

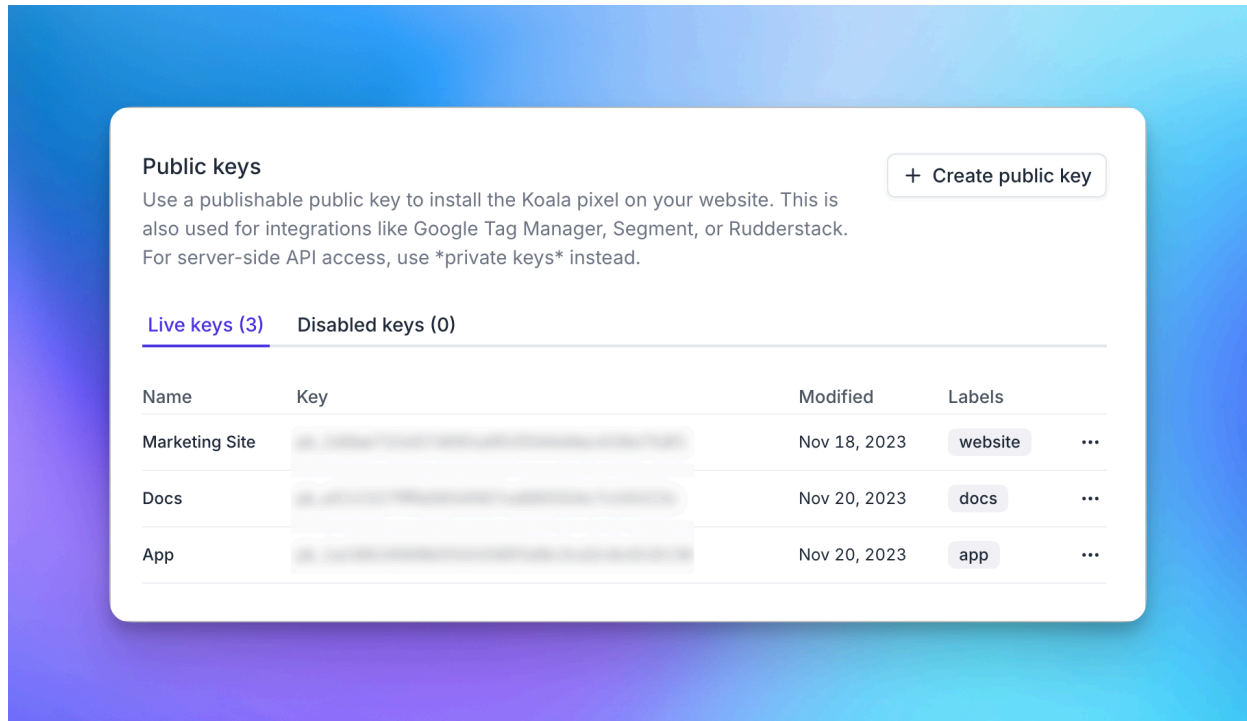
Hightouch + Koala Setup

This is a guide on how to set up Hightouch to reverse ETL data into Koala.

The setup can be achieved by using Hightouch's HTTP Request destination to map your Models to HTTP Requests that are sent to the Koala API.

Koala Setup

- All data must be sent into Koala as discrete events, or traits.
- For Visitor operations (Track Events, or Identify calls): Each Hightouch > Koala API call **must** include an **email** or **profile_id** identifier, so Koala can match the information to an existing Visitor profile.
 - The Hightouch > Koala integration only supports visitor data that has been identified via **email**, or via an **existing profile_id**, otherwise Koala will be unable to tie the information back to the user.
 - [Advanced] Existing profile_ids can be captured from the Koala cookie that is available in the browser.
- For Visitor operations (Account Identify): Each Hightouch > Koala API call **must** include a **company domain**, so Koala can tie the company information to a company.
- We recommend that you create a new Public API Key that is tied to Hightouch. That makes it easier for Koala to disambiguate the source of a request, as well as better optimize rate limits for your workspace.
 - You can create a new Public API Key on <https://app.getkoala.com/goto/settings/install>



Hightouch Setup

You'll connect your Hightouch model to Koala via the HTTP Request Destination.

Create your Destination

The HTTP Request Destination will allow you to send data from your Hightouch models to Koala using Koala's ingest API.

1. Create a new HTTP Request destination

Create destination - Hightouch x +

app.hightouch.com/koala-test-t9sv7/destinations/new

Create destination — Select destination — Connect destination — ● Finalize destination Exit

Finalize settings for this destination

Destination name
Including details about the destination's business purpose and owners

Koala HTTP Endpoint

> Advanced configuration (optional)

Go back Finish

2. Add the Koala tracking endpoint to your new Destination.

- Select "Basic Auth" as the Authentication method
- Enter the Base url: https://api.getkoala.com/web/projects/<your_public_key>
- Make sure to add your new Public Key to the URL

The screenshot shows a web browser window with the URL `app.hightouch.com/koala-test-t9sv7/destinations/new`. The page title is "Create destination - Hightouch". At the top, there's a progress bar with three steps: "Select destination" (checked), "Connect destination" (active), and "Finalize destination" (disabled). An "Exit" button is in the top right.

The main heading is "Connect to HTTP Request". Under "Authentication method", "Basic Auth" is selected with a radio button, and "OAuth" is unselected. An information box states: "Endpoints and payloads are defined later during sync configuration. This form only collects information about your base URL, HTTP headers, and certificates. Specific endpoints, payloads, rate limits, and other logic are configured during a later step."

The "Base URL" section explains it's the consistent part of the API endpoint. A text input field contains the URL: `https://api.getkoala.com/web/projects/pk_25c953a2fa106dc293619f2a8d7e13cc`.

The "HTTP headers" section has a "Key" input field, a "Secret" toggle (checked), and an "Add key" button. Below are two more toggles: "Use custom CA certificate" and "Use custom SSL/TLS certificate", both currently unchecked.

On the right side, there are links for "Read our docs", "Invite a teammate", and "Contact support".

At the bottom, there are three buttons: "Go back", "Test connection", and "Continue" (with a right arrow). A green circular icon with a white envelope is in the bottom right corner.

Next, we'll create a Sync, which will allow you to send data from your Model to the Koala ingest API.

Create a new Sync

1. Start by creating a sync from your Model to the newly created Destination

- Select **Rows added**, if you would like to send discrete Events over to Koala. i.e. if you want to see specific point in time events from a Visitor reflected in Koala.
- Select both **Rows added**, and **Rows modified** if you would like to send Traits to Koala via identify calls. i.e. if you want the state of an Account or Visitor record to be reflected in Koala.

2. Fill out the specific configuration for your Sync:

- Select **Single Row**
- Choose **POST** as the HTTP method
- Make sure to add the HTTP endpoint you'd like to use:
 - Choose **batch** if you'd like to send Visitor data
 - Choose **accounts/batch** if you'd like to send Account data

The screenshot shows the 'Configure sync' step in the Hightouch interface. The breadcrumb trail at the top is 'New sync' > 'Select model' > 'Select destination' > 'Configure sync' > 'Finalize sync'. The main heading is 'Configure sync to Koala HTTP Endpoint'. On the left, there are three sections: 'Batching' with a 'Rows added' status bar, 'Specify your webhook endpoint', and 'Which HTTP request method should be used?'. The 'Batching' section has a 'Batching' title and a description. It asks 'How many rows should be included in each HTTP request?' and provides a note about batching. Two options are shown: 'A single row' (selected) and 'A batch of multiple rows'. The 'Specify your webhook endpoint' section asks 'Tell us how to send HTTP requests to your internal system, third-party API, or other web service.' The 'Which HTTP request method should be used?' section has five radio button options: 'GET', 'POST' (selected), 'PUT', 'PATCH', and 'DELETE'. The 'What is the URL?' section has a description and a text input field containing 'https://api.getkoala.com/web/projects/pk_25c953...' with a 'batch' button next to it. On the right, there is an 'Edit as JSON' button and a 'Read our docs' link. At the bottom, there are 'Go back' and 'Continue' buttons.

3. [Important] Customize your payload

It's important that you map your Model fields to properties in the payload that will be sent to Koala.

For this step, select the following:

- Choose **JSON** as the payload format
- Then **Use multiple columns from model**
- Then **Sync specific columns**

In this step, you'll choose which columns from your model should be mapped to Koala.

Mapping Visitor Events

For visitors events, you should map the following fields:

- **Email:** You must pass an email field into the payload, or Koala won't be able to map the data from your Model into an existing Visitor in Koala.
- **Event:** You must pass the name of the event that will be displayed in Koala, e.g. "Check out form clicked", "UTM recorded", etc.


The destination key should be named `event.event`

- **[optional]: Properties:** You can provide optional properties for your event under the `'event.properties'` key in your mappings.

Which columns do you want to include in the payload?
Configure how the columns in your query results should be mapped as key/value pairs in JSON.

☐ Use all columns (columns will be mapped to keys with the same name)
☒ Sync specific columns

| UTM Data | | Destination field | |
|----------------|---|-----------------------------|---|
| email | → | email | × |
| My Koala Event | → | event.event | × |
| utm_source | → | event.properties.utm_source | × |
| utm_medium | → | event.properties.utm_medium | × |

Add mapping 

Mapping Visitor Traits

For visitors traits, you should map the following fields:

- **Email:** You must pass an email field into the payload, or Koala won't be able to map the data from your Model into an existing Visitor in Koala.
- **Identify.Traits:** You must also pass any traits that you'd like to tie to the specific email in question.


Which columns do you want to include in the payload?

Configure how the columns in your query results should be mapped as key/value pairs in JSON.

☐ Use all columns (columns will be mapped to keys with the same name)

☒ Sync specific columns

| UTM Data | Refresh | | Destination field | |
|------------|---------|---|----------------------------|---|
| email | | → | email | × |
| utm_source | | → | identify.traits.utm_source | × |
| utm_medium | | → | identify.traits.utm_medium | × |

Add mapping 

Mapping Account Traits

1. Set the URL path to `accounts/batch`

What is the URL?

If needed, you may inject variables using the [Liquid template language](#). See [docs](#) for examples. Here you only define the path that should be appended to the base URL provided during destination setup. If your base URL is the full URL (i.e., no additional path necessary), you may enter `/` here or leave this section empty.

`https://api.getkoala.com/web/projects/pk_25c953...` `accounts/batch`

2. Define you mappings:

- **Domain:** You must pass a domain field into the payload that maps the company to an Account in Koala.
- **Identify.Traits:** You must also pass any traits that you'd like to tie to the specific domain in question.

Which columns do you want to include in the payload?

Configure how the columns in your query results should be mapped as key/value pairs in JSON.

- ☐ Use all columns (columns will be mapped to keys with the same name)
- ☒ Sync specific columns



UTM Data

Refresh



Destination field



account_domain



domain



utm_campaign



identifies.traits.utm_campaign



utm_source



identifies.traits.utm_source



Add mapping

