



# **CLIENTSHARE PULSE**

## **US EXTERNAL API DOCUMENTATION**

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## Introduction

You can use Pulse API to get data from Pulse and integrate it into your system, for instance CRM, BI tools. Pulse API follows industry standards such as OAuth 2.0 protocol. Clientshare API is accessible via <https://pulse-us-api.myclientshare.com>

## Authentication

OAuth 2.0 is used to authenticate with Pulse API.

API access token is generated inside Pulse by an Owner user: Organisation settings -> API Authentication. This token should be used as bearer token in API requests.

The access token must be put into Authorization header with Bearer type:

```
'Authorization: Bearer organisation-access-token'
```

The token will not expire, however we recommend rotating the token every 6 months. Once a new token is generated, the previous one gets expired immediately.

## Media Types

The API supports only JSON as an exchange format.

All Date objects are returned in the following UTC format:

YYYY-MM-DD THH:mm:ss.sssZ

## HTTP verbs

Pulse API supports only GET HTTP verb that is used for retrieving objects.

## Rate limits

Default rate limit is 3 600 requests per hour per organisation.

## Error handling

### Error codes

The following list provides error codes, their corresponding HTTP status codes, and a description of the error.

Error code	Description	HTTP status code
bad_request	Request has missing required parameters or validation errors	400
unauthorized	The request has not been applied because it lacks valid authentication credentials for the target resource	401
forbidden	The server understood the request but refuses to authorize it.	403
not_found	The requested resource doesn't exist	404

unprocessable_entity	The request was well-formed but was unable to be followed due to semantic errors	422
rate_limit_exceeded	The API rate limit was exceeded. Please try again later.	429
internal_error	This is the generic error code for Pulse API internal errors. <i>Please refer to the error message for details and notify Pulse support.</i>	500

## Error example

```
{  
  "message": "Forbidden"  
}
```

## Organisation endpoint

API provides possibility to fetch Organisation data.

</api/v1/organisations>

### Parameters

*No parameters*

### Properties

Property	Type	Description
id	string (UUID)	Unique company identifier generated by Pulse
name	string	Provided organisation name
created_at	string	Organisation creation date in format YYYY-MM-DDTHH:mm:ss.SSSZ
updated_at	string	Date of the latest Organisation update
questions	array	List of Review Questions
- content	string	Review Question content
- category_name	string	Review Question category name
leadership_message	object	Leadership message object
- user_id	string (UUID)	User selected as Senior Leader
- title	string	Message title
- message	string	Message content

```

{
  "id": "b280410e-7f82-11ed-b770-0242ac160002",
  "name": "Primary Company",
  "created_at": "2022-12-21T19:23:14.000000Z ",
  "updated_at": "2022-12-21T19:23:14.000000Z ",
  "questions": [
    {
      "content": "How likely is it that you would recommend us to a friend or colleague?",
      "category_name": "NPS",
    },
    {
      "content": "How would you rate us for the service we provide?",
      "category_name": "Service",
    },
    {
      "content": "How would you rate us for the value for money we offer?",
      "category_name": "Value",
    },
    {
      "content": "How would you rate how well we manage the relationship?",
      "category_name": "Relationship",
    },
    {
      "content": "How would you rate the effectiveness of our business reviews?",
      "category_name": "Reviews",
    }
  ],
  "leadership_message": {
    "user_id": "b356b6f8-7f82-11ed-b770-0242ac160002",
    "title": "A message from our Managing Director",
    "message": "If there's something you want to talk to leadership team about then let me know.",
  }
}

```

## Workspace list endpoint

Endpoint returns id list of workspaces with last modification date.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

/api/v1/workspaces

### Parameters

Parameter	Description	Mandatory	type
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying `date=2023-01-01` would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	string (UUID)	Unique workspace identifier generated by Pulse
updated_at	string	Date of the latest workspace update

```
[
  {
    "id": "0987d5fe-8102-11ed-a1eb-0242ac120002",
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": "174bfeb8-8102-11ed-a1eb-0242ac120002",
    "updated_at": "2022-12-19T09:54:32.000000Z",
  },
]
```

## Workspace details endpoint

This endpoint returns information for a given workspace

/api/v1/workspaces/{workspace\_id}

### Parameters

Parameter	Description	Mandatory	type
workspace_id	Workspace identifier	yes	path
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying 'date=2023-01-01' would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	string (UUID)	Unique company identifier generated by Pulse
custom_id	string	Custom ID provided by client
name	string	Provided workspace name
created_at	string	Workspace creation date
updated_at	string	Date of the latest Workspace update
questions	array	List of Review Questions
- content	string	Review Question content
- category_name	string	Review Question category name
leadership_message	object	Leadership message object
- user_id	string (UUID)	User selected as Senior Leader
- title	string	Message title
- message	string	Message content



```
{
  "id": "b280410e-7f82-11ed-b770-0242ac160002",
  "custom_id": "example_id",
  "name": "Primary Workspace",
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
  "questions": [
    {
      "content": "How likely is it that you would recommend us to a friend or colleague?",
      "category_name": "NPS",
    },
    {
      "content": "How would you rate us for the service we provide?",
      "category_name": "Service",
    },
    {
      "content": "How would you rate us for the value for money we offer?",
      "category_name": "Value",
    },
    {
      "content": "How would you rate how well we manage the relationship?",
      "category_name": "Relationship",
    },
    {
      "content": "How would you rate the effectiveness of our business reviews?",
      "category_name": "Reviews",
    }
  ],
  "leadership_message": {
    "user_id": "b356b6f8-7f82-11ed-b770-0242ac160002",
    "title": "A message from our Managing Director",
    "message": "If there's something you want to talk to leadership team about them let me know.",
  }
}
```

## User list endpoint

Endpoint returns list of users ids and their last modification date.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

/api/v1/users/

### Parameters

Parameter	Description	Mandatory	type
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying `date=2023-01-01` would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	string (UUID)	Unique user identifier generated by Pulse
updated_at	string	Date of the latest user update

```
[
  {
    "id": "0987d5fe-8102-11ed-a1eb-0242ac120002",
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": "174bfeb8-8102-11ed-a1eb-0242ac120002",
    "updated_at": "2022-12-19T09:54:32.000000Z",
  },
]
```

## User details endpoint

Endpoint returns information for a given user.

/api/v1/users/{user\_id}

### Parameters

Parameter	Description	Mandatory	Type
user_id	User identifier	yes	path
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying `date=2023-01-01` would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	String (UUID)	Unique user identifier generated by Pulse
first_name	String	User first name
last_name	String	User last name
email	String	Email address of user
job_title	String	User job title
role	String	User role in Pulse
invite_accepted	Boolean	Whether user has accepted Pulse invite
invite_date	String	Date user was invited
two_factor_auth_enabled	Boolean	Whether 2FA is enabled for the user
has_picture	Boolean	Whether user has uploaded a profile picture
created_at	String	User creation date
updated_at	String	Date of the latest User update. Every user's login to Pulse triggers update of user entity.

```
{
  "id": "b280410e-7f82-11ed-b770-0242ac160002",
  "first_name": "John",
  "last_name": "Doe",
  "email": "joe@example.com",
  "job_title": "Manager",
  "role": "client",
  "invite_accepted": true,
  "invite_date": "2022-12-21T19:23:14.000000Z",
  "two_factor_auth_enabled": true,
  "has_picture": true,
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
}
```

## Licence list endpoint

Endpoint returns list of licence ids and their last modification date.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

`/api/v1/workspaces/{workspace_id}/licences`

### Parameters

Parameter	Description	Mandatory	Type
<code>workspace_id</code>	Workspace identifier	yes	path
<code>next_review</code>	Date of next scheduled review	no	query
<code>date</code>	Date or datetime to filter records starting from provided date ( <code>updated_at</code> ). E.g. Specifying <code>'date=2023-01-01'</code> would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
<code>id</code>	integer	Unique licence identifier generated by Pulse
<code>updated_at</code>	string	Date of the latest licence update

```
[
  {
    "id": 1342,
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": 1222,
    "updated_at": "2022-12-19T09:54:32.000000Z",
  },
]
```

## Licence details endpoint

Endpoint returns information for a given licence.

/api/v1/workspaces/{workspace\_id}/licences/{licence\_id}

### Parameters

Parameter	Description	Mandatory	Type
workspace_id	Workspace identifier	yes	path
licence_id	Licence identifier	yes	path
next_review	If this parameter is specified, date of next scheduled review will be returned.	no	query
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying 'date=2023-01-01' would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	integer	Unique licence identifier generated by Pulse
custom_id	string	Custom ID provided by client
name	string	Provided licence name
created_at	string	Licence creation date
updated_at	string	Date of the latest Licence update
has_logo	boolean	Whether logo for licence is uploaded
account_managers	string	ID(s) of account manager(s) that is (are) assigned to the licence
next_review_date	string	Date of next scheduled review. If next_review is included as query parameter (next_review = 1), updated_at will take into account the modification of this field. If it's not included as query parameter, last modified date will ignore this field.

```
{
  "id": 123,
  "custom_id": "customId",
  "name": "JoeDoe Company",
  "has_logo": true,
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
  "account_managers": ["0987d5fe-8102-11ed-a1eb-0242ac120002", "0888d5fe-8102-11ed-a1eb-0242ac120990"]
  "next_review_date": "2022-12-21T19:23:14.000000Z",
```

## Review list endpoint

Endpoint returns id list of reviews with last modification date.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

`/api/v1/workspaces/{workspace_id}/licences/{licence_id}/reviews`

### Parameters

Parameter	Description	Mandatory	Type
<code>workspace_id</code>	Workspace identifier	yes	Path
<code>licence_id</code>	Licence identifier	yes	path
<code>date</code>	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying <code>'date=2023-01-01'</code> would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
<code>id</code>	string	Unique review identifier generated by Pulse
<code>updated_at</code>	string	Date of the latest Review update

```
[
  {
    "id": 1233,
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": 3465,
    "updated_at": "2022-12-19T09:54:32.000000Z",
  }
]
```

## Review details endpoint

Endpoint returns information for a given review.

/api/v1/workspaces/{workspace\_id}/licences/{licence\_id}/reviews/{review\_id}

### Parameters

Parameter	Description	Mandatory	Type
workspace_id	Workspace identifier	yes	Path
licence_id	Licence identifier	yes	Path
review_id	Review identifier	yes	path
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying 'date=2023-01-01' would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	string	Unique licence identifier generated by Pulse
name	string	Provided review name
meeting_date	string (date)	Provided meeting date
meeting_type	string	Provided meeting type (video call, face to face...)
sent_at	string (date)	The date the review was sent
has_video	boolean	Whether introduction message includes video
attachments	array (of objects)	Array of objects with titles and description of attachments
attachment_count	integer	Number of attachments added as content items to review
action_ids	array	List of IDs of actions under this review
user_id	string (UUID)	ID of the user who created the review
intro_message_text	string	Text of review introduction message
scores_mandatory	boolean	Whether scoring section on review is mandatory
created_at	string (date)	Review creation date
updated_at	string (date)	Date of the latest Review update

```
{
  "id": "123",
  "name": "Example Q1 Review",
  "meeting_date": "2022-12-21T19:23:14.000000Z",
  "meeting_type": "Video call",
  "sent_date": "2022-12-21T19:23:14.000000Z",
  "has_video": true,
  "attachments": [
    {
      "title": "Sample file",
      "description": "Nothing to add",
    },
    {
      "title": "Another file",
      "description": "Description",
    },
  ],
  "attachment_count": 2,
  "action_ids": [1, 2, 3],
  "user_id": "174bfeb8-8102-11ed-a1eb-0242ac120002",
  "intro_message_text": "Sample intro",
  "scores_mandatory": true,
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
}
```



## Action list endpoint

Endpoint returns id list of actions with last modification date.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

/api/v1/workspaces/{workspace\_id}/licences/{licence\_id}/reviews/{review\_id}/actions

### Parameters

Parameter	Description	Mandatory	Type
workspace_id	Workspace identifier	yes	Path
licence_id	Licence identifier	yes	Path
review_id	Review identifier	yes	path
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying 'date=2023-01-01' would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
id	integer	Unique action identifier generated by Pulse
updated_at	string	Date of the latest Action update

```
[
  {
    "id": 1,
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": 2,
    "updated_at": "2022-12-19T09:54:32.000000Z",
  }
]
```

# Action details endpoint

Endpoint returns information for a given action

/api/v1/workspaces/{workspace\_id}/licences/{licence\_id}/reviews/{review\_id}/actions/{action\_id}

## Parameters

Parameter	Description	Mandatory	Type
workspace_id	Workspace identifier	yes	Path
licence_id	Licence identifier	yes	Path
review_id	Review identifier	yes	Path
action_id	Action identifier	yes	path
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying `date=2023-01-01` would return records that were updated since 2023-01-01 (inclusive).	no	query

## Properties

Property	Type	Description
id	integer	Unique Action Identifier
title	string	Action title
recipient_ids	array	List of assigned recipients to the action
user_id	string (UUID)	Action creator identifier
licence_id	integer	Licence id
due_date	String (date)	Action due date
completed	Boolean	Whether action is completed or not
completed_at	String (date)	Action completion date
completed_by	String (UUID)	UUID of user who completed the action
created_at	string (date)	Action creation date
updated_at	string (date)	Date of the latest Action update

```
{
  "id": 123,
  "title": "Example action",
  "recipient_ids": [3082, 3029],
  "user_id": "174bfeb8-8102-11ed-a1eb-0242ac120002",
  "licence_id": 1452,
  "due_date": "2022-12-21T19:23:14.000000Z",
  "completed": true,
  "completed_at": "2022-12-21T19:23:14.000000Z",
  "completed_by": "174bfeb8-8102-11ed-a1eb-0242ac120002",
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
}
```

## Licence Recipients list endpoint

Endpoint returns id list of recipients per licence with last modification date.

Only recipients who are on review recipient list are returned.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

`/api/v1/workspaces/{workspace_id}/licences/{licence_id}/recipients`

### Parameters

Parameter	Description	Mandatory	Type
<code>workspace_id</code>	Workspace identifier	yes	Path
<code>licence_id</code>	Licence identifier	yes	path
<code>date</code>	Date or datetime to filter records starting from provided date ( <code>updated_at</code> ). E.g. Specifying <code>'date=2023-01-01'</code> would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
<code>id</code>	string	Unique recipient identifier generated by Pulse
<code>updated_at</code>	string	Date of the latest recipient update

```
[
  {
    "id": 3029,
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": 4445,
    "updated_at": "2022-12-19T09:54:32.000000Z",
  }
]
```

## Review Recipients list endpoint

Endpoint returns id list of recipients per review with last modification date.  
By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

`/api/v1/workspaces/{workspace_id}/licences/{licence_id}/reviews/{review_id}/recipients`

### Parameters

Parameter	Description	Mandatory	Type
<code>workspace_id</code>	Workspace identifier	yes	Path
<code>licence_id</code>	Licence identifier	yes	Path
<code>review_id</code>	Review identifier	yes	path
<code>date</code>	Date or datetime to filter records starting from provided date ( <code>updated_at</code> ). E.g. Specifying <code>'date=2023-01-01'</code> would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
<code>id</code>	string	Unique recipient identifier generated by Pulse
<code>updated_at</code>	string	Date of the latest recipient update

```
[
  {
    "id": 3029,
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": 4445,
    "updated_at": "2022-12-19T09:54:32.000000Z",
  }
]
```

# Review Recipient details endpoint

Endpoint returns information for a given recipient.

/api/v1/workspaces/{workspace\_id}/licences/{licence\_id}/recipients/{recipient\_id}

## Parameters

Parameter	Description	Mandatory	Type
workspace_id	Workspace identifier	yes	Path
licence_id	Licence identifier	yes	Path
recipient_id	Recipient identifier	yes	Path
follow_up	Specifying `follow_up=1` in request will append `follow_up_completion` object to response	no	query
feedback	Specifying `feedback=1` in request will Append `feedback` object to response	no	query
date	Date or datetime to filter records starting from provided date (updated_at). E.g. Specifying `date=2023-01-01` would return records that were updated since 2023-01-01 (inclusive).	no	query

## Properties

Property	Type	Description
id	Integer	Recipient unique identifier
source	String	Source of recipient: Pulse or CRM
first_name	String	First name
last_name	String	Last name
job_title	String	Job title
type	String	Recipient type
email	String	Email
delivery_status	String	Review email deliver status
review_opened	Boolean	Whether review was opened
review_opened_at	String (datetime)	Review open date
index_score_avg	float	Average Pulse Index score
nps_score	Integer	NPS score
index_scores	Object	List of Pulse Index Categories, Questions and Scores
scored_date	String (datetime)	Scored date
follow_up	Boolean	Whether Recipient requested a follow up
follow_up_submitted_at	Datetime	Date when follow-up request was submitted by review recipient
follow_up_completion	Object	Details of follow-up request
- completed	Boolean	Whether follow-up was marked as completed
- date	Datetime	Date when follow-up was marked as completed
- completed_by	String (UUID)	ID of Pulse user who marked follow up as completed
feedback	Object	Details of feedback
- date	String (datetime)	Date when feedback was submitted by review recipient
- comment	String	Feedback comment submitted by review recipient
- completed	Boolean	Whether feedback comment was marked as completed
- completed_at	String (datetime)	Date when feedback comment was marked as addressed
- completed_by	String (UUID)	ID of Pulse user who marked feedback comment as addressed
created_at	string (datetime)	Recipient creation date
updated_at	string (datetime)	Date of the latest Recipient update

```

{
  "id": 123,
  "source": "Pulse",
  "first_name": "Joe",
  "last_name": "Doe",
  "job_title": "Manager",
  "type": "client",
  "email": "joedoe@example.com",
  "deliver_status": "Delivered",
  "review_opened": true,
  "review_opened_at": "2022-12-21T19:23:14.000000Z",
  "index_score_avg": 3.5,
  "nps_score": 9,
  "index_scores": [
    {
      "category": "Service",
      "question": "How would you rate us for the service we provide?",
      "score": 3
    },
    {
      "category": "Value",
      "question": "How would you rate us for the value for money we offer?",
      "score": 3
    },
    {
      "category": "Relationship",
      "question": "How would you rate how well we manage the relationship?",
      "score": 4
    },
    {
      "category": "Reviews",
      "question": "How would you rate the effectiveness of our business reviews?" ,
      "score": 5
    }
  ],
  "scored_date": "2022-12-21T19:23:14.000000Z",
  "follow_up": true,
  "follow_up_submitted_at": "2023-02-15 13:03:34",
  "follow_up_completion": {
    "completed": true,
    "completed_by": "0987d5fe-8102-11ed-a1eb-0242ac120002",
    "completed_at": "2022-12-21T19:23:14.000000Z",
  },
  "feedback ": {
    "date": "2022-12-21T19:23:14.000000Z",
    "comment": "feedback comment",
    "completed": true,
    "completed_by": "0987d5fe-8102-11ed-a1eb-0242ac120002",
    "completed_at": "2022-12-21T19:23:14.000000Z",
  },
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
}

```

## Saved Recipients list endpoint

Endpoint returns id list of recipients per licence with last modification date.

Recipients returned correspond to recipients displayed on Recipients page of Pulse UI.

By default, data for the last 12 months is returned. Use *date* parameter to get data beyond the default time period.

`/api/v1/workspaces/{workspace_id}/licences/{licence_id}/saved-recipients`

### Parameters

Parameter	Description	Mandatory	Type
<code>workspace_id</code>	Workspace identifier	yes	Path
<code>licence_id</code>	Licence identifier	yes	Path
<code>date</code>	Date or datetime to filter records starting from provided date ( <code>updated_at</code> ). E.g. Specifying <code>'date=2023-01-01'</code> would return records that were updated since 2023-01-01 (inclusive).	no	query

### Properties

Property	Type	Description
<code>id</code>	string	Unique recipient identifier generated by Pulse
<code>updated_at</code>	string	Date of the latest recipient update

```
[
  {
    "id": 4029,
    "updated_at": "2022-12-21T19:23:14.000000Z",
  },
  {
    "id": 4945,
    "updated_at": "2022-11-19T09:54:32.000000Z",
  }
]
```

## Saved Recipient details endpoint

Endpoint returns information for a given recipient.

Recipient details returned correspond to recipient details displayed on Recipients page of Pulse UI

/api/v1/workspaces/{workspace\_id}/licences/{licence\_id}/saved-recipients/{recipient\_id}

### Parameters

Parameter	Description	Mandatory	Type
workspace_id	Workspace identifier	yes	Path
licence_id	Licence identifier	yes	Path
recipient_id	Recipient identifier	yes	Path

### Properties

Property	Type	Description
id	Integer	Recipient unique identifier
first_name	String	First name
last_name	String	Last name
job_title	String	Job title
type	String	Recipient type: client or colleague
source	String	Source of recipient: Pulse or CRM
email	String	Email
created_at	string (datetime)	Recipient creation date
updated_at	string (datetime)	Date of the latest Recipient update

```
{
  "id": 123,
  "first_name": "Joe",
  "last_name": "Doe",
  "job_title": "Manager",
  "type": "client",
  "source": "Pulse",
  "email": "joedoe@example.com",
  "created_at": "2022-12-21T19:23:14.000000Z",
  "updated_at": "2022-12-21T19:23:14.000000Z",
}
```