Setting Up Permissions for the Integration User with Your CRM

To ensure a smooth integration with your CRM, the integration user must have the correct permissions.

Below are the required permissions that need to be enabled:

✅ Required general permissions

The integration user must be able to:

- Read properties (fields) from the CRM
- Read users
- Search and write contacts, companies, and/or leads (depending on your CRM setup)
- Write activities (such as notes, tasks, or calls)

🛠️ Property-level permissions

In addition to general permissions, make sure the integration user has **write access to all the properties that will be mapped** during the sync process. This is required in order to update the relevant fields in the CRM.

💡 Tip: If you're unsure which properties are being mapped, check with your technical team or review the mapping settings in the integration.