

# CRM

If you are using the deprecated endpoints, download the [PDF file](#).

## What does the CRM API do?

This API enables integration with CRMs that are not natively integrated with Gong, so that Gong can provide you with its full capabilities based on your CRM data. This includes:

- Pipeline review and forecast
- Narrow down conversations (calls and emails) by customer data for coaching and analytics
- Track initiatives and adoption based on accounts and opportunities

By uploading your CRM data to Gong, your Gong users will be able to see their CRM deals in the Gong Deals page, view deal boards to follow up on deal progress, get warnings for deals that are at risk, and see whether their team will reach its quota. The CRM data is also displayed in conversations and calls, so that your Gong users can see account and contact data such as the name and job title of the contact in the call. Account data is displayed in the Accounts page, together with the history of all communication and contact with the company.

**Note:** Gong provides native integrations with Salesforce, HubSpot and Microsoft Dynamics 365.

## API Protocol

The API protocol is based on REST guidelines. Check [here](#) what's your base URL for all API calls.

The payload is either a JSON object or, for API calls that upload lists of objects, line delimited JSON (see: [JSON streaming](#)). JSON objects should be UTF-8 encoded.

Dates and timestamps in JSON objects should be in ISO-8601 format without milliseconds (e.g. '2018-02-18T02:30:00-07:00' or '2018-02-18T08:00:00Z', where Z stands for UTC).

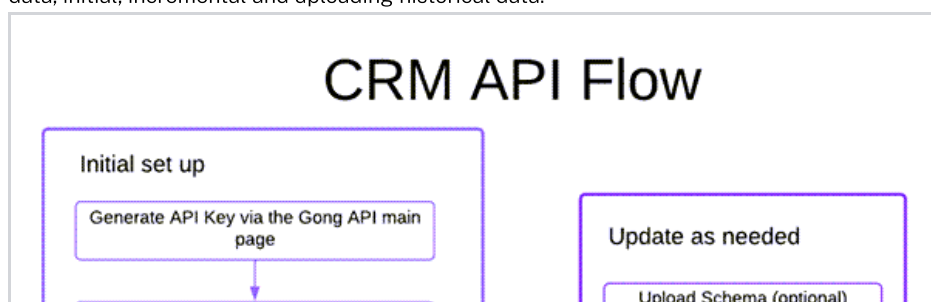
## What data can I upload?

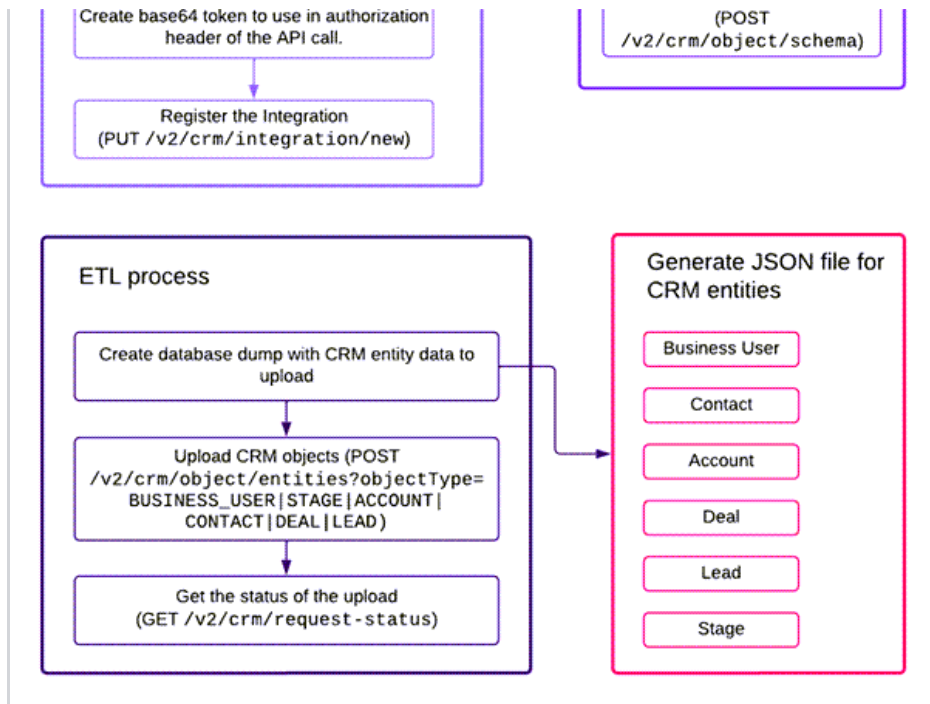
To see your CRM data in Gong, upload the following entities:

- Business User: The CRM user, such as a seller or manager.
- Account: The customer details in the CRM
- Contact: A specific contact in the CRM that is associated with a customer
- Deal: A deal or opportunity, or a contract of a specific account in the CRM
- Lead: A potential customers who are not associated with an account
- Stage: The list of stages the deal can be in, in your CRM

## Uploading CRM data to Gong

This diagram shows how to set up your system in order to upload CRM data to Gong. This is relevant for each scenario of uploading data, initial, incremental and uploading historical data.





## Registering your Integration

Register your integration to get an integrationId used to identify your company's integration with Gong. This is a one time action that does not need to be repeated unless you delete your integration.

Use [PUT v2/crm/integrations](#) to register your integration. The integration Id is returned in the response. Include the integration Id each time you upload your CRM data.

## Uploading additional data for CRM entities

Each CRM entity has a set of standard fields. In addition, you may want to upload additional fields.

Use the [POST /v2/crm/entity-schema](#) to adjust the schema according to your needs. Once you have uploaded your schema to Gong, you can upload your entities with the additional fields.

## Uploading your CRM data to Gong

This section explains how you can use the CRM API to upload your data to Gong:

### First-time upload

Create a database dump of the data you want to upload to Gong based on your CRM schema and data. When uploading your data for the first time you should include all of the CRM records that should appear in Gong.

### Incremental upload

Send regular incremental data updates to Gong. You can update your data as often as you like, we recommend updating between every 1-5 minutes.

You should only send new records or records that have changed since the previous upload of data. New records are added to Gong and existing records are updated or deleted, whichever is relevant. Entities are identified by the objectId. Ensure that this ID remains the same each time it is updated.

When updating data, the modificationDate parameter is mandatory. This enables us to maintain accurate historical data. If your CRM does not store the modification date, send the date the API call is made.

## Uploading data change history

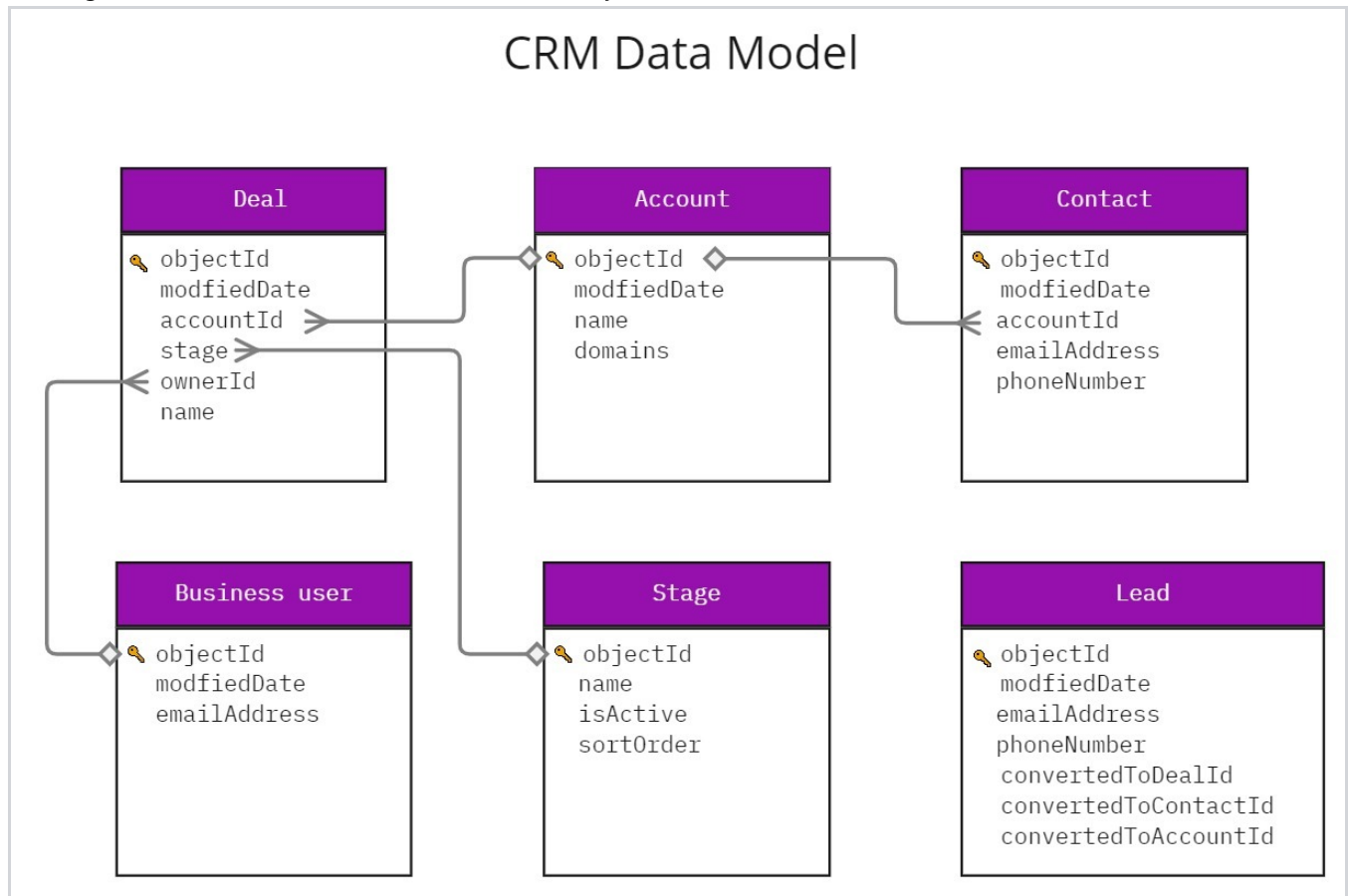
Gong incorporates historical change data in different areas of Gong in order to provide a more accurate picture of the status of different entities at that time. For example, showing the correct stage of a deal at the time a call was made.

If your CRM stores record history, you are encouraged to load historical change data as part of the integration. You can do this at any time, but we recommend doing this after the initial upload as follows:

1. Generate the JSON files with the relevant data. Ensure that the `modifiedDate` is set to the date the entity was updated.
2. Upload the entities with their historical data using the [POST /v2/crm/entities?objectType=ACCOUNT|CONTACT|DEAL|LEAD](#) endpoint.

## Gong Data Model

This diagram shows the connection between the different objects in the CRM API:



The following relationship between entities must exist:

- A contact must be linked to a single account.
- A deal is linked to a single account.
- A deal has an owner who is a user in Gong.
- A converted lead is expected to be converted into an account and/or a deal and/or a contact.

## What if my CRM doesn't match the Gong data model?

It is possible that your CRM entity model won't match the Gong CRM entity model. Your CRM may store your data in different entities, or you may not have an entity that represents one of the Gong CRM entities.

In order to upload your CRM data and associate it with calls and conversations, you need to identify the objects in your CRM which match the Gong CRM entities.

The account is a mandatory entity which must be uploaded in order to integrate Gong with your CRM. To upload account data, identify your CRM entities that contain data about your customers or companies that you do business with. These customers are not actual

your CRM entities that contain data about your customers or companies that you do business with. These customers are not actual people within the org, rather they represent the org itself.

To upload contact details, identify your CRM entities that hold data about employees in the company that your reps are in touch with. A contact represents a person where communication has advanced beyond the prospect stage. Your reps will have multiple conversations and interactions with the contact.

The deal represents the selling process to the customer (account).

The lead is a prospect or potential contact, who is not yet associated with an account. If your CRM has an entity which represents people who you contact in the very early stages, and who is later converted to another entity which represents the people you are doing business with (the contact), upload this data as a lead entity.

## When will my CRM data be displayed in Gong?

In addition to the time it takes for data to upload to Gong, the data is first uploaded as raw data and is not automatically available in Gong.