MergedAnalytics Integration – NutShell CRM

This document will outline the steps to integrate NutShell CRM with MergedAnalytics.

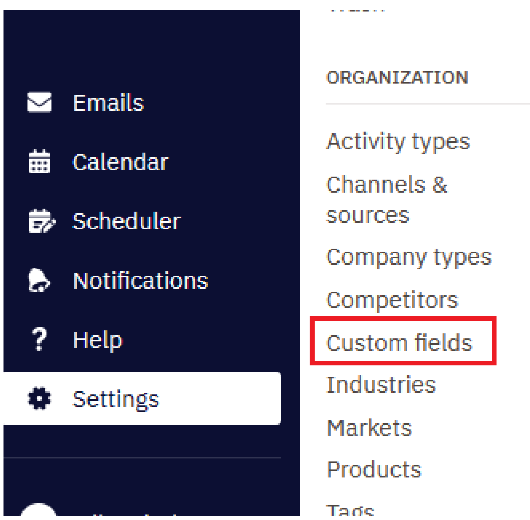
Important Notices about this integration:

1) Nutshell does not allow you to reference their Unique ID for a contact, thus you must create your own and populate it yourself (step 1 & 2)
2) It is possible that the contacts can be managed by the Nutshell API once it is more fully understood.

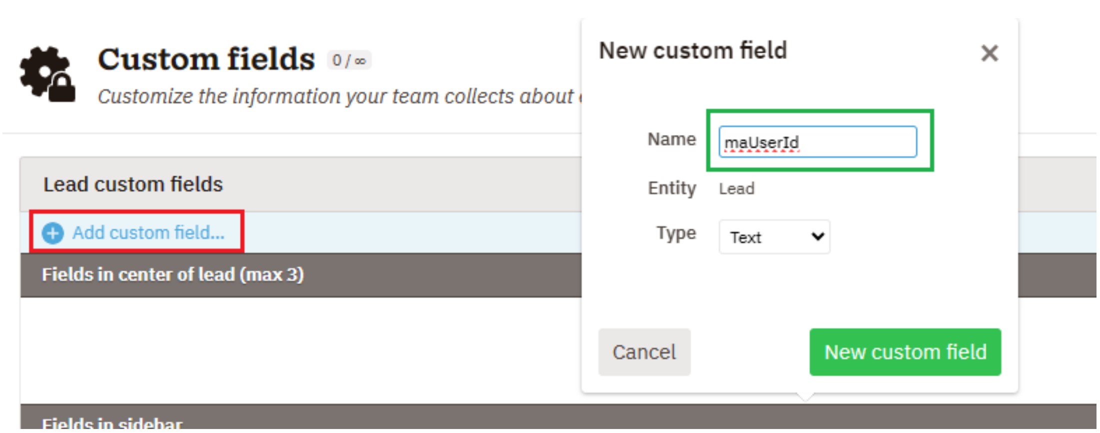
Step 1 – Creating a Unique ID Custom Field:

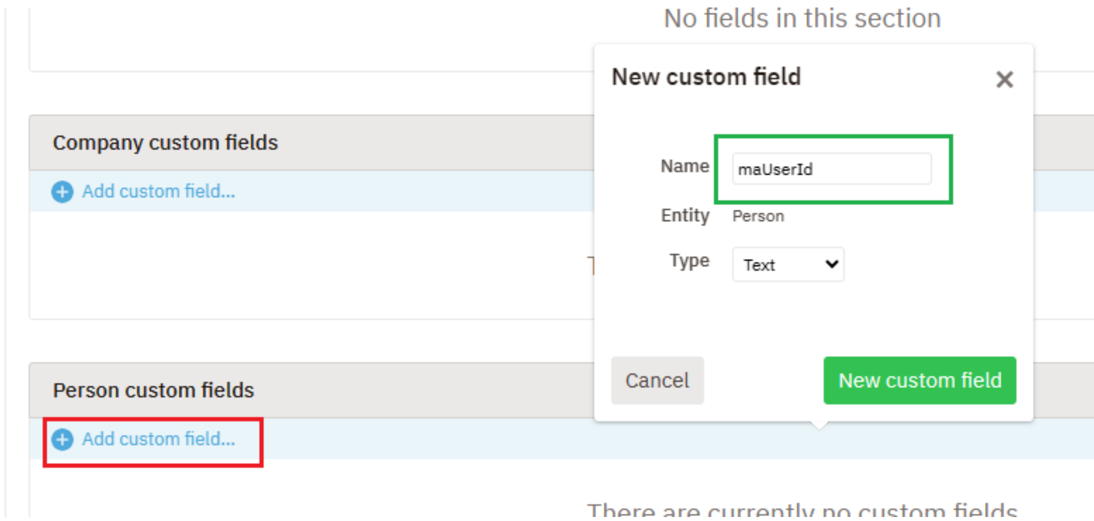
First thing, if you have not already done this, you must create a Custom Field for your contact lists that can be used as a Unique ID for your contacts. You can use the email field that is already a required field and exists for all contacts as it is unique, but that will potentially expose that data in links and is not recommended. To create a custom field to hold the new unique identifier do the following:

1) From within the Nutshell CRM go to “Settings” then under the “Organization” section, choose “Custom fields”

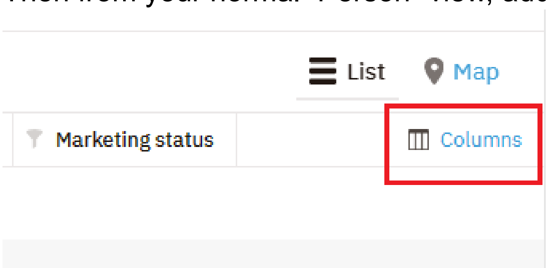


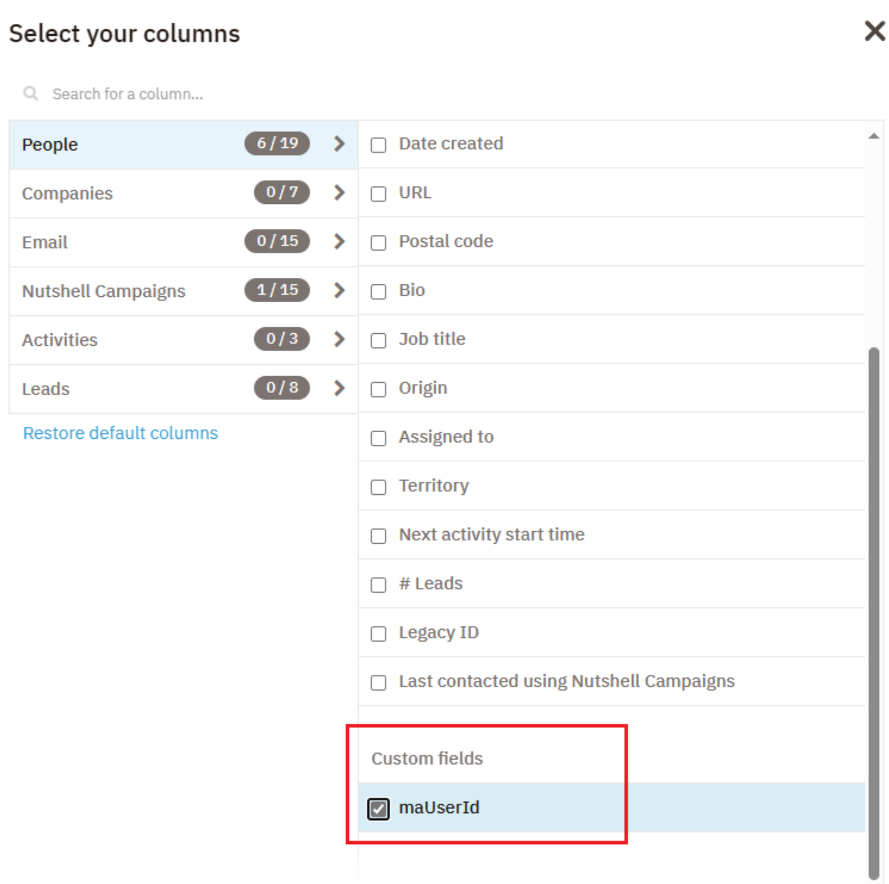
2) Depending on if you are doing this for “leads” or “contacts” (or both) you need to do what is shown in the images below. The first is for “leads” the second for “contacts” in both cases the goal is the same. Create a field distinguished for use with MergedAnalytics. While our preference for the name of the field is **MergedAnalyticsID**, we did use something different in the images – either is fine as long as the field exists, can be used **<u>and does not have any spaces in the name</u>**. Once you add a name (use Type of “Text”) click “New custom field” button.



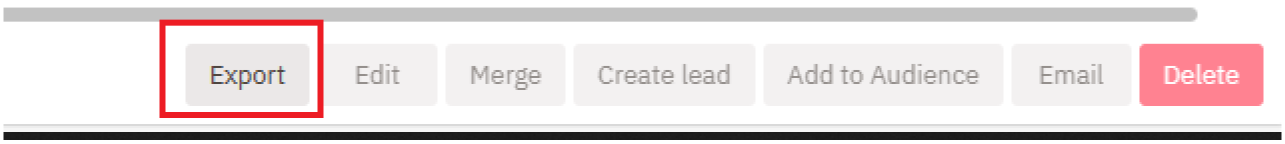


3) Then from your normal "Person" view, add this new column to the view so it can be exported.





4) Once the field is added to the view, use the “Export” button along the bottom of the screen to Export an Excel/CSV file to send to MergedAnalytics.



Step #2 – Send file to MergedAnalytics

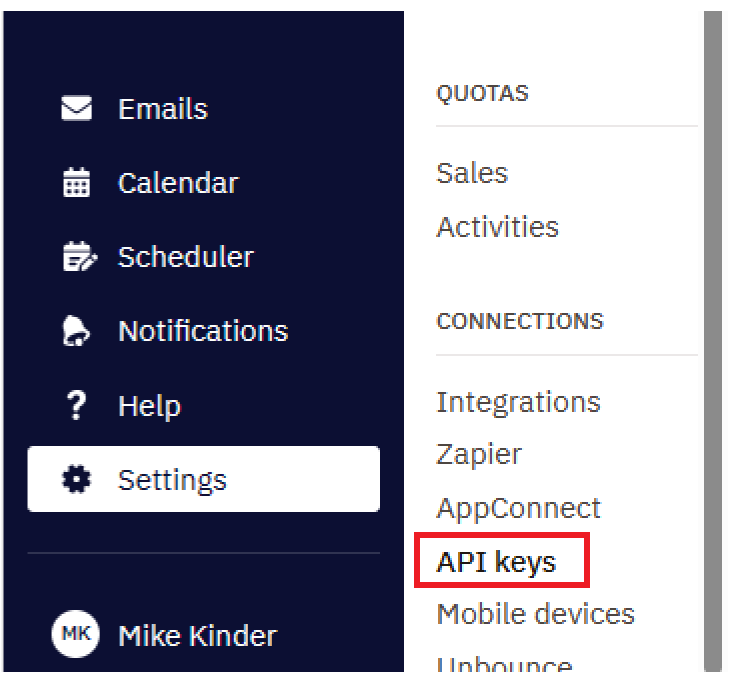
The file created from the Export should be sent to your MergedAnalytics rep. It will be processed on our end and a usable Unique ID will be assigned to the new custom field column for all the contacts in the export.

MergedAnalytics will send you a new export of the data, with the custom field data populated. You will then need to re-import the data into Nutshell CRM so the contacts will have the new value for the custom field.

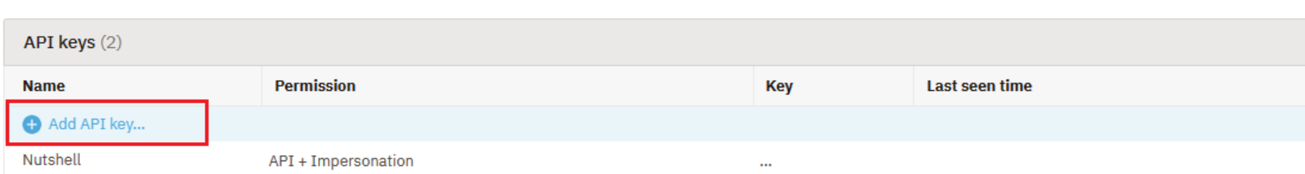
Step #3 – Getting an API Key setup

While not immediately needed, setting up a usable API key for your account that can be used as we improve our integration is a good idea. To request an API just do the following:

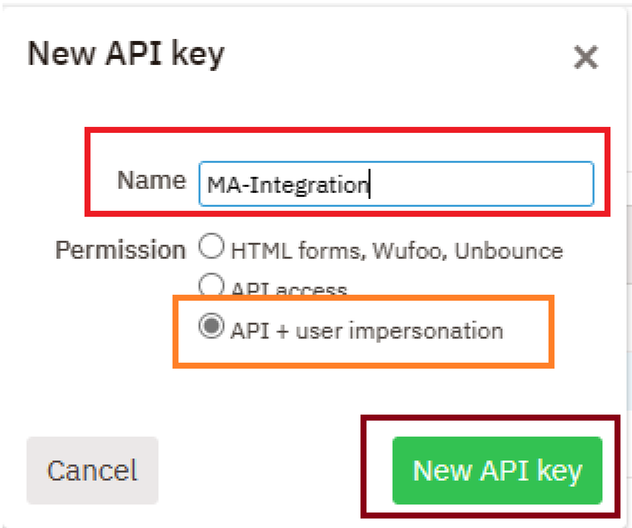
1) Go to “Settings” and in the “Connections” section you will see “API Keys”



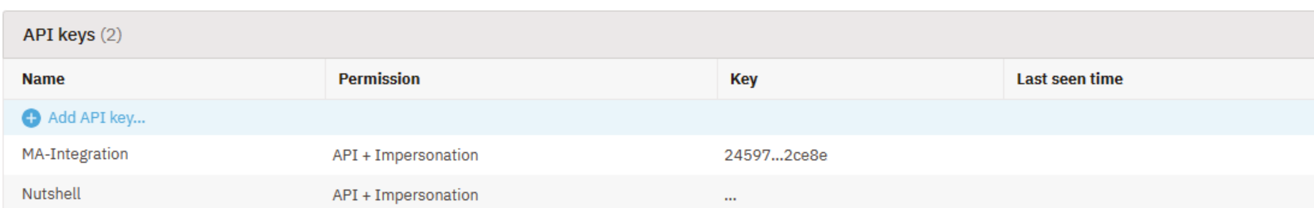
2) Next choose the “Add API key..” link as shown below



3) Next name your Key – suggest something that clearly shows it is for MergedAnalytics integration. Choose options as shown below.



4) Then you will see the new key listed. Double click where the "Key" is.



5) Then you should see the following. Highlight what is in the API Key box (CTRL+A once you click in the box) and copy it into memory (CTRL+C on keyboard). **NOTE: you can do these steps later when needed**