Website Integrations

Website Leads → ALIS Prospects

Connecting a website Contact Us or information request form to the ALIS Prospects module is a very common pattern. Most websites are built on a content management system such as WordPress. The integration involves configuring the web form plugin (such as Gravity Forms) to submit requests to ALIS.

The recommended integration steps are as follows:

1. Configure forms plugin to submit requests to ALIS Prospects using the ALIS API
2. Verify and finalize the field mappings by logging into the Sandbox to view the Prospect record
3. Go live by installing the **Website Integration** app in the ALIS App Store for the client's instance to receive production username/password

As a reminder, the ALIS API is located at ALIS API Your ALIS rep can provide you credentials to the Sandbox environment to make API calls and access the Sandbox instance to view the prospect records created.

BasicAuth is used to make API calls. See section BasicAuth Details below for details. *Note*: make sure to copy the full username that's provided to you, including the text following the @ sign. The text following the @ sign identifies the ALIS install.

The Website Integration app has access to the following endpoints:

- GET `/v1/integration/communities`
- POST `/v1/integration/prospects`
- GET `/v1/integration/prospects/sources`

Often times a senior living provider will have multiple locations. Use the GET communities call to build a dynamic list of communities. This endpoint returns the name and ID of each location. Each website lead must be routed to one and only one community. Using the endpoint ensures that any changes to the community list are immediately reflected on the website.

Alternatively, you can skip calling the GET communities endpoint and hard code a list of community names and IDs. Your ALIS rep can provide the list of IDs for our mutual client's properties. Please note that you will have to manually update this list as the client adds or removes properties.

Use the POST call to create a new Prospect record. See the endpoint documentation online for the full list of fields. Most website forms tend to be brief and collect the most essential information. Here is a typical JSON payload:

```
{
  "communityId": 32,
  "prospectFirstName": "James",
  "prospectLastName": "Cameron",
  "prospectEmail": "james.cameron@medtelligent.com",
  "prospectPhone": "999-312-9999",
  "prospectDateOfBirth": "19-04-21 19:52",
  "contactFirstName": "Julie",
  "contactLastName": "Cameron",
  "contactMobilePhone": "312-312-3131",
  "contactEmail": "julie.cameron@testemaio.com",
  "source": "Website",
  "story": "Interested in seeing if the website lead gets created."
}
```

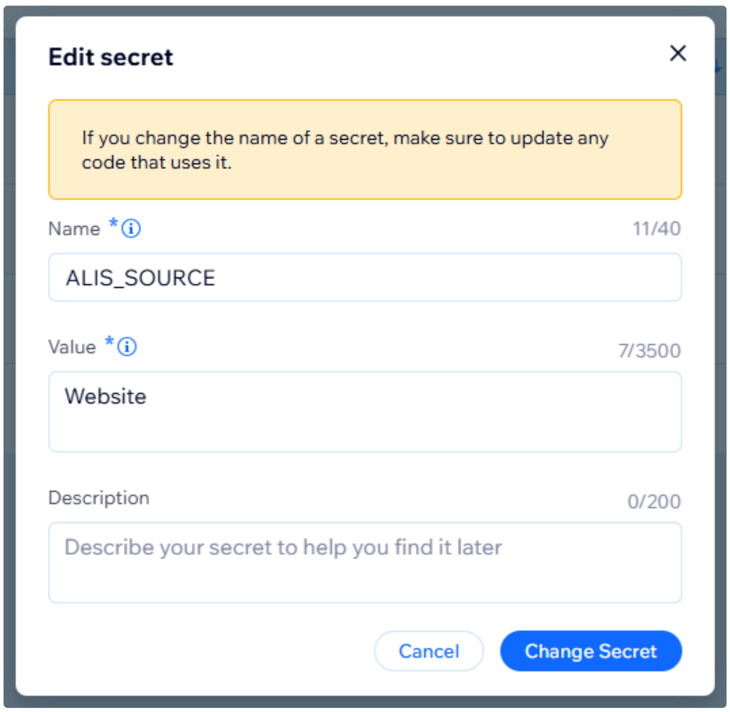
Please note the following:

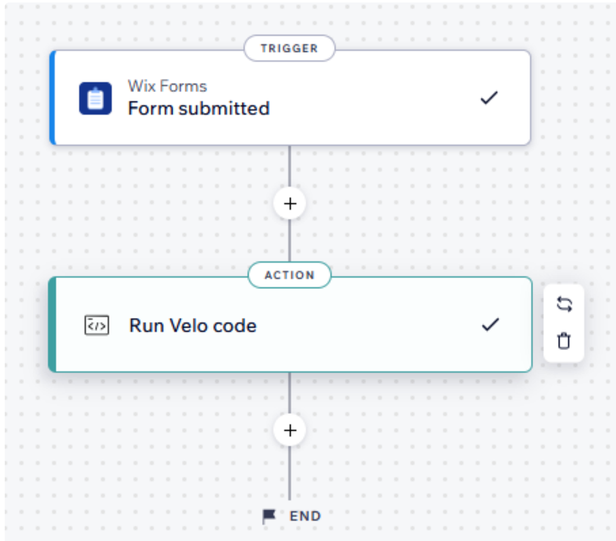
- `communityId`
  - Is a required and routes the lead to a specific property/building;
  - Use "32" for the sandbox environment.
  - You can use the GET `/v1/integration/communities` API to create a dropdown list of properties for the user to select. Alternatively, you can hard code a list and we can provide the IDs for each building.
- `source`
  - Is a required field and tags where the prospect originated from
  - Hard code this values to "Website"; for sandbox and production environment
  - Some clients may request that you set this to a specific value; verify with the client about their preference
- One of `prospectFirstName` / `LastName` or `contactFirstName` / `LastName` is required
  - Most partners will set the same value for both as it's difficult to know who is filling out the website form
  - You can use conditional logic to populate either the `prospect*` or `contact*` fields.
    - There is no direct mapping of who the prospect is inquiring for (self, parent, other, etc.)
    - The way to accomplish this is to use conditional logic. For example, see this article with Gravity Forms: Enabling Conditional Logic For Fields
    - We recommend setting a condition on your inquiring for field to either populate the `prospect*` fields (eg. `prospectFirstName`, `prospectLastName`, etc.) when "self" is selected or `contact*` fields (`contactFirstName`, `contactLastName`, etc.) for all other selections.

  - For `contactRelationshipType` use `Relatve`
- `story`
  - Is an optional field and should be used for comments/questions the prospect is asking
- `inquiryDate`
  - Is an optional field and will default to today, reflecting the date the prospect was created
  - We recommend **not** setting this field
- `stage`
  - Is an optional field and will default to the client's selected default
  - Most often the default works well, verify with the client about their preference

> ℹ️ If using Wix forms and automations, the best way to post leads from the website with no middleware like Zapier is to use Velo Code.

Wix Automation

1. 



4.
```
```

The API endpoint will also accept user defined fields (fields not defined in the spec). These are stored and displayed in the prospect module under the More Info button.

See the section Tool to Test API Calls for steps to test and explore the API calls before configuring your plugin.

You can see how the website leads look in ALIS by logging into the Sandbox instance.

- All leads sent to community ID “32” will appear in the Website Integration community.
- Navigate the menu to Prospects > Prospects and look for your test leads in the Prospect tab and select the lead to see all details (prospect information, contact, story, etc.)
- This is what the ALIS user will see/experience. Add/remove the API field mapping to achieve the desired outcome.

Ask your ALIS rep for the credentials to access the Sandbox and see the section below Sandbox Details for additional details.

Contact your ALIS repo when you are ready to go live. Your rep will coordinate the following steps:

- Install the Website Integration app for the mutual client
- Generate production username/passwords and send them to you
- Update the website credentials to point leads to the production ALIS install
- Create a test lead to ensure credentials work, community IDs are mapping correctly and leads are making it to the client’s ALIS Prospect module