2014

# vCita Partnerships API

## Version 1.3

An API for creating users and scripts for integrating vCita into websites.

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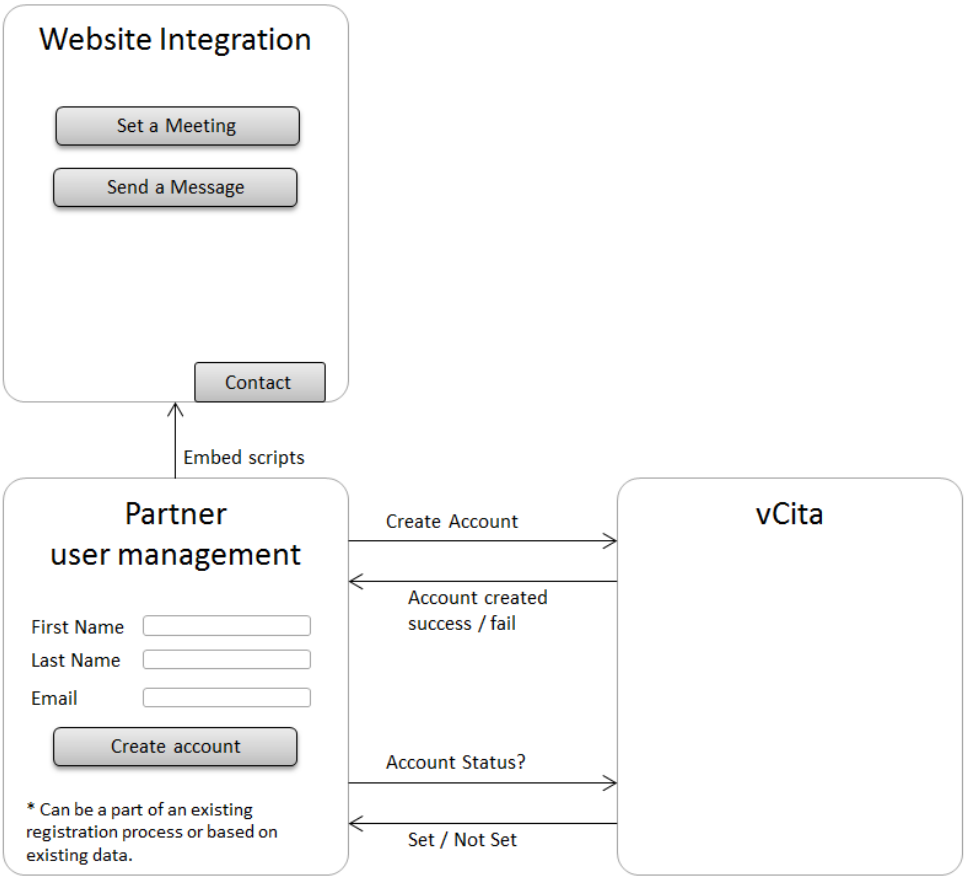
## 1. Purpose

This document describes how to integrate with vCita:

1. Backend Integration - Use a RESTful API in order to :
   - ✓ Create a new user account.
   - ✓ Retrieve information of an existing account.
   - ✓ Check if the user has completed his vCita account settings.
2. Frontend integration - Add vCita to websites:
   - ✓ Add vCita "set meeting" and "send message" links or buttons.
   - ✓ Add vCita Proactive Contact Form to all the website pages.

## 2. Main Flows



# 3. RESTful API

## 3.1. Create a new user account

### 3.1.1. Input values

To create a new account, send HTTP POST request to http://www.vcita.com/api/experts with following fields:

| Field | Description | Possible Values |
|---|---|---|
| **Ref** | Identification of the partner using the API | "<Partner ID>" |
| **Email** | The email of the created / validated expert | Valid email – String |
| **first_name** | The first name of the expert | URL Encoded String |
| **last_name** | The last name of the expert | URL Encoded String |
| **professional_title** | The professional title of the expert | URL Encoded String |

### 3.1.2. Comments

- ✓ All **Fields are mandatory** - Field names are in lowercase.
- ✓ If email belongs to a user that **already exists:**
  - Name and title will be ignored.
  - Existing **user information will be returned**.
    The User ID will be returned
- ✓ Use HTTP POST - For example:
  http://www.vcita.com/api/experts?ref=<PARTNERID>&first_name=Mike&last_name=Wright&professional_title=Tax%20Consultant&email=mikewright@vcita.com

### 3.1.3. Return values

A String representation of a JSON object, returned HTTP Status is HTTP_OK (200)

| Field | Description | Possible Values |
|---|---|---|
| **Success** | Indication if the call is valid or not | Integer: 0 / 1 |
| **Error** | An error message in case of invalid request.<br>User should see this error message, and asked to correct his information | String |
| **Id** | The unique identifier of the user | String |
| **confirmation_token** | A token used to allow the user complete his account configuration.<br>Returned only when a new user is created. | String / null |
| **Confirmed** | Indicates that the user has already completed its account configuration | true / false |

## 3.2. Check if the account is configured

Using this API is optional, and can be used in case you want to present different messages to your end-users in case they didn't complete their setting yet. For example, instruct to "complete vCita account settings" if the account was not set yet, and "edit account settings" in case it is successfully set.

Once account is set, keep user ID and confirmation token.
Every time vCita settings section is shown, you can retrieve the information on a specific user, using HTTP GET request to http://www.vcita.com/api/experts/<id> with the Id associated with the user.

### 3.2.1. Example Call

http://www.vcita.com/api/experts/193

### 3.2.2. Return values

| Field | Description | Possible Values |
|---|---|---|
| **Success** | Indication if the call is valid or not | Integer: 0 / 1 |
| **Id** | The unique identifier of the user | String |
| **Confirmed** | Indicated if the user has completed basic settings. | True/false |

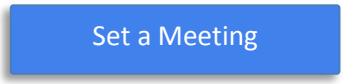
# 4. Integrate vCita to a website

## 4.1. Adding "Set Meeting" and "Send Message" links/buttons

### 4.1.1. Integrate as a URL

The following links can be used as is or as buttons to set a meeting or send a message to the expert

http://www.vcita.com/<id>/set_meeting
http://www.vcita.com/<id>/send_message




* The <id> placeholder should be replaced with the associated expert id

### 4.1.2. Integrate as a 'light box' on top of the hosting site

It is usually preferable that the end-user will not leave the hosting site. Therefore, the "set meeting" and "send message" processes can be triggered as a floating layer on top of the existing site. In order to do that, follow these instructions:

1. Embed The vCita Javascript in the head section

```
<script type='text/javascript' charset='utf-8'>
window.vcita_options = {};
window.vcita_options.active_engage = false;
var vcHost = document.location.protocol == "https:" ? "https:"
: "http:";
document.write(unescape("%3Cscript src='" + vcHost +
"//www.vcita.com/<id>/loader.js'
type='text/javascript'%3E%3C/script%3E"));
</script>
```

2. The <id> placeholder should be replaced with the associated user id.
3. Place the following HTML in the desired location for the set meeting button / link.

```
<a href="#" class="vcita-set-meeting">Set Meeting</a>
<a href="#" class="vcita-send-message">Send Message</a>
```

4. Specify its dimension and any other style you would like. Make sure to keep the **vcita-set-meeting** and **vcita-send-message** classes.

## 4.2. Adding a Proactive Contact label (vCita ActiveEngage ™)

1. Add the following code on a specific business profile page to add contact-label at the bottom of every page.

```
<script type='text/javascript' charset='utf-8'>
window.vcita_options = {};
var vcHost = document.location.protocol == "https:" ?
"https:" : "http:";
document.write(unescape("%3Cscript src='" + vcHost +
"//www.vcita.com/<id>/loader.js'
type='text/javascript'%3E%3C/script%3E"));
</script>
```

2. The <id> placeholder should be replaced with the associated user id.

## 4.3. Add the directory branding

1. You may want to make sure all widgets show on the directory page will have the directory's branding. It's possible to overwrite the account widget theme and the set-meeting screens theme when opened from the directory website.

2. To control the Active Engage widget colors:

    a. Create the theme:
        i. Go to the main directory account ActiveEngage editing: http://www.vcita.com/my/widgets/active_engage/edit
        ii. Select Colors&Themes and configure your theme.
        iii. Copy the widget_theme_id that is shown there.
    b. Add window.vcita_options.theme_id parameter to the code.

3. To control the branding (logo and colors) of the Set Meeting / Send message user experience :
    a. Create the theme
        i. Go to the main directory account branding settings: http://www.vcita.com/settings?section=branding
        ii. Create the theme and copy the branding theme_id shown there.
    b. Add window.vcita_operations.branding_id parameter to the code.

4. Note: Only the main directory account can see the theme ID on the setting pages. If the theme you have set is on a different account, please contact vCita support to get the theme_id.

```
<script type='text/javascript' charset='utf-8'>
window.vcita_options = {};
window.vcita_options.theme_id = <widget theme ID>;
window.vcita_options.branding_id =<branding theme ID>;
var vcHost = document.location.protocol == "https:" ?
"https:" : "http:";
document.write(unescape("%3Cscript src='" + vcHost +
"//www.vcita.com/<id>/loader.js'
type='text/javascript'%3E%3C/script%3E"));
</script>
```

## 4.4. Redirect to a URL once the process is done or close the window

1. This is how the system works by **default**:
    - By default there is no URL redirection.
    - Close on desktop – The scheduling / contact screens are usually opened on top of the website, either on a new window or in a 'lightbox' ( 4.1.2). Therefore, the client can just close the window.
    - On Mobile devices – The scheduling/contact screens should be opened in a new tab. On the confirmation page, a "Done" button is shown and if clicked it closes the current tab, and the browser will take the user back to the previous page.

2. With vCita API you can change the default behavior and do the following:
    - On Mobile – Make the "Done" button redirect the user to a specified URL rather than just close the tab.
    - On Desktop – Add the "Done" button to a pop up window, and either set it to close the existing window or redirect to a new page. Note: If the screen is opened in a 'lightbox' on top of the website, then this option will be automatically disabled.

3. There are several ways to overwrite the default behavior:

a. **Using direct links**- Create your own link to open a pop up or a new tab. This gives you full flexibility to implement "redirect" both on mobile and on desktop.
    - Choose your link from https://www.vcita.com/my/widgets/links
    - Add the parameter "redirect=close" or "redirect=http://<your url>

```
https://www.vcita.com/v/xxxxxx/online_scheduling?service_id=3a158a9c&redirect=http://www.bbc.com
```

b. **Using 'lightbox' or ActiveEngage (mobile only)** - If you are using the vCita ActiveEngage or 'lightbox' implementation, you can change the default behavior from 'close' to 'redirect' only on mobile devices.
    - Add the vcita-set-meeting and vcita-send-message classes to the HTML body.
    - Add the 'data-redirect' property.
    - If data-redirect is not added – the default behavior remains.
    - If data-redirect is set to "close" – then the "Done" button will appear also on Desktop mode, and if clicked, will close the window.
    - If data-redirect is set to a URL, then when clicked the "Done" button will redirect to this URL. Note: The URL must include the http:// prefix.

```
<a href="#" class="vcita-set-meeting" data-redirect="close">Set Meeting</a>
<a href="#" class="vcita-send-message" data-redirect="http://www.cnn.com">Send Message</a>
```