Base CRM API Provider Setup

Last Modified on 11/05/2018 1:01 pm EST

Endpoint Setup

Log in to your Base CRM profile at https://app.futuresimple.com/sales. 1. Click your profile pic in the top right

1. Select "Settings"

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Dashboard		
() This is your dashboard, an overview o Get a few quick stats, review the global activiti	the general state of your account. es on the account, and act quickly with your upcoming tasks and top deals.	Settings Manage Account
total PIPELINE WORTH \$0 \$0 Forecasted	Displaying all activity * by everyone * Support Team added by 10/11/2015 10:52 A	Manage Repository TASKS Down at https: crm/full- Impo Tweet
ACTIVE DEALS	Base CRM added by 10/11/2015 10:52 A	M https://c /imports
6 0 Hot	Claude Elements left a note for Website Redesign (sample deal) 10/11/2015 10:52 A This is a note. Use notes to enter updates about a call, a meeting, or a conversation you had with a contact. Notes are helpful by keeping a history of your	M TOP DEA O Privacy Policy Support T Websit: 0 Terms of Service
0 Won 0 Lost 0 Unqualified	communications with a contact or deal. Website Redesign (sample deal) (\$0) added by Claude Elements 10/11/2015 10:52 A	S0 (+ Logout

- 2. Select OAuth
- 3. Under "Developer Apps"
- 4. Select "Add Developer App"

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Settings				
of PREFERENCES Manage Account Manage Users Profile	OAuth2 Settings Setup OAuth2 access control Access Tokens Authorized apps Developer apps			
Import OAuth	Developer Apps are applications that you create to allow yourself a	and others to connect you	ur application to Base.	
UPGRADE Plans and Pricing CUSTOMIZE	+ Add Developer App			
Leads Contacts Prospects and Customers Deals Products Goals Automated Actions				

- 5. Name the app
- 6. Input "Redirect URL"
- 7. Select "Save"

		Add Application
Leads	6 Name	Test App
Contacts		Name of the application
Prospects and Customers		warne of the application.
Deals	Description	connected app
Products		
Goals		Add an explanation what you application does. It will be displayed on the authorize page.
Automated Actions		
F TOOLS	Website	http://www.mycoolapp.com
Integrations		Add a url to your website. We will automatically add a link on the authorize page.
Calendars		
Email	Redirect URL	https://www.mycoolapp.com/auth
Voice and Text		Add an OAuth2 callback url. It must be an SSL url.
Scoring		
Client Space	Logo URL	
Lead Capture Form		Add an URL to your logo. We will display your logo on the authorize page.
Export	Terms of equilat UDI	
C Surrent	Terms of service URL	
sa support		Add an URL to your terms of service. We will automatically add a link to it on the authorize page.
		Paula Cappel
	•	Save

- 8. Under OAuth > Developer Apps: Select "Details" under the newly created app.
- 9. Copy the "Client ID" and "Client Secret" as they will be needed to provision a Base CRM connector

of PREFERENCES Manage Account Manage Users	OAuth2 Settings Setup OAuth2 access control
Profile	Access Tokens Authorized apps Developer apps
Import	
OAuth	Developer Apps are applications that you create to allow yourself and others to connect your application to Base.
UPGRADE	
Plans and Pricing	Test App 9 Details Edit 🗑
CUSTOMIZE	connected app
Leads	
Contacts	Details
Prospects and Customers	
Deals	Description connected app
Products	
Goals	Logo
Automated Actions	Website http://www.mycoolapp.com
F TOOLS	Torm of control to the second s
Integrations	ientis di service
Calendars	Redirect URL https://www.mycoolapp.com/auth
Email	
Voice and Text	Credentiala
Scoring	Gredenuais
Client Space	
Lead Capture Form	Endpoint https://api.getbase.com
Export	Client ID
Or Support	Client secret Begenerate