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Effortlessly Sync User Data with Your External CRM

2025-01-17 - Lara Proud - Sylwadau (0) - Product (Admin)

With CRM Sync, administrators can now effortlessly synchronize user data with third-party systems and Salesforce during key lifecycle events like creation, updates, and deletion. Available on Professional and Enterprise, this feature ensures your records are always accurate and up-to-date, reducing manual entry and minimizing errors.

New Salesforc	e Sync o 3rd party platform when users o	created in Deskoro			salesforce
Setup Guide	o siù party plationn when users c	created in Deskpro.			
Setup Field Ma	oping Logs				
Setup					
Friendly Na	ne o you can distinguish your Salesfo	orce syncs.			
Authentication					
	e with Salesforce				
	sforce Sync please sign in to you ermission to perform necessary a		Please ensure your	agent	
→ Authent	icate				
Save	nc CRM	Discard	Changes	elete	

Enjoy seamless management of contact information and custom field data (excluding File custom fields), keeping your system aligned and enhancing your business intelligence. Elevate your customer relationship management with this streamlined and efficient solution.

To sync your Deskpro account with Salesforce, check out the <u>Salesforce Sync</u> guide. Or to use a 3rd party CRM, check out the <u>Webhook CRM Sync</u> guide.