



## Pipedrive Connect

### Document Control Information

Settings	
Document Title:	Pipedrive Connect
Project Title:	App documentation
Doc Version:	V1.0
Date	26/09/2021

## 1 OVERVIEW

### 1.1 Introduction

The Pipedrive Connect app allows you to integrate your Pipedrive account with Enfocus Switch. Following environments are available with their specific functions:

- Organizations
- Persons
- Leads
- Deals
- Products
- Activities
- Notes
- Files

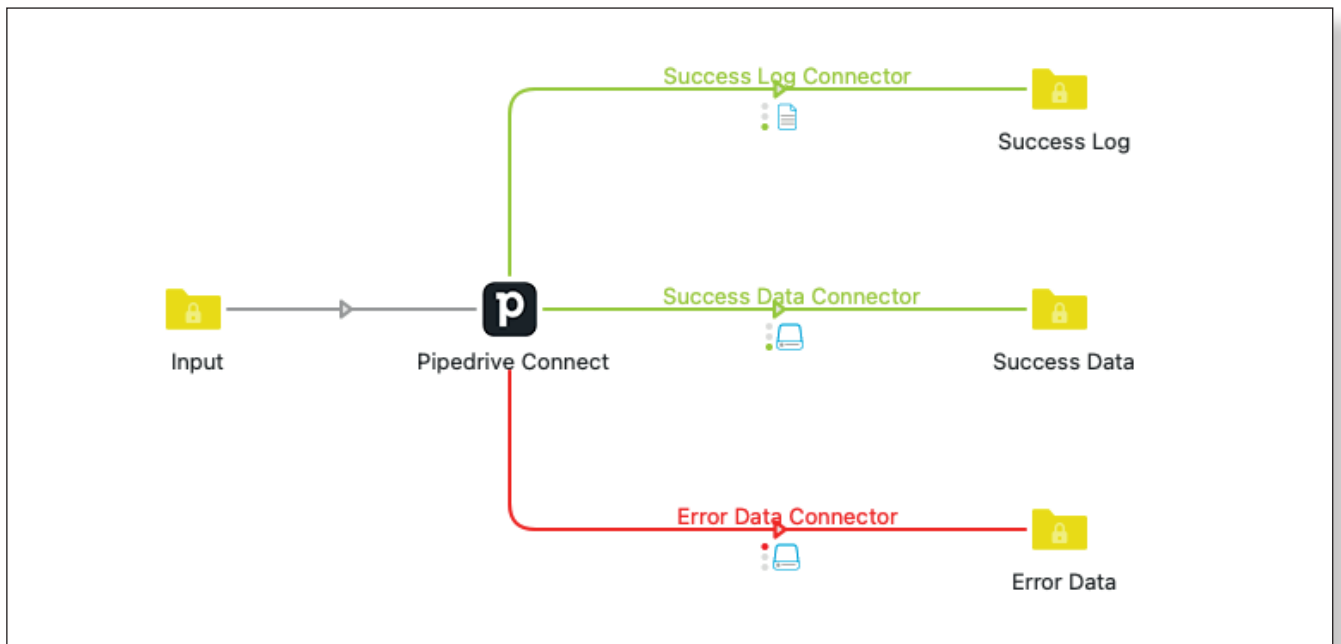
### 1.2 Compatibility

The app is compatible with Enfocus Switch 2021 Spring and higher, Windows & Mac

### 1.3 Connections

Pipedrive Connect requires at least one input and one output connection. The job will be sent to the Data "success" output connection in case of success, or to the Data "error" connection if the action fails.

Obtaining files requires a Log "success" output connection if you would like to download a file from Pipedrive. The job itself continues to follow the Data "success" output in this case.



## 2 SETUP

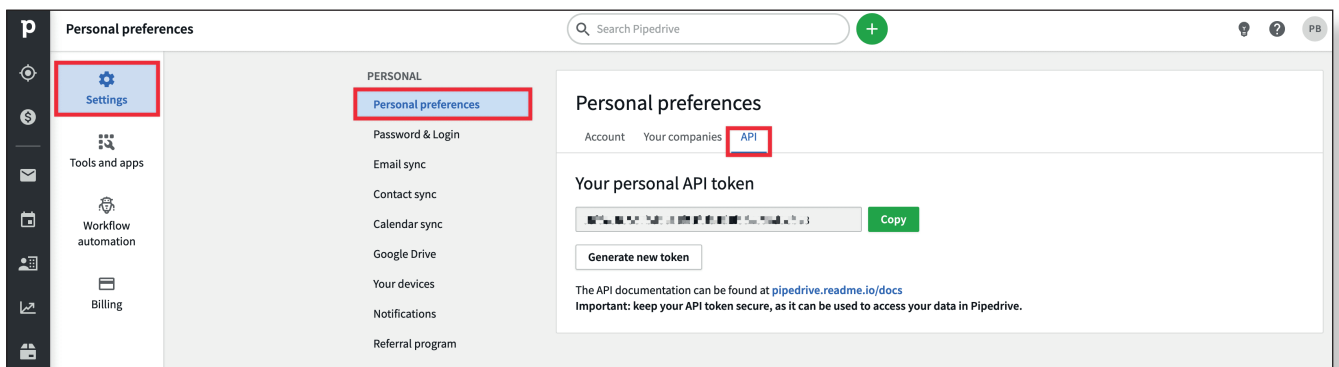
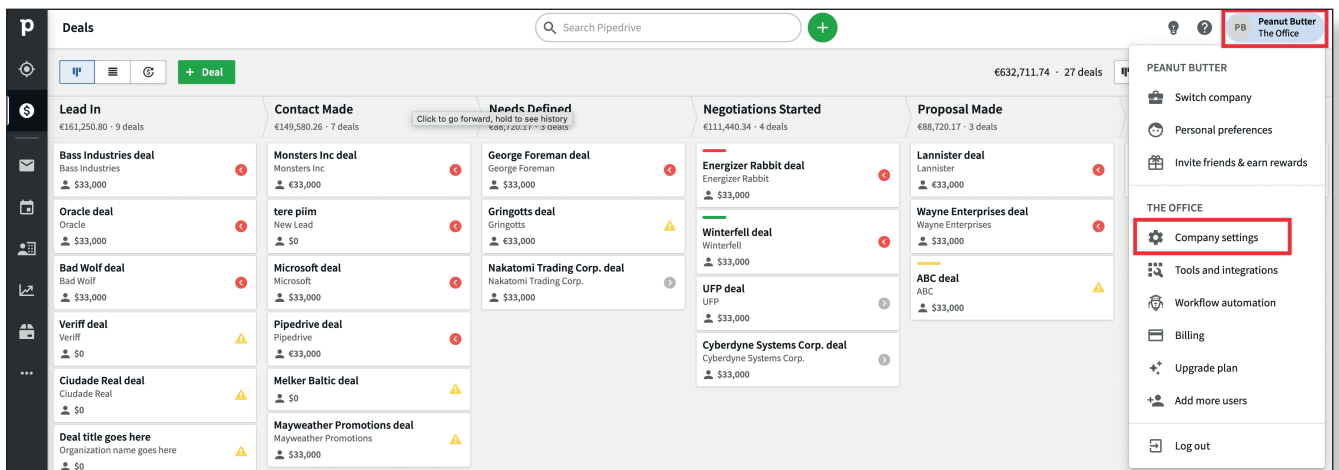
### 2.1 How to find the API token

To validate the connection, you'll need your API token. This means that Pipedrive will need to know who you are and be able to connect all actions you do with your chosen Pipedrive account.

Keep in mind that a user has a different API token for every company the user is a part of.

### 2.2 API is enabled

You can get the API token manually from the Pipedrive web app by going to account name (on the top right) > Company settings > Personal preferences > API (in case you have multiple companies open at the same time, this link will redirect you to the API token of the last opened company).



### 2.3 API is disabled

If you don't see API next to the Your companies section, it's due to the permission sets handled by the company's admin. The company's admin can give you access to your API token by enabling it for you from the Settings in Pipedrive web app.

## 3 Resources

### 3.1 Organizations

Organizations are companies and other kinds of organizations you are making Deals with. Persons can be associated with organizations so that each organization can contain one or more Persons.

#### 3.1.1 Get all organizations

Returns all organizations, the result can be filtered by using the user ID. If supplied, only organizations owned by the given user will be returned.

#### 3.1.2 Get details of an organization

Returns details of an organization. Note that this also returns some additional fields which are not present when asking for all organizations.

#### 3.1.3 Search organizations

Searches all Organizations by name, address, notes and/or custom fields.

#### 3.1.4 Add an organization

Adds a new organization. Note that you can supply additional custom fields along with the request that are not described here. These custom fields are different for each Pipedrive account.

#### 3.1.5 Update an organization

Updates the properties of an organization.

#### 3.1.6 Delete an organization

Marks an organization as deleted.

### 3.2 Persons

Persons are your contacts, the customers you are doing Deals with. Each Person can belong to an Organization. Persons should not be confused with Users.

#### 3.2.1 Get all persons

Returns all persons, the result can be filtered by using the user ID. If supplied, only persons owned by the given user will be returned.

#### 3.2.2 Get details of a person

Returns details of a person. Note that this also returns some additional fields which are not present when asking for all persons.

#### 3.2.3 Search persons

Searches all Persons by name, email, phone, notes and/or custom fields.

### 3.2.3 Add a person

Adds a new person. Note that you can supply additional custom fields along with the request that are not described here. These custom fields are different for each Pipedrive account.

### 3.2.4 Update a person

Updates the properties of a person.

### 3.2.5 Delete a person

Marks a person as deleted.

## **3.3 Leads**

Leads are potential deals stored in Leads Inbox before they are archived or converted to a Deal. Each Lead needs to be named and be linked to a Person or an Organization. In addition to that, a Lead can contain most of the fields a Deal can (such as value or expected close date).

### 3.3.1 Get all leads

Returns multiple Leads. Leads are sorted by the time they were created, from oldest to newest. If a Lead contains custom fields, the fields' values will be included in the response in the same format as with the Deals. If a custom field's value hasn't been set for the Lead, it won't appear in the response. Please note that Leads do not have a separate set of custom fields, instead they inherit the custom fields' structure from Deals.

### 3.3.2 Get one lead

Returns details of a specific Lead. If a Lead contains custom fields, the fields' values will be included in the response in the same format as with the Deals. If a custom field's value hasn't been set for the Lead, it won't appear in the response. Please note that Leads do not have a separate set of custom fields, instead they inherit the custom fields' structure from Deals.

### 3.3.3 Add a lead

Creates a Lead. A Lead always has to be linked to a Person or an Organization or both. All Leads created through the Pipedrive Connect App will have a Lead Source API assigned. If a Lead contains custom fields, the fields' values will be included in the response in the same format as with the Deals. If a custom field's value hasn't been set for the Lead, it won't appear in the response. Please note that Leads do not have a separate set of custom fields, instead they inherit the custom fields' structure from Deals.

### 3.3.4 Update a lead

Updates one or more properties of a Lead. Only properties included in the request will be updated. If a Lead contains custom fields, the fields' values will be included in the response in the same format as with the Deals. If a custom field's value hasn't been set for the Lead, it won't appear in the response. Please note that Leads do not have a separate set of custom fields, instead they inherit the custom fields' structure from Deals.

### 3.3.4 Delete a lead

Deletes a specific Lead

## 3.4 Deals

Deals represent ongoing, lost or won sales to an Organization or to a Person. Each deal has a monetary value and must be placed in a Stage. Deals can be owned by a User, and followed by one or many Users. Each Deal consists of standard data fields but can also contain a number of custom fields.

### 3.4.1 Get all deals

Returns all deals, the result can be filtered by using the user ID. If supplied, only deals owned by the given user will be returned.

### 3.4.2 Get details of a deal

Returns details of a specific deal. Note that this also returns some additional fields which are not present when asking for all deals, such as deal age and stay in pipeline stages.

### 3.4.3 Search deals

Searches all Deals by title, notes and/or custom fields.

### 3.4.4 Add a deal

Adds a new deal. Note that you can supply additional custom fields along with the request that are not described here. These custom fields are different for each Pipedrive account.

### 3.4.4 Add a product to the deal

Adds a product to the deal.

### 3.4.5 Update a deal

Updates the properties of a deal.

### 3.4.6 Delete a deal

Marks a deal as deleted.

## 3.5 Products

Products are the goods or services you are dealing with. Each product can have N different price points. First, each Product can have a price in N different currencies, and secondly, each Product can have N variations of itself, each having N prices different currencies. Note that only one price per variation per currency is supported. Products can be instantiated to Deals. In the context of instantiation, a custom price, quantity, duration and discount can be applied.

### 3.5.1 Get all products

Returns data about all Products.

### 3.5.2 Get one product

Returns data about a specific product.

### 3.5.3 Search products

Searches all Products by name, code and/or custom fields.

### 3.5.4 Add a product

Adds a new product to the Products inventory.

### 3.5.5 Update a product

Updates product data.

### 3.5.6 Delete a product

Marks a product as deleted.

## **3.6 Activities**

Activities are appointments/tasks/events on a calendar that can be associated with a Deal, a Person and an Organization. Activities can be of different type (such as call, meeting, lunch or a custom type) and can be assigned to a particular User. Note that activities can also be created without a specific date/time.

### 3.6.1 Get all Activities assigned to a particular User

Returns all Activities assigned to a particular User.

### 3.6.2 Get details of an Activity

Returns details of a specific Activity.

### 3.6.3 Add an Activity

Adds a new Activity. Includes more activities scheduled in context property in response's additional data which indicates whether there are more undone Activities scheduled with the same Deal, Person or Organization (depending on the supplied data).

### 3.6.4 Edit an Activity

Modifies an Activity. Includes more activities scheduled in context property in response's additional data which indicates whether there are more undone activities scheduled with the same Deal, Person or Organization (depending on the supplied data).

### 3.6.5 Delete an Activity

Deletes an Activity.

## 3.7 Files

Files are documents of any kind (images, spreadsheets, text files, etc.) that are uploaded to Pipedrive, and usually associated with a particular Deal, Person, Organization, Product, Note or Activity. Remote files can only be associated with a particular Deal, Person or Organization.

### 3.7.1 List files

Returns data about all files.

### 3.7.2 Add file

Lets you upload a file and associate it with Deal, Person, Organization, Activity or Product.

### 3.7.3 Download file

Initializes a file download, the downloaded file will be send to the Log "success" output connection.

### 3.7.4 Delete a file

Marks a file as deleted.

## 3.8 Notes

Notes are pieces of textual (HTML-formatted) information that can be attached to Deals, Persons and Organizations. Notes are usually displayed in the UI in chronological order – newest first – and in context with other updates regarding the item they are attached to. The maximum note size is approximately 3,000,000 characters (or 3MB per note).

### 3.8.1 Get all notes

Returns all notes.

### 3.8.2 Get one note

Returns details about a specific note.

### 3.8.3 Add a note

Adds a new note.

### 3.8.4 Update a note

Updates a note.

### 3.8.5 Delete a note

Deletes a specific note.