName: ", ", ", supplierName: ", supplierName: ", ", supplierName: ", supplierName: ", supplierName: ", ", supplierName: sup
h?a=4254687683&u=447081	ssigneeObjectRefName": "Services Demo", "assigneeObjectRefId":46374, "assigneeObjectId": "8", "contactCategoryName": ", "categoryId":null, "descriptio
checkin	ame":","territoryId":null,"industryName":","industryId":null,"hobies":","fods":","faceBookWL:"","tuitterURL:"","linkeIINURL:"","terkeisit
	<pre>e":"","createdByName":","lastUpdatedByName":"","creationDate":","lastUpdateDate":","labels":[],"contatStatusName":"Active","contatStatusId":10 000 "ipDisout","U" NorthWorldContactWorldContact": "hosPhane":"ActiveDateDate":","labels":[],"contatStatusName":"Active","contatStatusId":10</pre>
contacts?a=save	voo, isriamiy: r. joestwayioontatimame: Emait, joestwayioontatut: 10000, accounts; j, isonisustribud: w. isoountatuta: w. iso
contacts?a=getById& =1512	peCode": 'PHONE BUSINESS", "id" "contact phone_input"}], "emailAddresses": [{"emailAddress"; isravellggmail.com", emailTypeCode": BUSINESS", "emailTyp
	<pre>e : BUSINESS , AU : LONC email_input j], createuxy :nut, casuppareuxy :nut, contactLategoryIds :[], Categories :[], Synciowoogle : N', addresses s':[("addressAttributeld":"address section attr id", "addressTypeCode":"l'address":"Billing Address", "addressLine2":", "attributeld":", "addressLine2":", "citt</pre>
contacts?a=getById&_=1512	y":"","stateCode":"","addressGroupName":"Address1","state":"","zipCode":"","countryId":70,"countryName":"India","countryCode":"IN","deliveryInstruc tions":null,"county":null}],"lastContactedDate":null}

11. Prepare a code now with the ampersand symbol included between each of the following(Request URL, Form Data(Contact Data), API Key, Access Key):

https://www.apptivo.com/app/dao/v6/contacts?a=save&contactData={"customAttributes":[],"title":null,"firstName":"Arun","externalRefId":"","lastName": "Isravel","jobTitle":"","contactTypeName":"E-Commerce

User", "contactType":221153, "accountName":"", "customerNumber":"", "accountId":null, "customerNumberId":null, "supplierName":"", "supplierId":null, "as signeeObjectRefName":"Services

Demo","assigneeObjectRefld":46374,"assigneeObjectId":"8","contactCategoryName":"","categoryId":null,"description":"","skypeName":"","phoneticNa me":"","nickName":"","dateOfBirth":"","marketName":"","marketId":null,"segmentName":"","segmentId":null,"territoryName":"","territoryId":null,"industry Name":"","industryId":null,"hobbies":"","faceBookURL":"","twitterURL":"","linkedInURL":"","website":"","createdByName":"","lastUpdateDate":"","lastUpdatedByN ame":"","creationDate":"","lastUpdateDate":","labels":[],"contactStatusName":"Active","contactStatusId":10000,"isPrimary":Y","bestWayToContactNa me":"Email","bestWayToContactId":10000,"accounts":[],"isUnsubscribed":"N","isBounced":"N","isResponded":"N","bouncedReason":null,"languageCo de":"en","languageName":"English","phoneNumbers":[{"phoneNumber":"223634564","phoneType":"Business","phoneTypeCode":"PHONE_BUSINES S","id":"contact_phone_input"],"emailAddresses":[{"emailAddresses":"isravell@gmail.com","emailTypeCode":"BUSINESS","emailType":"Business","id":

"cont_email_input"}],"createdBy":null,"lastUpdatedBy":null,"contactCategoryIds":[],"categories":[],"syncToGoogle":"N","addresses":[{"addressAttributeI d":"address_section_attr_id","addressTypeCode":"1","addressType":"Billing

Address","addressLine1":"","addressLine2":"","city":"","stateCode":"","addressGroupName":"Address1","state":"","zipCode":"","countryId":70,"country Name":"India","countryCode":"IN","deliveryInstructions":null,"county":null}],"lastContactedDate":null}&uDxzzQzKVBtQ-BuIrPUYtUYPqQr-a89bc062-1 c8f-460d-b7fc-edd17f947ab4&421E9G8H5d19B9A0

12. Now copy and paste this whole code in your browser as shown below. Once done, you will be generated with a API as shown below.



- 13. You can now make use of this generated API on your need.
- 14. The same procedure can be followed for the 'Create functionality' in all the other respective apps.
- 15. Alternative usage: You can also replace the Request URL with 'www' as 'api or api2', even for this the same API will be generated.

Create Customer API

1. Prepare a code now with the ampersand symbol included between each of the following(Request URL, Form Data(Customer Data), API Key, Access Key):

https://www.apptivo.com/app/dao/v6/customers?a=save&customerData={"customAttributes":[],"customerId":null,"customerName":"Arun Rajah","customerNumber":"Auto generated

number", "customerCategory":"", "customerCategoryId":null, "statusName": "Active", "statusId": 10000, "defaultBillingCurrency": "INR", "assigneeObjectRefName": "Servi ces

Demo","assigneeObjectRefId":46374,"assigneeObjectId":8,"description":"","phoneNumber":"","contactEmail":"","skypeName":"","parentCustomerName":"","parentCustomerName":"","parentCustomerId":null,"employeeRange":"","employeeRangeId":null,"website":"","tickerSymbol":"","annualRevenue":null,"annualRevenueCurrencyCode":"INR","campaign Name":"","campaignId":null,"creditRating":"","marketName":"","marketId":null,"segmentName":"","segmentId":null,"industryName":"","industryId":null,"paymentTerm ":"Net

30","paymentTermId":69976,"ownership":"","slaName":"","slaId":null,"isUnsubscribed":"N","accounts":[],"territories":[],"isBounced":"N","bouncedReason":null,"isRes ponded":"N","followUpDate":null,"followUpDescription":null,"createdByName":"","lastUpdatedByName":"","creationDate":"","lastUpdateDate":"","isExistingCustomer ":"N","isAffiliate":"N","faceBookURL":"","twitterURL":"","linkedInURL":"","createdBy":null,"lastUpdatedBy":null,"labels":[],"phoneNumbers":[{"phoneNumbers":"465654 5646","phoneType":"Business","phoneTypeCode":"PHONE_BUSINESS","id":"cust_phone_input"}],"removePhoneNumbers":[],"emailAddresses":[{"emailAddresses":" rajah@gmail.com","emailTypeCode":"BUSINESS","emailType":"Business","id":"cont_email_input"}],"addresses":[{"addressAttributeId":"address_section_attr_id","a ddressTypeCode":"1","addressType":"Billing

Address","addressLine1":"","addressLine2":"","city":"","stateCode":"","addressGroupName":"Address1","state":"","zipCode":"","countryId":70,"countryName":"India", "countryCode":"IN","deliveryInstructions":null,"county":null}],"lastContactedDate":null}&isLeadConvert=N&isDuplicate=false&uDxzzQzKVBtQ-BulrPUYtUYPqQr-a8 9bc062-1c8f-460d-b7fc-edd17f947ab4&421E9G8H5d19B9A0

2. After the process you can now make use of this generated API on your need.

Create Items API

1. Prepare a code now with the ampersand symbol included between each of the following(Request URL, Form Data(CreateItem Data), API Key, Access Key):

https://www.apptivo.com/app/dao/v6/items?a=save&createItemData={"isEnabled":true,"itemCode":"Autogeneratednumber","billsOfMaterialType":"Standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","billsOfMaterialTypeId":"bills_of_materials_standard","bills_ofMaterialSystem_bills_bil

New","itemConditionId":21189572,"inventoryType":"Purchased","inventoryTypeId":0,"customAttributes":[],"itemPriceCurrencyCode":"INR","currencyCode":"INR","c ostCurrencyCode":"INR","enabledForSales":"Yes","labels":[],"itags":[],"isDirtypage":null,"itemPrice":"500.00","itemName":"Watch","customAttributeValueId":"bills_of _materials_standard","shape":"","color":"","attributeValues":[{"attributeId":"bills_of_materials_standard","attributeValue":"Standard","shape":"","color":""}],"categorie s":[],"taxCode":null,"trackSize":"","minOrderQuantity":0}&uDxzzQzKVBtQ-BulrPUYtUYPqQr-a89bc062-1c8f-460d-b7fc-edd17f947ab4&421E9G8H5d19B9A0

2. After the process you can now make use of this generated API on your need.

Create Kit Orders API

1. Prepare a code now with the ampersand symbol included between each of the following(Request URL, Form Data(CreateItem Data), API Key, Access Key):

https://www.apptivo.com/app/dao/v6/kitorders?a=save&kitOrderData={"kitOrderNumber":"Auto generated

number","discountTypeName":"PERCENTAGE","discountType":"%","discountValue":"10.00","currencyCode":"INR","subTotal":1000,"total":900,"shippingAndHandli ng":"0.00","employeeld":46577,"customAttributes":[],"itemList":[{"unitPriceCurrencyCode":"INR","currencyCode":"INR","itemAmountCurrencyCode":"INR","supplier PriceCurrencyCode":"INR","supplierAmountCurrencyCode":"INR","itemName":"Football","itemId":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"attributeValues":[{"id":13,"attributeld":225368,"fieldType" :"input","itemCode":"1","customAttributeValue":"1","refFieldObjectRefName":"1","undefined":"1","quantity":1,"supplierName":"","supplier_name_select":null,"supplie rld":null,"supplierNumber":null,"supplierPrice":null,"supplierAmount":null,"taxCode":"","taxId":null,"unitPrice":1000,"itemNote":"","rowNote":"","itemAmount":1000,"ite mDiscount":100,"itemTax":0,"supplierItemId":null,"amount":1000}],"labels":[],"tags":[],"subTotalCurrencyCode":"INR","discountAmountCurrencyCode":"INR","taxAm ountCurrencyCode":"INR","shippingAndHandlingCurrencyCode":"INR","totalCurrencyCode":"INR","isDirtypage":null,"assigneeObjectRefId":46577,"assigneeObjectId"::8","updateAutocomplete":true,"customerName":"Arun Isravel","customerId":914668,"customer_input":914668,"discountAmount":100,"taxAmount":0,"fromObjectId":174}&yCOxOzWzVVGT-ExjKIEvGJOxzzS-e0b7a209c4f3-478b-8388-321391c8cc22&4H3I10109Mw4I18I

2. After the process you can now make use of this generated API on your need.

Advanced Search for Contacts

1. Click on the 'Advanced Search' option with the Inspect page opened.

		Â	***	search contacts	✓ Q
Create	Show All (8)				Advanced Search
	Pulk Actions -			Display Over	

2. A pop-up will emerge with all the fields, where you can opt for any field using which you need to do an advanced search.

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Create	Show All (8) Bulk Actions -		Advanced Search	×
🛄 Lists 🗸 🗸	🔳 < 🛛 First Name	🕈 🗘 🖨	> Contact Details	
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S T U V			> Address Information	
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🕞 🖬 Elements Console Source	s Network Timeline Pro	files Application Security Auc	lits	◎ 3 🗛 3 🚦 🗙
● ◎ ■ 😽 View: 🏭 🛬	📄 Preserve log 📄 Disable c	ache 🗍 🗐 Offline No throttling	v	
Filter 🛛 🗍 Regex 🗍 Hi	de data URLs 🔊 XHR JS	CSS Img Media Font Doc V	VS Manifest Other	
500 ms 1000 ms 1500 ms	2000 ms 2500 ms	3000 ms 3500 ms	4000 ms 4500 ms 5500 ms 5500 ms	6000 ms 6500 ms 7000 ms 7500 ms
Name	Method Status Typ	pe Initiator Size	Time Timeline – Start Time	1.00 s 1.50 s
checkin	OPTIONS 200 xhr	firebuq-lite.js:18994	380 B 1.19 s	
	200 xhr	Other	478 B 315 ms	

- 3. After you click the search button, you will be displayed with the search result based on the search criteria performed.
- 4. Click the "contacts?a=getAllByAdvancedSearch" under Name category, now you will be displayed with the 'Request URL' as shown below:

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checkin contacts	a=getAlli	ByAdvanc u=44708	e	▼ Gener Req Req Stat	al uest URL: uest Metho us Code:	nttps://www. d: POST 200 OK	apptivo.com/a	app/dao/v6/co	ontacts?a=g	etAllByAdv	vancedSearc	h						

5. Now, scroll down to make use of the 'Form data' under the headers tab as highlighted below.

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6. Prepare a code now with the ampersand symbol included between each of the following(Request URL, Form Data(Contact Data), API Key, Access Key):

https://www.apptivo.com/app/dao/v6/contacts?a=getAllByAdvancedSearch&startIndex=0&numRecords=50&sortColumn=lastName.sortable&sortDir=asc&iDisplay Length=50&iDisplayStart=0&sSortDir_0=asc&multiSelectData={"marketIds":[],"segmentIds":[],"contactTypeIds":[],"industryIds":[]}&searchData={"title":"","accountId ":null,"isPrimary":null,"isBounced":null,"categories":[],"addresses":[{"addressAttributeId":"address_section_attr_id","addressGroupName":"Address1","addressType ":"","state":"","stateCode":","stateId":null,"stateName":""}],"phoneNumbers":[],"emailAddresses":[{"emailAddresses":isravell@gmail.com","id":"cont_email_input"}],"cu stomAttributes":[],"labels":[]}&status=0&uDxzzQzKVBtQ-BuIrPUYtUYPqQr-a89bc062-1c8f-460d-b7fc-edd17f947ab4&421E9G8H5d19B9A0 7. Now copy and paste this whole code in your browser as shown below. Once done, you will be generated with a API as shown below.



- 8. You can now make use of this generated API on your need.
- 9. The same procedure can be followed for the 'Advanced Search functionality' in all the other respective apps.
- 10. Alternative usage: You can also replace the Request URL with 'www' as 'api or api2', even for this the same API will be generated.

Advanced Search for Customers

1. Prepare a code now with the ampersand symbol included between each of the following(Request URL, Form Data(Customers Data), API Key, Access Key):

https://www.apptivo.com/app/dao/v6/customers?a=getAllByAdvancedSearch&startIndex=0&numRecords=50&iDisplayLength=50&iDisplayStart=0&searchData={" customerName":"","customerNumber":"","assigneeObjectRefName":null,"assigneeObjectld":null,"assigneeObjectRefld":null,"description":"","followUpDescription":"","phoneNumbers":[],"emailAddresses":[{"emailAddresse":"rajah@gmail.com","id":"cont_email_input"}],"skypeName":"","parentCustomerName":"","parentCustomerName":"","parentCustomerName":"","parentCustomerName":"","territoryName":"","territoryName":"","territoryld":null,"ownership":"","faceBookURL":"","twitt erURL":"","linkedInURL":"","isUnsubscribed":null,"isBounced":null,"isResponded":null,"creationOnStartDate":"","creationOnEndDate":"","creationDateDuration":"","creationTypeId":"","lastUpdateDateRangeTypeId":"","lastUpdateOnEndDate":"","lastUpdateDateDuration":"","lastUpdateDateRangeTypeId":"","tateld":","stateCode":","stateId":null,"stateName":"","]}&multiSelectData={"marketIds":[],"statusIds":[],"employeeRangeIds":[],"addressType":","stateSide:[],"statusIds":[],"employeeRangeIds":"","]}

2. Now copy and paste this whole code in your browser as shown below. Once done, you will be generated with a API as shown below. You can now make use of this generated API on your need.

Advanced Search for Items

1. Prepare a code now with the ampersand symbol included between each of the following(Request URL, API Key, Access Key):

https://www.apptivo.com/app/dao/v6/items?a=getAllByAdvancedSearch&iDisplayLength=50&iDisplayStart=0&multiSelectData=%7B%22itemTaxIds%22:%5B%5D,%22itemConditionIds%22:%5B%5D,%22categoryIds%22:%5B%5D,%22inventoryTypeIds%22:%5B%5D%7D&numRecords=50&objectId=13&sSortDir_0=&searc hData=%7B%22itemName%22:%22Watch%22,%22customAttributes%22:%5B%5D%7D&sortColumn=creationDate&sortColumnType=&sortDir=&startIndex=0&t =1512744551535&uDxzzQzKVBtQ-BuIrPUYtUYPqQr-a89bc062-1c8f-460d-b7fc-edd17f947ab4&421E9G8H5d19B9A0

2. Now copy and paste this whole code in your browser as shown below. Once done, you will be generated with a API as shown below. You can now make use of this generated API on your need.

Show All for Items

1. Click on the 'Show All' option with the Inspect page opened.

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- 2. After you click the show all button, you will be displayed with the search result based on the search criteria performed.
- 3. Click the "items?a=getAll&iDisplayLength=50" under Name category, now you will be displayed with the 'Request URL' as shown below:

				Show A Bulk Ac	All (7)		Display	Overview • 1-7 of 7
Lists		~			ltem #	Item Name	\$ Price	¢ I≯Actio
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By Queu	ie				6	Watch	₹500.00	Sei ***
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C D	E	F		-	-	Weather Sea 12 Wille	10.00	Sei
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4. Prepare a code now with the ampersand symbol included between each of the following(Request URL, API Key, Access Key):

https://www.apptivo.com/app/dao/v6/items?a=getAll&iDisplayLength=50&iDisplayStart=0&numRecords=50&objectId=13&objectStatus=0&sSortDir_0=desc&select edTab=show-all&sortColumn=creationDate&sortColumnType=&sortDir=desc&startIndex=0&t=1512744667959&trash=false&uDxzzQzKVBtQ-BuIrPUYtUYPqQr-a 89bc062-1c8f-460d-b7fc-edd17f947ab4&421E9G8H5d19B9A0

5. Now copy and paste this whole code in your browser as shown below. Once done, you will be generated with a API as shown below.



- 6. You can now make use of this generated API on your need.
- 7. The same procedure can be followed for the 'Advanced Search functionality' in all the other respective apps.
- 8. Alternative usage: You can also replace the Request URL with 'www' as 'api or api2', even for this the same API will be generated.