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# Birdeye Segment Setup



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2 months ago · Updated

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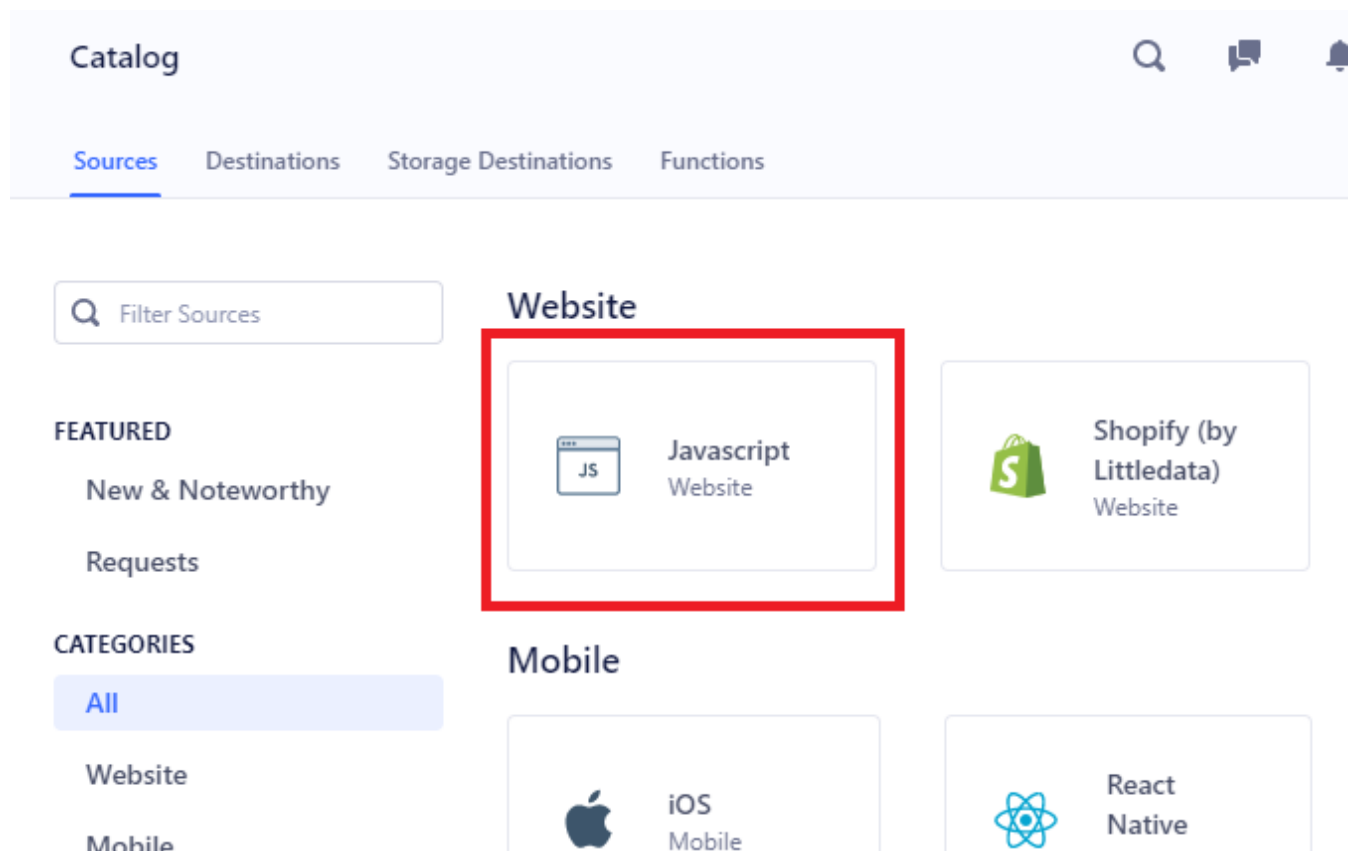
Have the customer go to Segment.com and create an account. Click this [link](#) to be taken to the signup page: <https://segment.com/signup>

1 - Once you get access to their new Segment account, under Sources choose Add Source:

The screenshot shows the Segment dashboard interface. On the left is a dark sidebar with a menu. The 'Sources' option is highlighted with a red box. The main content area is titled 'List of Sources' and 'My Sources'. A search bar is present with the placeholder text 'Search sources by name...'. A blue 'Add Source' button is highlighted with a red box. Below the search bar is a table with columns: NAME, STATUS, CATEGORY, DESTINATIONS, and a menu icon. The table currently shows one entry: 'Website' with a status of 'No Recent Data' and a destination icon. The top right of the dashboard includes an 'Upgrade' button and a user profile icon labeled 'NT'.

Help

## 2 - Select Javascript for the source type



## 3 - Name the source "SMRT" leaving the other fields blank. Then Add Source.

### Source setup

#### Name \*

Identifies this source within your workspace, and typically includes the product area and environment. E.g. Website Prod or App Dev

SMRT

#### Labels

Set labels to help organize and filter your sources, as well as enforce more granular access permissions.

Add Labels...

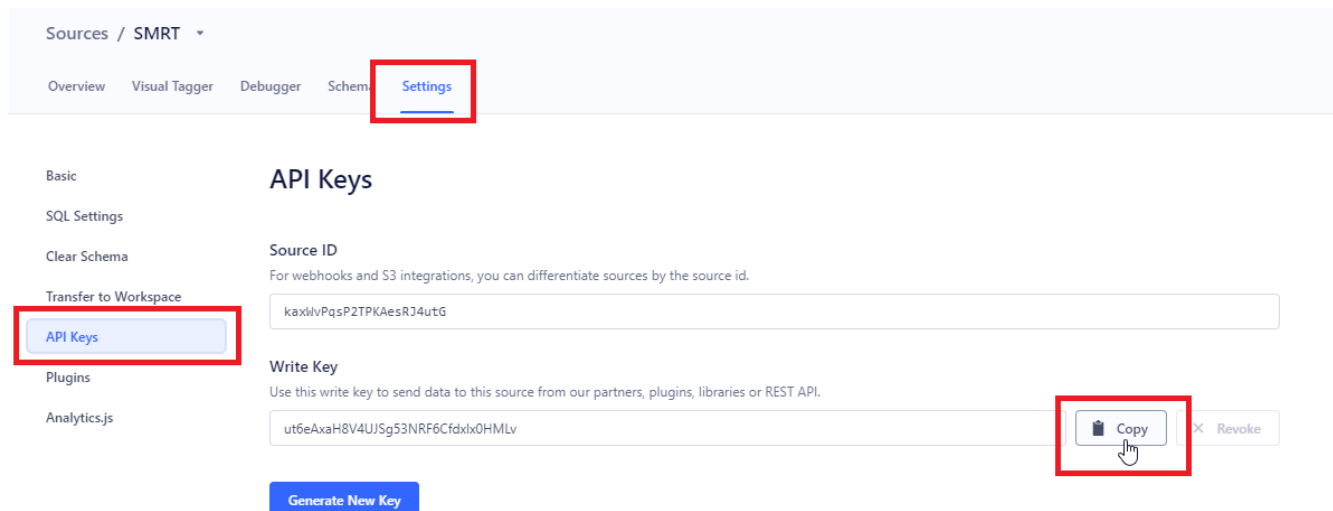
#### Website URL

The full URL where you will install analytics.js.

https://example.com

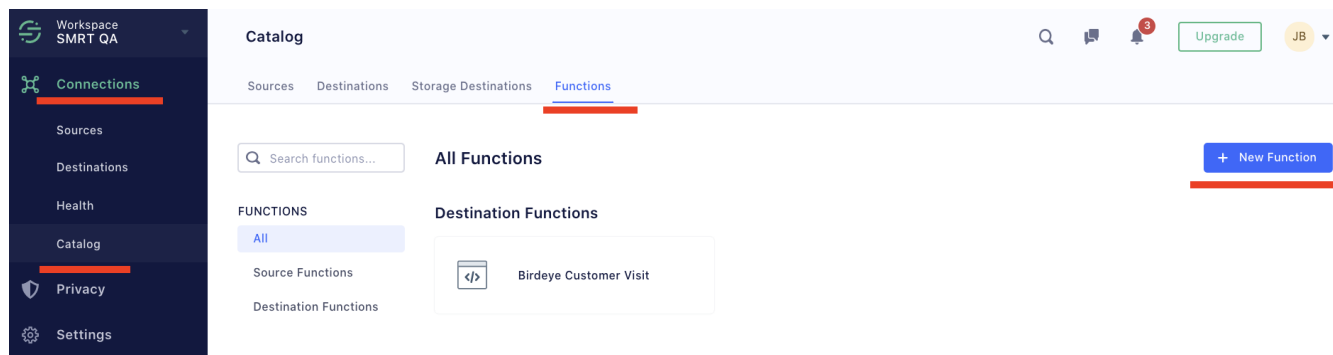
Add Source

4 - Retrieve the Write API key to send to [support@smrtsystems.com](mailto:support@smrtsystems.com) by selecting your new source and navigating to Settings -> API Keys -> Write Key:



5 - Send Write Key to [support@smrtsystems.com](mailto:support@smrtsystems.com) along with Birdeye BID for each location.

6 - Birdeye Destination Setup. Sign in to your segment workspace at <https://app.segment.com/>, and go to connections -> catalog -> functions -> new function as shown in below screenshot:




7 - Select function type "Destination" and press "Build" in the bottom right:

**Select Function Type**

**Source**  
Ingest data from anywhere into Segment

**Destination**  
Send data from Segment to any endpoint ✓

**Destination**  
Send data from Segment to any endpoint



**Use Cases**

- Send events to a service unsupported by Segment out-of-the-box.
- Trigger webhooks when any Segment event occurs.
- Transform data from sources before sending it to a destination.

Build →

**8** – Paste the code at the bottom of this guide under **Integration Code**, into the source code editor on the left side of the screen as shown in the screenshot below.

**New Destination Function**


✓ Select Type
2 Build Function
3 Configure & Create
Cancel

```

1 //Replace INSERT_API_KEY below with your Birdeye API key.
2 const apiKey = 'INSERT_API_KEY';
3
4 async function onTrack(event, settings) {
5   if (event.event !== 'Customer Visit') {
6     return;
7   }
8
9   if (
10    event.properties.homeStore ||
11    event.properties.homeStore.externalStoreIdentifier ||
12    event.properties.orderWasReturned
13  ) {
14    return;
15  }
16
17  const externalStoreIdentifier =
18    event.properties.homeStore.externalStoreIdentifier;
19  const endpoint = `https://api.birdeye.com/resources/v1/customer/checkin?api_key=${apiKey}&bid=${externalStoreIdentifier}`;
20  let response;
21
22  const traits = event.context.traits;
23  let name = '';
24
25  function isSet(val) {
26    return !!val && val !== '';
27  }
28
29  if (isSet(traits.firstName) && isSet(traits.lastName)) {
30    name = `${traits.firstName} ${traits.lastName}`;
31  } else if (isSet(traits.firstName)) {
32    name = traits.firstName;
33  } else if (isSet(traits.lastName)) {
34    name = traits.lastName;
35  }
36
37  const payload = {
38    name,
39    phone: traits.phone,
40    emailId: traits.email,
41    smsEnabled: traits.receiveTexts ? 1 : 0,
42    employees: [
43      {
44        emailId: event.properties.staff.staffEmail,
45        firstName: event.properties.staff.staffFirstName,
46      }
47    ]
48  };
49
50  return {
51    endpoint,
52    payload,
53    method: 'POST'
54  };
55 }

```

Test
Settings
Templates
▶ Run



**Test with custom event**

Use sample event from any of your workspace sources to test this function. Alternatively, [customize the event yourself](#).

Use Sample Event

← Back
Configure →

**9** – Replace the text **INSERT\_API\_KEY** with your Birdeye API key. Please see the Prerequisites section for how to get the API key from Birdeye. Then press configure.

**10** – Name the function Birdeye Customer Visit and press Create Function:

Configure & Create

**Name \***

**Description**

**Logo**

Select or drag & drop logo

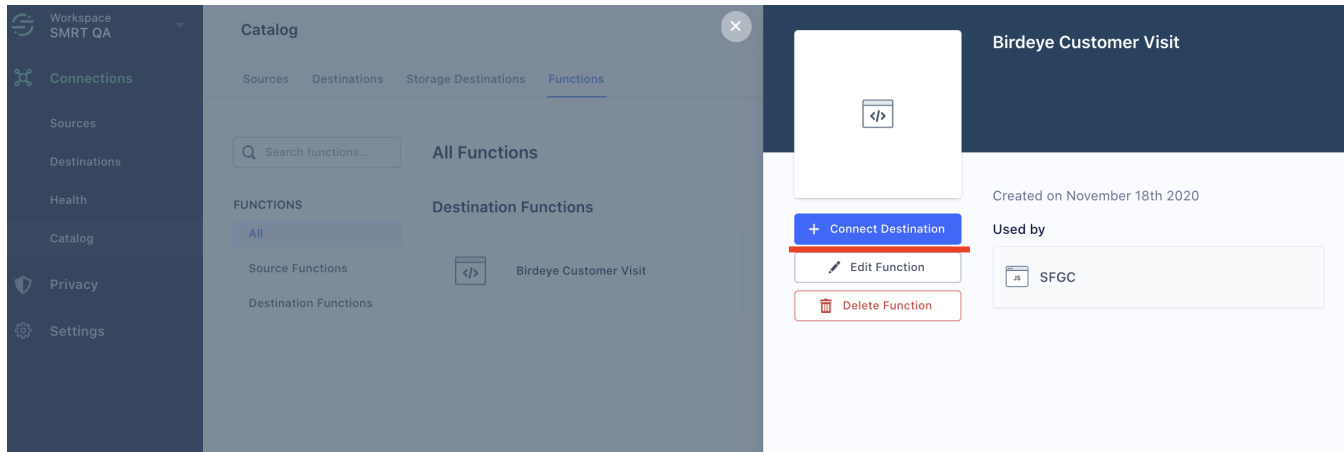
File must be in SVG or PNG format.

**Preview**

Birdeye Customer Visit

← Back
Create Function

**11** - After creating the function, a popup should appear on the right side of the screen showing a button **Connect Destination** that you should press. You can get back to this screen at a later time, by going to Connections => Catalog => Functions => Birdeye Customer Visit.



**12** - Select the SMRT source that you already setup (see the Prerequisites section above), and press **confirm source**.

Connecting Birdeye Customer Visit to SFGC

← Back

Confirm Source

Select Source

Please select from the compatible sources below.

All

Dev

Prod

Q Search sources...

CONNECTED TO

Development

0 Integrations, 0 Warehouses

SFGC

3 Integrations, 0 Warehouses

13 - On the next screen, flip the toggle to enable the integration. This activates the integration

Settings

Filters

Event Tester

Event Delivery

BUSINESS TIER

Send all your data since November 16th to Birdeye Customer Visit!

Take advantage of unlimited historical replay with our Business Plan.

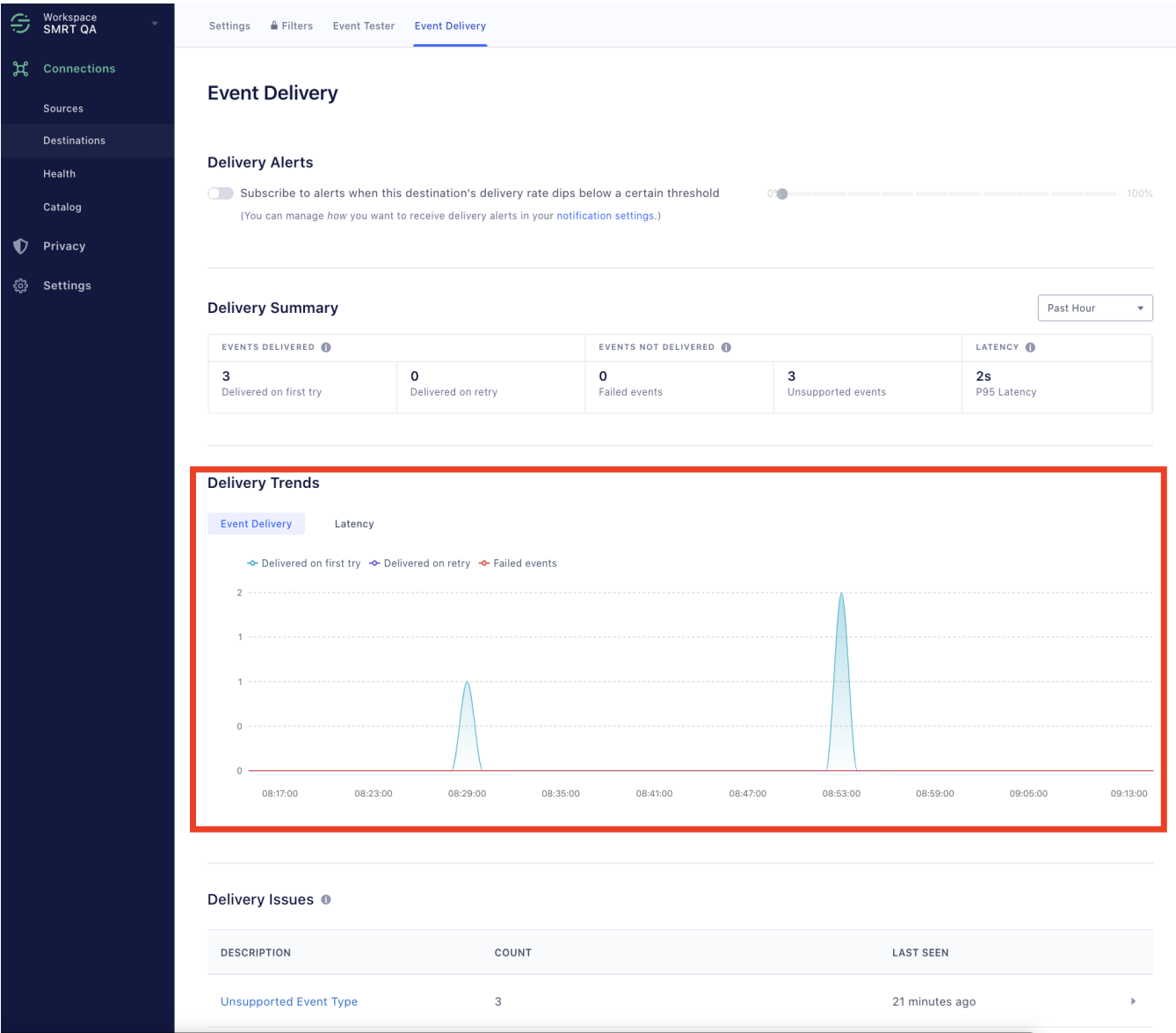
Talk to Sales

Birdeye Customer Visit Settings

This destination is powered by [Birdeye Customer Visit](#) destination function. To modify the behavior of this destination, edit the code of that function and save your changes.

# Monitoring Integration

In segment, you can go to the delivery tab under the function, to monitor the integration. Please note that event delivery from SMRT is delayed by 10-20 minutes, and only triggers on store pickup or delivery, and not on new orders.



hover a contact and press actions => contact journey, you should see the API at work like so:

The screenshot displays the Birdeye interface. On the left is a sidebar with navigation options: Overview, Inbox, Listings, Reviews, Surveys, Ticketing, **Contacts** (highlighted), Campaigns, Reports, Insights, Competitors, Settings, and Account. Below the sidebar is a button that says "Connect your social pages" with a right-pointing arrow. The main content area is titled "← Sam Test's journey". Below the title, it shows a timeline for "Dec 2020" with the following events:

- Sam Test opened Review request sent via email  
Dec 10 at 07:24 AM PST · SF GreenClean
- Sam Test opened Review request sent via email  
Dec 10 at 07:24 AM PST · SF GreenClean
- Sam Test opened Review request sent via email  
Dec 10 at 07:23 AM PST · SF GreenClean
- Sam Test opened Review request sent via email  
Dec 10 at 07:23 AM PST · SF GreenClean
- Alert for Review request TEXT : Contact has been restricted from Text  
Dec 10 at 07:22 AM PST · SF GreenClean
- Sam Test was sent Review request email  
Dec 10 at 07:22 AM PST · SF GreenClean
- Sam Test was added to locationType:store  
Dec 10 at 07:22 AM PST · SF GreenClean
- Sam Test opted out from TEXT communication  
Dec 10 at 07:22 AM PST · SF GreenClean
- Sam Test was checked in successfully for SF GreenClean  
Dec 10 at 07:22 AM PST · SF GreenClean
- Sam Test was created from API  
Dec 10 at 07:22 AM PST · SF GreenClean

## Integration Code

```
//Replace INSERT_API_KEY below with your Birdeye API key.
const apiKey = 'INSERT_API_KEY';

async function onTrack(event, settings) {
  if (event.event !== 'Customer Visit') {
    return;
  }

  if (
    !event.properties.homeStore ||
    !event.properties.homeStore.externalStoreIdentifier ||
    !event.properties.orderWasReturned
  ) {
```



```

        return;
    }

    const externalStoreIdentifier =
        event.properties.homeStore.externalStoreIdentifier;
    const endpoint = `https://api.birdeye.com/resources/v1/customer/`;
    let response;

    const traits = event.context.traits;
    let name = '';

    function isSet(val) {
        return !!val && val !== '';
    }

    if (isSet(traits.firstName) && isSet(traits.lastName)) {
        name = `${traits.firstName} ${traits.lastName}`;
    } else if (isSet(traits.firstName)) {
        name = traits.firstName;
    } else if (isSet(traits.lastName)) {
        name = traits.lastName;
    }

    const payload = {
        name,
        phone: traits.phone,
        emailId: traits.email,
        smsEnabled: traits.receiveTexts ? 1 : 0,
        employees: [
            {
                emailId: event.properties.staff.staffEmail,
                firstName: event.properties.staff.staffFirstName,
                lastName: event.properties.staff.staffLastName,
            }
        ],
        additionalParams: {
            customerAgent: traits.agent,
            locationType: event.properties.locationType
        }
    };

```

```
try {  
    response = await fetch(endpoint, {  
        method: 'POST',  
        headers: {  
            Authorization: `Basic ${btoa(settings.apiKey)}`,  
            'Content-Type': 'application/json'  
        },  
        body: JSON.stringify(payload)  
    });  
} catch (error) {  
    // Retry on connection error  
    throw new RetryError(error.message);  
}  
  
if (response.status >= 500 || response.status === 429) {  
    // Retry on 5xx (server errors) and 429s (rate limits)  
    throw new RetryError(`Failed with ${response.status}`);  
}  
}
```



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