ActiveCampaign Integration Guide

What the AI can do

The Newo AI Agent integrates with ActiveCampaign so your AI can act as a CRM intake and follow-up assistant during live conversations.

Once connected, the AI agent can:

- create or update a contact in ActiveCampaign from the caller's name, email, and phone
- apply an intent-based tag to the contact at the end of the conversation
- enroll an existing contact into an ActiveCampaign automation
- create a sales deal in the CRM pipeline for qualified inquiries
- auto-register Canvas scenarios and custom tools on publish
- sync tags, automations, and deal stages from ActiveCampaign into Newo settings during setup

In plain terms: the AI collects lead details in conversation, writes them into ActiveCampaign, and can trigger the next CRM action without a human opening the CRM.

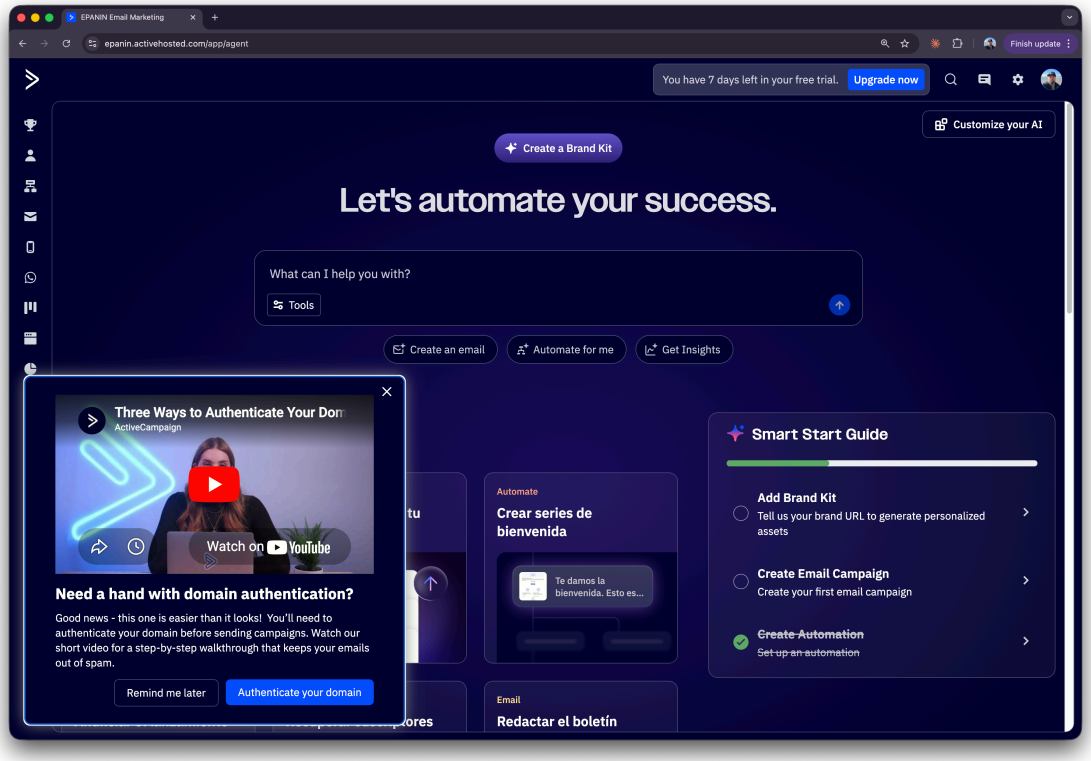


Figure S01. ActiveCampaign home screen before opening account settings.

Before You Start

Make sure you have:

- an ActiveCampaign account with API access
- permission to view **Settings → Developer**

- access to the Newo project builder for your project
- permission to edit attributes and run **Publish All**

You will need:

- **API URL** from ActiveCampaign
- **API Key** from ActiveCampaign

> ***Important:*** *this integration uses ActiveCampaign API v3 over the shared* `http` *connector. The API URL can be stored either as the full* `.../api/3` *path or as the account base URL; the integration appends* `/api/3` *when needed.*

Setup

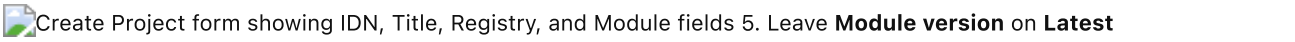
Create the Newo project

If this project already exists in **Newo Builder**, skip this subsection and continue with the integration-specific settings below.

1. In **Newo Builder**, open the projects list and click **Create Project** (or **Create New Project** from the top-right menu).


Create New Project menu in Newo Builder

2. Fill **IDN** and **Title**. The exact names do not matter; use any clear names your team will recognize.
3. In **Registry**, choose the release channel:
    - **staging** — the newest module fixes appear here first. Use it when you need the latest fix, but expect possible unfinished changes.
    - **production** — the final stable version for live projects.
4. In **Module**, select the module for this integration.


Create Project form showing IDN, Title, Registry, and Module fields 5. Leave **Module version** on **Latest version** unless support tells you to pin a specific version, then click **Create**.

3.1 Get Credentials in ActiveCampaign

1. Log in to ActiveCampaign.
2. Open **Settings → Developer**.
3. Copy your **API URL**.
4. Copy your **API Key**.

The API URL usually looks like `https://your-account.api-us1.com/api/3` .

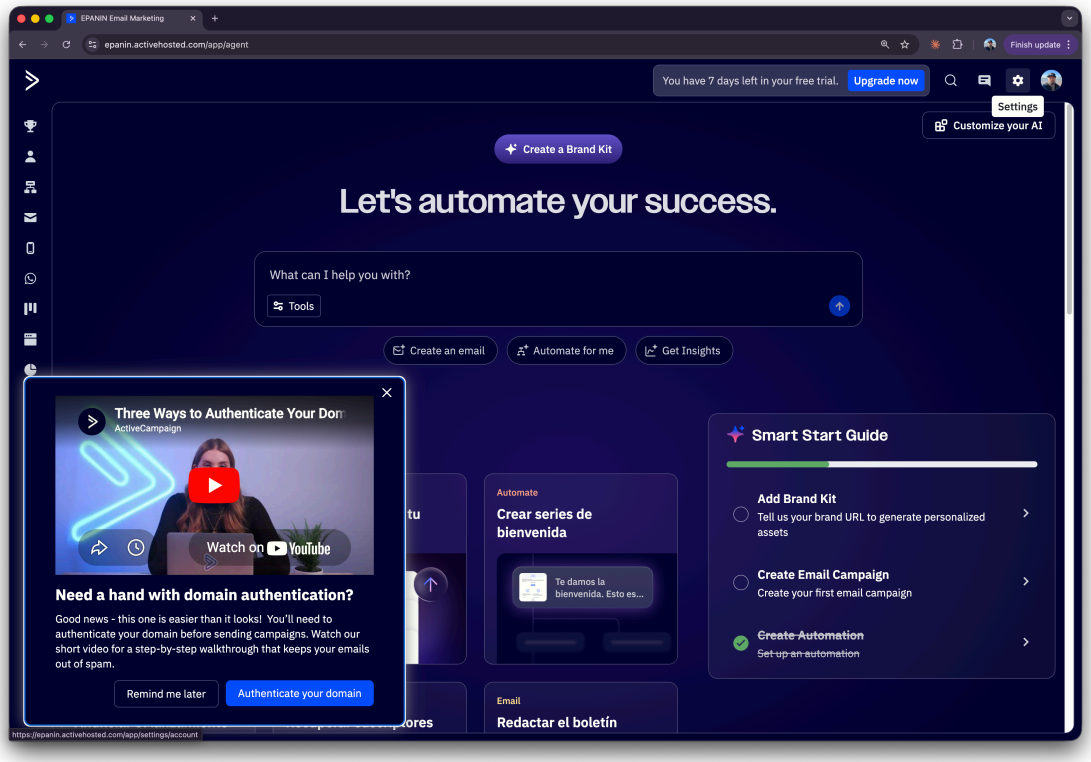


Figure S02. Open ActiveCampaign settings from the top-right corner.

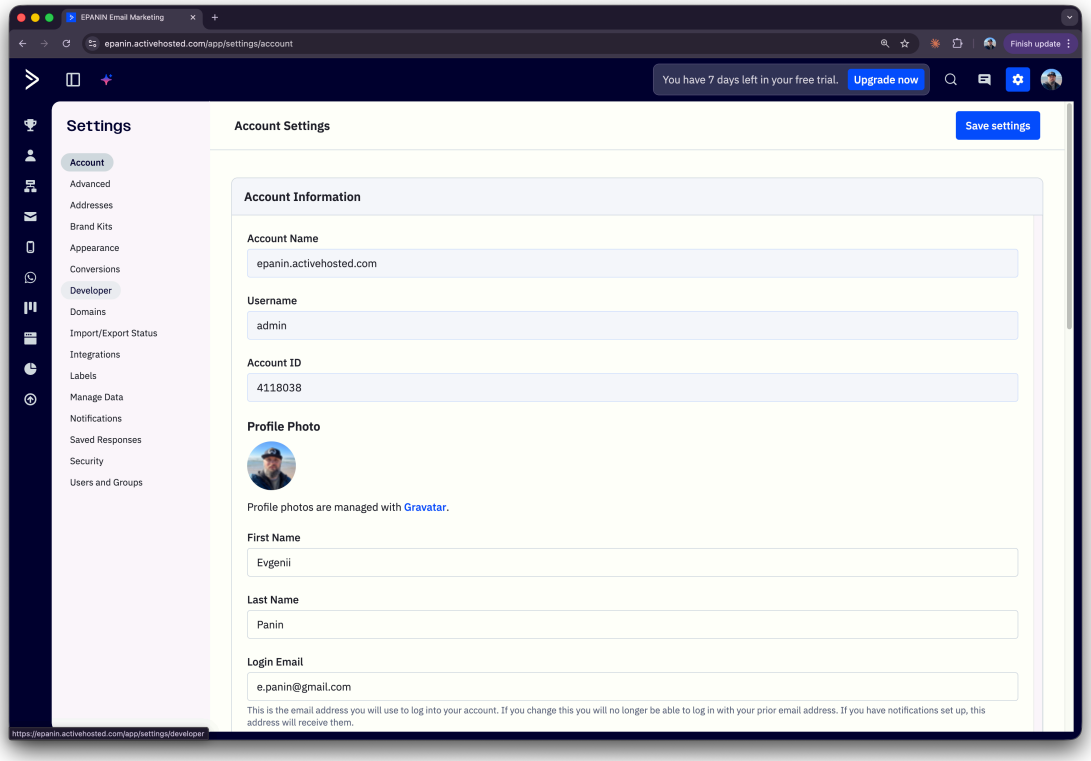


*Figure S03. Settings screen with the sidebar where the **Developer** section is located.*

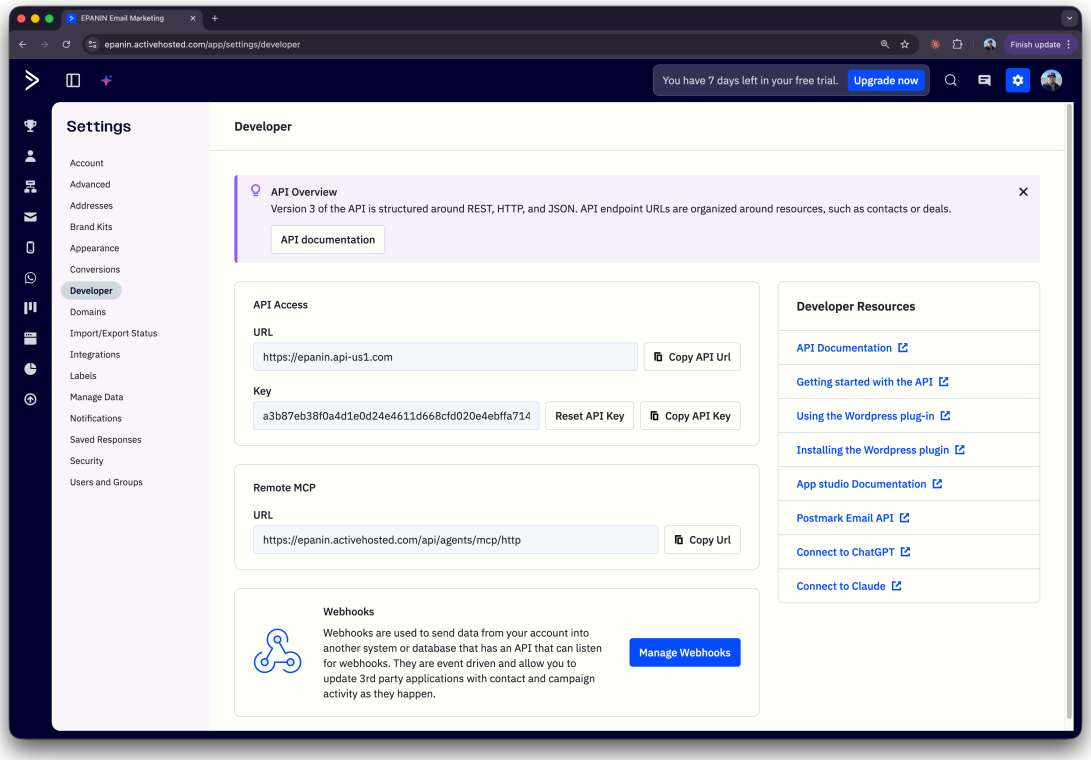


*Figure S04. Copy the API URL and API Key from **Settings → Developer**.*

3.2 Connect in Newo

1. Open your project in Newo and go to **Builder → Attributes**.
2. Find the **Activecampaign Settings** section.
3. Fill in the following fields:

Setting	What it does	Required
API URL (`activecampaign_base_url`)	Base URL for ActiveCampaign API v3	Yes
API Key (`activecampaign_api_key`)	API token sent as `Api-Token` header	Yes

4. Click **Save**.
5. Click **Publish All**.

What happens after Publish:

- Newo creates the `activecampaign_connector` connection if it does not exist
- Newo creates an internal `setup_persona_id` used for custom tool registration
- Newo registers four custom tools in ConvoAgent:
  - `activecampaign_create_update_contact`
  - `activecampaign_tag_contact`
  - `activecampaign_add_to_automation`
  - `activecampaign_create_deal`

- Newo syncs tags from the lookup request
- Newo syncs automations from the lookup request
- Newo syncs deal stages from the lookup request
- Newo stores synced data in customer attributes for later use

3.3 Advanced Runtime Settings

These attributes are read by the flows but are not created automatically in `SetupFlow`. If you want to influence behavior, add them manually in Builder:

Setting	What it does	Required
Automation Name (`project_attributes_setting_automation_name`)	Intended default automation label for enrollment messaging	No
Deal Title (`project_attributes_setting_deal_title`)	Overrides the default generated deal title	No
Tag Map (`project_attributes_setting_activecampaign_tag_map`)	JSON map of synced tag names to ActiveCampaign IDs	Auto-filled on publish
Automation Map (`project_attributes_setting_activecampaign_automation_map`)	JSON map of synced automation names to IDs	Auto-filled on publish
Default Stage ID (`project_attributes_setting_activecampaign_default_stage_id`)	First synced stage ID saved during setup	Auto-filled on publish

> ***Current implementation note:*** *`Automation Name` is stored in flow context and used in user-facing confirmation text, but the enrollment flow currently fetches all automations and uses the first returned automation instead of filtering by that name.*

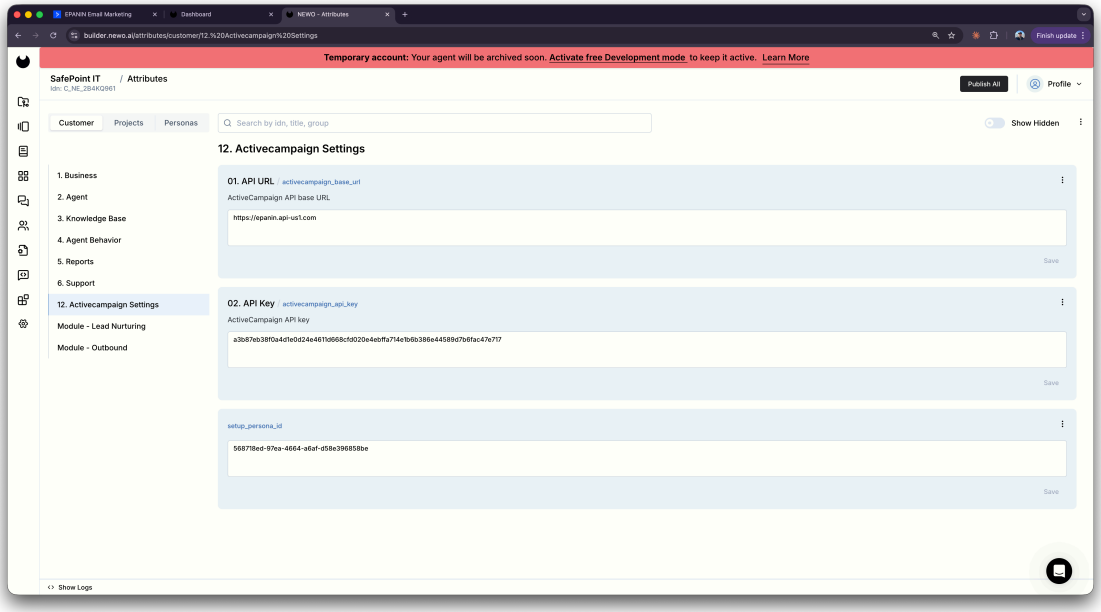


Figure S05. Newo Builder attributes for ActiveCampaign credentials and post-publish setup persona.

What the AI can do

4.1 Create or Update a Contact

When the conversation reaches the code phrase **"Let me save your contact information now."**, the integration:

- reads `user.name`
- reads persona `email`
- reads persona `phone`
- splits full name into first and last name
- calls ActiveCampaign the create/update request

You will see in ActiveCampaign: a new or updated contact record.

You will see in Newo: persona attribute `activecampaign_contact_id` is saved after success.

4.2 Tag a Contact by Intent

At wrap-up, the integration can label the contact based on conversation intent. The current heuristics are:

- `callback-requested` if memory mentions `callback` or `call me back`
- `new-lead` if memory mentions `new` plus `lead` or `customer`
- otherwise `interested`

The flow:

1. searches the contact by email via the lookup request
2. creates the contact first via the create/update request if no contact exists
3. searches tags via the lookup request
4. links the tag via the create/update request

You will see in ActiveCampaign: the contact gets a new contact-tag association.

4.3 Enroll a Contact into an Automation

When the conversation reaches the code phrase **"Let me set up your follow-up sequence now."**, the integration:

1. looks up the contact by email via the lookup request
2. loads automations via the lookup request
3. uses the first returned automation
4. enrolls the contact via the create/update request

You will see in ActiveCampaign: the existing contact is added to an automation.

> ***Important limitation:*** *this flow does* ***not*** *create a missing contact. If the email does not match an existing contact, the integration still continues but may try to enroll an empty contact ID. In practice, you should run contact sync first or ensure the contact already exists.*

4.4 Create a Sales Deal

When the conversation reaches the code phrase **"Let me create a deal for your inquiry now."**, the integration:

1. looks up the contact by email via the lookup request
2. creates the contact first via the create/update request if needed
3. loads stages via the lookup request
4. chooses the first returned stage
5. builds a deal payload and sends the create/update request

Deal value is inferred from conversation memory by scanning for numbers over `100`, and currency is always `usd`.

You will see in ActiveCampaign: a new deal connected to the contact.

> ***Current implementation note:*** *deal owner is hardcoded to* `"1"` *in* `CreateDealFlow`*, not taken from a customer attribute.*

4.5 Auto-Setup Canvas Scenarios

On canvas build, the integration inserts library content for:

- introduction
- gather name
- gather phone
- gather email
- finish conversation
- capture contact scenario
- add to automation scenario
- create deal scenario

This lets the conversation layer trigger the custom tools using explicit code phrases rather than generic booking tools.

5. How the Integration Works

How to test that everything works

6.1 After Setup

After clicking **Publish All**, confirm:

- [ ] the `activecampaign_connector` exists
- [ ] `project_attributes_settings_platform_tools` contains four ActiveCampaign tools
- [ ] `project_attributes_setting_activecampaign_tag_map` is populated
- [ ] `project_attributes_setting_activecampaign_automation_map` is populated
- [ ] `project_attributes_setting_activecampaign_default_stage_id` is populated

6.2 Test Contact Sync

1. Start a test conversation.
2. Give the agent a name, phone number, and email.
3. Trigger the contact-save scenario.
4. Verify in ActiveCampaign that the contact exists or was updated.
5. Verify persona attribute `activecampaign_contact_id` is set.

6.3 Test Tagging

1. Use a conversation that clearly contains callback or lead intent.
2. Let the conversation reach the finish procedure.
3. Verify the contact was found or created.
4. Verify a tag association appears on the contact in ActiveCampaign.

6.4 Test Automation Enrollment

1. Make sure the contact already exists in ActiveCampaign.
2. Make sure at least one automation exists.
3. Trigger the follow-up sequence scenario.
4. Verify the contact is enrolled in an automation.

6.5 Test Deal Creation

1. Start a sales inquiry conversation.
2. Mention a budget such as `$1200` or `1500 per month`.
3. Trigger the deal-creation scenario.
4. Verify the contact exists.
5. Verify a new deal appears in ActiveCampaign with a value and stage.

6.6 If Something Does Not Work

- confirm both `activecampaign_base_url` and `activecampaign_api_key` are filled in
- confirm the API URL belongs to the correct account
- republish after changing any credentials
- verify the user has persona `email` before tag, automation, or deal flows
- verify ActiveCampaign already has automations configured if enrollment is expected
- verify at least one deal stage exists if deal creation is expected
- check whether the flow hit `activecampaign_api_error`

FAQ

Q: Does this integration support OAuth?
A: No. The current implementation uses only API URL + API Key and sends requests through the shared `http` connector.

Q: What happens on Publish All?
A: The integration creates its connector, creates an internal setup persona, registers four custom tools, and syncs tags, automations, and deal stages from ActiveCampaign.

Q: Does automation enrollment create a missing contact automatically?
A: No. `AddToAutomationFlow` only searches by email and then continues to automations. If the contact is missing, enrollment may fail or target an empty contact ID.

Q: How does the tag get chosen?
A: The current code uses simple keyword heuristics on `memory`. It maps to `callback-requested`, `new-lead`, or falls back to `interested`.

Q: How is the automation selected?
A: The current flow fetches the lookup request and uses the first returned automation. The configured `automation_name` is not yet used as an API filter.

Q: How is the deal stage selected?
A: The flow fetches the lookup request and uses the first returned stage. The synced default stage attribute is stored during setup but is not read back by `CreateDealFlow`.

Q: Who becomes the deal owner?
A: Right now the owner is hardcoded to `"1"` in `CreateDealFlow`, so production use should verify that user ID is valid in the target ActiveCampaign account.