

Hi,

If you are not the person who is in charge of sending lead information, please find the representative at your company who IS and have them follow these instructions. This process requires you to create code that allows our system to populate lead information directly into their MoverBase Account.

#### SIGN UP

If you are this person and you have not already, please create a MoverBase account by going to [moverbase.com](https://moverbase.com) and clicking on Sign Up for the free account.

While you are signing up, you will be asked to choose a URL. \*It is very important that you choose a URL that is brief and that reflects your company.

Here's an example: Billy.moverbase.com

Next, you will be asked to enter account owner information. If you choose to enter your own personal information, you will be the only person with the credentials at your company who can access this account and set this up. Please make your team aware that you have created this account with us as this account will be what we use to receive leads from your company for all of our mutual clients.

#### RESOURCE

Please have your development team look over the information on this page: <https://developers.moverbase.com/>. They will want to refer to the Accounts Resource section and the Leads Resource section.

#### TESTING

For testing purposes, you will want to first add (COMPANY NAME) as a lead provider for your own (COMPANY NAME) MoverBase account. This can be done under the referral section. Go to Set Up > Referrals> Click on New Referral. This is the same way one of your clients would give you access. Here is a link with those instructions:

[http://support.moverbase.com/?st\\_kb=i-purchase-leads-from-a-leads-provider-how-can-i-get-them-in-moverbase](http://support.moverbase.com/?st_kb=i-purchase-leads-from-a-leads-provider-how-can-i-get-them-in-moverbase)

#### STEPS

1. Create API key

To create the API key:

[https://\(YourCompanyName\).moverbase.com/](https://(YourCompanyName).moverbase.com/) → Setup → Integrations → Moverbase API → Add API key

Next, enter the password you chose when you created the account and choose a name for your key.

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HOME LEADS JOBS CLIENTS STAFF COMPANY REPORTS **SETUP**

## SETUP

COMPANY SETUP SUBSCRIPTION LOGS

### COMPANY SETUP:

PROFILE JOBS REFERRALS EMAILS DOCUMENTS LEADS INTEGRATIONS

GOOGLE CALENDAR FACEBOOK PAGES ZAPIER **MOVERBASE API**

**ADD API KEY**

### API KEYS:

ADD NEW API KEY - *Type account owner password and key name, click YES to add key.*

Account Owner Password:  Are you sure you want to add api key?

Key Name:  Title your API Key. (A-Z, a-z, 0-9, No Space)

\* To learn more about integration with Moverbase API, please read: <https://developers.moverbase.com>

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2. Go to the [developers.moverbase.com](https://developers.moverbase.com) link and look over the Leads section. Use this to send your MoverBase Account a lead.

<https://developer.moverbase.com/> → Leads Resource → Add

3. Login and check the lead you sent in the Leads tab within MoverBase (top left of your screen after logging in)

[https://\(YourCompany\).moverbase.com/](https://(YourCompany).moverbase.com/) → Leads

4. Create referral. Name the referral something like “(Company Name) Leads” then give access to your MB account. (See support link above)

[https://\(YourCompany\).moverbase.com/](https://(YourCompany).moverbase.com/) → Setup → Referrals → New Referral

5. Use account ID and the key you created to send your Moverbase account another lead.

<https://developer.moverbase.com/> → Accounts Resource → Send lead to another Moverbase account

6. Check the lead and confirm that you see the name you chose under the Referral column (this is what your clients will see)

[https://\(YourCompany\).moverbase.com/](https://(YourCompany).moverbase.com/) → Leads

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HOME LEADS JOBS CLIENTS STAFF COMPANY REPORTS SETUP

### LEADS - LAST 30 DAYS

+ NEW LEAD

LEAD DATE: Last 30 Days

All New Open Converted Closed 10 20 50

1 - 10 OF 17

CREATED	FULL NAME	MOVE DATE	FROM	TO	SIZE	REFERRAL	STATUS
03/18/2016	Kevin Demo	03/19/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	4+ Bedroom Apt	Magazine ad	CONVERTED
03/17/2016	Kyle Demo	03/18/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	4+ Bedroom Apt	Internet search	CONVERTED
03/11/2016	Example Demo	03/11/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	Large Studio	Billycom	CONVERTED
03/11/2016	Stephen Jason	03/12/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	3 Bedroom House	Internet search	OPEN QUOTE
03/10/2016	Kate Bill	03/11/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	2 Bedroom Apt	Yellow pages	CONVERTED
03/09/2016	James A	03/10/2016	N/A	N/A	N/A	Truck rental co x	CONVERTED
03/08/2016	Demo Example	03/08/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	N/A	Billydotcom	CONVERTED
03/07/2016	Bill Demo	03/08/2016	Philadelphia, PA 19104	Somerville, MA 02145	4+ Bedroom House	Movingdotcom12	CONVERTED
03/07/2016	Tyler Demo	03/08/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	3 Bedroom House	Billydotcom	CONVERTED
03/07/2016	Kieron Demo	03/08/2016	Philadelphia, PA 19104	Philadelphia, PA 19105	3 Bedroom Apt	Internet search	OPEN QUOTE

SOURCE: LEAD WIDGET API API (remote account)

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7. Send yourself a lead from your company server

8. Code the integration

Steps 1-6 are require just a few minutes to test. The rest a developer can do with very basic coding. As soon as you have verified that your leads can be submitted to your own account successfully, you can begin sending test leads to your client.

## LEAD SUBMISSION REQUESTS FROM CLIENTS

When our mutual clients request that you submit lead information to them through our software, you will see an automatically generated email message. This email notification will be sent to the email address that is associated with the owner account. The owner account is held by the person who created the account initially. If you have not already, please tell your team if you are the one who has created your company MoverBase account. If you are not the person who created your company's MB account, you will need to find out which email address the message was sent to.

1. Check the account owner email inbox for the automatically generated message which has a special key inside that will related to one of our mutual clients.
2. Our API allows you to list all accounts that gave you access, please refer to [developers.moverbase.com](https://developers.moverbase.com)  
Accounts -> List
3. Ask your client to copy and paste the account ID that appears under the assigned referral into your app UI

Please reach out with questions after reading this document.

Best,

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