

CRM Sync

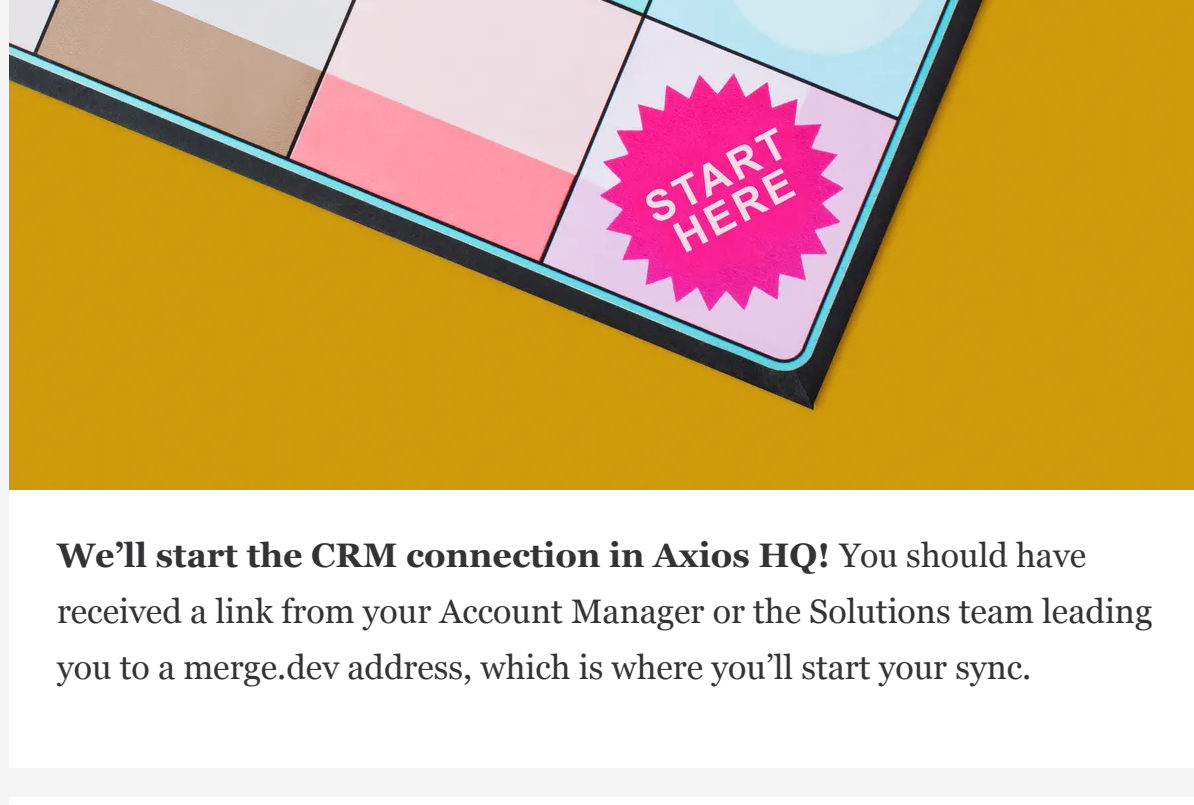
By Axios HQ Solutions • Dec 14, 2023

Smart Brevity® count: 2 mins...490 words

What's new: Axios HQ now supports syncing our users' CRM contacts to the platform in HQ!

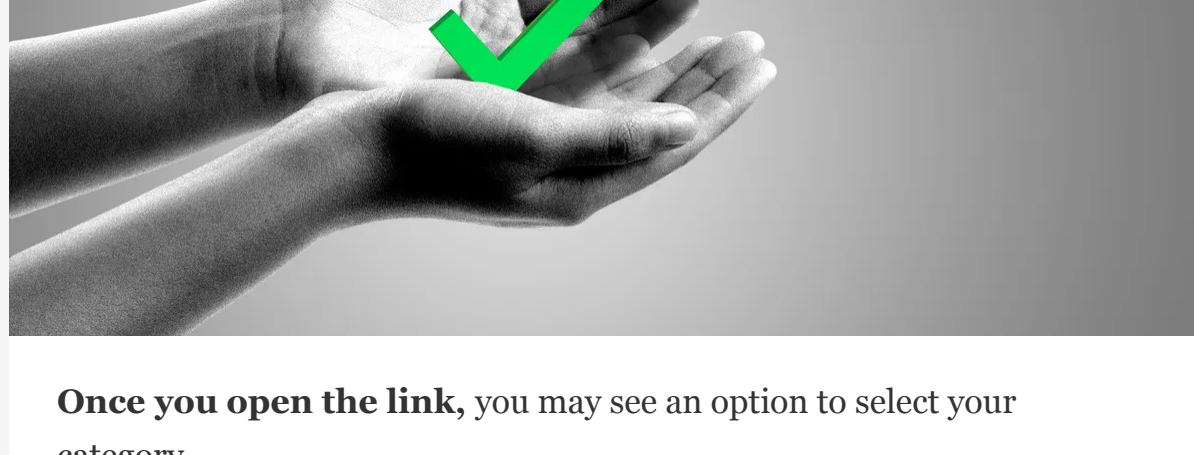
Currently, Axios HQ supports Hubspot and Salesforce connections. Interested in a different CRM? Let us know!

1. Connect Salesforce to Merge.dev



We'll start the CRM connection in Axios HQ! You should have received a link from your Account Manager or the Solutions team leading you to a merge.dev address, which is where you'll start your sync.

2. Authenticate Salesforce



Once you open the link, you may see an option to select your category.

- If so, select "Customer Relationship Management," and under "Select Integration" choose **Salesforce**.

How would you like to authenticate?

I want to use my Salesforce credentials.
(Recommended)

I want to integrate with my Salesforce Security Token
and Organization ID.

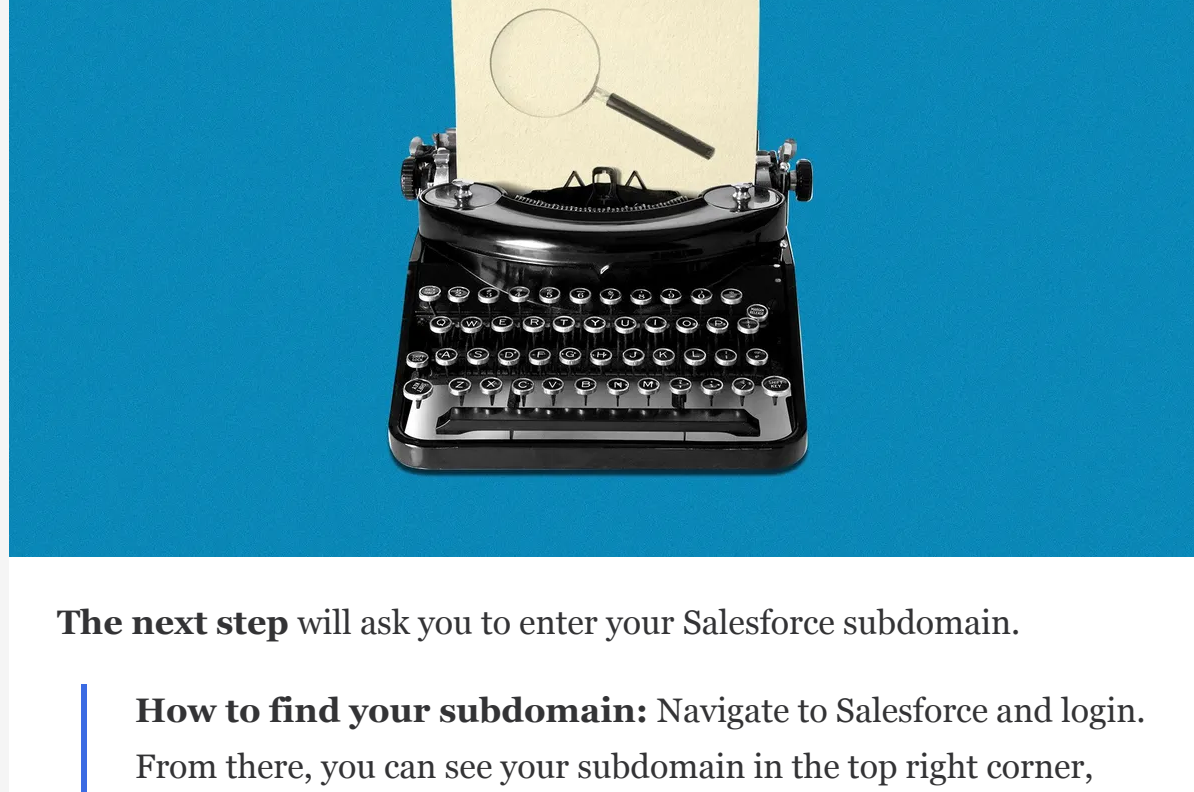
It will ask: How would you like to authenticate?

- Select "I want to use my Salesforce credentials. (Recommended)"
- Click **Next**.

Merge will list the read data Axios HQ is requesting access to.

- Review, and then click **Continue**.

3. Enter your Salesforce subdomain



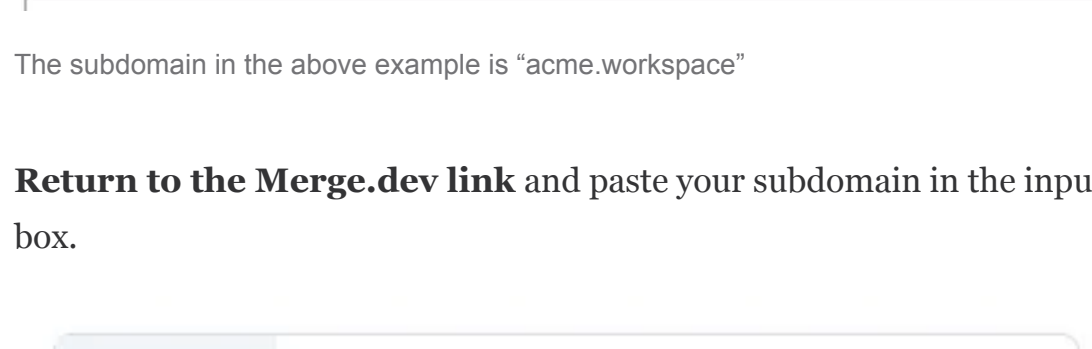
The next step will ask you to enter your Salesforce subdomain.

How to find your subdomain: Navigate to Salesforce and login.

From there, you can see your subdomain in the top right corner, under your profile.

Click the icon in the top right to open the menu and see your Salesforce name and domain. Copy everything before

"my.salesforce.com"



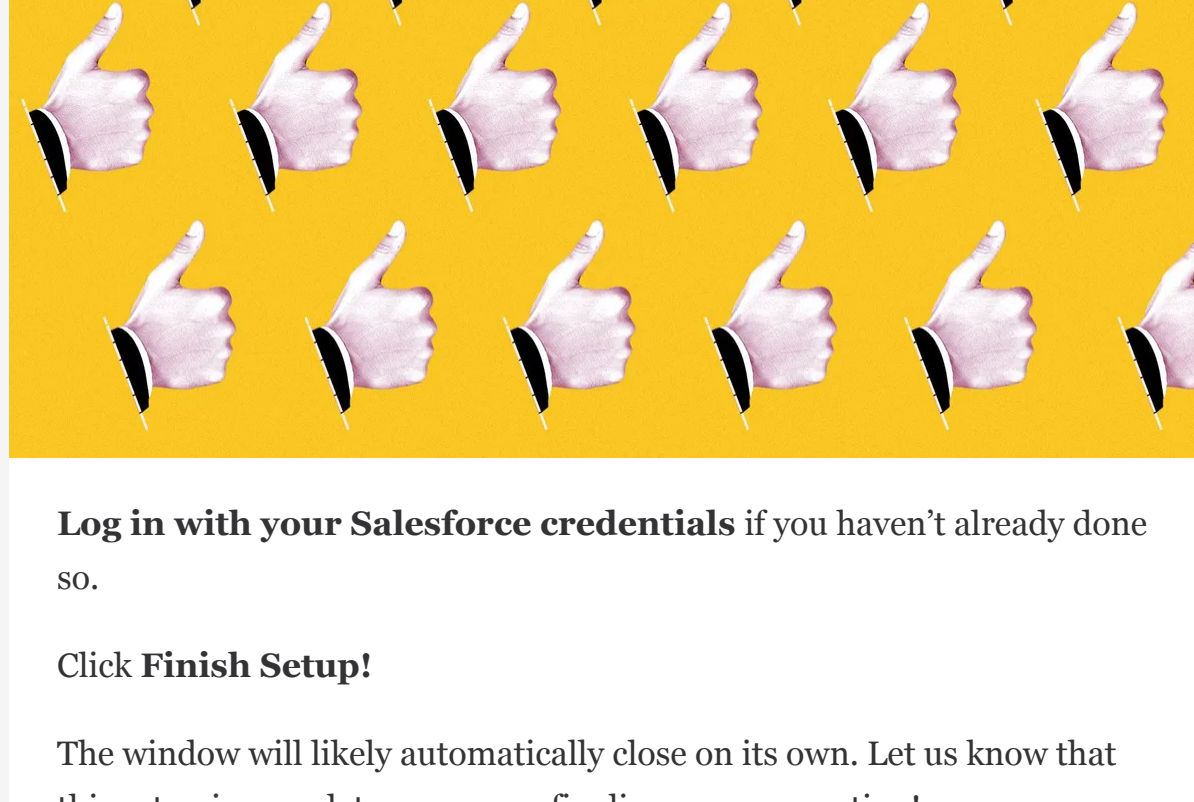
The subdomain in the above example is "acme.workspace"

Return to the Merge.dev link and paste your subdomain in the input box.

https:// .my.salesfor...

Paste your subdomain here! In the example, we would paste "acme.workspace".

4. Complete the setup



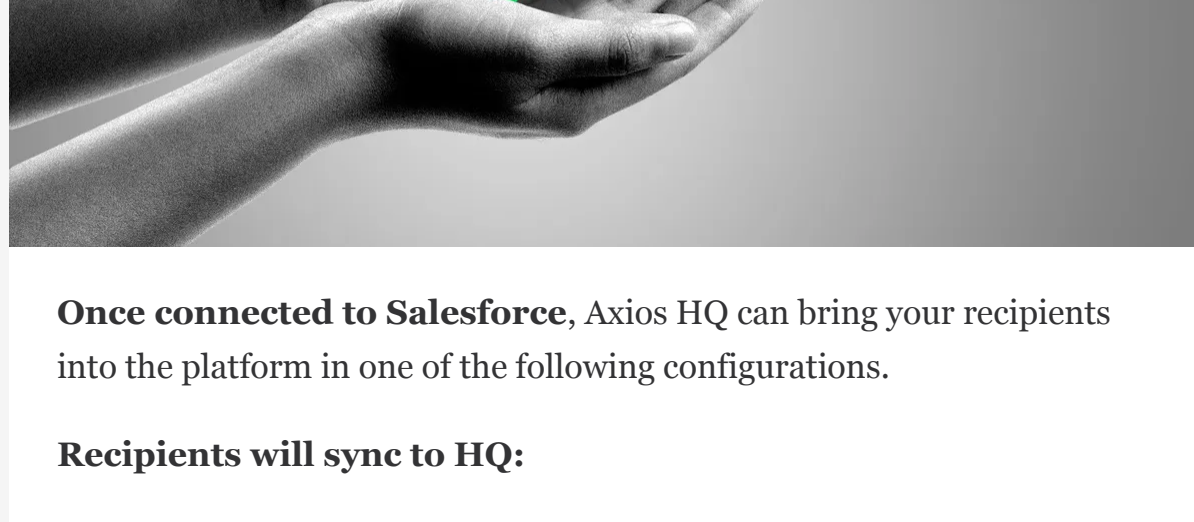
Log in with your Salesforce credentials if you haven't already done so.

Click **Finish Setup!**

The window will likely automatically close on its own. Let us know that this setup is complete, so we can finalize your connection!

🎉 **Congrats,** you have successfully created the application that will sync to HQ!

5. Your Salesforce configuration



Once connected to Salesforce, Axios HQ can bring your recipients into the platform in one of the following configurations.

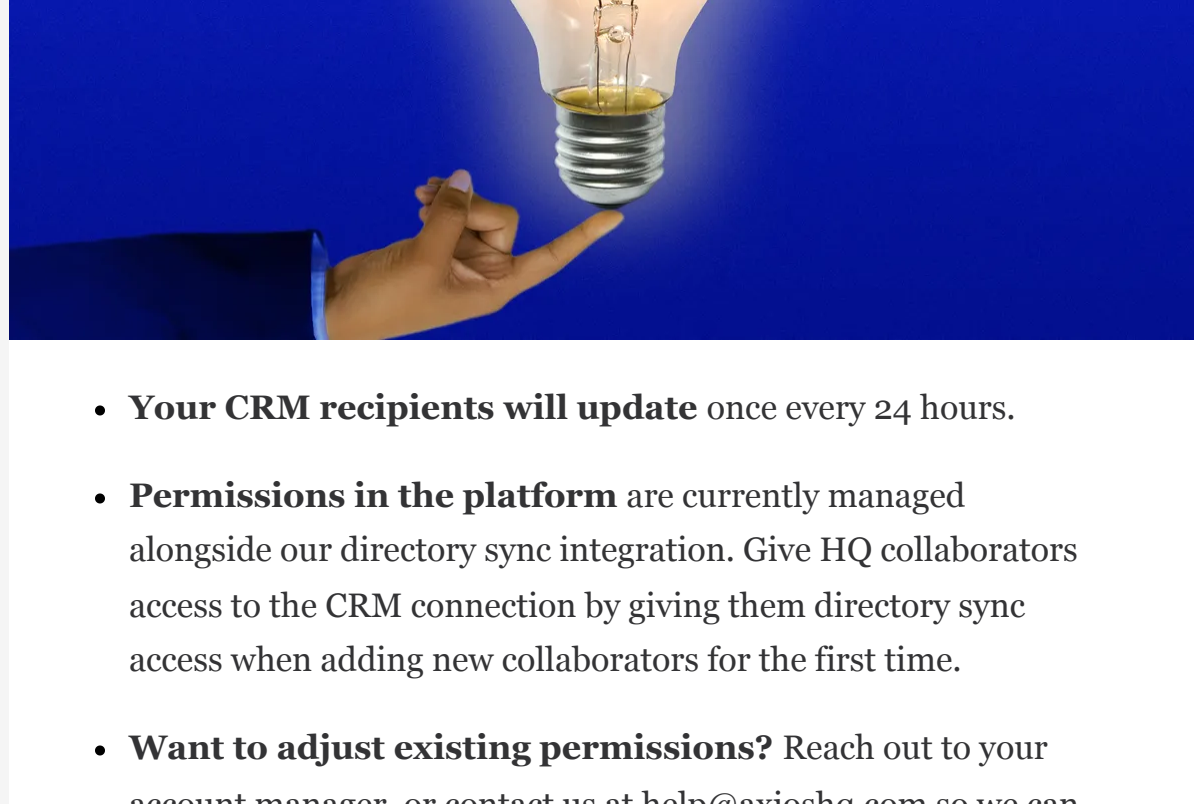
Recipients will sync to HQ:

- As individuals, unaffiliated with a group (**All Contacts**)
- In segments based on the company they are part of (**All Companies**)
- In segments based on their industry (**All Industries**)
- In segments based on your custom lists, developed in your CRM (**All Contact Lists**)

Once these groups are synced to the platform, you can leverage any of the available segments or individuals you'd like in order to craft your audience!

Let us know how you'd like to organize your contacts and we'll be sure to set up your sync accordingly!

⚠️ Keep in mind



- **Your CRM recipients will update** once every 24 hours.
- **Permissions in the platform** are currently managed alongside our directory sync integration. Give HQ collaborators access to the CRM connection by giving them directory sync access when adding new collaborators for the first time.
- **Want to adjust existing permissions?** Reach out to your account manager, or contact us at help@axioshq.com so we can help get your team where they need to be!

Axios HQ partners with hundreds of clients, Fortune 500 companies, and small nonprofits alike. We have a dedicated security specialist on staff and have completed a SOC2 Type 2 audit.

Feedback

Anonymously tell us what you thought of this edition. Your responses will help us create better content for you!

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AXIOS HQ

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