



## Getting Started

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# Getting Started

Freshsales Suite - CRM supports identify, page, and track methods, which allows users to create and update Freshsales contacts through Segment. To enable the Freshsales Suite - CRM destination:

1. Navigate to **Freshsales Admin Settings > Third Party Integrations > Segment** on the Freshsales platform.
2. Click **Install** and select the Segment source you wish to connect to your Freshsales Suite - CRM destination.

You can also add the Freshsales Suite - CRM destination from the Segment destinations catalog.

1. From the Segment web app, navigate to **Catalog > Destinations** and click **Add Destination**.
2. Find the Destinations Actions item in the left navigation, and click it.
3. Search for **Freshsales Suite - CRM** and select it.
4. Click **Configure Freshsales Suite - CRM**.
5. Select the Source you want to connect to Freshsales Suite - CRM.
6. Provide the subdomain and API key in the destination settings that are found in your Freshsales account.

## Supported methods

Freshsales Suite - CRM supports the following methods.

### Identify

You can use identify to create a contact when a website visitor fills a webform. When you identify a user, Segment passes that user's information to Freshsales.

### UserId

userId is a mandatory field which is used to identify the contact in Freshsales. If your user identifier is not email, then email has to be a part of traits.

```
{
  "userId": "97980cfea0067",
  "type": "identify",
  "traits": {
    "firstName": "John",
    "lastName": "Doe",
    "email": "john.doe@example.com",
    "cfAlternateNumber": "98765432",
    "company": {
      "name": "Example.com"
    }
  }
}
```

### Traits

Traits are pieces of information you know about a user. They are a mandatory part of the [Identify method](#).

### Default Traits

Segment reserved some traits that have semantic meanings for users. You should only use reserved traits for their intended meaning. Check the [Segment Spec](#) to get a list of reserved traits.

All attributes that are a part of traits should correspond to the internal names of those fields in Freshsales. Segment ignores attributes that aren't mapped with their corresponding fields.

However, Segment makes an exception for two attributes: `title` and `phone`, which are reserved traits in Segment. They automatically map to the Freshsales attributes of `job_title` and `work_number` respectively.

### Custom Traits

As part of traits, you can send custom fields created in Freshsales by using their internal names in camel case. You can find internal names in the corresponding field settings page.

Custom fields won't automatically create. You have to create them in Freshsales before proceeding to send data from Segment. [Learn more](#) about creating custom fields in Freshsales.

EDIT FIELD

Field label \*

Alternate Number

Internal name

cf\_alternate\_number

Field type \*

Number

## Objects

You can also update Accounts and Deals associated with a contact in Freshsales. The company and deal objects in the identify payload correspond to the Accounts and Deals objects in Freshsales. When you use the identify method to create a contact, it's possible to also create the corresponding Account and Deal and Freshsales. To do this, pass the company or the deal objects within traits in the identify call.

```
{
  "userId" : "97980cfea0067",
  "type": "identify",
  "traits" : {
    "firstName": "John",
    "lastName": "Doe",
    "email": "john.doe@example.com",
    "company": {
      "name": "Example.com"
    },
    "deal" :{
      "name" : "Sample Deal",
      "amount": 1234
    }
  }
}
```

## Track

You can track activities of your website visitors. If a user is subscribing to a newsletter and you want to track it, use the track method.

```
{
  "userId" : "john.doe@example.com",
  "event": "Email Bounced",
  "type": "track",
  "properties" : {
    "emailId": "110688",
    "emailSubject": "Welcome to Example.com",
    "campaignId": "123",
    "campaignName": "New Customer Discount"
  }
}
```

Segment standardized a series of reserved event names that have special semantic meaning. Segment maps these events to tools that support them whenever possible. See the [Semantic Events docs](#) for more detail. Custom events are supported as well.

## Page

If you want to track users visiting your sites, you can use the page method. When you call a page event, Segment sends a pageview to Freshsales. You can send extra data parameters within properties in the event payload. [See the reserved properties for more details.](#)

```
{
  "userId" : "john.doe@example.com",
  "name": "Page view",
  "type": "page",
  "properties" : {
    "title": "Welcome to pricing page | Example.com",
    "url" : "http://example.com/pricing"
  }
}
```

## FAQs

## Custom Fields Aren't Updating

Make sure that the traits you're passing through match the custom field's internal name and data type.

## 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 Freshsales Suite - CRM 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 <i>(required)</i>	<code>string</code> . You can find your Freshsales Suite API token under Profile Settings -> API Settings.
domain <i>(required)</i>	<code>string</code> . If your domain is mycompany.myfreshworks.com, then your subdomain is 'mycompany'.

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