Lead Actions Guide

Prepared By:	Karen Barker
Date:	05/10/2022
Version:	2.40 Release

Introduction

Lead actions are performed specific to a lead type, when a specific event occurs, such as when a lead is first received, or when a lead is referred to a partner.

To add or update actions, edit the lead type that the actions will relate to.

To do this, select ‘Settings > Lead Groups’ from the main menu, click ‘Lead Types’ next to the group that the lead type is under, then click ‘Edit’ for the lead type that the action relates to.

Available Events

Events determine when an action (or multiple actions) will be carried out. It’s very important to consider the order in which events are processed, as the order can have an effect on how the actions behave.

For example, if you use the ‘Received (Other)’ event to assign a lead that comes in from a web form to a specific user, but send the customer an email with details of who the lead has been assigned to using the ‘Received’ event, details of the assigned user won’t be available to the email as the email is sent **before** the event assigning the user.

The solution in this example is to send an email only on event ‘Received (User)’, and assign to a specific user and also send an email on the ‘Received (Other)’ event. Only one of these events will trigger.

The table below explains what events are available and when they will trigger.

Event	Description
Appointment Created	The event triggers when an appointment is created.
Appointment Updated	The event triggers when an appointment is updated.
Appointment Cancelled	The event triggers when an appointment is cancelled.
Appointment Started	The event triggers when an appointment is started.
Appointment Completed (task ticked off)	The event triggers when an appointment is completed.
Appointment .. Before	The event triggers at the defined time period before an appointment (hours, weeks, days etc.).
Appointment .. After	The event triggers at the defined time period before an appointment (hours, weeks, days etc.).
Call Unanswered (Inbound)	The event triggers when an inbound call is unanswered. This relates only to Voice integrations.

Call Voicemail (Inbound)	The event triggers when an inbound voicemail is left. This relates only to Voice integrations.
Received & Duplicate **or** Received & Not Duplicate	**One** of these events triggers before 'Received'. 'Received & Duplicate' triggers only when the lead is first received and has been identified as a duplicate and linked to another lead. This event can be used to notify a user for further action, for example. Otherwise, 'Received & Not Duplicate' triggers.
Receive & Referred **or** Received & Not Referred	**One** of these events triggers before 'Received'. 'Received & Referred' triggers when the lead is first received and has been automatically referred to a partner. This event can be used to notify a user for further action, for example. 'Received & Not Referred' triggers in all other cases.
Received	The event triggers when a lead is first received.
Received (User) **or** Received (Other)	**One** of these events triggers after 'Received', depending on how the lead was received. If the lead was manually added by a user using 'New Lead', the 'Received (User)' event triggers, otherwise the 'Received (Other)' event triggers.
Updated	The event triggers when a lead's details are updated.
Updated (User) **or** Updated (Other)	**One** of these events triggers after 'Updated', depending on how the lead was updated. If the lead was updated by a user using 'Edit Lead', the 'Updated (User)' event triggers, otherwise the 'Updated (Other)' event triggers.
Status Changed	The event triggers when the lead's status changes. Commonly used with a condition so it only triggers on a particular status.
User Changed	The event triggers when the lead's user changes.
Validated	The event triggers when progress first moves to 'Validated'. It will only trigger once.
Invalidated	The event triggers when progress moves to 'Invalidated'. It will only trigger once.
Contacted	The event triggers when progress moves to 'Contacted'. It will only trigger once.
Qualified	The event triggers when progress moves to 'Qualified'. It will only trigger once.
Converted	The event triggers when progress moves to 'Converted'. It will only trigger once.
Closed	The event triggers when progress moves to 'Closed'. It will only trigger once.
Referred	The event triggers **every time** the lead is referred to a partner, either automatically or manually.
Return Started	The event triggers when a lead is returned by a partner.
Return Declined	The event triggers when the return of a lead by a partner is declined.
Return Accepted	The event triggers when the return of a lead by a partner is accepted.

Email Failed, Opened, etc..	The event triggers when emails fail (bounce permanently) or are interacted with. Replied and clicked can trigger many times, the others will only trigger once.
Email Address Invalidated	The event triggers when an email address is marked as invalid.
Text Message Failed, Replied, etc.	The event triggers when text messages fail or are interacted with. Replied can trigger many times (each time a reply is received). Clicked only triggers on SMS Short Links and can trigger many times (each time a link is clicked).
Journey Started	The event triggers when a journey is started.
Journey Partially Completed	The event triggers when a journey is partially completed.
Journey Completed	The event triggers when a journey is completed.
Document Uploaded - Internal	The event triggers when a document is uploaded by an FLG user directly to a lead.
Document Uploaded - Customer	The event triggers when a document is uploaded by a customer via a secure document upload URL.

Available Actions

Actions determine what happens when each event triggers.

Action	**Description**
Appointment	Tasks the assigned user, specified user or random user selected from a group to make an appointment.
Assign to User*	Assigns the lead to a specific user or a random user within a specified group.
Change Lead Type	Changes the lead type. Note that the current event will continue to run the actions of the old lead type.
Change Status	Changes the status of the lead to the specified value.
Contact Customer	Sends the customer a processed email, letter or text message template.
Contact Partner	Sends the referral partner a processed email or text message.
Contact User	Sends the assigned user, specified user or single user randomly selected from a group a processed email or text message.
Form	Tasks the assigned user, specified user or random user selected from a group to complete a form.
Journey	Tasks the assigned user, specified user or random user selected from a group to complete a journey.

Notify User by Email	Emails the assigned user, specified user or single user randomly selected from a group with a lead notification.
Notify User by Text	Sends a text message to the assigned user, specified user or a random user selected from a group with a lead notification.
Start Workflow	Starts the specified workflow (after stopping any existing workflow).
Stop Workflow	Stops any running workflow.
Refer	Refers the lead to a referral partner. This only happens if the 'Referral Method' within the lead type is set to 'Deliver Immediately' or 'Deliver Manually'.
Task User	Tasks the assigned user, specified user or random user selected from a group.
Webhook	A HTTP POST request is made to the specified URL containing form fields with the lead's details. See the section below for details on how to use webhooks.

* Assign to User actions are always processed first as some of the other actions depend on a user being assigned.

Webhooks

What is a Webhook?

Webhooks are a way to notify an external script on one of your own web servers whenever an event occurs. This enables you to react in any way you want.

Webhooks are a type of event listener or push notification. They are sometimes called 'callbacks'.

Webhook Basics

See the instructions above on how to create a lead type action. To create a webhook, you'll need a 'webhook' action, choosing the event you want to trigger the webhook on.

The only parameter you need to enter is the full URL of your webhook. This must of course be a publicly accessible web address.

We recommend you use SSL (https) to secure your request.

Authentication

There isn't any formal authentication mechanism for webhooks, so it's important that you're sure that the request is coming from our server.

The best way to do this is to use a 'secret key' in your request. So if you're webhook URL is:

https://www.example.com/webhook.php

Use a secret key in the request like this:

https://www.example.com/webhook.php?secret=sgb25gfHhgfUIYT7674

As only you know what the secret should be, simply check the value is what you expect, and discard the request if it's not.

Request Data

A set of URL encoded key=value pairs will be sent in the POST's body containing the lead's details.

The keys are broadly in line with those returned by the lead read API, but may differ very slightly. Set up a test and capture the details that are sent. A service like RequestBin might be useful for this.

2 extra values are sent relating to the event. 'eventtype' contains the internal event name, and 'eventdatetime' contains the timestamp that the event was triggered. The table below shows the 'eventtype' values and the corresponding events:

Event Type	Description
deliverydupe	Received & Duplicate
deliveryndupe	Received & Not Duplicate
deliveryref	Received & Referred
delivery	Received & Not Referred
deliveryall	Received
deliveryass	Received (User)
deliveryna	Received (Other)
updatedall	Updated
updatedass	Updated (User)
updatedna	Updated (Other)
status	Status Changed
user	User Changed
progvalidated	Validated
proginvalidate	Invalidated
progcontacted	Contacted

progqualified	Qualified
progconverted	Converted
progclosed	Closed
referral	Referred
emailfailed	Email Failed
emailopened	Email Opened
emailclicked	Email Clicked
emailreplied	Email Replied
emailunsub	Email Unsubscribed
emailspam	Email Spam Reported
smsfailed	Text Message Failed
smsclicked	Text Message Clicked
smsreplied	Text Message Replied

Here's an example of the request:

```
POST /webhook.php
Content-Type: application/x-www-form-urlencoded

eventtype=delivery&
eventdatetime=2012-01-01 12:00:00&
id=1000001&
subid=&
ipaddress=192.168.0.1&
received=2012-01-01 12:00:00&
...
```

What Should be Returned

The body of your response will be ignored, all your script needs to do is to make sure the HTTP status code of the request indicates that it was successful.

This normally means returning a 200 OK status, but any status code between 200-399 will be considered successful.

Timeout & Retry

The request will timeout after a set number of seconds, so make sure that your webhook returns a response quickly.

If an error is returned or a timeout occurs, the same request will be retried up to 5 times with an exponential backoff approach (each time the request fails, the service will wait a little longer to try again).

Logging of Webhook Requests

The outcome of webhook requests are logged in the lead's history. To view webhook activity, filter the list so that you can see actions (they're hidden by default).