



Overview

CRM Data is a critical source of Data that the Fullpath CDXP utilizes across various marketing and sales solutions in order to connect and enhance interactions and customer engagements as well as populate the Fullpath Data Lake.

Connecting your CRM to the CDXP

In order to sync Fullpath CDXP with Momentum, as the customer, we will need you to reach out to your Momentum representative to request the following:

1. A Daily SFTP be set up and sent to Fullpath.
2. A one-time, bulk historical extract be sent to Fullpath.

Before you contact Momentum, your Implementation Manager will provide you with the Fullpath API Key. Momentum will need this API Key to fulfill the request. For convenience, we've provided an email template below that you can copy/paste when it's time to contact the CRM.

Email Template

To: **Your Momentum CRM Representative** Cc: **Your Fullpath Implementation Manager**

Hello **Name**,

I am reaching out to request that you send the following data for Fullpath's SFTP:

- An automated daily export that includes the past 30-days of leads, sales, service ROs, and appointments.
- A bulk, historical extract of the same data, going back 10 years.

Please use the following API Keys and Conventions for each file and each store. It is critical for the files to be named exactly as instructed so they will be processed properly.

- **<Fullpath API Key>_<file Type>__<upload timestamp>**
 - *Note the double underscore before the upload timestamp.*
- File Type Names:
 - Prospects
 - Sales
 - Appointments
 - ServiceRos

I have copied a member of the Fullpath team on this message if you have any further questions.

Thank you,
Your Name

Permissions and Reports

Due to the nature of the integration with Momentum, Fullpath does not require any special permissions to receive the CRM data. Momentum will provide a daily feed of the following data-points, which will then be integrated with the CDXP:

- Leads
- Sales
- Appointments
- Service ROs

Time to Completion

We endeavor to complete the CRM Link setup within 3 business days. This, however, is dependent on the timing and cooperation of Momentum, as we are dependent on their data to configure the CRM Link with the CDXP.