Pipedrive Leads to Mria CRM

Jira Automation · https://mriacrm.com/docs/pipedrive-leads-to-mria-crm/

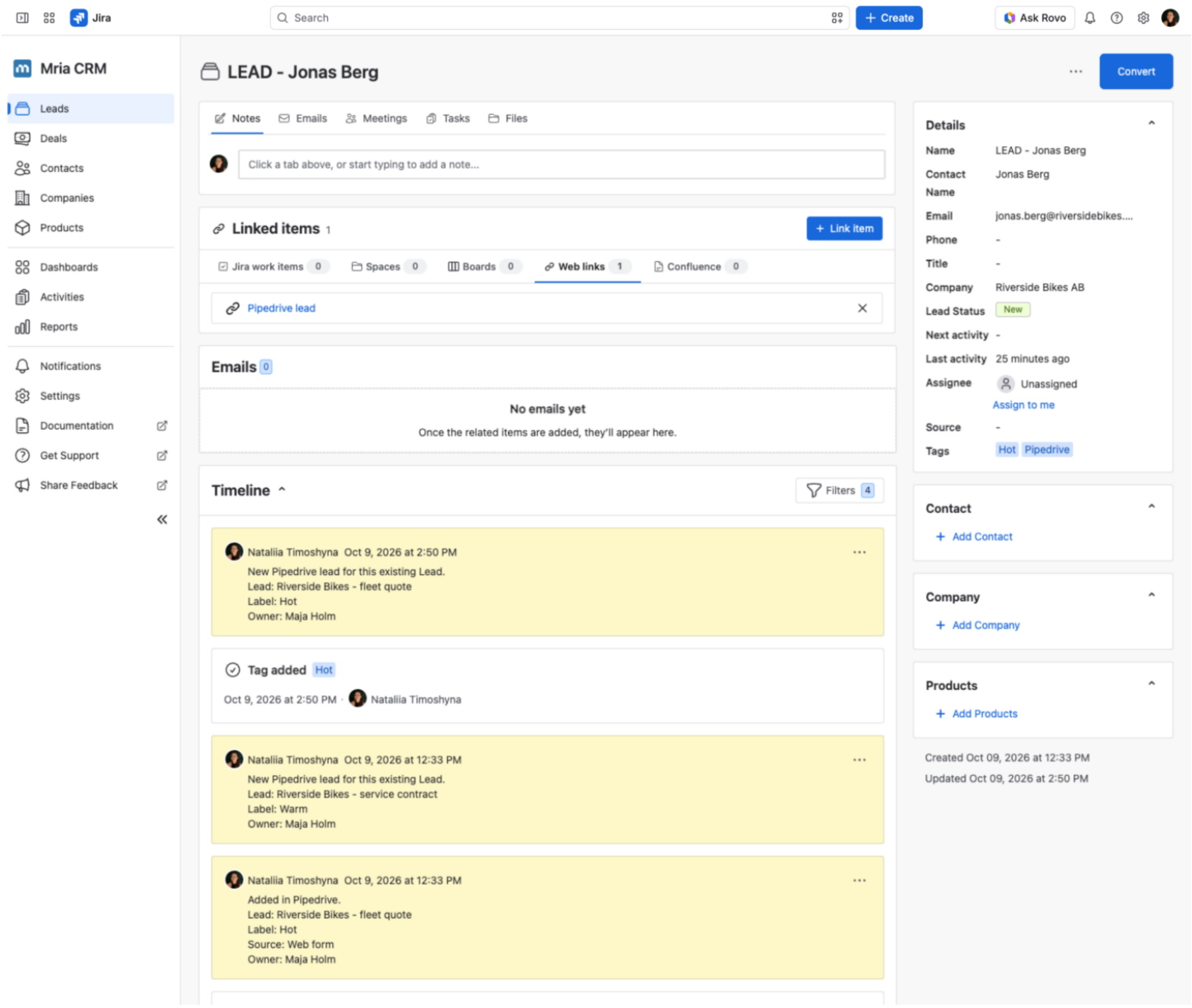
Prospecting in Pipedrive, delivery in Jira: every hot lead becomes a Mria CRM Lead

A sales team that prospects in Pipedrive and a delivery team that lives in Jira see each other's work late. This flow fixes that for leads: when a lead is added in Pipedrive (or reaches a label you choose), Pipedrive posts it to Jira Automation, and Mria CRM gets a Lead with the person's details, a link back to the Pipedrive lead and a note saying where it came from. A person who is already a Lead gets the note instead of a duplicate.

The Jira side is the same shape as HubSpot Leads to Mria CRM and Capture Leads from Web Forms: an Incoming webhook, a Find record, a branch. What is specific to Pipedrive is that it cannot send a custom header, so the secret travels in the URL, and that there are two ways to send the lead: an Automation with a webhook action, or a plain Webhook. This page covers both.

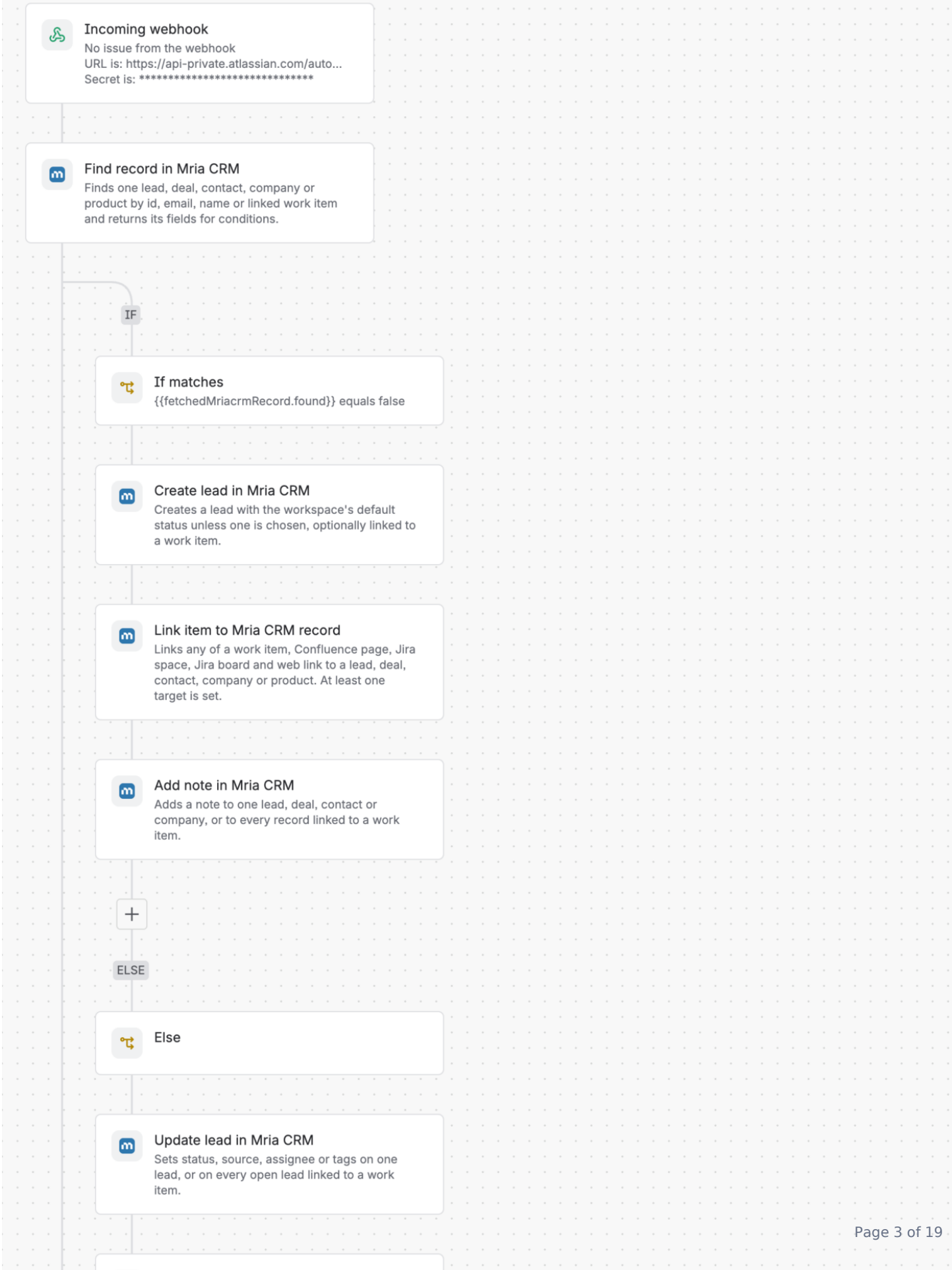
1. What you get

A lead *Riverside Bikes - fleet quote* for **Jonas Berg** of Riverside Bikes AB was added in Pipedrive with the label Hot. Seconds later Mria CRM holds **LEAD - Jonas Berg** tagged Pipedrive and Hot, with a web link to the Pipedrive lead and a note with the lead title, label, source and owner. When a second Pipedrive lead was added for the same person, the existing Lead got that lead's label as a tag and a second note instead of a duplicate.



2. The flow at a glance

1. **Incoming webhook** — receives the lead from Pipedrive.
2. **Find record** — looks for a Lead with that email.
3. **If/else** — `{{fetchedMriacrmRecord.found}}` equals false?
4. **If: Create lead**, **Link item** (web link to the Pipedrive lead) and **Add note**.
5. **Else: Update lead** (adds the label as a tag) and **Add note** on the Lead that already exists.


Incoming webhook
No issue from the webhook
URL is: https://api-private.atlassian.com/auto...
Secret is: ••••••••••••••••••••••••••••••
Find record in Mria CRM
Finds one lead, deal, contact, company or product by id, email, name or linked work item and returns its fields for conditions.
IF
If matches
{{fetchedMriacrmRecord.found}} equals false
Create lead in Mria CRM
Creates a lead with the workspace's default status unless one is chosen, optionally linked to a work item.
Link item to Mria CRM record
Links any of a work item, Confluence page, Jira space, Jira board and web link to a lead, deal, contact, company or product. At least one target is set.
Add note in Mria CRM
Adds a note to one lead, deal, contact or company, or to every record linked to a work item.
ELSE
Else
Update lead in Mria CRM
Sets status, source, assignee or tags on one lead, or on every open lead linked to a work item.

3. Build the Jira side

You need permission to create automation flows in Jira, and a Mria CRM role that can create and edit Leads; the steps run as you. Section 4 covers Pipedrive.

Step 1. Create the flow and its trigger

1. Open **Settings → System → Global automation** and choose **Create flow → Create from scratch**.
2. Pick the trigger **Incoming webhook**.
3. Add one action (the Find record below) and save the flow with **Save without enabling**. Jira cannot issue the webhook URL for a flow that is not saved, and it will not save a flow without an action.
4. Back on the trigger, set **Work item criteria** to **No work items from the webhook** and click **Generate secret**. Copy the **Webhook URL** and the secret for section 4.

Incoming webhook

Trigger a flow from external sources. This flow will run when a HTTP POST is sent to a URL. More detailed guidance is available in our documentation.

Webhook URL

https://api-private.atlassian.com/automation/webhooks/jira/a/<c

Copy the URL and secret into your configuration

Latest call Fri Oct 09 2026 12:33:42 GMT+0300 (Eastern European Summer Time)

Secret

••••••••••••••••••••••••••••

Work item criteria

- ○ Issues provided in the webhook HTTP POST body
- ○ Issues provided by running the following JQL search
- ◉ No work items from the webhook

> How to format the request

> Can I provide additional data in my webhook?

> How can I check that the incoming webhook is working?

+ Add condition

Back Next

Pipedrive cannot add the token header, so the secret goes into the URL instead. Jira accepts the secret as the last path segment: `<Webhook URL>/<secret>`. That is the address you will give Pipedrive. It is as sensitive as a password — anyone who has it can create Leads in your CRM — so keep it out of shared documents, and if it leaks, generate a new secret; the old one stops working at once.

Step 2. Find record — is this person already a Lead?

Add **Find record in Mria CRM**. If this is your first Mria CRM step, click **Connect** first.

Field	Value
Find by	Email
Record type	Lead
Email	`{{webhookData.email}}`

Find record in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Find by

- ○ Work item
- ◉ Email
- ○ Name
- ○ Record id

Record type *

Lead

Email *

{{webhookData.email}}

A lead's or contact's email, a deal's primary contact email, or for a company the email's domain. Not for products

Open only

Select...

Deals in open stages; leads that are not converted. Default true

Back | Next

Step 3. Branch on the result

Add an **If/else block**. In the If part choose **Add condition → {{smart values}} condition**: first value `{{fetchedMriacrmRecord.found}}`, condition *equals*, second value `false`.

Step 4. If not found: create the Lead and link Pipedrive

Inside the If part add **Create lead in Mria CRM**:

Field	Value
Contact name	`{{webhookData.person_name}}`
Contact email	`{{webhookData.email}}`
Company name	`{{webhookData.organization}}`
Lead source	empty, or a source that exists in your workspace (Settings → Lead sources)
Tags	`Pipedrive, {{webhookData.label}}` — the Pipedrive label (Hot, Warm, Cold) becomes a tag; missing tags are created
Work item key	**empty** — there is no work item

Create lead in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Contact name *

{{webhookData.person_name}}

Contact email *

{{webhookData.email}}

Company name

{{webhookData.organization}}

Lead status

Select...

Default status for new leads when empty

Lead source

Select...

Tags

Pipedrive, {{webhookData.label}}

Comma-separated names. Missing tags are created

Assignee

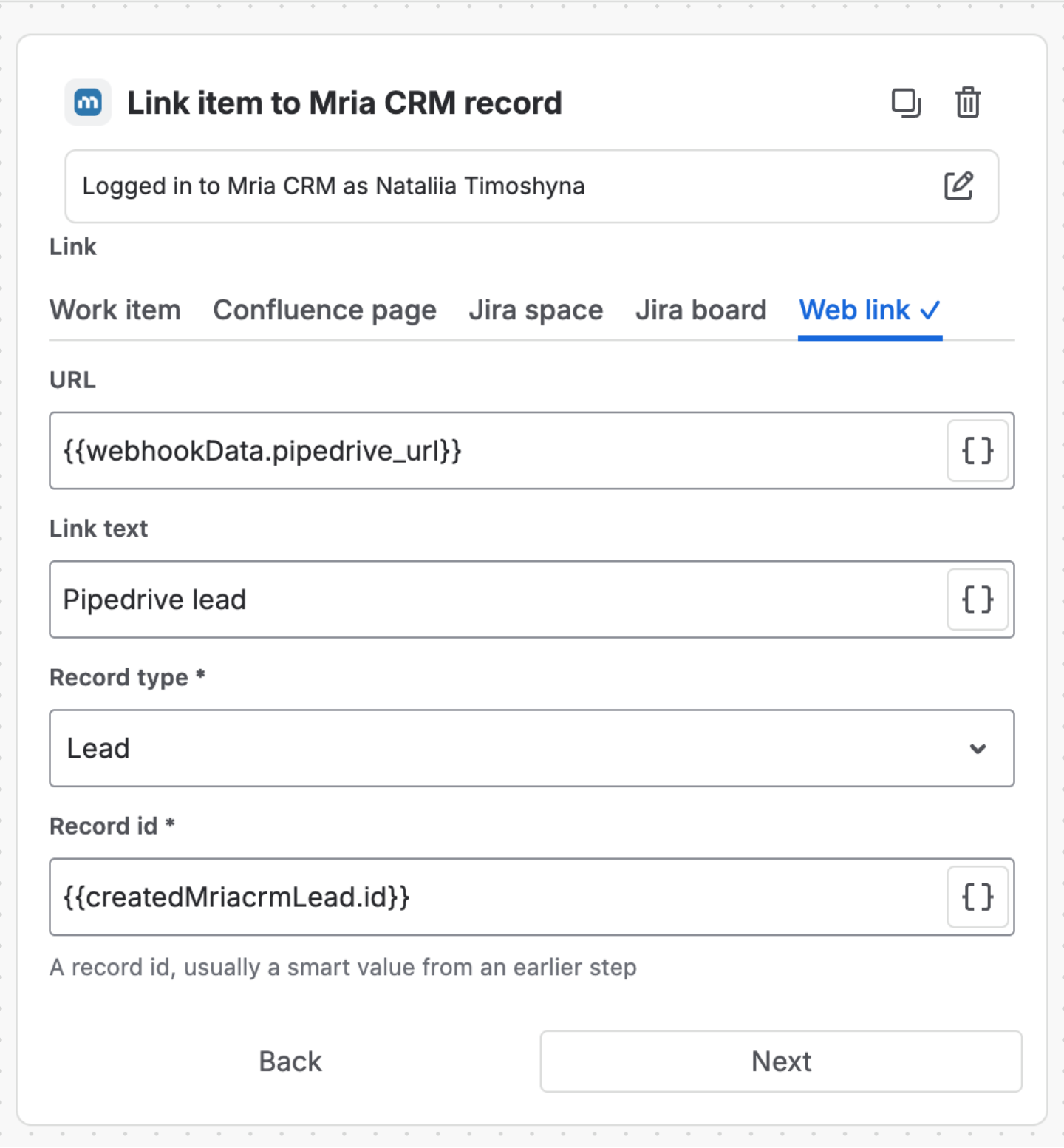
Pick a user

Use a smart value

Leave empty to create the record unassigned

Then **Link item to Mria CRM record**, tab **Web link**, so the Lead opens the Pipedrive lead in one click:

Field	Value
URL	`{{webhookData.pipedrive_url}}`
Link text	Pipedrive lead
Record type	Lead
Record id	`{{createdMriacrmLead.id}}`



And **Add note in Mria CRM** with *Add to* = One record by id, Record type Lead, Record id `{{createdMriacrmLead.id}}` and this content:

```
Added in Pipedrive.
Lead: {{webhookData.title}}
Label: {{webhookData.label}}
Source: {{webhookData.source}}
Owner: {{webhookData.owner}}
```

Step 5. Else: tag and note the new Pipedrive lead on the existing Lead

In the Else part add **Update lead in Mria CRM** with *Update* = One lead by id, Record id `{{fetchedMriacrmRecord.id}}` and Tags `Pipedrive, {{webhookData.label}}`. Leave Tags mode empty: its default, add, keeps the tags the Lead already has and adds the new ones.

Update lead in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Update

- ○ Leads linked to a work item
- ◉ One lead by id

Lead id *

{{fetchedMriacrmRecord.id}}

A lead id, usually a smart value from an earlier step

Lead status

Select...

Lead source

Select...

Assignee

Pick a user

☐ Use a smart value

Leave empty to keep the owner

Tags

Pipedrive, {{webhookData.label}}

Comma-separated names. Missing tags are created

Tags mode

Select...

Then another **Add note in Mria CRM** with Record id `{{fetchedMriacrmRecord.id}}` and a content such as `New Pipedrive lead for this existing Lead. Lead: {{webhookData.title}} / Label: {{webhookData.label}} / Owner: {{webhookData.owner}}`.

Step 6. Turn it on

Save the flow and switch it on. Until it is on, calls to the URL do nothing.

4. Send the lead from Pipedrive

Pipedrive has two outbound mechanisms. **Automations** (Advanced plan and above for the webhook action) let you pick the trigger, add conditions and compose the body key by key, which is what the flow above expects. **Webhooks** (every plan) fire on raw events with Pipedrive's own payload, which needs different smart values. Start with Automations if your plan has them.

Option A. An Automation with a webhook action

1. As a global admin open **Tools and apps → Webhooks**, click **+ Webhook** and choose **Automation webhook**. Name it (for example *Jira Automation — Mria CRM*), set the **Endpoint URL** to the **Webhook URL from step 1 followed by a slash** — Pipedrive insists the base URL ends with `/`, `&`, `?` or `=` — and leave the authentication fields empty.
2. Open **Tools and apps → Automations**, click **+ Automation** and choose an **Event trigger**: *Lead → added*. To send only qualified leads, trigger on *Lead → updated* instead and add the condition *Label is Hot*.
3. Add the **Webhook** action: Webhook = the one from step 1, Method **POST**, Body = **Key-value** with the keys below (insert each Pipedrive field with the field button), and **Path** = the secret from the trigger. Pipedrive appends the path to the base URL, which gives exactly `<Webhook URL>/<secret>`.
4. Save and set the automation to **Active**.

Key	Pipedrive field
title	Lead → Title
person_name	Person → Name
email	Person → Email

Key	Pipedrive field
organization	Organization → Name
label	Lead → Label
source	Lead → Source
owner	Lead → Owner
pipedrive_url	switch the body to *Raw* and build it: `https://<yourcompany>.pipedrive.com/leads/inbox/` followed by *Lead → ID*; or leave the key out and drop the Link item step

The automation's **History** tab shows the final body and path of every request, which is the first place to look when a lead does not arrive.

Option B. A plain Webhook on the person event

On **Tools and apps → Webhooks** click **+ Webhook**, choose **Webhook**, Event action `create`, Event object `person`, Endpoint URL `<Webhook URL>/<secret>`, HTTP auth empty, version 2.0. Pipedrive then posts its own envelope: `meta`, `data` and `previous`. Jira Automation reads a top-level `data` key as the webhook's own data, so the fields inside it arrive directly under `{{webhookData}}`, next to `meta` and `previous`. The smart values in the flow therefore change to:

Flow field	Smart value with a plain Webhook
Email (Find record, Create lead)	`{{webhookData.emails.get(0).value}}` — `{{webhookData.emails.first.value}}` works too
Contact name	`{{webhookData.name}}`
Company name	not available — the payload carries only `org_id`; leave the field empty
Note	`Added in Pipedrive ({{webhookData.meta.action}} {{webhookData.meta.entity}} {{webhookData.meta.entity_id}}, owner {{webhookData.owner_id}})`

Why the person event and not the lead event: Pipedrive's lead payload carries `person_id` and `organization_id` but no email or names, and Jira Automation cannot call back into Pipedrive to resolve them. The Automation route sends the fields you need directly, which is why it comes first on this page. Pipedrive also deletes a Webhook after three days without a successful

delivery, so keep the flow on.

Not sure what arrived? Put a temporary **Log action** with the message `{{webhookData}}` right after the trigger; the audit log then prints the whole payload as Jira sees it.

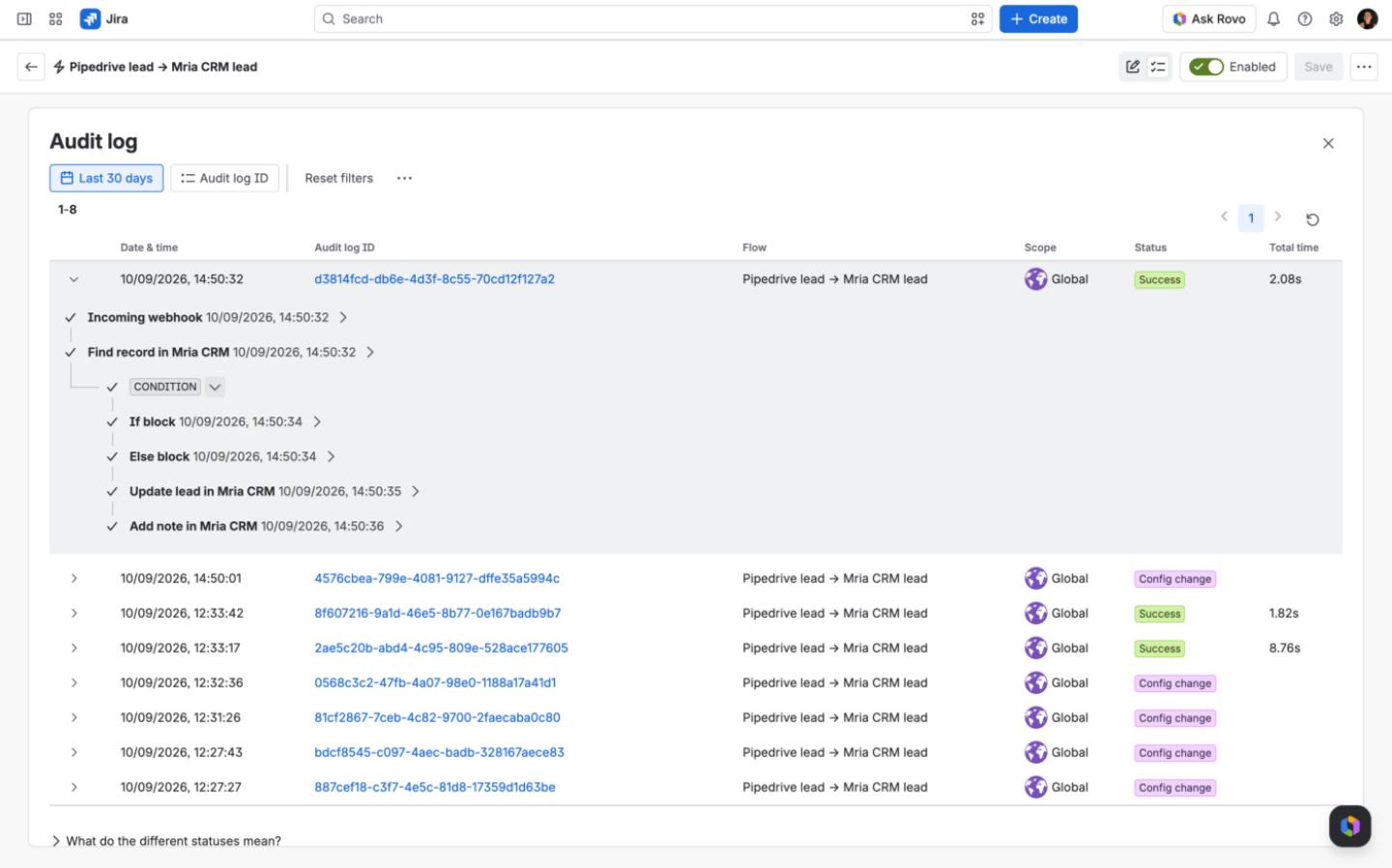
Test it from a terminal

The same request the Automation sends, with a sample lead. The secret is in the path, exactly as Pipedrive will send it:

```
curl -X POST '<webhook URL from the trigger>/<secret from the trigger>' \
  -H 'Content-Type: application/json' \
  -d '{"title": "Riverside Bikes - fleet quote", "person_name": "Jonas Berg", "email":
"jonas.berg@riversidebikes.se",
       "organization": "Riverside Bikes AB", "label": "Hot", "source": "Web form", "owner": "Maja
Holm",
       "pipedrive_url": "https://riversidebikes.pipedrive.com/leads/inbox/7c1e9a52-3b7d-4f10-9d2e-
5a8c0b4e6f21"}'
```

5. Check that it worked

Open the flow's **Audit log**. Every accepted call is a row; expand it to see each step and which branch ran. The Lead itself shows the link and the note on its page.



A wrong secret is answered with HTTP 200 and nothing runs. Jira acknowledges the request but drops it silently, so Pipedrive's history shows a successful delivery while the audit log stays empty. Only a request with no secret at all gets a 400. If the audit log has no row for a call, check the path first.

6. Make it yours

- **Only hot leads.** Trigger the automation on *Lead → updated* with the condition *Label is Hot*, so cold prospects stay in Pipedrive.
- **Deals instead of leads.** Trigger on *Deal → added* and use **Create deal** with a pipeline and stage of your choice; see the Actions Reference.
- **Keep the owner.** Send the owner's email as `owner_email` and branch on it to set the Lead's Assignee.

- **Close the loop.** A second automation on *Deal* → *updated* with status Won can call a flow whose Else branch runs **Update lead** with status Converted.
- **Zoho CRM, Freshsales and others.** Any CRM whose workflow can POST JSON to a URL fits the same flow; only the keys in the body change.

7. Troubleshooting

What you see	Why, and what to do
Pipedrive shows a successful delivery, the audit log has nothing	The secret in the path is wrong or missing: Jira answers 200 and drops the call. Compare the path in the automation's History with the trigger's secret.
Pipedrive refuses the endpoint URL	The Automation webhook's base URL must end with /, &, ? or =. Put the Webhook URL plus a trailing slash there and the secret in the action's Path.
The Lead is created but a field is empty	The key in the body and the smart value differ. Open the automation's History, copy the final body and compare it with the smart values in the flow.
Create lead fails on Lead source	The source does not exist in the workspace. Add it under Settings, or leave the field empty.
The same person became two Leads	Find record must search by the same email the Lead is created with, and the body must carry the person's email.
The Webhook disappeared from Pipedrive	Plain Webhooks are deleted after three days without a successful delivery (and paused for 30 minutes after ten failed attempts). Turn the flow on, then create the Webhook again.
Aborted — Monthly flow executions have been exceeded	The site reached its monthly automation usage. Runs resume next month or on a larger plan; Pipedrive retries plain Webhooks three times, automations keep their own history.

Related Pages

- Jira Automation — how Mria CRM steps work, and the other use cases.
- Automation Actions Reference — every field of Find record, Create lead, Link item and Add note.

- HubSpot Leads to Mria CRM — the same flow fed by a HubSpot workflow.
- Pipedrive: Automations webhook requests — Pipedrive's documentation of the webhook action.
- Pipedrive: Guide for Webhooks v2 — payload format, retries and limits of plain Webhooks.