



## Getting Started

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## Getting Started

You have two options to connect - either automatically within your Refersion dashboard, or manually by copying and pasting an API key into the Segment dashboard.

### Option 1 - Refersion UI

- 1 In Refersion, find "Segment" in the Integrations section of the Account > Settings page.
- 2 After pressing "Enable with Segment Integration" you will choose the first data source from the pop-up screen.
- 3 When the initial connection is established you will be able to connect additional sources to your Refersion destination.

### Option 2 - Segment UI

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

2. Search for “Refersion” in the Catalog, select it, and choose which of your sources to connect the destination to.

3. Once connected, you will be asked to input an API key - which can be found in your [Refersion dashboard](#) - which is formatted as publickey.secretkey. You will need to click “Show” to obtain the “Secret Key” portion.

## 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:

```
{
  "messageId": "test-message-txsmji",
  "timestamp": "2019-05-02T14:14:40.519Z",
  "type": "identify",
  "email": "test@example.org",
  "traits": {
    "name": "Peter Gibbons",
    "email": "peter@example.com",
    "plan": "premium",
    "logins": 5,
    "address": {
      "street": "6th St",
      "city": "San Francisco",
      "state": "CA",
      "postalCode": "94103",
      "country": "USA"
    }
  },
  "userId": "test-user-t0zpx"
}
```

Identify calls will be sent to Refersion as an `identify` event.

All `identify` requests made to the Refersion destination must contain the following traits in order for a new affiliate to be created:

TRAIT	TYPE	DESCRIPTION
name	String	Name of the affiliate you would like to add
firstName or first_name	String	First name of the affiliate you would like to add
lastName or last_name	String	Last name of the affiliate you would like to add
email	String	Email address of the affiliate you would like to add
address	Object	Street address of a user optionally containing: city, country, postalCode or postal_code, state or street

If you plan on using `camelCase` or `snake_case` use it consistently for all your traits to keep the request uniform. Your request can also only contain the `name` instead of `firstName/lastName` or `first_name/last_name`.

## Delete

You can use a `delete` request to remove a certain affiliate from our system.

```
{
  "type": "delete",
  "channel": "server",
  "messageId": "delete-022bb90c-bbac-11e4-8dfc-aa07a5b093db",
  "projectId": "abcd123",
  "userId": "5678",
  "context": [],
  "integrations": [],
  "email": "peter@example.com",
  "receivedAt": "2019-02-19T23:58:54.387Z",
  "sentAt": "2019-02-19T21:58:54.387Z",
  "originalTimestamp": "2019-02-19T23:58:54.387Z",
  "timestamp": "2019-02-19T23:58:54.387Z"
}
```

## 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.



### Real-time to batch destination sync frequency

Real-time audience syncs to Refersion 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)	<code>string</code> . You can find your API key (publickey.secretkey) in your <a href="#">account settings page</a> under Refersion API.

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