



Getting Started

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Getting Started

You can create and update Freshsales Leads and Contacts through Segment. We support `identify`, `page`, and `track` methods.

Once your Segment source starts receiving data, you can send them to Freshsales by enabling this destination. You can enable it from Freshsales Admin Settings for Third Party Integrations. Select the Segment source from which data has to be forwarded to Freshsales.

You can also enable Freshsales destination from Segment destinations dashboard. You will have to provide the subdomain of your Freshsales Account and an admin API key.

Identify

You can use `identify` to create a lead or a contact when a website visitor fills a webform. When you `identify` a user, we'll pass that user's information to Freshsales.

User ID

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

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

By default, every identity is created as a lead. If you'd like an identity to be a contact, you'd need to pass `fs_contact` as `true` as a part of traits.

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

Traits

traits are pieces of information you know about a user that are included in an `identify` method.

Default Traits

Segment has 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.

Field Name	Field Type
Business type	Dropdown
Product	Dropdown
First name	Text Field
Last name	Text Field
Job title	Text Field
Department	Text Field
Email	Text Field
Work	Text Field
Mobile	Text Field

EDIT FIELD - LAST NAME

Label *
Last name

Internal Name
last_name

Group
Basic Information

Field type
Text Field

Cancel Save

All attributes that are a part of traits should correspond to the internal names of those fields in Freshsales. Attributes that are not mapped with their corresponding fields are ignored.

However, we make exception to two attributes `title` and `phone` that are part of default traits. They are automatically mapped to Freshsales attributes `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 corresponding field settings page. Also, custom fields will not be automatically created. You have to create them in Freshsales before proceeding to send data from Segment. To learn more about creating custom fields in Freshsales check this [link](#).

EDIT FIELD - ALTERNATE NUMBER

X

Label *

Alternate number

Internal Name

cf_alternate_number

Group

Application Data

Field type

Text Field

Cancel

Save

Objects:

Accounts and Deals associated to a contact or lead can also be updated in Freshsales. The objects company and deal in the identity correspond to the Accounts and Deals in Freshsales. You can pass the `traits` of the company or the deal along with the respective objects in the identity.

```
{
  "userId" : "97980cfea0067",
  "traits" : {
    "firstName": "John",
    "lastName": "Doe",
    "email": "john.doe@example.com",
    "fsContact": "true",
    "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 track method to accomplish that. When you track an event, we will send that event to Freshsales.

Track request payload

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

Segment has standardized a series of reserved event names that have special semantic meaning. We map these events to tools that support them whenever possible. See the [Semantic Events docs](#) for more detail. Also, custom events are supported.

Page

If a user is visiting your web pages and you want to track it, then use page method to do that. When you call a page event, we send a pageview to Freshsales. You can send extra pieces of information as part of properties. See the [reserved properties](#) for more detail.

Sample Page request payload

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

Troubleshooting

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 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 token <i>(required)</i>	<code>string</code> . You can find your Freshsales API token on the Integrations page under Profile Settings -> API Settings.
Freshsales subdomain <i>(required)</i>	<code>string</code> . Provide the subdomain of your Freshsales account. So if your domain is <code>segment.freshsales.io</code> , then your subdomain is 'segment'.

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