Documentation

SETTING	DESCRIPTION
API key	*Required.* Your Close API key.
Contact Custom Field ID for User ID	Enter the ID of a Contact Custom Field that'll be used to store User ID. You'll need to create this Contact Custom Field in Close first, and then the integration will use this field to store the User ID when creating new contacts, and/or will be used as a lookup key when updating existing Contacts. The Custom Field type must be a text. If this field is not filled out, it will only look up and de-dupe based on email.
Lead Custom Field ID for Company ID	Enter the ID of a Lead Custom Field that'll be used to store Company ID. You'll need to create this Lead Custom Field in Close first, and then the integration will use this field to store the Company ID when creating new contacts, and/or will be used as a lookup key when updating existing Lead. The Custom Field type must be a text. If this field is not filled out, it will only lookup and de-dupe based on Contact's email.

Available Actions

Build your own Mappings. Combine supported triggers with the following Close-supported actions:

> ℹ️ **Mapping limits per destination**
>
> Individual destination instances have support a maximum of 50 mappings.

Create or Update Contact and Lead

Create or Update Contact and Lead

Create or Update Contact and/or Lead. At first, Close will try to find Lead via Lead Company ID. If Lead is not found, Close will try to find a Contact either via Contact User ID or via Contact Email. If Contact is not found, Close will create a new Lead and Contact. It will also create a new Lead and Contact if Contact is found but exists under a Lead with different Lead Company ID. If the Action does not specify Lead Company ID, Close will update the Contact and also the Contact's Lead. It might happen that Close will find multiple Contacts with the same Contact User ID or Contact Email. In such case, Close will update up to 10 Contacts, ordered by creation date.

Create or Update Contact and Lead is a **Cloud** action. The default Trigger is: `type = "identify"`

Click to show / hide fields

FIELD	DESCRIPTION
Lead Name	Type: `STRING` The name of the Lead.
Lead Company ID	Type: `STRING` Your ID that identifies the Lead. Lead Custom Field ID for Company must be defined in the global integration settings.
Lead Description	Type: `STRING` Description of the Lead.
Lead Status ID	Type: `STRING` ID of the Lead Status (`stat_xxxx`). You can get it in Close in the Statuses & Pipelines page.
Lead Custom Fields	Type: `OBJECT` Custom Fields to set on the Lead. Key should be Custom Field ID (`cf_xxxx`).
Contact Name	Type: `STRING` The name of the Contact.
Contact Email	Type: `STRING` Used to lookup Contact if Contact User ID is not set. If the Contact already has different email address, this value will be appended.
Contact Phone	Type: `STRING` If the Contact already has different phone number, this value will be appended.
Contact URL	Type: `STRING` If the Contact already has different URL, this value will be appended.
Contact Title	Type: `STRING` The title of the Contact.
Contact User ID	Type: `STRING` Your ID that identifies the Contact. Contact Custom Field ID for User ID must be defined in the global integration settings.
Contact Custom Fields	Type: `OBJECT` Custom Fields to set on the Contact. Key should be Custom Field ID (`cf_xxxx`).
Allow creating new Leads	Type: `BOOLEAN` Whether the integration is allowed to create new Leads.

FIELD	DESCRIPTION
Allow updating existing Leads	Type: `BOOLEAN` Whether the integration is allowed to update existing Leads.
Allow creating new Contacts	Type: `BOOLEAN` Whether the integration is allowed to create new Contacts.
Allow updating existing Contacts	Type: `BOOLEAN` Whether the integration is allowed to update existing Contacts.
Allow creating duplicate Contacts under different Lead	Type: `BOOLEAN` Whether the integration is allowed to create duplicate Contact (same email or Contact User ID) under a different Lead (different Lead Company ID).

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