

# Integrations

eLeads

Standard Integrations

Non-Supported Integrations



improveit 360

# Agenda

Review the common integrations available for:


- eLeads / Lead Provider Integrations
- Appointment Scheduling
- Call Centers & Phone Systems
- Quoting Apps
- General API & Mapping data
- Payment Processing
- Accounting

# eLead Integrations


HomeAdvisor and Angi are set up custom using a Zapier account to parse nested data

All other eLead integrations use a Standard eLead endpoint

Sites (improveit360-9975.my.salesforce-sites.com)			New
Action	Site Label ↑	Site URL	
Edit   Deactivate	AccountingSite	https://improveit360-9975.my.salesforce-sites.c...	
Edit   Deactivate	HomeAdvisor	https://improveit360-9975.my.salesforce-sites.com/	
Edit   Deactivate	PaySimpleWebhook	https://improveit360-9975.my.salesforce-sites.c...	
Edit   Deactivate	TrainingSite	https://improveit360-9975.my.salesforce-sites.c...	




1. Catch Raw Hook in Webhooks by Zapier



2. Run Javascript in Code by Zapier

```
const DELETE = false;
const CUSTOM_FIELD = undefined;

const names = {
  "name": DELETE,
  "firstName": "FirstName",
  "lastName": "LastName",
  "address": "StreetAddress",
  "city": "City",
  "stateProvince": "State",
  "postalCode": "Zip",
  "primaryPhone": "Phone1",
  "phoneExt": DELETE,
  "secondaryPhone": DELETE,
  "secondaryPhoneExt": DELETE,
  "email": "Email",
  "taskName": "Product",
  "comments": "Comments",
  "matchType": DELETE,
  "leadDescription": DELETE,
  "contactStatus": DELETE,
  "appointment": DELETE,
  "fee": DELETE,
  "interview": DELETE,
  "leadId": "1360_External_Campaign_ID_c",
  "spEntityId": DELETE,
  "spCompanyName": DELETE,
  "spPartnerId": DELETE,
  "crmKey": DELETE
};
```



Site Edit

Save Cancel

Site Label

HomeAdvisor

Site Name

HomeAdvisor

Site Type

Guest

Site Description

Site Contact

Martha Marketing

Default Record Owner

Martha Marketing

Default Web Address

https://improveit360-9975.my.salesforce-sites.com/

Active

☒

Active Site Home Page

HomeAdvisorPost

Inactive Site Home Page

InMaintenance

Site Template

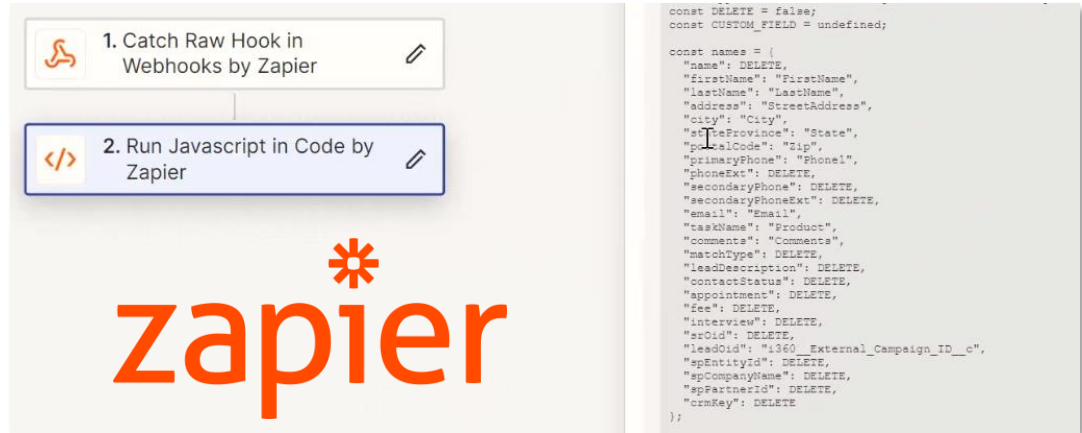
SiteTemplate

# What eLead payload formats do Angi and HomeAdvisor use?

Nested JSON formatted like this:

```
{ "first_name": "Gandalf",  
  "last_name": "TheGrey",  
  "email" : "1234@fake.com",  
  "sourceName": "Website",  
  "address": {  
    "street_address": "456 The Shire",  
    "subAddress": {  
      "city" : "Oxford",  
      "state": "OH",  
      "zip_code": "45056" }  
    }  
  }  
}
```

A Zapier account is required to parse the JSON and create a string to insert as the new payload which i360 will accept.



# What payload formats does improveit 360 accept?

HTTP Post Query String formatted like this:

```
FirstName=Gandalf&LastName=TheGrey&Phone1=1235551234&Phone1Type=Mobile&StreetAddress=456+The+Shire&City=Oxford&State=OH&Zip=45056&Email=1234@fake.com&SourceType=Lead+Provider&Source=Website&Interest=Roofing&Comments=A wizard is never late, nor is he early, he arrives precisely when he means to.
```

These payloads can include Requested Appointment data

JSON formatted like this:

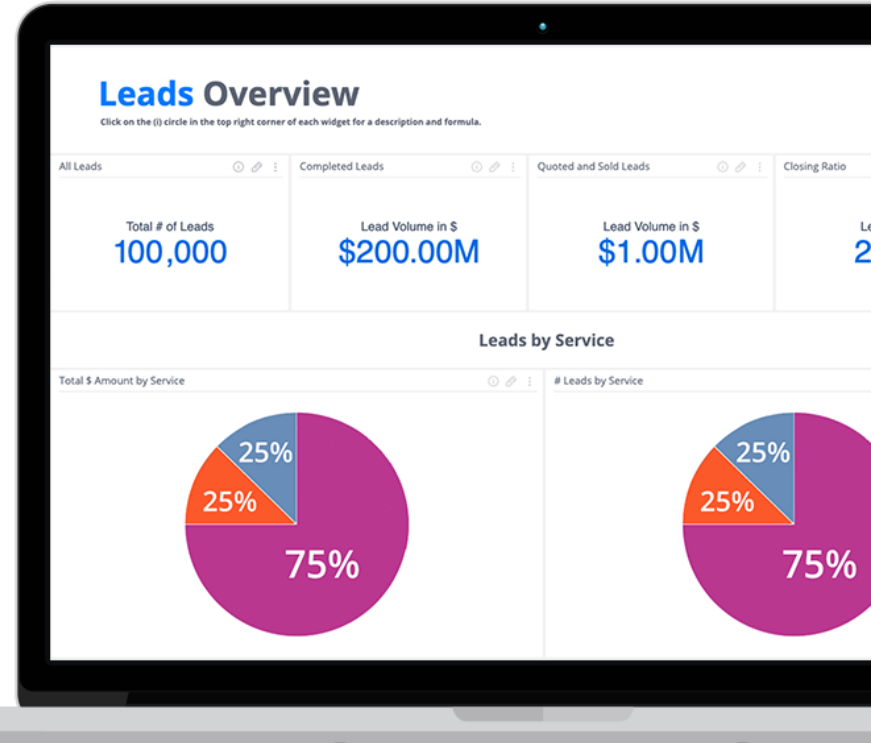
```
{
  "FirstName": "Gandalf",
  "LastName": "TheGrey",
  "Phone1": "1235551234",
  "Phone1Type": "Mobile",
  "StreetAddress": "456 The Shire",
  "City": "Oxford",
  "State": "OH",
  "Zip": "45056",
  "Email": "1234@fake.com",
  "SourceType": "Lead Provider",
  "Source": "Website",
  "Interest": "Roofing"
  "Comments": "A wizard is never late, nor is he early, he arrives precisely when he means to."
}
```

# Lead Providers



## Features:

- eLeads sent into improveit 360 every Hour
- Estimate Date is sent to Centah when an Appointment is Scheduled
- Sold Date and Amount is sent to Centah when Appointment is Sold
- Project Completion Date and Centah Notes are sent when the Project is completed



# Lead Scoring & Assigning



Features:

- Lead Optimization – AI optimizes which leads to prioritize to increase efficiency and profitability
- Assign AI – auto Assignment of Sales Rep
- AI Lead Scoring
- Algorithm tailored to your business
- AI continues learning and producing better and better results as it gets to know your client base

# Appointment Scheduling

## Common Features:

- Create an Appointment in improveit 360
- Assign a Sales Rep to the Appointment
- Assign a Time Block (no Sales Rep)
- Any Lead Provider can send an Appointment into improveit 360, see [Standard eLead fields](#)

Partners:

**EverConnect**<sup>®</sup>

**Treehouse**  
Marketing

 **HeavySet**

 **Calendly**

\*Calendly & EverConnect are Supported integration Partners



# Phone System Integrations

## Common Features:

- Click to Dial
- Screen pop to record page
- Call Log & Call Recording\*
- Third party auto-dialer
- Third-party Call Center software

## Partners:

**REGAL**

**Five9**<sup>TM</sup>

**RingCentral**

\* RingCentral is a Supported integration Partner

\* Regal is Supported for Lightning only

# Quoting



## Common Features:

- Customizable Document Templates
- Electronic Signature Acceptance
- Send Result and Quoted Amount sent to improveit 360
- All Documents sent to improveit 360



## Common Limitations:

- Sale does not get created without improveit 360's automation
- Sale cannot be itemized. The data improveit 360 receives is a lump sum.
- Third-party vendor and improveit 360 are required in the setup process
- Two setup costs

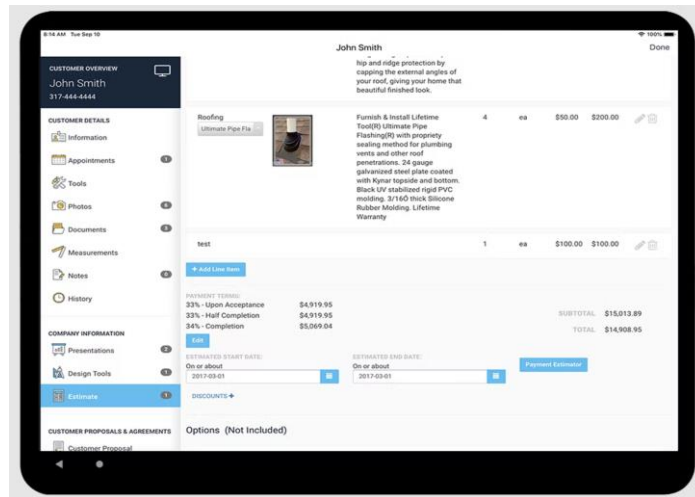
# Quoting



**ONECLICK**  
Contractor

## Features:

- Customizable Document Templates
- Electronic Signature Acceptance
- Sends only Sold Results and the Sold Price for the Sale
- All Documents sent to improveit 360



## Limitations:

- Results other than Sold must be entered through improveit 360
- Sale cannot be itemized. The data improveit 360 receives is a lump sum.

# CAD Drawing App

# ArcSite



## Features:

- Mobile CAD Drawings
- Itemized Quotes sent to improveit 360
- Customizable Document Templates
- Electronic Signature Acceptance
- Itemized Sales sent to improveit 360

## Limitations:

- Result must be entered in improveit 360

# Mapping and API Details

[Where to find Object and Field API Names in your improveit 360 system.](#)

Setup > Objects menu

ANY Integration is going to require that third-party developers know the API Names of the Objects and Fields you plan to map data to in improveit 360.

Singular Label	Appointment
Plural Label	Appointments
Object Name	Appointment
Namespace Prefix	i360
API Name	i360__Appointment__c

Field Label	Result
Field Name	Result
Namespace Prefix	i360
API Name	i360__Result__c


\*Every improveit 360 customer may have unique Fields with unique API names

# Payments Integration

Innovation  
Integration  
Experience  
Overhead Enhance  
Convenience Safety  
**Customer**  
Cost-effectiveness  
Security  
Reduced Reliability  
Flexibility Support




**PAYSIMPLE®**

[< Back](#)

\*TypeDeposit >

\*Type DetailCredit Card >

Payment Details

Credit CardACH

Credit Card \*

4242 4242 4242 4242

Expiration \*

08 / 24

Security Code \*

123

Zip/Postal Code \*

43214

Collect Payment

# Real-time Payment Processing

- Get paid faster!
- PaySimple allows you to collect the payment immediately
- Mobile App transactions can process both Credit Card and ACH\*



\*ACH transactions can take longer to process. Payments Events are updated in improveit 360 in real time from PaySimple.

# Accounting Integrations

## Common Features:

- Send Prospect data to QB as Customers
- Send Sales to QB for Invoicing
- Send Payment details to QB and match with Invoices
- Send Adjustment records to QB and apply to Invoices
- Send Projects to QB for Invoicing (requires assigning Sale Items to Projects) \*

\* Supportworks package only

\*\* QuickBooks is the only Supported integration



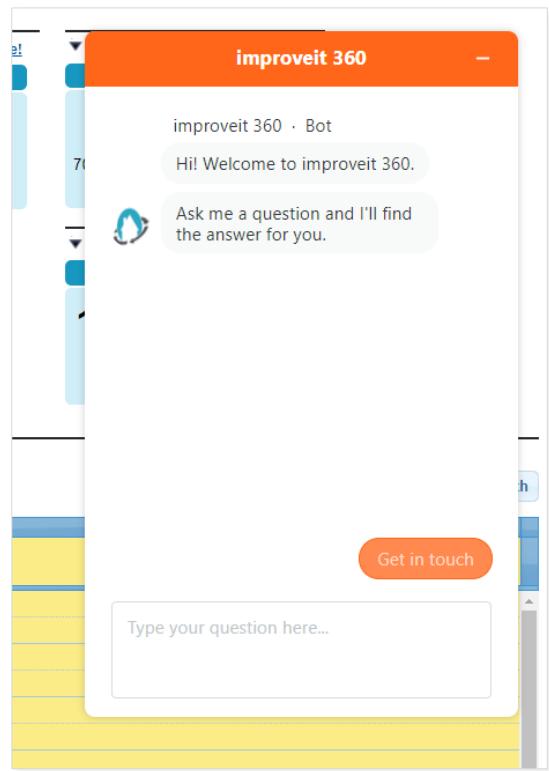


# How to Reach Us

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:  
<https://support.improveit360.com/>
3. Or Email Us:  
[support@improveit360.com](mailto:support@improveit360.com)

## Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time



# Thanks for Attending



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