Repcard CRM Integration

What the AI can do

Summary

Repcard CRM Integration connects **Repcard CRM** (field sales CRM for solar, home services, and insurance) with **Newo Platform**.

It enables:

- Creating appointments in Repcard with customer details, address, and calendar selection
- Cancelling existing appointments by updating their status
- Checking availability by computing free 30-minute slots from existing appointments
- Creating contacts (customers) in Repcard with type, owner, and status assignment
- Sending digital business cards (RepCards) to contacts via SMS or email
- Dynamic calendar synchronization from the Repcard API at setup
- DevMode for testing without real API credentials (LLM-emulated responses)
- Auto-configuring conversation canvas with booking and cancellation scenarios

This integration is designed for **field sales teams** (solar installers, home services providers, insurance agents) who use Repcard CRM to manage their leads and appointments and need **an AI receptionist to book, cancel, and check availability** through voice or chat.

Common use cases

- When a caller requests an appointment --> Agent collects details (name, phone, email, address, date/time) and creates an appointment in Repcard
- When a caller wants to cancel an appointment --> Agent finds the booking and cancels it in Repcard
- When a caller asks about availability --> Agent fetches existing appointments and computes free 30-minute slots over the next 5 days
- When a contact needs to be created --> Agent collects customer info and creates a contact in Repcard via create/update request
- When a digital business card needs to be sent --> Agent sends a RepCard to a contact via SMS or email
- When the project is published --> Agent syncs available calendars from Repcard API and populates the calendar dropdown

Features at a glance

Feature	Supported	Notes
Create Appointment	Yes	Full customer details, address, calendar selection, setter email
Cancel Appointment	Yes	the update request with cancellation notes
Check Availability	Yes	Computes free 30-min slots from existing appointments (5-day window)
Create Contact	Yes	create/update request with type, owner, status
Send RepCard	Yes	create/update request (digital business card via SMS/email)

Calendar Sync	Yes	Dynamic sync from lookup request on publish
Canvas Auto-Setup	Yes	Booking + cancellation scenarios and intents
DevMode (LLM Emulation)	Yes	Test without real API -- LLM generates realistic responses
Reschedule	No	Cancel + rebook as workaround
Existing Client Lookup	No	Not implemented

Before You Start

Before installation:

- Active **Repcard CRM** Enterprise account with API access
- **API Key** from Repcard Company Settings > API Keys tab
- At least one calendar configured in Repcard
- A setter (sales rep) email address for appointment assignment
- A contact owner email for contact creation

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 Step 1 -- Get API Credentials from Repcard CRM

1. Log in to your **Repcard CRM** account
2. Navigate to **Company Settings** > **API Keys** tab
3. Generate or copy your **API Key**
4. Note: API access requires an **Enterprise** account
5. Note your **Calendar IDs** (these will be synced automatically on publish)
6. Note the **setter email** address for appointment assignment

3.2 Step 2 -- Connect in Platform

1. Open **Newo --> Projects**
2. Set the following attributes in **Builder / Attributes**:

Attribute	Required	Default	Description
`repcard_api_key`	Yes	--	API Key from Repcard Company Settings > API Keys tab
`repcard_base_url`	No	`https://api.repcard.com`	API base URL
`repcard_mode`	No	`Production`	`Production` for real API, `DevMode` for LLM emulation
`repcard_enable_booking`	No	`True`	Enable appointment creation
`repcard_enable_cancellation`	No	`True`	Enable appointment cancellation
`repcard_enable_contact_creation`	No	`True`	Enable contact creation
`repcard_enable_send_repcard`	No	`True`	Enable sending digital business cards
`repcard_default_calendar`	No	(auto-synced)	Calendar ID for new appointments (dropdown populated after sync)
`repcard_default_setter`	Yes*	--	Setter (sales rep) email for new appointments
`repcard_default_contact_type`	No	`Lead`	Contact type for new contacts (Lead, Customer, Recruit)
`repcard_default_contact_owner`	Yes*	--	Owner (assigned rep) email for new contacts
`repcard_default_contact_status`	No	`New`	Status for new contacts
`repcard_default_repcard_id`	No	--	Digital business card template ID
`repcard_setup_scenarios`	No	`True`	Auto-add booking/cancellation scenarios to canvas

*Required for the respective feature to work (booking requires setter, contacts require owner).

3. Click **Save + Publish All**
4. On publish, the InitFlow automatically:
   - Prepares the connection for Repcard API (`repcard_connector`)

    - Sets all customer attributes with metadata
    - Registers booking, availability, and cancellation tools on ConvoAgent
    - Syncs calendars from Repcard API (lookup request)
    - Populates the calendar dropdown with synced values

How to use the integration

4.1 How the Integration Works

The integration uses a Repcard API key. In production, customer actions are written to Repcard CRM; in demo mode, the agent can be tested without touching live Repcard records.

Canvas scenarios

When `repcard_setup_scenarios` is `True` (default), Publish All automatically adds:

Scenarios:

- **"Scheduling Appointment via Agent"** (`repcard_schedule_appointment_via_agent_scenario`) -- 10-step guided booking flow that collects all required fields (name, phone, email, address, ZIP, date/time) with code-phrases
- **"Canceling Appointment via Agent"** (`cancellation_via_agent_scenario`) -- 6-step cancellation flow with confirmation and code-phrases

Intent Types:

- **"[L] Appointment via Agent"** (`library_intent_types_common_appointment_agent`) -- from library
- **"[T] Cancellation via Agent"** (`cancellation_via_agent_intent`) -- caller wants to cancel

Where to test

Testing can be done through the **Newo conversation interface** (chat or voice).

DevMode: Set `repcard_mode` to `DevMode` to test without real API credentials. The integration will use LLM to generate realistic Repcard API responses.

How to test that everything works

To test the integration:

1. **Setup**: Publish the project and verify calendar sync completed (check `repcard_calendars` attribute and `repcard_default_calendar` dropdown)
2. **Availability**: Ask about available times -- verify agent returns computed free slots
3. **Booking**: Request an appointment -- provide name, phone, email, address, and date --> verify appointment created in Repcard
4. **Cancellation**: Ask to cancel -- verify appointment status updated in Repcard
5. **Contact Creation**: Trigger contact creation -- verify customer created in Repcard via create/update request

If no action occurs:

- Ensure API key is set (`repcard_api_key`) -- requires Enterprise account
- Verify `repcard_mode` is `Production` (not `DevMode`)
- Check feature flags (`repcard_enable_booking` , `repcard_enable_cancellation` , etc.)
- Confirm `repcard_default_setter` is set (required for booking)

- Confirm `repcard_default_contact_owner` is set (required for contacts)
- Verify calendars synced (check `repcard_default_calendar` dropdown)
- Re-publish after configuration changes

> *Note: This integration creates real appointments and contacts in Repcard CRM. Changes made through the agent are reflected in the live system.*

FAQ

Q: How does authentication work? A: Repcard uses an **API Key** sent in the `x-api-key` HTTP header. API access requires an Enterprise-tier Repcard CRM account. The key is obtained from Company Settings > API Keys tab.

Q: What is DevMode? A: When `repcard_mode` is set to `DevMode`, the integration uses LLM (Gen) to emulate Repcard API responses instead of making real HTTP requests. Useful for testing the booking flow without creating real appointments.

Q: How does calendar selection work? A: On publish, the integration calls the lookup request to fetch all active calendars. These are stored in `repcard_calendars` and populate the `repcard_default_calendar` dropdown. The LLM can also select a `calendarId` from the enum in the booking schema. If no calendar is selected, the default is used.

**Q: Why is the customers endpoint create/update request and not create/update request A: Repcard CRM uses `/customers` as the endpoint name for creating contacts. This is the official Repcard API convention despite the feature being called "contact creation" in the integration.

Q: How does availability checking work? A: The integration fetches all existing appointments for the next 5 days via the lookup request, then computes free 30-minute slots during business hours (9:00 AM to 5:00 PM) by excluding busy time slots. Past slots are also excluded. Up to 20 available slots are returned.

Q: What DateTime format does the API use? A: The Repcard API uses `YYYY-MM-DD HH:MM:SS` format. The integration automatically appends `:00` seconds if the input is in `YYYY-MM-DD HH:MM` format (16 characters).

Q: How does the calendarId work? A: The `calendarId` is numeric and identifies a calendar in Repcard CRM. It is synced dynamically from the API. The `setterEmail` identifies the sales representative assigned to the appointment.

Q: Can I use the Send RepCard feature through the conversational agent? A: The Send RepCard feature (the create/update request) is primarily designed for Zapier-style automation triggers. It requires a `contact_id` and a `repcard_default_repcard_id` template to be configured.