# **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.

Custom fields 0/ Customize the information your team collects about	New custo	om field	×	
	Name	maUserId		
Lead custom fields	Entity	Lead	-	
Add custom field	Туре	Text 🗸		
Fields in center of lead (max 3)				
	Cancel	New custo	om field	
Fields in sidebar				

	No fields in this section
	New custom field 🛛 🗙
Company custom fields	Name maUserId Entity Person Type Text V
Person custom fields	Cancel New custom field
Vau custom neta	

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

	E List	🖗 Мар
Marketing status		🛄 Columns

#### Select your columns

Q. Search for a column...

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People	6/19	>	Date created
Companies	0/7	>	URL
Email	0/15	>	Postal code
Nutshell Campaigns	1/15	>	🗌 Bio

0/3

Leads		0/8

Restore default columns

Activities

>	Bio
>	🗋 Job title
>	🗌 Origin
	Assigned to
	Territory
	Next activity start time
	Legacy ID
	Last contacted using Nutshell Campaigns
ſ	Custom fields
	🔽 maUserId

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

API keys (2)				
Name	Permission	Кеу	Last seen time	
🕀 Add API key				
Nutshell	API + Impersonation			

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

New	API key	×
	Name MA-Integration	
Pei		
	API + user impersonation	
Car	cel New API key	

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

API keys (2)				
Name	Permission	Кеу	Last seen time	
🚯 Add API key				
MA-Integration	API + Impersonation	245972ce8e		
Nutshell	API + Impersonation			

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** 

