



Getting Started

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Powerful, flexible and data-driven, [Attio](#) makes it easy to build the exact CRM that your business needs.

This destination allows you to use your existing Segment events to create or update records in Attio, for example creating Attio User records from Segment Identify events.

Getting started

- From the Segment web app, click **Catalog**, then click **Destinations**.
- Search for **Attio (Actions)** and select it.
- Click **Add destination**, then follow the setup instructions.
- Click **Connect to (destination name)** to select the Attio Workspace you'd like to connect to.

Identify User

Create or update a **Person** using the provided email address, then create or update a related **User** using the same address. By default, this mapping runs for `identify` events.

This mapping is a special form of [Assert Record](#), because it asserts both a Person and User and links them

together. If you only need to assert either a **Person** or **User**, you should configure [Assert Record](#) instead.

In Attio, a **Person** represents a human. People have names, email addresses, Twitter profiles, email and calendar interactions, etc.

Meanwhile, a **User** is a user of your product. Users might have feature flags, permission levels, etc. A **Person** can have multiple **Users**, for example if they exist in different workspaces or have different sets of permissions, but are ultimately the same **Person**.



To use the **User** standard object, you'll need to make sure it's activated first. Visit your [Workspace Settings > Objects](#) page and click the "Activate" button next to the **Users** object.

This mapping makes the assumption that your Segment event includes two properties:

1. **email_address** property, to create or update a **Person**

2. **id** property, to create or update an associated **User**

You can specify additional attributes to be mapped on the **Edit Mapping** page.

For example, you could set some additional properties on the **Person** using these Mapping Fields under "Additional Person attributes". The column on the left should contain properties from your event, or custom text, and the column on the right should reference attributes on that object type in Attio, represented by their slug.



Every Attio attribute has both an ID and a slug, and you can use either to reference those attributes in this action. To find this value, on the object settings page, select the "Attributes" tab, locate your attribute, then click on the button and select "Copy slug".

Here's an example configuration that sets the **description**, **name** and **company** attributes on the **Person** object:

SELECT EVENT VARIABLE	ENTER KEY NAME	NOTES
traits.description	description	
traits.last_name, traits.first_name	name	Person names must be formatted as Last name(s), First name(s)
traits.domain	company	A Company relationship can be populated using the Company's domain

You can also use the same approach to specify additional properties on the **User** object. Please note that by default, the **User** object doesn't specify many attributes; the expectation is that you'll add your own that make the most sense for your product. All custom attributes can be specified here, please see [attribute types](#) below for more information.

Group Workspace

Create or update a **Company** using the provided domain, then create or update a **Workspace** using the provided name. By default, this mapping runs for **group** events.

*This mapping is a special form of [Assert Record](#), because it asserts both a **Company** and **Workspace** and links them together. If you only need to assert either a **Company** or **Workspace**, you should configure [Assert Record](#) instead.*

In Attio, a **Company** can have names and domains, as well as enriched properties like ARR or category.

Meanwhile, a **Workspace** represents a group of **Users** in your product. Workspaces might have feature flags, billing configurations, customer support representatives, etc. A **Company** can have many **Workspaces**.



To use the Workspace standard object, you'll need to make sure it's activated first. Visit your [Workspace Settings > Objects](#) page and click the "Activate" button next to the Workspaces object.

This mapping makes the assumption that your Segment event includes two properties:

- 1. domain property, to create or update a Company
- 2. id property, to create or update an associated Workspace

You can specify additional attributes to be mapped on the **Edit Mapping** page.

For example, you could set some additional properties on the Company using these Mapping Fields under "Additional Company attributes". The column on the left should contain properties from your event, or custom text, and the column on the right should reference attributes on that object type in Attio, represented by their slug. For example:

SELECT EVENT VARIABLE	ENTER KEY NAME
traits.twitter_handle	twitter

Similarly, you can also set some additional properties on the Workspace. All custom attributes can be specified here, please see [attribute types](#) below for more information.

Assert Record

Create or update a single type of Object, given a matching attribute name and value. For example, you could assert that a Company exists using a given domain property.

This mapping makes the assumption that your data includes the matching property. For the following example, assume you have domain and twitter properties, like so:

```
{
  "type": "identify",
  "traits": {
    "domain": "app.attio.com",
    "twitter_handle": "@attio"
  }
}
```

First, you'll need to set the "Attio Object" property - it should pre-populate with all of the activated objects in your Attio instance. Then, you'll need to set the "Matching Attribute" property. This is the slug for the attribute in Attio, and must also be present in your "Attributes" mapping in the next form. In this example, you'll select "Company" as the Attio Object, and "domains" as the Matching Attribute.

You would then need to ensure the Attributes mapping is populated like so:

SELECT EVENT VARIABLE	ENTER KEY NAME
traits.domain	domains
traits.twitter_handle	twitter

When this mapping runs, Attio will try to find an existing Company where one of the domains matches the one you've provided here. If it finds it, it will update the twitter attribute with the value "@attio". If it doesn't find it, a new Company will be created with both the domain and twitter handles above.

Batching support

This action supports batching. You can toggle batching using the **Edit Mapping > Enable Batching** property. Batching sends groups of events to Attio in a single request, rather than individually, which can improve stability & correctness if you are sending a lot of events.

However, there are a couple of caveats to be aware of:

- 1. Attio will process these events asynchronously, which means it might take a few seconds between Attio acknowledging the request and the record updates appearing in your Attio workspace.
- 2. Invalid events will be silently dropped. This can happen if your mapping configuration points to a non-existent Attio attribute, or you're trying to write the wrong attribute type (for example: writing a number to a domain attribute). We recommend you continue to use the **Send test event** feature on the mapping page to check configurations before saving them.

Attribute types

The Attio Action can write all types of attribute to Attio. Below is an example of the format that each attribute must be; please note that you'll get validation failures if any of these are incorrect. To unset an attribute, you can also pass `null` as the value.

TYPE	FORMAT	EXAMPLE VALUES
actor-reference	An email address of a workspace member	"alice@attio.com"
checkbox	Boolean	true, false
currency	Number with up to 4 decimal places	99, 29.9999
date	YYYY-MM-DD	"2023-09-28"
domain	{domain}.{tld}	"app.attio.com", "www.example.com"
email	A valid email address	"person@example.com"
location	String with all valid address parts (street address, city, state, country, and postal code) combined	"1 Infinite Loop, Cupertino, CA, US"
number	Number, stored as a 64 bit float	42.192, 17
personal-name	Last name(s), First name(s) <i>(note the comma in the middle)</i>	"Bloggs, Joe"
phone-number	E.164 format, starting with +...	" +15558675309"
pipeline	A UUID or title representing the status	"open", "closed"
rating	Integer from 0 to 5	0, 5
record-reference	To a person, an email. To a company, a domain. UUID of other entity always supported.	"person@example.com", "app.attio.com", "0677efa..."
select	A UUID or title representing the option	"open"
text	String	"A piece of text"
timestamp	ISO8601, e.g. YYYY-MM-DDTHH:MM:SS	"2023-09-28 04:39:17.000"

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