

LEAD DOCKET PROCESS CONFIGURATION

1. Enter to your Lead Docket account. Click on 'Manage' and then click on 'Integrations'.

The screenshot shows the 'Integrations' page in the Lead Docket system. The left sidebar contains a navigation menu with 'Integrations' highlighted. The main content area displays a table titled 'List of Integrations' with columns for 'Enabled', 'Title', and 'Type'. The table lists several integrations, including 'Answering Legal', 'Apex Chat', 'FV Integration Test', 'Lawyer.com', 'Reception Form', 'Sandbox', 'Test', and 'Website Form'. Each row includes an 'Edit' button and a 'Preview & Test' link. A dropdown menu is open for the 'Add New' button, showing options like 'Web Form', 'Web Chat', 'Answering Service', 'Lead Generation Service', 'Reception Form', 'Referral Form', and 'Other'.

Enabled	Title	Type	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Answering Legal	Answering Service	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Apex Chat	Web Chat	Preview & Test	Definitions
<input checked="" type="checkbox"/>	FV Integration Test	Other	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Lawyer.com	Lead Generation Service	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Reception Form	Reception Form	Preview & Test	
<input checked="" type="checkbox"/>	Sandbox	Other	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Test	Web Chat	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Website Form	Web Form	Preview & Test	Definitions

2. Click on 'Add New' and select 'Other' from the type of integrations list.

This screenshot is similar to the previous one, but the 'Add New' dropdown menu is open, and the 'Other' option is highlighted. The table below shows the existing integrations.

Enabled	Title	Type	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Answering Legal	Answering Service	Preview & Test	
<input checked="" type="checkbox"/>	Apex Chat	Web Chat	Preview & Test	
<input checked="" type="checkbox"/>	FV Integration Test	Other	Preview & Test	
<input checked="" type="checkbox"/>	Lawyer.com	Lead Generation Service	Preview & Test	Definitions
<input checked="" type="checkbox"/>	Reception Form	Reception Form	Preview & Test	

3. Complete all the required fields in the form and click 'Save'.
 - **Opportunity Name:** Write the name of the integration you want to create (this field is mandatory).
 - **Post Submit Action:** Select 'JSON Response' from the list.

- **Email Addresses & Notes:** You do not need to enter an email address or notes, as these fields are not used.
- **Security Key (Optional):** The system will generate a code in this field.

Create Integration
Back to List

Home / Integrations / Create Integration

Add Integration

Opportunity Name *

Post Submit Action

Email Addresses

Notes

Security Key (optional)

Save
Cancel

4. Once saved, a success message will appear. Check if the new integration appears in the list.

Success
Integration updated
BM
x

Integrations

Home / Integrations

List of Integrations

Add New
Other Options

Excel

Filter:

	Enabled	Title	Type	Preview & Test	Definitions
Edit	✓	Answering Legal	Answering Service	Preview & Test	Definitions
Edit	✓	Apex Chat	Web Chat	Preview & Test	Definitions
Edit	✓	FV Integration Test	Other	Preview & Test	Definitions
Edit	✓	Lawyer.com	Lead Generation Service	Preview & Test	Definitions
Edit	✓	<u>Lead Docket Test1</u>	Other	Preview & Test	Definitions

5. Go to the list of integrations and click the 'Edit' button next to the integration you created.

Integrations
Home / Integrations

List of Integrations Add New Other Options

Excel Filter:

	Enabled	Title	Type		
Edit	✓	Answering Legal	Answering Service	Preview & Test	Definitions
Edit	✓	Apex Chat	Web Chat	Preview & Test	Definitions
Edit	✓	FV Integration Test	Other	Preview & Test	Definitions
Edit	✓	Lawyer.com	Lead Generation Service	Preview & Test	Definitions
Edit	✓	Lead Docket Test1	Other	Preview & Test	Definitions

6. Scroll down to the bottom and click 'Add Form Field' to add a new field.

Form Fields Add Form Field

	Field Name	Field Type	Accept Data	Order
Edit Delete	First	First Name (Textbox standard field)	Yes	1
Edit Delete	Last	Last Name (Textbox standard field)	Yes	2
Edit Delete	Phone	Mobile Phone (Textbox standard field)	Yes	3
Edit Delete	Email	Email (Textbox standard field)	Yes	4
Edit Delete	Summary	Summary (Text Area standard field)	Yes	5

7. In the 'Add Form Field' section, select a 'Field Type' from the list, choose 'Yes' in the 'Accept data' field, and give it a 'Field name'. Enter the 'Display Order' and click 'Save changes'.

Add Form Field ×

Field Type *

Address (Textbox standard field) ▼

Accept data *

Yes ▼

Field name *

Address

Display Order *

6

Close Save changes

8. If you choose 'No - Use a preset value', write the default value and click 'Save changes'.

Add Form Field ×

Field Type *

Address (Textbox standard field) ▼

Accept data *

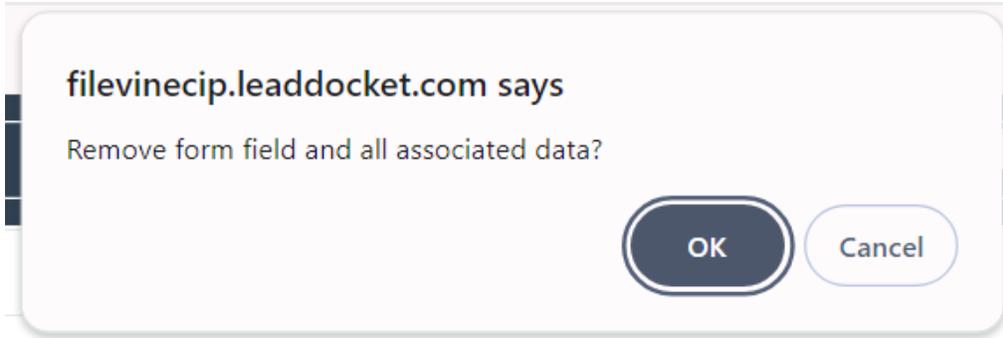
No - Use a preset value ▼

Default Value *

Neostella Office

Close Save changes

9. Click the 'Edit' button on an existing field to modify it or the 'Delete' button to remove it. Confirm your action by clicking "Save changes" to save an edited field or "Ok" to confirm the deletion. You can click "Cancel" if you change your mind.



10. Once you've finished configuring the integration, click 'Save' to save the changes, and a success message will appear. Click on 'Preview & Test' to review your integration.

Integrations

Home / Integrations

List of Integrations Add New Other Options

Excel Filter:

Enabled	Title	Type		
Edit ✓	Answering Legal	Answering Service	Preview & Test	Definitions
Edit ✓	Apex Chat	Web Chat	Preview & Test	Definitions
Edit ✓	FV Integration Test	Other	Preview & Test	Definitions
Edit ✓	Lawyer.com	Lead Generation Service	Preview & Test	Definitions
Edit ✓	Lead Docket Test1	Other	Preview & Test	Definitions

11. In the 'Integration Review' section, you will see a list of all the fields available for your integration. From this section, you will need to extract specific information for configuring the Bot in Filevine. The necessary fields and their corresponding values are as follows:

- **Ld Subdomain:** The code for the Ld Subdomain field is **filevinecip**.
- **Ld Form Id:** The code for the Ld Form Id field is **32**.
- **Ld Form Token:** The code for the Ld Form Token field is **48d36f5b**.

← → ↻  filevinecip.leaddocket.com/opportunities/form/32?apikey=48d36f5b&preview=true

Integration Preview

[View Definitions](#)

This form is a tool to test Lead Docket integrations and should not be used directly by leads.

Form data should be submitted via the API endpoint described in the Integration Definitions.

Lead Docket Test1

First

Last

Phone

Email

Summary

Address

[Submit](#)

12. As you already have the fields (form) to your Integration, click on 'Definitions' and scroll down to the 'JSON POST' section to validate the form fields, necessary for the Filevine configuration. As an example, for this project, the following fields are required:

```
{  
  "First": "your-value",  
  "Last": "your-value",  
  "Phone": "your-value",  
  "Email": "your-value",  
}
```

```
"Summary": "your-value",  
"Address": "your-value"  
}
```

List of Integrations

Add New ▾ Other Options ▾

Filter:

	Enabled	Title	Type		
Edit	✓	Answering Legal	Answering Service	Preview & Test	Definitions
Edit	✓	Apex Chat	Web Chat	Preview & Test	Definitions
Edit	✓	FV Integration Test	Other	Preview & Test	Definitions
Edit	✓	Lawyer.com	Lead Generation Service	Preview & Test	Definitions
Edit	✓	Lead Docket Test1	Other	Preview & Test	Definitions

JSON POST

Endpoint: Lead Docket Test1
Endpoint URL (multipart/form-data): <https://filevinecip.leaddocket.com/opportunities/formjson/32?apikey=48d36f5b>
Endpoint URL (JSON as a parameter): https://filevinecip.leaddocket.com/opportunities/formjson/32?apikey=48d36f5b&fieldname=YOUR_FIELD_NAME

Example JSON accepted for this endpoint

```
{  
  "First": "your-value",  
  "Last": "your-value",  
  "Phone": "your-value",  
  "Email": "your-value",  
  "Summary": "your-value",  
  "Address": "your-value"  
}
```

A successful submission will return the following json response: {"success":true,"opportunityId":[ID_OF_NEW OPPORTUNITY]}
A failed submission will return the following json response: {"success":false,"message":["FAILURE_REASON]}