SIGNIVENT

Integrations: connections, CRM and Salesforce

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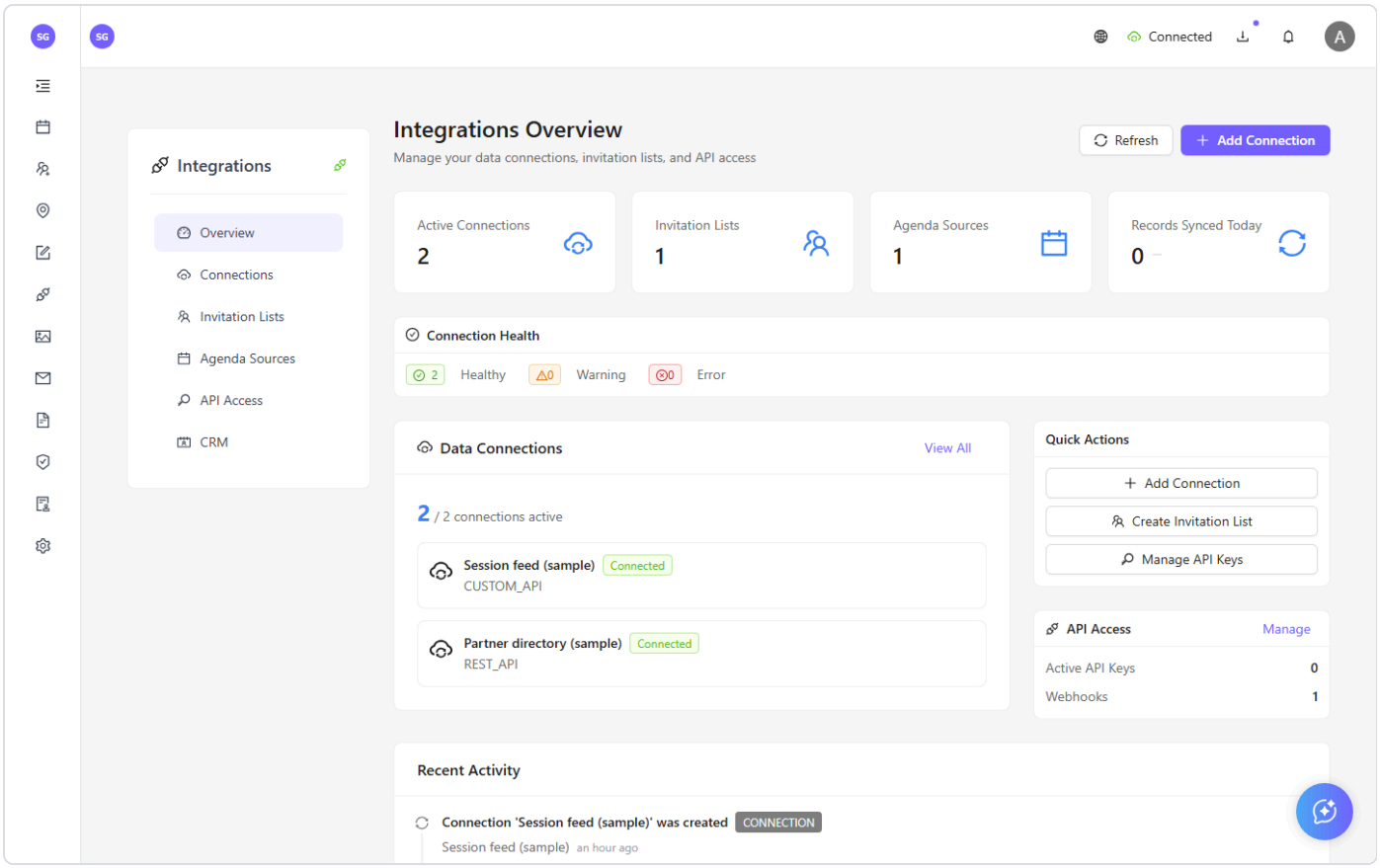
Integrations in the organization sidebar connects Signivent to the systems your organization already uses: CRMs such as Salesforce and HubSpot, your own APIs, spreadsheets and agenda tools. Its own menu has **Overview**, **Connections**, **Invitation Lists**, **Agenda Sources**, **API Access** and **CRM**.

The overview

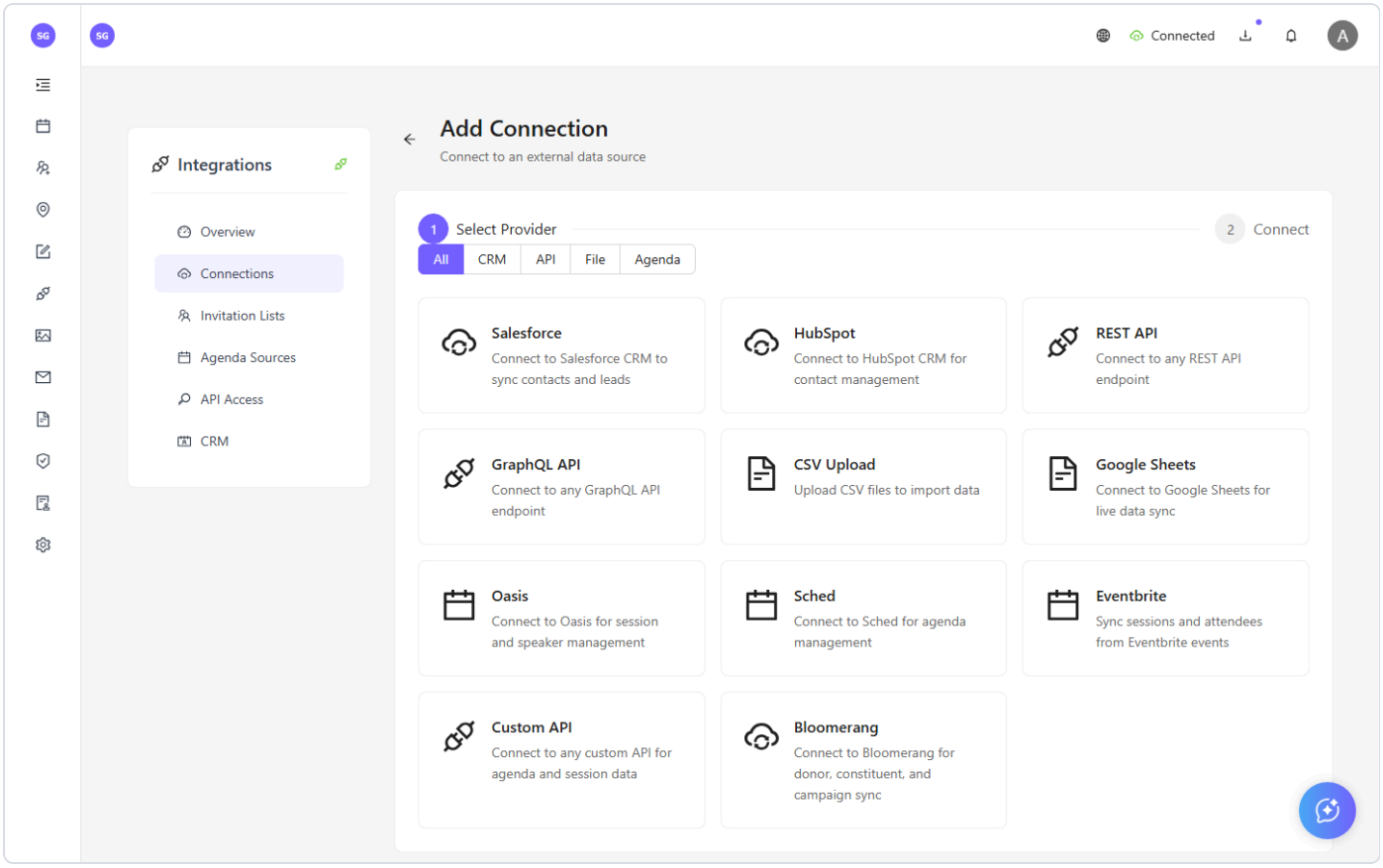
Integrations > **Overview** counts your active connections, invitation lists, agenda sources and the records synced today, shows the health of each connection, and has quick buttons to add a connection, create an invitation list or manage API keys.



Integrations Overview: counters, connection health, data connections, quick actions and API access

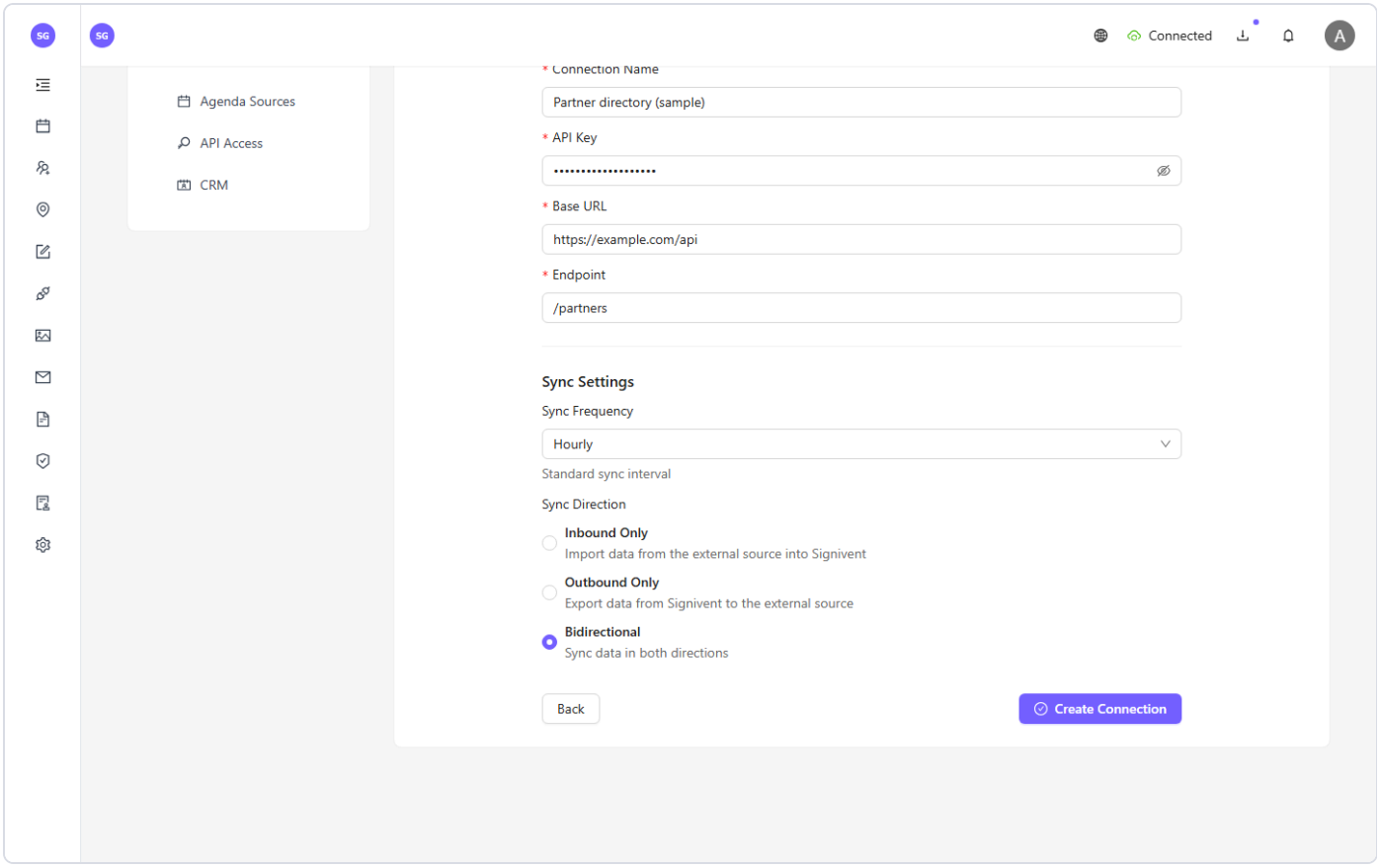
Add a data connection

1. Go to **Integrations** > **Connections** and click **Add Connection**. (The **Quick Start** tiles on the same page open the same steps for the most common sources.)
2. **Select Provider.** Filter by **CRM**, **API**, **File** or **Agenda**, and pick one: Salesforce, HubSpot, REST API, GraphQL API, CSV Upload, Google Sheets, Oasis, Sched, Eventbrite, Custom API or Bloomerang.



Add Connection: the list of providers, filtered by type

3. **Connect.** Give the connection a name and the details the provider needs. For a REST API that is an **API Key**, the **Base URL** and the **Endpoint**. For providers that use your own account (such as Salesforce and HubSpot) there is a **Connect with …** button instead, which sends you to the provider's login page.
4. Under **Sync Settings**, choose the **Sync Frequency** and the **Sync Direction**: **Inbound Only** (into Signivent), **Outbound Only** (from Signivent) or **Bidirectional**.
5. Click **Create Connection**. The connection's page opens.

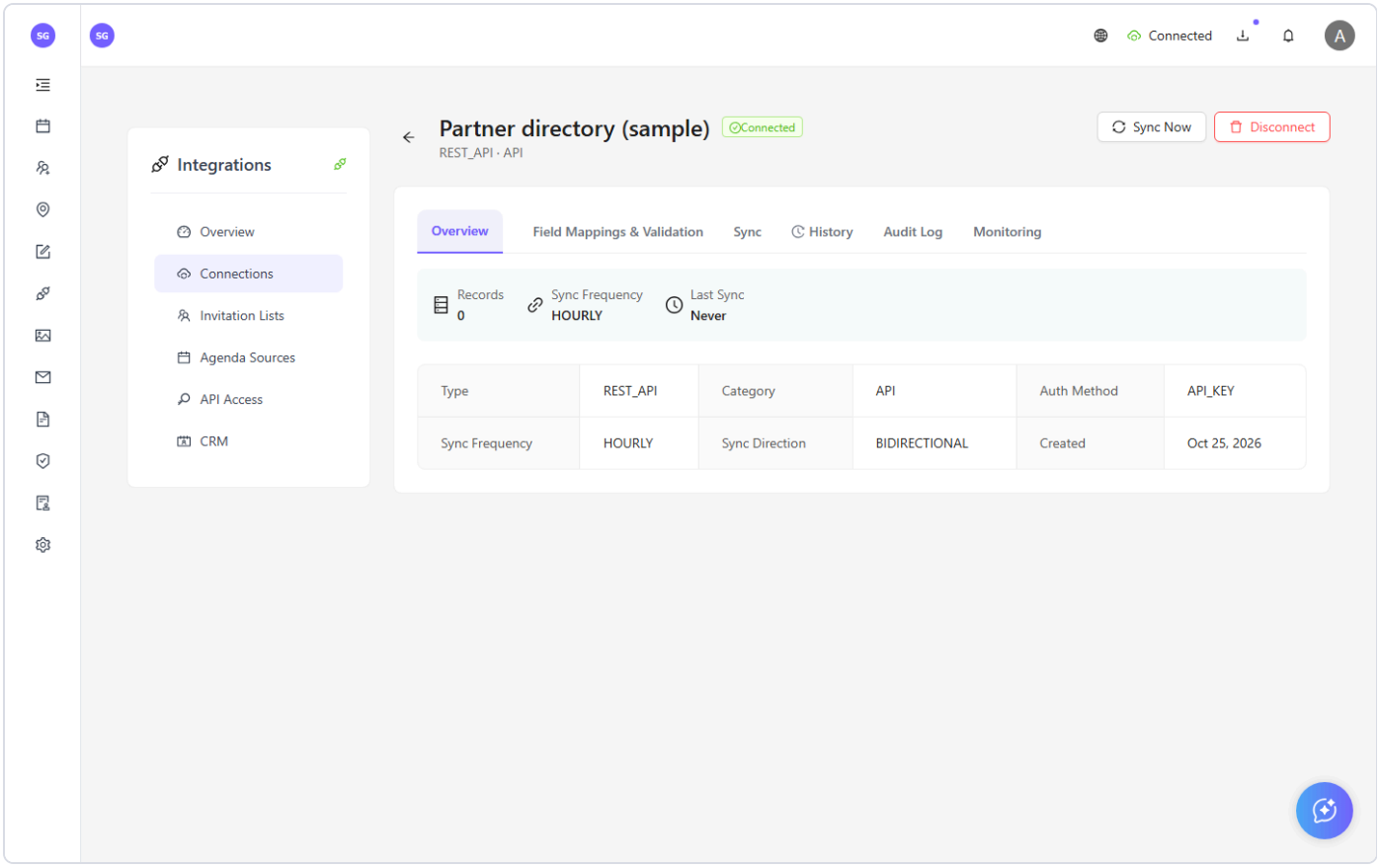


The REST API connection form: name, API key, base URL, endpoint, sync frequency and direction

Today only **Bidirectional** can be saved for API connections; Inbound Only and Outbound Only are refused with "Failed to create connection". Choose Bidirectional for now.

Run and follow a sync

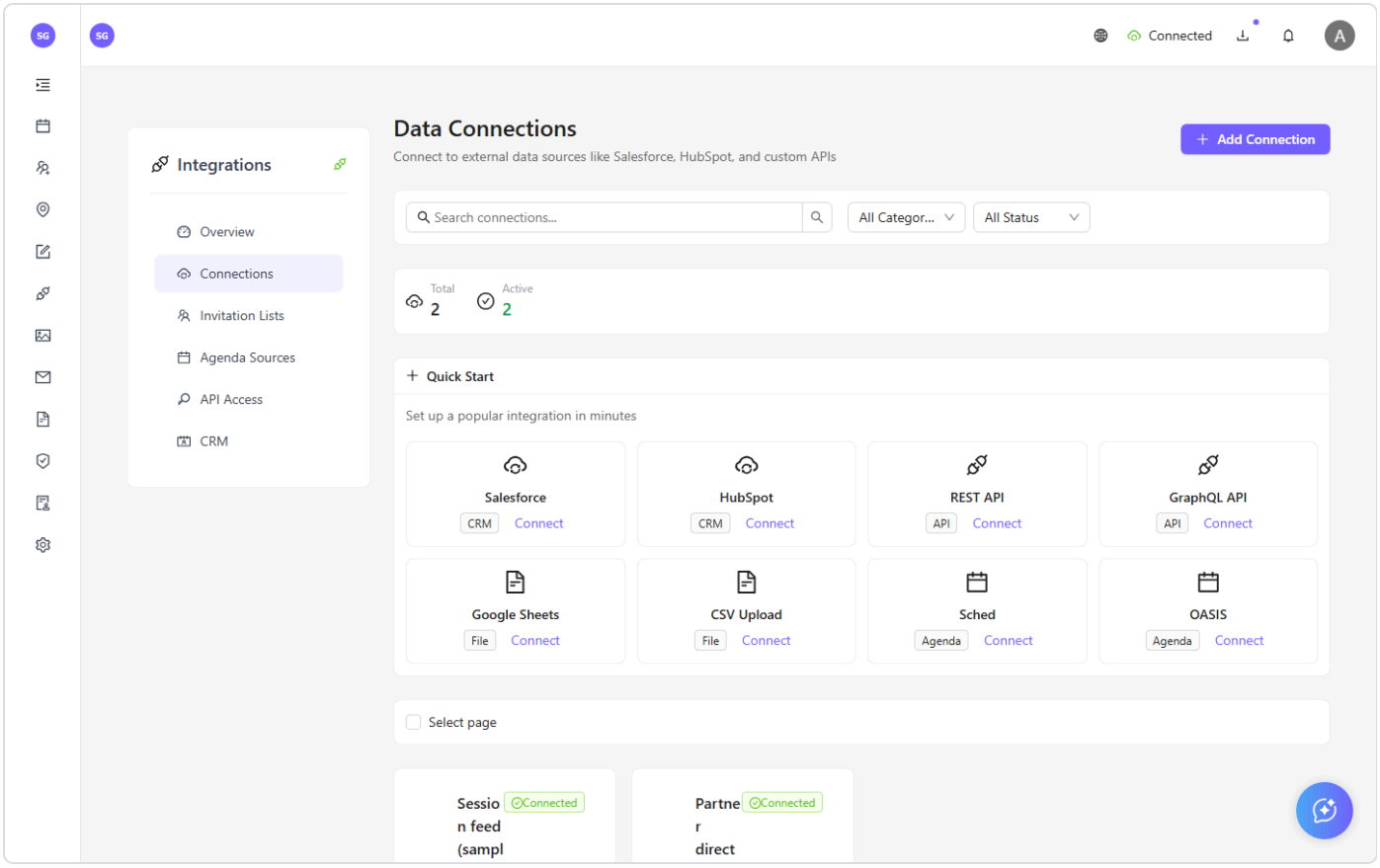
Each connection has its own page with **Sync Now** and **Disconnect** at the top, and tabs for **Overview**, **Field Mappings & Validation**, **Sync**, **History**, **Audit Log** and **Monitoring**.



A connection's page: status, record count, sync frequency, last sync and the connection details

1. Click **Sync Now** to start a sync. It runs in the background ("Sync started").
2. Open **History** to see each run with its status, record count and duration, and **Last Sync** on the Overview tab for the most recent one.
3. Use **Field Mappings & Validation** to decide which source fields fill which Signivent fields.

Disconnect asks for confirmation, then removes the connection from your list. Data already imported is kept.

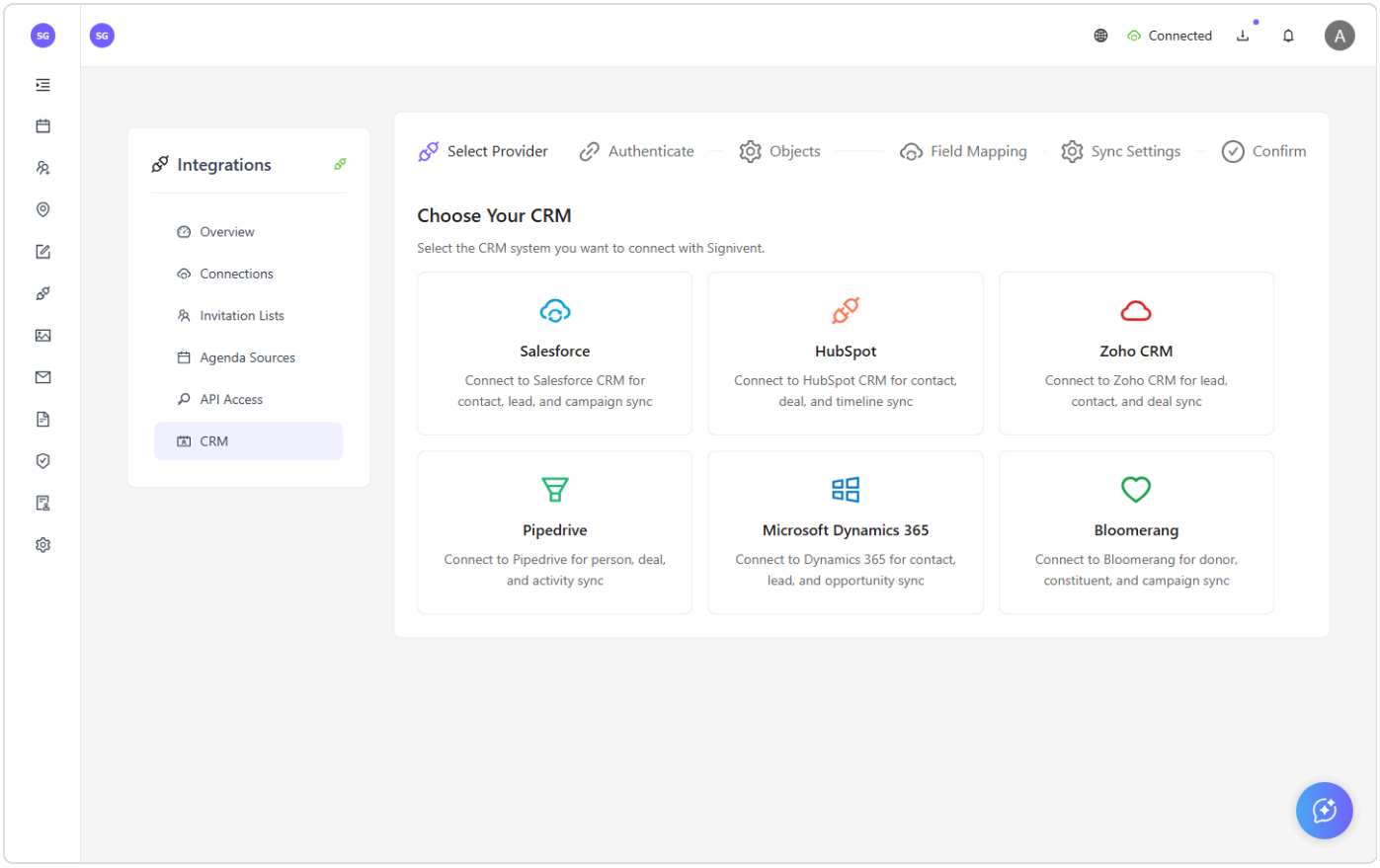


Data Connections: search and filters, totals, Quick Start tiles and your connections

Connect a CRM

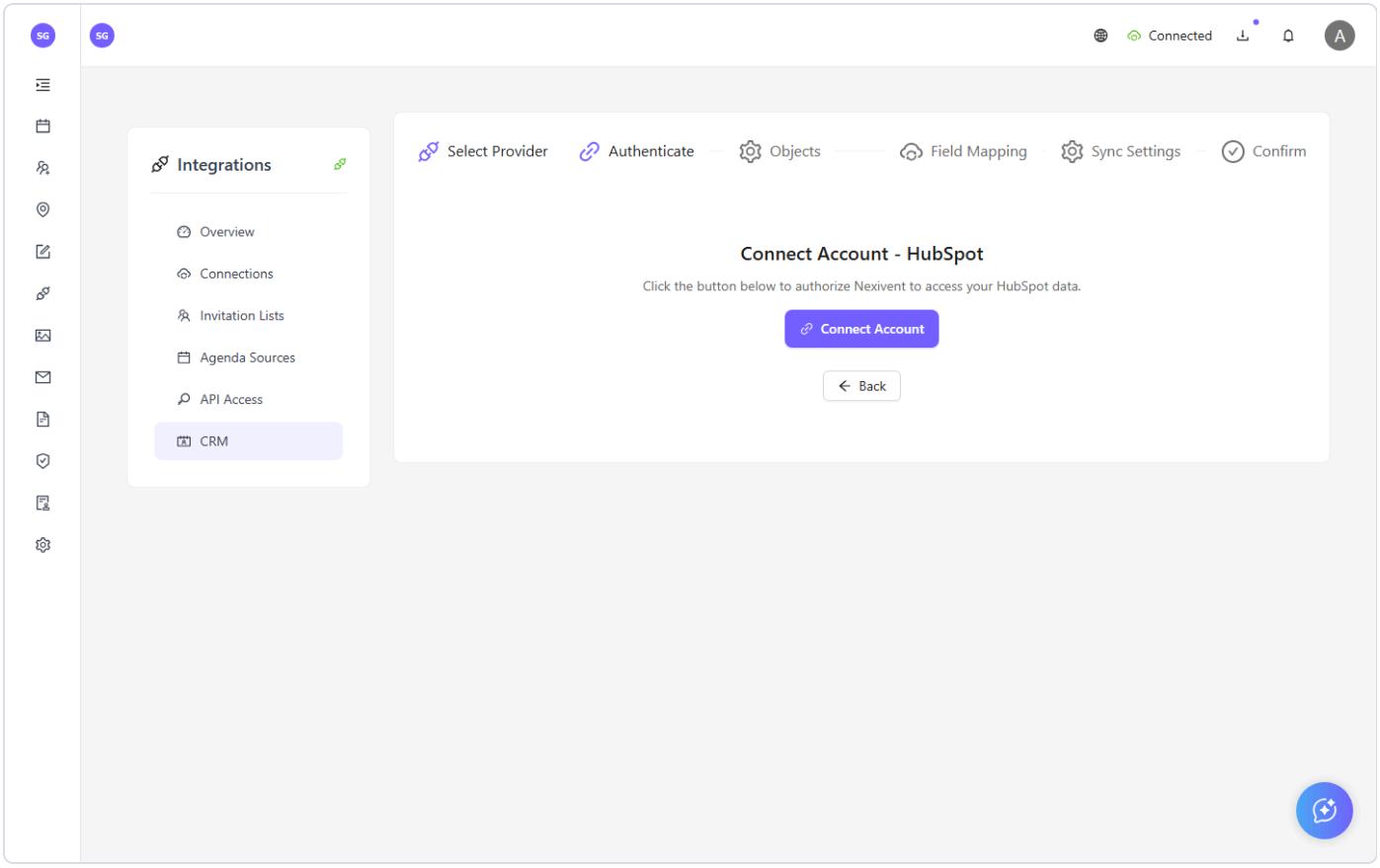
Integrations > **CRM** is the CRM hub. It walks through six steps: **Select Provider**, **Authenticate**, **Objects**, **Field Mapping**, **Sync Settings** and **Confirm**.

1. Choose your CRM: **Salesforce**, **HubSpot**, **Zoho CRM**, **Pipedrive**, **Microsoft Dynamics 365** or **Bloomerang**.



Choose Your CRM: Salesforce, HubSpot, Zoho CRM, Pipedrive, Microsoft Dynamics 365 and Bloomerang

2. Click **Connect Account** and sign in to the CRM to allow access.



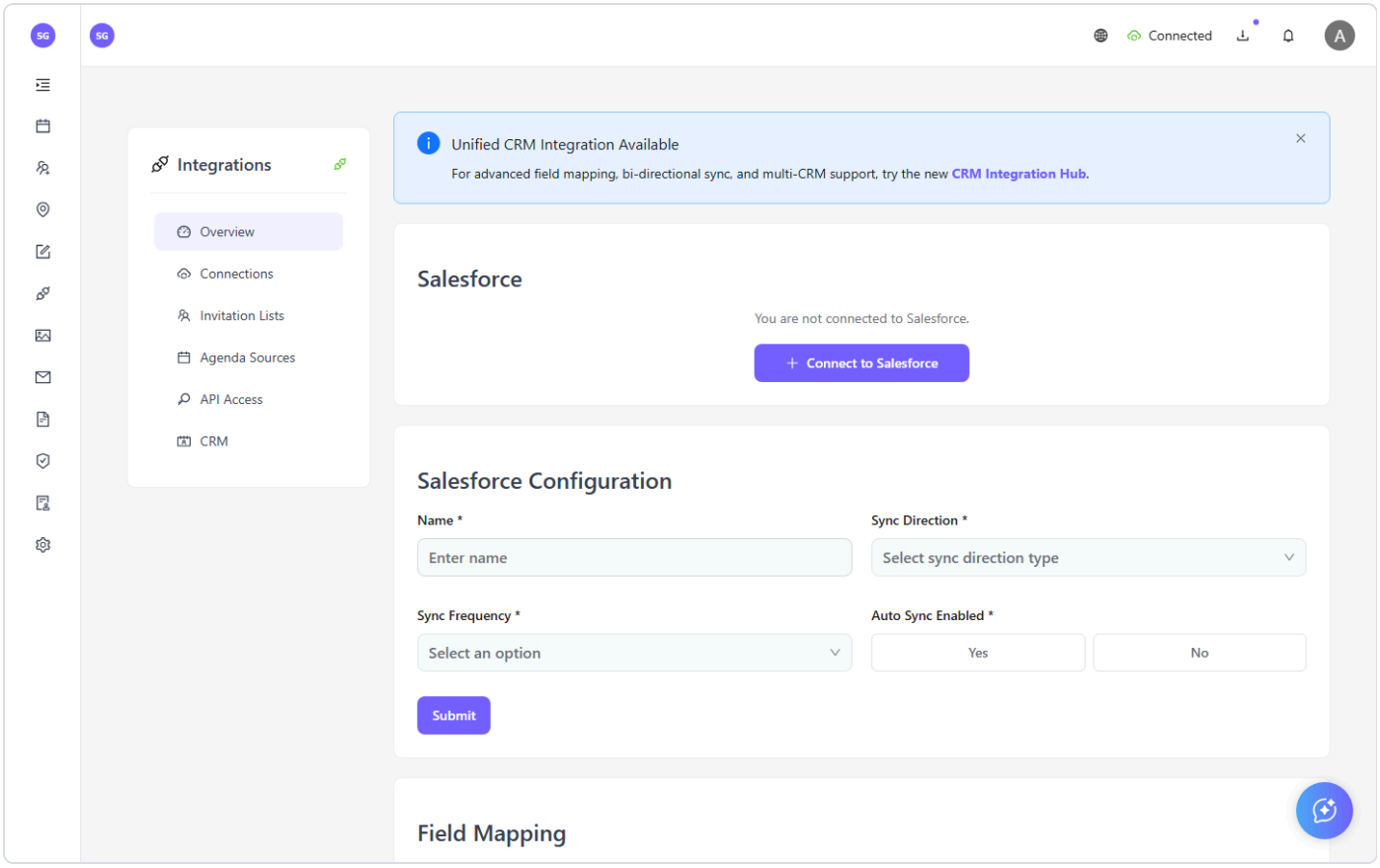
The Authenticate step for HubSpot with the Connect Account button

3. Pick the CRM objects to sync (for example contacts, leads or deals), map their fields, set how often and in which direction to sync, and confirm.

If sign-in for that CRM has not been set up on your Signivent site yet, Connect Account shows "Failed to initiate OAuth connection". Contact Signivent support.

The older Salesforce page

Integrations > **Salesforce** (at `/dashboard/integrations/salesforce`) is the original Salesforce setup: **Connect to Salesforce**, a **Salesforce Configuration** form (name, sync direction, sync frequency, auto sync) and object mappings. A banner on that page points to the CRM hub, which supports more CRMs, field mapping and two-way sync. Use the CRM hub for new set-ups.



The older Salesforce page with the banner pointing to the CRM Integration Hub

Who can do this

Organization admins can add, sync and disconnect connections.

Troubleshooting

You see	Why	Fix
"Failed to create connection"	Inbound Only or Outbound Only was chosen	Choose **Bidirectional** and create it again
"Failed to initiate OAuth connection: OAuth client ID not configured"	Sign-in for that CRM is not set up on your site	Contact Signivent support
A connection shows Pending after a failed sign-in	The attempt was recorded before the sign-in failed	Open it and click **Disconnect**
Last Sync stays at Never	No sync has finished yet	Click **Sync Now**, then check **History**