Pipedrive Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

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SETUP GUIDE OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Vertify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

OPTIONAL STEP: PIPEDRIVE VERTIFY USER ACCESS

Please create an Admin user for the integration and provide the following credentials to your Vertify Implementation Specialist if you'd like them to have access to your CRM's UI. It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Follow this format when creating the log in: passwords+clientname@vertify.com

Example: passwords+vertify@vertify.com

If license/seat is unavailable, it can also be created through a personal account. Please note, it will need to be updated if the user or password is inactivated.

STEP 1: CUSTOM FIELD CREATION

Custom fields are required to be created on the Person Object in Pipedrive for the Vertify integration.

Reference the API Name column in the table below for the list of how to title the fields, the needed data type, and the purpose of the field for context.

API Name	Data Type	Purpose
ExternalContactId	String	This field will be used to house the other endpoint system's Contact's internalId, and for merging and lookup purposes in Vertify.

ExternalCompanyId	String	This field will be used to house the other endpoint system's Company's internalId, and for merging and lookup purposes in Vertify.
SyncToMAP	Boolean	This field will be hard-coded by Vertify or by a workflow in Pipedrive. It is used to determine which records are eligible to move back to the other endpoint system and for filtering in Vertify.

STEP 2: PIPEDRIVE USER CREATION

It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Action Item: Please create an Admin user in Pipedrive for the integration and provide the following credentials to your Vertify Implementation Specialist.

Follow this format when creating the log in: passwords+clientname@vertify.com

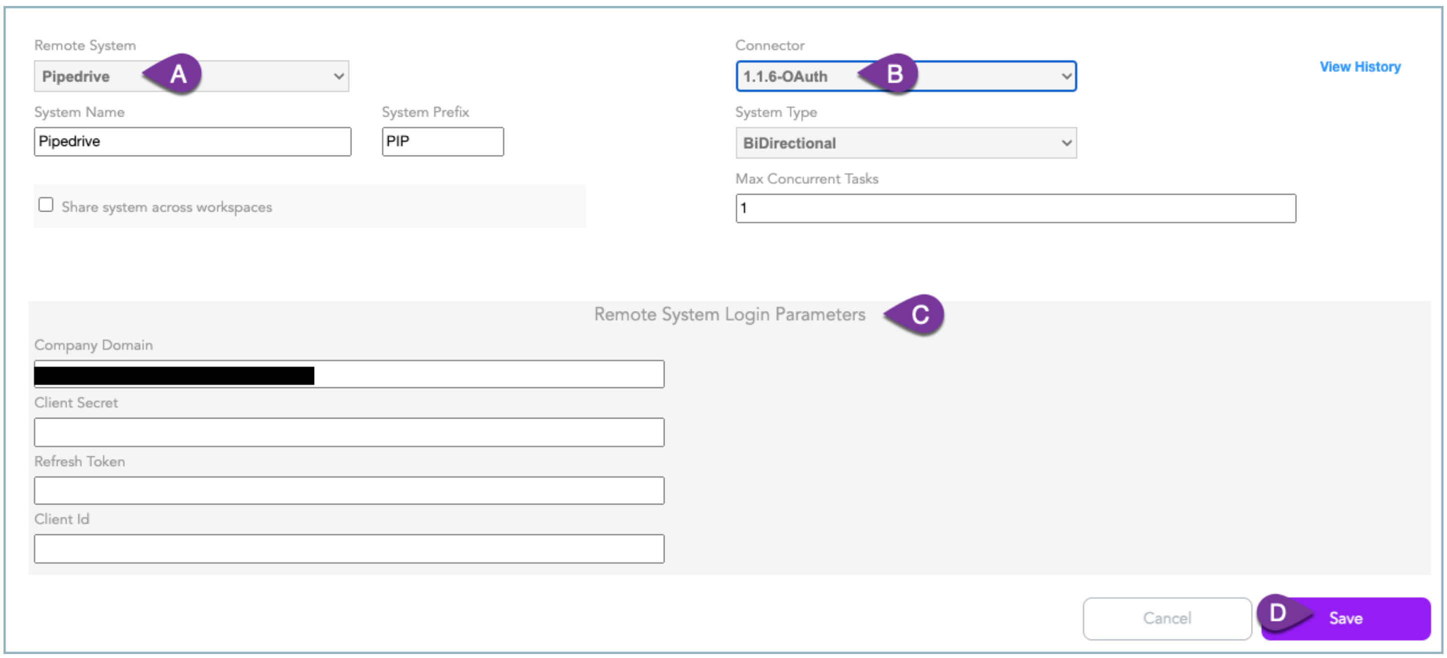
Example: passwords+vertify@vertify.com

- API Token
- Company Domain URL
  - example: https://company.pipedrive.com/

Please see Pipedrive's API documentation for specific steps on generating the API Token: https://pipedrive.readme.io/docs/marketplace-oauth-authorization

STEP 3: VERTIFY SYSTEM SETUP

Refer to the steps outlined below to set up the system in Vertify. Alternatively, you're welcome to schedule a working session to partner with your Vertify Integration Specialist on the steps below.



1. In Vertify, navigate to the Connect page
2. Click the New System button
3. Next, enter the required system credentials -
    a. Select Pipedrive from the Remote System List
    b. Select the highest Connector number (i.e., 1.3.5)
    c. You will enter the Login Parameters when available from steps outlined above:
        i. Company Domain [Required]
        ii. Client Secret [Required]
        iii. Refresh Token [Required]
        iv. Client Id [Required]
    d. In Vertify, click the blue Save button
    e. This will initiate the scan and authentication step of connecting with the provided credentials
    f. Look for a green Scan Complete message; if failed or error, please reach out to your system administrator for the endpoint system and your Vertify One Team.