Close Integration

Connects **Close** with the Newo AI agent so chat visitors and callers can ask for pricing, request a callback, share contact info, and have the team receive a clean follow-up record without leaving the conversation.

> ***Time to first success:*** *about 15 minutes if you already have Close admin access and a Newo Builder project.*

Before You Start

Make sure you have:

- an active **Close** account;
- admin access in Close, so you can create an API key;
- access to **Newo Builder**, with permission to edit project settings and click **Publish All**;
- the contact status or request status IDs your team wants to use, if the agent should apply specific statuses;
- a Close Scheduling Link or a default scheduling-link URL, if the agent should send meeting links;
- Newo SMS configured for the project, if the agent should send text messages.

What The AI Can Do

- **Pass contact info to the team.** The agent asks for a name and at least one contact method, then updates Close after it has enough information.
- **Update an existing request.** The agent can pass along confirmed next steps, priority, status, value, or notes.
- **Add conversation notes.** The agent can add a summary of the conversation to the current contact record.
- **Create follow-up reminders.** The agent can set a team reminder to call, email, text, or otherwise follow up.
- **Subscribe a contact to a follow-up sequence.** The agent can use a configured Close sequence when the operator enables this.
- **Send approved text messages.** The agent sends SMS through Newo SMS when SMS is enabled.
- **Handle meeting-link workflows.** The agent can send a Close scheduling link by SMS, find existing Close meeting activities, cancel confirmed meetings, and add meeting-change notes.

Features At A Glance

Feature	Included
Contact info handoff	Yes
Contact status updates	Yes
Conversation note logging	Yes
Structured request updates	Yes
Team follow-up reminders	Yes
Sequence enrollment	Yes
SMS through Newo SMS	Optional

Meeting link sharing	Yes
Existing meeting lookup/cancel/note	Yes
Live slot booking	No
Close webhooks	No
OAuth marketplace flow	No

Live slot booking is intentionally not included in this module. The Close module sends a configured Close scheduling link by SMS and manages existing Close meeting activities. Use a scheduling integration if the agent must check live times or create calendar bookings directly.

Screenshots

Close setup screenshots are saved in:

File	What it shows
`S01-settings-menu.png`	Close left navigation with **Settings** selected.
`S02-developer-menu.png`	Close Settings side menu under **Connect**, with **Developer** selected.
`S04-api-key-created.png`	Close Developer page after creating the API key.

Do not include raw API keys in screenshots. If a key is visible, blur it before committing the image.

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).

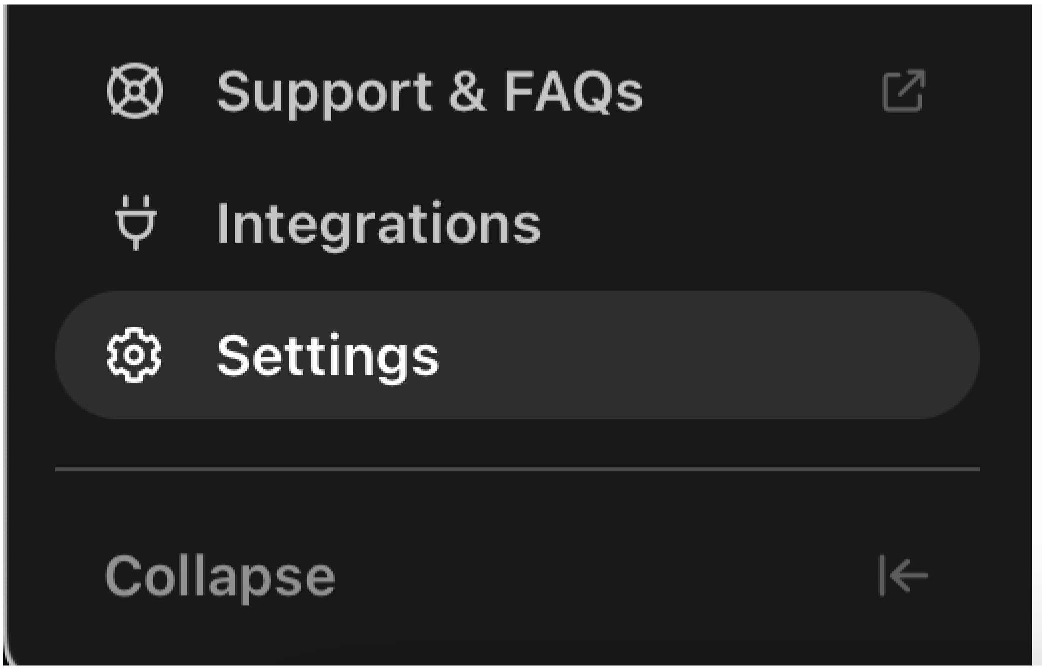
Create New Project menu in Newo Builder

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.

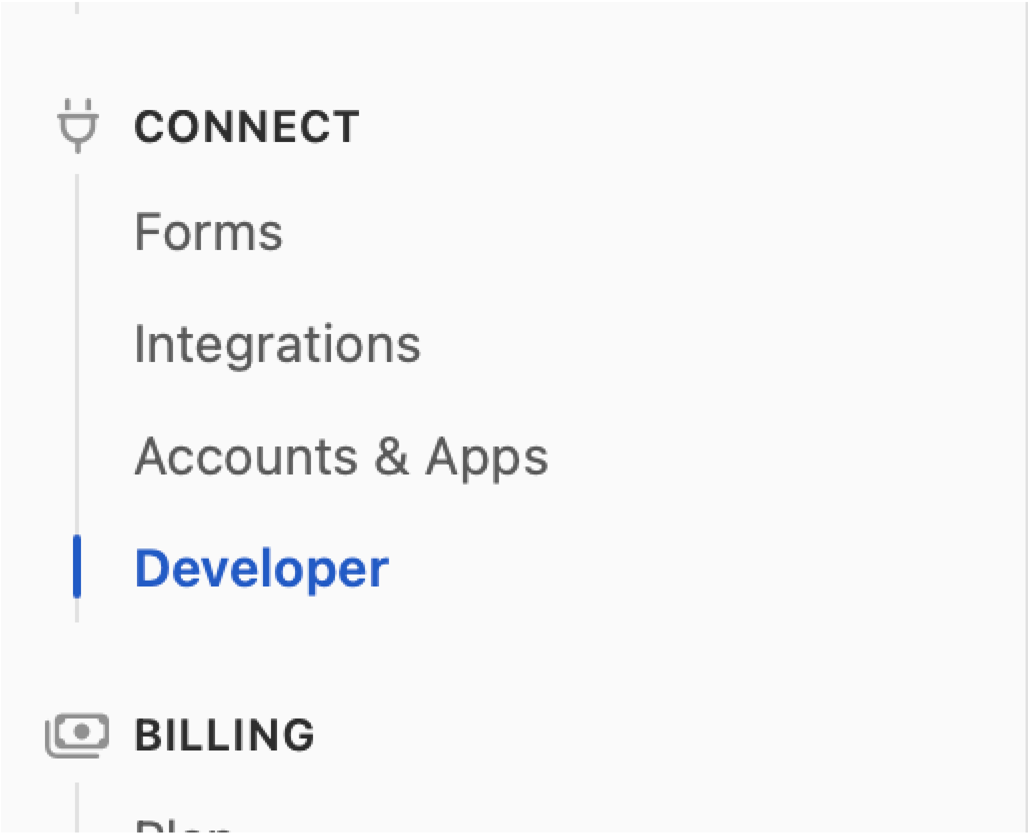
Create Project form showing IDN, Title, Registry, and Module fields 5. Leave **Module version** on **Latest version** unless support tells you to pin a specific version, then click **Create**.

1. Prepare Your Close Account

1. Open Close.
2. Go to **Settings**.

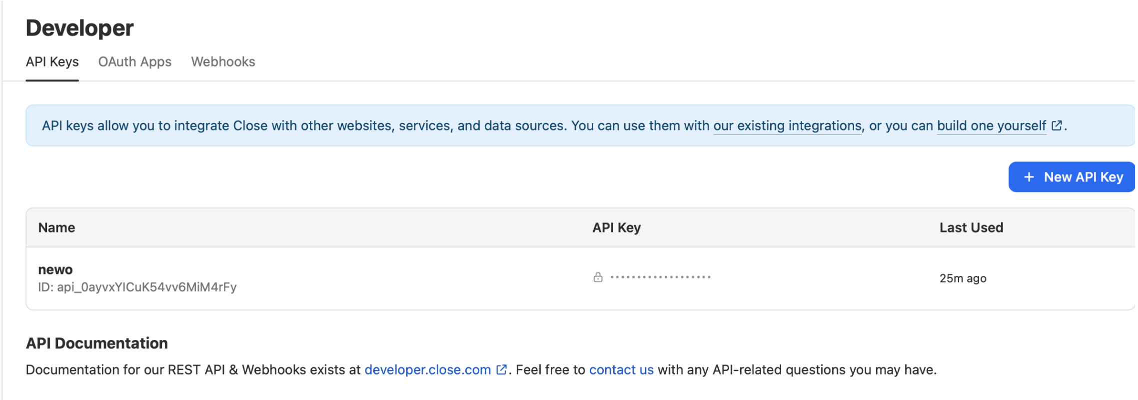


3. Under **Connect**, open **Developer**.



4. Open the **API Keys** tab.
5. Click **New API Key**.
6. Give the key a recognizable name, for example `Newo`.
7. Copy the full API key when Close shows it.

Close shows the full key only once. If it is lost, create a new one and replace the value in Newo.



2. Configure In Newo

Open **Newo Builder**, go to project settings, and find the **Module - Close** settings group.

Fill the required settings first:

Setting	What to enter
Close API Key	The full Close API key.
Close API Base URL	Keep the default unless Close support gives you another URL.
Default Contact Record Name	Fallback name used when the visitor does not give a company name.

Then review optional defaults:

Setting	Use when
Default Contact Status ID	The team wants new or updated contact records to use a specific Close status.
Potential Status ID	A new caller shows initial interest but has not asked for a meeting yet.
Interest Status ID	The caller asks for or confirms a meeting.
Not Interest Status ID	The caller is wrong-number, inappropriate, no longer interested, or rejects required terms.
Not Fit Status ID	The caller does not meet configured requirements such as location or organization type.
Canceled Status ID	The caller cancels an existing meeting because they lost interest.

Default Request Status ID	The team wants structured request updates to use a specific status.
Default Scheduling Link URL	Optional override link. If empty, the module attempts to read the first Close Scheduling Link from the Close API.

Review feature switches:

Setting	Default	Purpose
Enable Contact Info Handoff	On	Lets the agent pass visitor contact info to the team.
Enable Contact Status Updates	On	Lets the agent update contact status and configured fields.
Enable Interaction Logging	On	Lets the agent add conversation notes.
Enable Request Updates	On	Lets the agent create or update structured request details.
Enable Follow-up Tasks	On	Lets the agent set reminders for the team.
Enable Sequence Enrollment	On	Lets the agent subscribe a contact to a configured sequence.
Enable Meeting Management	On	Lets the agent send scheduling links by SMS and manage existing Close meetings.
Enable SMS	Off	Lets the agent send caller-approved SMS through Newo SMS.
Setup Follow-up Scenarios	On	Adds the reference canvas scenarios during publish.

3. Hit Publish All

Click **Publish All** after saving the settings.

During publish, Newo:

- creates or reuses the Close connection;
- creates the visible setup settings and hidden system settings;
- registers the custom follow-up actions the agent can use;
- keeps generic booking, availability, and cancellation tools out of this module;
- registers Close-specific meeting-link and meeting-management actions;
- adds follow-up scenarios to the canvas when **Setup Follow-up Scenarios** is on.

4. Verify Setup

After **Publish All**:

- The **Module - Close** settings group should show the visible settings listed above.
- The canvas should include **Initial Interest Intake**, **Meeting Request**, **Request Disposition**, **Meeting Change Request**, **Team Follow-up Reminder**, and **Text Message Send**.

- A test chat should reach the phrase `"I'll pass your contact info to the team now."` only after the visitor has given a name and at least one contact method.

How To Test That Everything Works

Run these checks before going live.

Contact Follow-up

1. Start a test chat.
2. Say:

```
Hi, I need pricing for your annual plan.
```

3. When the agent asks who should be contacted, answer naturally:

```
It's for a team, and I'd like someone to get back to me with pricing.
```

4. When the agent asks for contact info, provide it:

```
Sure, I'm Riley Brooks. You can reach me at riley@example.com or +1 555 010 7806.
```

Expected:

- The agent says: `"I'll pass your contact info to the team now."`
- The agent waits for the Close result before saying the team has the contact info.
- A Close contact record exists with the name, email, and phone from the test.

Request Update

After contact info is already known, say:

```
Please add that we're interested in the annual plan for a 20-person team.
```

Expected:

- The agent says it will pass the update to the team.
- Close receives the request update.
- The agent confirms only after the result is available.

Follow-up Reminder

After contact info is already known, say:

```
Please remind the team to call me tomorrow about pricing.
```

Expected:

- The agent says it will set a follow-up reminder for the team.
- The reminder appears in Close.

Meeting Link

Use this when **Enable Meeting Management** is on and Close has a scheduling link or **Default Scheduling Link URL** is configured.

Say:

```
I'd like to book a meeting with the team.
```

Expected:

- The agent says: `"I'll send the meeting link now."`
- The link is sent through Newo SMS.
- In a voice conversation, the agent does not read or spell the URL.
- The Close contact status is updated to Interest when the status ID is configured.

SMS

Use this only when **Enable SMS** is on and Newo SMS is configured for the project.

Say:

```
Please text me: Thanks for your interest, our team will follow up today.
```

Expected:

- The agent confirms the exact text before sending.
- The message is sent through Newo SMS.

Scenarios

What Gets Added On Publish All

Intent	Scenario
Follow-up Contact Info	Follow-up Contact Info
Request Update	Request Update
Meeting Request	Meeting Request
Meeting Change Request	Meeting Change Request
Team Follow-up Reminder	Team Follow-up Reminder
Text Message Send	Text Message Send

These scenarios are a reference implementation. Operators can edit wording in the canvas UI, but future module updates do not overwrite edited copies. To get newer shipped defaults, delete the edited canvas item and run **Publish All** again.

Why Trigger Phrases Matter

Trigger phrases are the plain-English sentences that tell the agent it is time to call Close. If you customize scenario wording, keep the trigger phrase for the action you still want to happen.

Follow-up Contact Info

Use this when a visitor asks for pricing, a callback, more information, or someone from the team to get back to them.

Steps:

1. Check whether the conversation already contains the visitor's name and at least one contact method.
2. Ask only for missing information, one question at a time.
3. Confirm the information in plain language.
4. Say the trigger phrase: *"I'll pass your contact info to the team now."*
5. Wait for the result.
6. Confirm that the team has the contact info.

Triggered by intent: **Follow-up Contact Info**

Trigger phrases, do not edit:

- `"I'll pass your contact info to the team now."`
- `"I'll make sure the team has your contact info."`
- `"I'll pass your pricing request to the team now."`

What the agent reads to know the result:

- **Contact record panel** — tells the agent whether the handoff is loading, successful, or failed.

Safe customization:

- You can reword how the agent asks for name, email, or phone.
- You can add business-specific context around pricing or callback expectations.
- Do not remove the trigger phrase.
- Do not tell the agent to confirm success before the Close result is available.

Request Update

Use this when the visitor or operator gives a concrete update, such as priority, status, expected value, or next step.

Steps:

1. Make sure contact info is already known.
2. Use only confirmed update info.
3. Say the trigger phrase: *"I'll pass that update to the team now."*
4. Wait for the result.
5. Confirm briefly that the team has the update.

Triggered by intent: **Request Update**

Trigger phrases, do not edit:

- `"I'll pass that update to the team now."`

What the agent reads to know the result:

- **Contact record panel** — tells the agent whether the update is loading, successful, or failed.

Safe customization:

- You can change how the agent asks for priority or next-step details.
- Do not invent status IDs or values the visitor did not provide.
- Do not remove the trigger phrase.

Team Follow-up Reminder

Use this when a visitor asks for a call, email, text, or later team follow-up.

Steps:

1. Make sure contact info is already known.
2. Ask for the concrete follow-up action in the visitor's words.
3. Say the trigger phrase: *"I'll set a follow-up reminder for the team."*
4. Wait for the result.
5. Confirm that the reminder is set.

Triggered by intent: **Team Follow-up Reminder**

Trigger phrases, do not edit:

- `"I'll set a follow-up reminder for the team."`

What the agent reads to know the result:

- **Contact record panel** — tells the agent whether the reminder is loading, successful, or failed.

Safe customization:

- You can change how the agent asks about preferred channel or timing.
- Do not promise a specific person unless your business context names that person.
- Do not remove the trigger phrase.

Text Message Send

Use this when the visitor asks for a specific text message and SMS is enabled.

Steps:

1. Confirm the recipient phone number and exact SMS body.
2. Say the trigger phrase: *"I'll send that text now."*
3. Wait for the result.
4. Confirm whether the text was sent.

Triggered by intent: **Text Message Send**

Trigger phrases, do not edit:

- `"I'll send that text now."`

What the agent reads to know the result:

- **Contact record panel** — tells the agent whether SMS sending is loading, successful, or failed.

Safe customization:

- You can change how the agent asks for message approval.
- Do not rewrite the visitor-approved SMS body.
- Do not remove the trigger phrase.

Trigger Phrases Reference

Trigger phrase	Action
`"I'll pass your contact info to the team now."`	Contact follow-up
`"I'll make sure the team has your contact info."`	Contact follow-up
`"I'll pass your pricing request to the team now."`	Contact follow-up
`"I'll pass that update to the team now."`	Request update
`"I'll set a follow-up reminder for the team."`	Follow-up reminder
`"I'll send that text now."`	SMS

Example Dialogs

Contact Follow-up

Customer: Hi, I need pricing for your annual plan.
Agent: Great, so you'd like pricing for the annual plan, correct?
Customer: It's for a team, and I'd like someone to get back to me with pricing.
Agent: Could I get your name and the best email or phone number to reach you?
Customer: Sure, I'm Riley Brooks. You can reach me at riley@example.com or +1 555 010 7806.
Agent: I'll pass your contact info to the team now.
Agent after Close result: The team has your contact info and will follow up with pricing.

Missing Contact Method

Customer: Please have someone get back to me.
Agent: Sure. Could I get your name and the best email or phone number to reach you?
Customer: Riley Brooks.
Agent: Thanks, Riley. What email or phone number should the team use?

Follow-up Reminder

Customer: Please remind the team to call me tomorrow about the annual plan.
Agent: I'll set a follow-up reminder for the team.
Agent after Close result: The reminder is set for the team.

Customizing The Agent

You can safely edit:

- how the agent introduces the follow-up flow;
- how it asks for name, email, and phone;
- business-specific wording around pricing, demos, proposals, or callback expectations;
- whether the scenario asks for company name or team size.

Always preserve:

- the trigger phrases listed above;
- the step where the agent waits for the result;
- the rule that the agent asks only for missing contact info;
- the rule that the agent does not claim completion before Close responds.

Common Errors And Recovery

Symptom	Likely cause	How to recover	How to verify
Agent says the API key is not configured	**Close API Key** is empty	Paste the full Close API key and click **Publish All**	Run a contact follow-up test
Close rejects the request	The API key is wrong or was copied incompletely	Create a new key in Close and replace the value in Newo	The test creates or updates a contact record
Agent asks for the same info twice	Scenario wording was edited and no longer checks existing conversation info	Restore the reference **Follow-up Contact Info** scenario or compare against this guide	The agent asks only for missing info
Agent says it will pass info along but nothing appears in Close	Trigger phrase was removed or changed too much	Restore one supported trigger phrase and click **Publish All**	The test reaches the Close result message
SMS is not sent	SMS is disabled or Newo SMS is not configured	Configure Newo SMS, enable **Enable SMS**, and publish	A test text is delivered through Newo SMS
Meeting link is not sent	No Close Scheduling Link exists and **Default Scheduling Link URL** is empty	Create a Close Scheduling Link or fill **Default Scheduling Link URL**, then publish	A meeting-link test sends the link by SMS

Limitations

- This module sends meeting links and manages existing Close meeting activities; it does not check live availability slots.
- This module does not configure Close webhooks.
- This module does not implement a Close OAuth marketplace flow.
- SMS delivery depends on Newo SMS.
- The agent depends on exact trigger phrases to start Close actions.

Support Handoff Notes

- Auth method: Close API key.
- Main Newo settings group: **Module - Close**.
- First smoke test: contact follow-up with a fresh email and phone.
- Most common fix: replace the API key and click **Publish All**.
- Canvas reset: delete edited follow-up scenarios and click **Publish All** to restore shipped defaults.

All Settings Reference

Name	Description	Required	Default	Hidden	Edit

Close API Key	API key used to connect to Close	Yes	Empty	No	Yes
Close API Base URL	Base URL for Close API calls	No	`https://api.close.com/api/v1`	No	Rarely
Default Contact Record Name	Fallback record name when company name is unknown	No	`Newo AI Prospect`	No	Yes
Default Contact Status ID	Optional status for new or updated contact records	No	Empty	No	Yes
Potential Status ID	Status for initial-interest callers	No	Empty	No	Yes
Interest Status ID	Status for callers who request or confirm a meeting	No	Empty	No	Yes
Not Interest Status ID	Status for wrong-number, inappropriate, or no-longer-interested callers	No	Empty	No	Yes
Not Fit Status ID	Status for callers outside configured qualification requirements	No	Empty	No	Yes
Canceled Status ID	Status for callers who cancel an existing meeting after losing interest	No	Empty	No	Yes
Default Request Status ID	Optional status for structured request updates	No	Empty	No	Yes

Default Scheduling Link URL	Optional override scheduling link; otherwise Close Scheduling Links are used	Only for meeting links	Empty	No	Yes
Enable Contact Info Handoff	Lets the agent pass contact info to the team	No	On	No	Yes
Enable Contact Status Updates	Lets the agent update contact status and configured fields	No	On	No	Yes
Enable Interaction Logging	Lets the agent add conversation notes	No	On	No	Yes
Enable Request Updates	Lets the agent create or update structured request details	No	On	No	Yes
Enable Follow-up Tasks	Lets the agent set team reminders	No	On	No	Yes
Enable Sequence Enrollment	Lets the agent add contacts to configured sequences	No	On	No	Yes
Enable Meeting Management	Lets the agent send meeting links and manage Close meetings	No	On	No	Yes
Enable SMS	Lets the agent send approved SMS through Newo SMS	No	Off	No	Yes
Setup Follow-up Scenarios	Adds reference canvas scenarios during publish	No	On	No	Yes

Internal extraction schemas and instructions	System-only data used to read conversation fields	No	Auto-created	Yes	No
Internal setup record	System-only setup record used during publish	No	Auto-created	Yes	No