Pipedrive Integration

What the AI can do

Summary

Pipedrive Integration connects **Pipedrive CRM** with **Newo Platform** and lets a Newo agent manage appointment-style activities inside Pipedrive.

It currently supports:

- checking availability by reading existing Pipedrive activities
- booking appointments with automatic contact lookup or contact creation
- cancelling booked appointments
- identifying existing callers by phone and loading future bookings into persona memory
- token-based auth and connector-based OAuth auth

The integration is aimed at **service businesses and sales teams** that want a conversational agent to schedule, confirm, and cancel meetings in Pipedrive.

Common use cases

- When a caller asks for available times -> the agent reads Pipedrive activities and computes free slots
- When a caller confirms a slot -> the agent creates or reuses a Pipedrive person and books an activity
- When a caller wants to cancel -> the agent deletes the matching Pipedrive activity
- When the caller phone number is known -> the agent loads the matching person and future bookings into prompt context
- When the session starts and preload is enabled -> the agent silently preloads nearest available slots

Features at a glance

Feature	Supported	Notes
Availability check	✅	Uses `activities_list` and computes free slots locally
Booking creation	✅	Uses `persons` + `activities` APIs
Booking cancellation	✅	Deletes activity by `booking_id`
Existing client detection	✅	Phone-based lookup through `persons/search`
Prompt context preload	✅	Future bookings injected into prompt sections
Session-start slot preload	✅	Controlled by `pipedrive_check_availability_on_conversation_start`
Token auth	✅	`x-api-token` header through `http` connector
OAuth auth	✅	`oauth_code` + `create_extension_connector` through `api` connector

Reschedule flow	❌	Use cancel + rebook
Deal / pipeline management	❌	Not implemented
Multi-location routing	❌	Single Pipedrive workspace/account per integration

Before You Start

Before setup:

- active Pipedrive account
- for `Token` auth: a Pipedrive API token
- for `OAuth` auth: a Pipedrive app authorization flow that yields `oauth_code`
- a correct tenant domain in `pipedrive_base_api_url`, because runtime requests target the workspace-specific Pipedrive URL even in OAuth mode

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 Authentication Modes

The integration has two auth modes:

1. **Token**
   - operator sets `pipedrive_auth_type = Token`
   - runtime sends `x-api-token`
   - this is the simplest direct API path
2. **OAuth**
   - operator sets `pipedrive_auth_type = OAuth`

- operator pastes `pipedrive_oauth_code`
- `SetupFlow/_setupConnectorSkill` creates a Pipedrive extension connector via `create_extension_connector`
- the visible authorization link currently uses placeholder app credentials in the repo and should be replaced with the real Pipedrive app credentials when they are known
- runtime API calls then go through the `api` connector instead of the raw token header path

3.2 Operator-Facing Attributes

Attribute	Required	Description
`pipedrive_auth_type`	Yes	`OAuth` or `Token`
`pipedrive_api_token`	Required for `Token`	Pipedrive API token used in `x-api-token` header
`pipedrive_oauth_code`	Required for `OAuth`	One-time authorization code used to create the OAuth connector
`pipedrive_base_api_url`	Yes	Required workspace URL such as `https://your-company.pipedrive.com`
`project_business_time_zone`	Yes	Shared project timezone used for slot interpretation and UTC conversion before booking
`pipedrive_show_for_days`	No	Availability window size, default `1`
`pipedrive_duration`	No	Default appointment duration in minutes, default `30`
`pipedrive_enable_availability`	No	Enable / disable availability tool
`pipedrive_enable_booking`	No	Enable / disable booking tool
`pipedrive_enable_cancellation`	No	Enable / disable cancellation tool
`pipedrive_check_availability_on_conversation_start`	No	Silent slot preload at session start
`pipedrive_setup_scenarios`	No	Publish default canvas/library content

3.3 System-Managed Hidden Attributes

These are not meant for normal operator editing but are part of the integration contract:

Attribute	Purpose
`pipedrive_setup_persona_id`	Setup persona used for setup-time operations
`pipedrive_availability_extraction_schema`	LLM extraction schema for availability

`pipedrive_availability_extraction_instructions`	LLM extraction instructions for availability
`pipedrive_booking_extraction_schema`	LLM extraction schema for booking
`pipedrive_booking_extraction_instructions`	LLM extraction instructions for booking
`pipedrive_cancellation_extraction_schema`	LLM extraction schema for cancellation
`pipedrive_cancellation_extraction_instructions`	LLM extraction instructions for cancellation

3.4 What SetupFlow Does

On publish, `SetupFlow` :

- registers both `api` and `http` connectors named `pipedrive_connector`
- creates/maintains the hidden setup persona
- publishes operator-facing and hidden attributes
- registers custom Newo tools through `_setupToolsSkill`
- when `pipedrive_auth_type = OAuth` , runs `_setupConnectorSkill` to create the OAuth extension connector

How to use the integration

4.3 Important Runtime Rules

- The integration uses **custom tools**, not generic NAF booking tools.
- `search_booking_tool` is still expected to stay available in ConvoAgent for booking lookup.
- Availability and booking extractions are LLM-assisted through hidden JSON schemas and extraction prompts.
- Booking now converts the caller-confirmed local time into **UTC** before sending `due_date` and `due_time` to Pipedrive.
- Activity creation in `v2` uses `participants` with a primary participant instead of writable `person_id` .

How to test that everything works

Recommended checks:

1. Publish the project and verify `SetupFlow` runs without runtime errors.
2. Confirm custom tools are present in `project_attributes_settings_platform_tools` .
3. In `Token` mode, run availability + booking + cancellation smoke tests.
4. In `OAuth` mode, verify `pipedrive_oauth_code` leads to connector creation and business requests go through `pipedrive_connector` .
5. Verify a booking creates:
    - person lookup/create in `v2`
    - activity create in `v2`
    - `participants` payload instead of `person_id`
    - UTC `due_date` / `due_time` while user-facing confirmation remains local

Recent live evidence in this repo:

- slot truncation fix validated by a prod e2e run
- booking create validated on prod after the `participants` fix

- post-fix live booking payload used `participants` and `due_time=12:00` UTC for a `3 PM Europe/Istanbul` user-facing slot

FAQ

Q: Does the integration use generic NAF booking tools?
A: No. It registers custom tools `pipedrive_check_availability`, `pipedrive_book_appointment`, and `pipedrive_cancel_appointment`, while overriding the generic booking tools to stay disabled.

Q: Are appointments stored as Pipedrive deals?
A: No. They are stored as Pipedrive **activities**.

Q: How is the contact linked to a booked activity?
A: In `v2`, the booking payload uses `participants` with a primary participant instead of writable `person_id`.

Q: What time format is sent to Pipedrive on booking?
A: The user-facing slot is handled in local business time, then converted to UTC before `due_date` / `due_time` are sent in the activity create payload.

Q: What happens if the caller already exists in Pipedrive?
A: The integration stores `pipedrive_person_id`, reuses that contact for booking, and loads future bookings into persona memory for the conversation.

Q: Can I use OAuth without a raw API token?
A: Yes. The integration now supports connector-based OAuth through `oauth_code` + `create_extension_connector`. Token mode remains available separately.