Documentation

Getting Started

1. From the Segment web app, click **Catalog**.

2. Search for "Callingly" in the Catalog, select it, and choose which of your sources to connect the destination to.

3. Enter the "API Key" into your Segment Settings UI which you can find from your Callingly Integrations page. Click "Connect" on the Segment integration to enable it.

4. In the Segment integration settings on the Callingly Integrations page you can also select which Team will receive the calls triggered from Segment events.

Identify

If you're not familiar with the Segment Specs, take a look to understand what the Identify method does. An example call would look like:

```
analytics.identify('userId123', {
  firstName: 'John',
  lastName: 'Doe',
  phone: '555-555-5555',
  email: 'john.doe@example.com'
});
```

Identify calls will be sent to Callingly as an `identify` event. To trigger a call, you must include a phone number as a `phone` trait.

If the `phone` trait is valid, formatted either in E.164 or your country's local standard, Callingly will add the visitor as a Lead to your account and trigger a phone call to the Team selected in your Integration settings.

To configure agents, schedules, call routing options and retry settings edit the Team settings on the Callingly Teams Page.

Engage

You can send computed traits and audiences generated using Engage to this destination as a **user property**. To learn more about Engage, schedule a demo.

For user-property destinations, an identify call is sent to the destination for each user being added and removed. The property name is the snake_cased version of the audience name, with a true/false value to indicate membership. For example, when a user first completes an order in the last 30 days, Engage sends an Identify call with the property `order_completed_last_30days: true`. When the user no longer satisfies this condition (for example, it's been more than 30 days since their last order), Engage sets that value to `false`.

When you first create an audience, Engage sends an Identify call for every user in that audience. Later audience syncs only send updates for users whose membership has changed since the last sync.

> ℹ️ **Real-time to batch destination sync frequency**
>
> Real-time audience syncs to Callingly may take six or more hours for the initial sync to complete. Upon completion, a sync frequency of two to three hours is expected.

Settings

Segment lets you change these destination settings from the Segment app without having to touch any code.

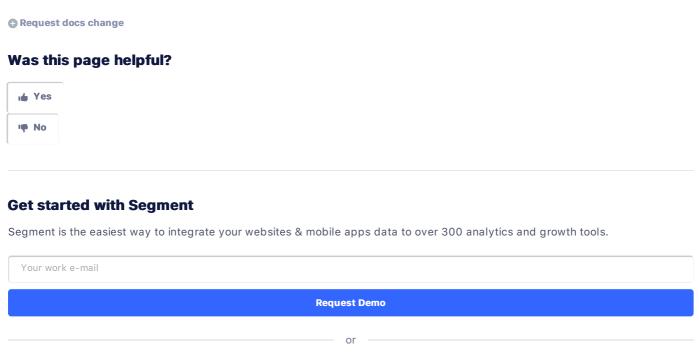| SETTING	DESCRIPTION
API Key *(required)*	`string` . Go to the Integrations page in the Callingly Dashboard and click Connect on the Segment integration to get your API key.

This page was last modified: 08 Jan 2024

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