apps, and devices to get a unified view of your customer's journey from page view to purchase.

Getting started

1. Sign in to your Segment Workspace
2. Click to the **Catalog** tab.
3. Click on the **Destinations** tab.
4. Use the search field to find the 'Pipedrive' destination. Click on the **Actions Pipedrive** tile.
5. Click **Add Destination**.
6. Select a source to connect to and click the **Next** button.
7. Provide a name for your Pipedrive destination and click the **Create Destination** button.
8. In the Settings tab, provide values in the **Domain** and **API Token** settings fields, then click the **Save Changes** button.
9. Navigate to the **Mappings** tab to configure how Segment events will be mapped to Pipedrive Entities. By default, mappings to upsert to Pipedrive's Person, Organization and Activity Entities will already be enabled.

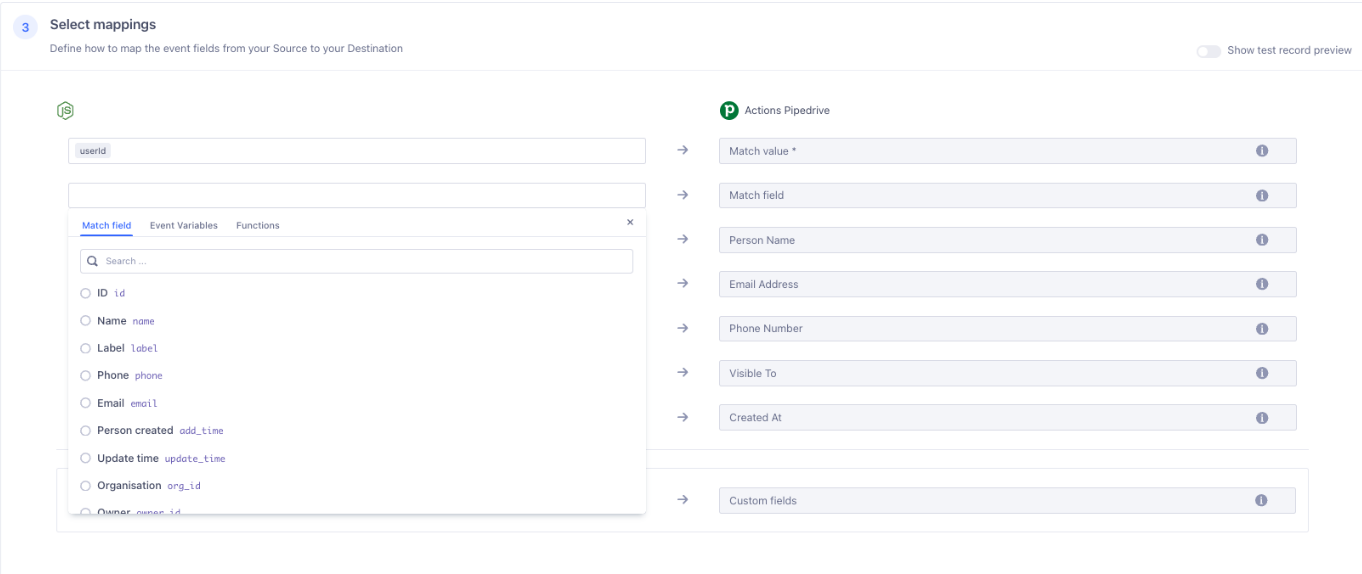
You can configure new Mappings by clicking on the **New Mapping** button.

10. After you've configured and enabled your Mappings, click back to the **Settings** tab and enable the integration using the **Enable Destination** toggle. Segment should now start sending event data to Pipedrive.

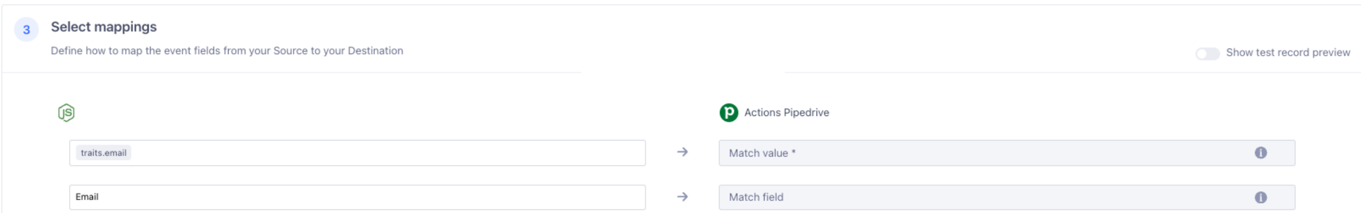
Inserting new Entities compared to updating existing Entities

Segment uses the **Match value** field value as a key when creating or updating an Entity in Pipedrive. By default, the **Match value** will be mapped to the **id** field for the corresponding Entity. You can specify which Pipedrive field to use as a key using the **Match field** field.

Match field fields are dynamic and will populate with data from your Pipedrive account.



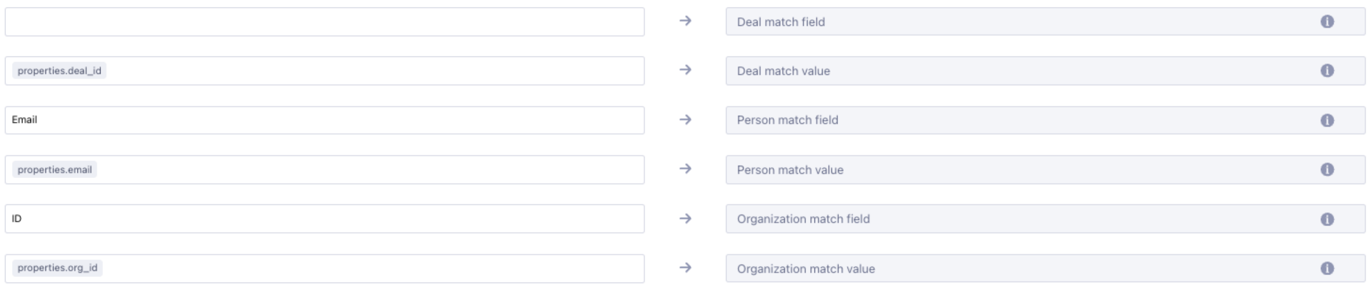
In the following example, Segment is configured to create or update Person Entities using the email field.



Associating Entities with other Entities

Entities such as the **Deal** Entity can be configured to be associated with other Entities in Pipedrive. In the example with the **Deal** mapping below the following will happen:

1. A **Person** Entity with an email address matching **properties.email** will be associated with the **Deal** Entity being created or updated.
2. An **Organization** Entity with an ID matching **properties.org_id** will be assocated with the **Deal** Entity being created or updated.



Destination Settings

SETTING	DESCRIPTION
API Token	*Required.* Pipedrive API token. This is found in Pipedrive in Settings > Personal preferences > API > Your personal API token.
External ID field for a Deal in Pipedrive	This is a key by which a Deal in Pipedrive will be searched. It can be either Deal id or has of a custom field containing external id. Default value is `deal_id`.
Domain	*Required.* Pipedrive domain. This is found in Pipedrive in Settings > Company settings > Company domain.
External ID field for an Organization in Pipedrive	This is a key by which an Organization in Pipedrive will be searched. It can be either Organization id or has of a custom field containing external id. Default value is `org_id`.
External ID field for a Person in Pipedrive	This is a key by which a Person in Pipedrive will be searched. It can be either Person id or has of a custom field containing external id. Default value is `person_id`.

Available Presets

Actions Pipedrive has the following presets:

PRESET NAME	TRIGGER	DEFAULT ACTION
Create or Update an Activity	Event type = "track" and event = "Activity Upserted"	Create or update an Activity
Create or Update an Organization	Event type = "group"	Create or Update Organization
Create or Update a Person	Event type = "identify"	Create or Update Person

Available Actions

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

Mapping limits per destination

Individual destination instances have support a maximum of 50 mappings.

- Create or Update Person
- Create or Update Organization
- Create or update an Activity
- Create or update Lead
- Create or update a Note

- Create or update a Deal

Create or Update Person

Update a person in Pipedrive or create them if they don't exist yet.

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

Click to show / hide fields

FIELD	DESCRIPTION
Match field	Type: `STRING` If present, used instead of field in settings to find existing person in Pipedrive.
Match value *	Type: `STRING` Value to find existing person by
Person Name	Type: `STRING` Name of the person
Email Address	Type: `STRING` Email addresses for this person.
Phone Number	Type: `STRING` Phone numbers for the person.
Visible To	Type: `STRING` Visibility of the Person. If omitted, visibility will be set to the default visibility setting of this item type for the authorized user. 'Owner's visibility group and sub-groups' and 'Entire company' options only available with Professional or Enterprise plans
Created At	Type: `DATETIME` If the person is created, use this timestamp as the creation timestamp. Format: YYY-MM-DD HH:MM:SS
Custom fields	Type: `OBJECT` New values for custom fields.

Create or Update Organization

Update an organization in Pipedrive or create it if it doesn't exist yet.

Create or Update Organization is a **Cloud** action. The default Trigger is: `type = "group"`

Click to show / hide fields

FIELD	DESCRIPTION
Match field	Type: `STRING` If present, used instead of field in settings to find existing organization in Pipedrive.
Match value *	Type: `STRING` Value to find existing organization by
Organization Name	Type: `STRING` Name of the organization
Visible To	Type: `STRING` Visibility of the Organization. If omitted, visibility will be set to the default visibility setting of this item type for the authorized user. 'Owner's visibility group and sub-groups' and 'Entire company' options only available with Professional or Enterprise plans
Created At	Type: `DATETIME` If the organization is created, use this timestamp as the creation timestamp. Format: YYY-MM-DD HH:MM:SS
Custom fields	Type: `OBJECT` New values for custom fields.

Create or update an Activity

Update an Activity in Pipedrive or create one if it doesn't exist.

Create or update an Activity is a **Cloud** action. The default Trigger is: `type = "track" and event = "Activity Upserted"`

Click to show / hide fields

FIELD	DESCRIPTION
Activity ID	Type: `INTEGER` ID of Activity in Pipedrive to Update. If left empty, a new one will be created
Person match field	Type: `STRING` If present, used instead of field in settings to find existing person in Pipedrive.
Person match value	Type: `STRING` Value to find existing person by
Organization match field	Type: `STRING` If present, used instead of field in settings to find existing organization in Pipedrive.
Organization match value	Type: `STRING` Value to find existing organization by
Deal match field	Type: `STRING` If present, used instead of field in settings to find existing deal in Pipedrive.
Deal match value	Type: `STRING` Value to find existing deal by
Activity Subject	Type: `STRING` Subject of the Activity. When value for subject is not set, it will be given a default value `Call`.
Type	Type: `STRING` Type of the Activity. This is in correlation with the key_string parameter of ActivityTypes. When value for type is not set, it will be given a default value `Call`
Description	Type: `STRING` Additional details about the Activity that is synced to your external calendar. Unlike the note added to the Activity, the description is publicly visible to any guests added to the Activity.
Note	Type: `STRING` Note of the Activity (Accepts plain text and HTML)
Due Date	Type: `STRING` Due date of the Activity. Format: YYYY-MM-DD
Due Time	Type: `STRING` Due time of the Activity. Format: HH:MM
Duration	Type: `STRING` Duration of the Activity. Format: HH:MM
Done	Type: `BOOLEAN` Whether the Activity is done or not.

Create or update Lead

Update a Lead in Pipedrive or create it if it doesn't exist yet.

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

Click to show / hide fields

FIELD	DESCRIPTION
Lead ID	Type: `STRING` ID of Lead in Pipedrive to Update. If left empty, a new one will be created
Person match field	Type: `STRING` If present, used instead of field in settings to find existing person in Pipedrive.
Person match value	Type: `STRING` Value to find existing person by. Required unless organization_match_value present
Organization match field	Type: `STRING` If present, used instead of field in settings to find existing organization in Pipedrive.
Organization match value	Type: `STRING` Value to find existing organization by. Required unless person_match_value present
Title *	Type: `STRING` The name of the Lead
Amount	Type: `NUMBER` Potential value of the lead
Currency	Type: `STRING` Three-letter code of the currency, e.g. USD
Expected Close Date	Type: `STRING` The date of when the Deal which will be created from the Lead is expected to be closed. In ISO 8601 format: YYYY-MM-DD.
Visible To	Type: `STRING` Visibility of the Lead. If omitted, visibility will be set to the default visibility setting of this item type for the authorized user. 'Owner's visibility group and sub-groups' and 'Entire company' options only available with Professional or Enterprise plans

Create or update a Note

Update a Note in Pipedrive or create it if it doesn't exist yet.

Create or update a Note is a **Cloud** action. The default Trigger is: `type = "track" and event = "Note Upserted"`

Click to show / hide fields

FIELD	DESCRIPTION
Note ID	Type: `INTEGER` ID of Note in Pipedrive to Update. If left empty, a new one will be created
Lead ID	Type: `STRING` ID of Lead in Pipedrive to link to. One of Lead, Person, Organization or Deal must be linked!
Person match field	Type: `STRING` If present, used instead of field in settings to find existing person in Pipedrive.
Person match value	Type: `STRING` Value to find existing person by. One of Lead, Person, Organization or Deal must be linked!
Organization match field	Type: `STRING` If present, used instead of field in settings to find existing organization in Pipedrive.
Organization match value	Type: `STRING` Value to find existing organization by. One of Lead, Person, Organization or Deal must be linked!
Deal match field	Type: `STRING` If present, used instead of field in settings to find existing deal in Pipedrive.
Deal match value	Type: `STRING` Value to find existing deal by. One of Lead, Person, Organization or Deal must be linked!

FIELD	DESCRIPTION
Note Content *	Type: `STRING` Content of the note in text or HTML format. Subject to sanitization on the back-end.

Create or update a Deal

Update a Deal in Pipedrive or create it if it doesn't exist yet.

Create or update a Deal is a **Cloud** action. The default Trigger is: `type = "track" and event = "Deal Upserted"`

Click to show / hide fields

FIELD	DESCRIPTION
Deal match field	Type: `STRING` If present, used instead of field in settings to find existing deal in Pipedrive.
Deal match value	Type: `STRING` Value to find existing deal by
Person match field	Type: `STRING` If present, used instead of field in settings to find existing person in Pipedrive.
Person match value	Type: `STRING` Value to find existing person by. Required unless organization_match_value present
Organization match field	Type: `STRING` If present, used instead of field in settings to find existing organization in Pipedrive.
Organization match value	Type: `STRING` Value to find existing organization by. Required unless person_match_value present
Title *	Type: `STRING` Deal title (required for new Leads)
Value	Type: `STRING` Value of the deal. If omitted, value will be set to 0.
Currency	Type: `STRING` Currency of the deal. Accepts a 3-character currency code. If omitted, currency will be set to the default currency of the authorized user.
Stage ID	Type: `NUMBER` The ID of a stage this Deal will be placed in a pipeline (note that you can't supply the ID of the pipeline as this will be assigned automatically based on stage_id). If omitted, the deal will be placed in the first stage of the default pipeline.
Status	Type: `STRING` Deal status - open, won, lost or deleted. If omitted, status will be set to open.
Expected Close Date	Type: `STRING` The expected close date of the Deal. In ISO 8601 format: YYYY-MM-DD.
Success Probability	Type: `NUMBER` Deal success probability percentage. Used/shown only when deal_probability for the pipeline of the deal is enabled.
Lost Reason	Type: `STRING` Optional message about why the deal was lost (to be used when status=lost)
Visible To	Type: `STRING` Visibility of the deal. If omitted, visibility will be set to the default visibility setting of this item type for the authorized user. 'Owner's visibility group and sub-groups' and 'Entire company' options only available with Professional or Enterprise plans
Created At	Type: `DATETIME` If the deal is created, use this timestamp as the creation timestamp. Format: YYY-MM-DD HH:MM:SS

FIELD	DESCRIPTION
Custom fields	Type: `OBJECT` New values for custom fields.

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