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Effortlessly Sync User Data with Your External CRM

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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 Salesforce Sync Automatically sync to 3rd party platform when users created in Deskpro.
Setup Guide
Setup Field Mapping Logs
Setup
Friendly Name Set a name so you can distinguish your Salesforce syncs.
Authentication
Authenticate with Salesforce To setup Salesforce Sync please sign in to your Salesforce Account. Please ensure your agent profile have permission to perform necessary actions. → Authenticate
Save Sync CRM Discard Changes Delete

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.