CRM import API

If your CRM is not one of the supported integrations, the CRM import API lets you send your own records as CSV. Alchemer Voice creates or updates them and links them to conversations for filtering and segmentation. Imported records are kept as Alchemer Voice's own CRM source, separate from records that come from connected CRMs. Records from supported CRMs arrive through their own connection, not this API.

Authentication

Create a personal access token with the **Import data** scope under **Admin > Connections > Access tokens > Personal tokens** (see the API access tokens and OAuth clients article). Send it as a Bearer token with every request. A missing or invalid token returns 401.

Endpoints

All addresses are on your Alchemer Voice domain, for example `https://fourfour.ai/import/crm/account`.

Method and path	Purpose
`PUT /import/crm/{type}`	Create or update records. The request body is the CSV.
`DELETE /import/crm/{type}`	Delete records. The CSV needs only an `id` column.
`GET /import/crm/{type}/{id}`	Read one record back as a CSV with a header row and one data row. Returns 404 if it does not exist.
`GET /import/job/{job}`	Check the progress of a submission.

Record types and fields

Use the type name in the path. You do not have to use every type.

Type	Fields
`account`	id, created, updated, name, type, parent_id, website, sic, industry, currency, annual_revenue, number_of_employees, region, owner_id
`contact`	id, created, updated, first_name, last_name, email, phone, title, account_id, department, lead_source, owner_id, region
`lead`	id, created, updated, first_name, last_name, company, email, phone, website, lead_source, status, industry, annual_revenue, number_of_employees, owner_id, is_converted, converted_date, converted_account_id, converted_contact_id, converted_opportunity_id, account_id, region, title, currency

Type	Fields
`opportunity`	id, created, updated, account_id, name, description, stage_name, amount, currency, probability, expected_revenue, close_date, type, next_step, lead_source, is_closed, is_won, region, forecast_category, owner_id, contact_id
`user`	id, created, updated, first_name, last_name, email, title. The CRM users who own records.
`object`	id, created, updated, service_type, account_id, contact_id, lead_id, opportunity_id, owner_id. A custom object of your own, such as a set of survey results.

Any extra column not in the list is stored as an additional field and returned when you read the record back. Additional fields can be set up as custom filters in Alchemer Voice.

Custom objects

Use the `object` type for content records. A custom object has no fixed fields of its own beyond those listed above, so everything that describes it (for example a name, NPS score or plan) goes in extra columns, which are stored as additional fields.

- `service_type` is a free-text label for the kind of object, such as Response or Project. Use it to tell different kinds of object apart when you send more than one kind through the same type.
- `account_id`, `contact_id`, `lead_id`, `opportunity_id` and `owner_id` are optional. Each holds the id of a record you imported with the matching type, and links the object to it.
- Object ids are unique among objects only, so an object and an account can share an id.

Once you have imported objects, a **Custom objects** group appears in the filters wherever you can filter by CRM data. It lists your additional fields, and you can use them to filter conversations and insights, as with the other record types. To choose which additional fields are available as filters, open **Admin** > **Connections** > **Custom CRM**. This entry appears once you have imported records through the API.

CSV format

Send the CSV as the raw request body with content type `text/csv`.

- The first row is the header. The first column must be `id`, your own unique identifier.
- Rows match on `id`: a new id creates a record, an existing id updates it.
- Fields declared in the header but empty in a row are stored as empty.
- Dates and times: ISO 8601 in UTC.
- Booleans: lowercase `true` or `false`.
- Currencies: ISO 4217 codes such as `USD`.
- The `created` and `updated` columns are optional and are set to the time of import if not supplied. If you supply them, use ISO 8601 format.

For example, an account upload could have this header row and one row per account, where `crm_segment` is an additional field:

```
id,name,website,industry,crm_segment
acc-001,Acme Industries,https://acme.test,Robotics,Enterprise
```

Processing and jobs

Alchemer Voice answers `202 Accepted` with a JSON body containing a job id and a `Location` header pointing to the job address. Keep the connection open until you receive it; if you disconnect early, nothing is queued.

Records are processed in the background. The job address returns a status (`pending` , `processing` , `completed` or `failed`), a processed count and timestamps. For a failed job, `error` describes the problem and `error_line` gives the row.

There is no hard row limit per request, but around 10,000 rows keeps uploads and jobs manageable. Send everything first, then send only changes on a schedule.

If a job fails part-way, rows before the failing row are already saved. Correct the CSV and resend; matching on `id` makes this safe.

Deleting

Send a `DELETE` request with a CSV containing an `id` column. Only records imported through this API are deleted; records from connected services are untouched.

Troubleshooting

- **401:** token missing, expired or without the Import data scope.
- **Missing "id" field in header:** the first column must be named `id` .
- **Missing "id" field with a row number:** that row has an empty id.
- **Records not visible yet:** imports run in the background, so check the job status.

Permissions

Creating the personal access token needs the Manage connections permission, which admins have by default.

If you need help, contact Alchemer Support.

Related Articles