

Custom Interactions API Demo

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As part of the Summer 2010 release, Convio has added the ability to record custom interactions for constituents, along with a new set of supporting Open API methods. Custom interactions allow clients to create their own interaction types to capture, view, track, report, and act upon constituent-initiated actions that are not provided out of the box, and also capture interactions that may occur outside of the Convio system. The primary application of custom interactions is intended to improve marketing segmentation by providing a richer set of constituent data for analysis and metrics. However custom interactions can also be leveraged in a variety of other ways to extend and improve existing product functionality.


More information on custom interactions can be found at <http://help.convio.net/CustomInteractions>.

This demo shows how the custom interaction API methods could be used for a virtual pet adoption application. Constituents can “adopt” one of a set of available pets, view a list of pets that have been adopted by other constituents, and view the pets they themselves have adopted.

Pet Adoption API Demo

[Available Pets](#) | [Adopted Pets](#) | [Your Pets](#)

Click a name to adopt the pet




[Jack](#)



[Max](#)



[Quincy](#)



[Sparkles](#)



[Toby](#)

A subset of the API methods is used in the demo, including:

- `listInteractions`
- `getUserInteractions`
- `logInteraction`

Details on the custom interaction API methods can be found at <http://open.convio.com>.

Directions for setting up the demo

At a high level, you need to do these things to enable this demo:

1. Extract the files contained within the zip file to a temporary area to edit them
2. Create the correct custom interaction types from the admin UI to work with the demo
3. Enable the site's API key
4. Create a dedicated demo directory and place the edited files into the proper location on the Convio site under `/home/convio`

STEP 1

Extract the files from apidemo.zip to your desktop for local editing first. The zip file will have everything under a folder/directory named 'apidemo'.

STEP 2

In the admin UI, go to Setup -> Interactions Management and click on "Create an Interaction Type". For the purposes of this demo, label it "pet adoption". Check the options "Yes, make this Interaction Type available for selection in contact records" and "Yes, make this a public Custom Interaction Type", then click "Finish".

Interactions Management

[Interaction Types List](#) > Create an Interaction Type

1. Enter Type Details



1. Interaction Type Name:

Enter a label for this Interaction Type that identifies its purpose or use.

2. Availability:

Enable this option to display this Interaction Type in the list on the Interactions tab (of a constituent record) so that it can be selected when administrators record interactions that have taken place offline.



Yes, make this Interaction Type available for selection in contact records

3. Public Interaction Type:

Enable this option to allow anonymous users to view interactions of this Custom Interaction Type that are returned by the listInteractions Open API method.



Yes, make this a public Custom Interaction Type

Finish

or **Cancel**

Note the ID number of the new interaction type you created.

Interaction Types List			
Records 1 - 1 of 1 First Previous Next Last			
ID	Name	Actions	Public
1000	pet adoption_A	Edit Archive	Public
Records 1 - 1 of 1 First Previous Next Last			

Open index.html and replace the ID in the following line of JavaScript:

```
var INTERACTION_TYPE_ID = 1000;
```

STEP 3

Go to Setup -> Site Options, and on the "Open API Configuration" tab, see what the value is for the Convio API Key. (Look for the line that says "The API key is set to XYZ".) Put that value in the index.html file at this line (it is the very next line after the var_INTERACTION_TYPE_ID line referenced above):

```
var API_KEY = 'XYZ';
```

If you do not already have an API Key set for your organization, click on the "Edit API Keys" link or work with your Convio administrator to get it set up.

STEP 4

Go to Constituent360 -> Constituents and create a new constituent record to use for testing. Keep note of the username and password for this account.

NOTE: You CANNOT log in as admin to test this demo- must be another user account! There are API permissions issues if you log in as admin- something like this will be displayed as you attempt to click on the sample demo links:

```
{{tId:3, status:403, statusText:"Forbidden", ...
```

STEP 5

Upload the apidemo folder to your Convio site via FTP. A suggestion is to place it in the 'static_data' folder if you do not have a designated web server root location already defined. If you do not have your site's FTP credentials, contact your Account Manager or Convio Support.

TEST IT OUT

To view the demo go to <http://www.yourconviosite.com/apidemo/index.html> (where yourconviosite.com is the domain used for your Convio Online Marketing content). Login using the constituent record you created above.

When a constituent adopts a pet, you will see under the interactions tab for that individual's record the adoption action, and the name of the pet adopted:

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

<input type="text"/> <input type="button" value="Search"/> <input type="button" value="Show All"/>				
Type	Subject	Solicitor	Date	Comments
Registration	Registered (Unknown)	Administrator, System	Aug 2, 2010 10:30:58 AM	
pet adoption	1 - Jack	Fierro, Doug	Aug 2, 2010 10:38:53 AM	✓

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

The Summer 2010 release also provides a way to select these custom interaction types for reporting and segmentation, so for example you could put all the constituents who adopted a pet into a particular group for emailing or for conditional content messaging:

Interaction Phrase Type

has interaction of type ▼

pet adoption

Group	Interaction Type
Default Types ▶	✓ pet adoption
Custom Types ▶	

RESET

The first release of custom interactions does not provide a way to remove the type instances, so one workaround is to re-name or archive the type. A future update to this demo would be to have Convio L3 write a small database script to remove the test custom interactions that would need to be run with the proper permissions set.