HubSpot Integration

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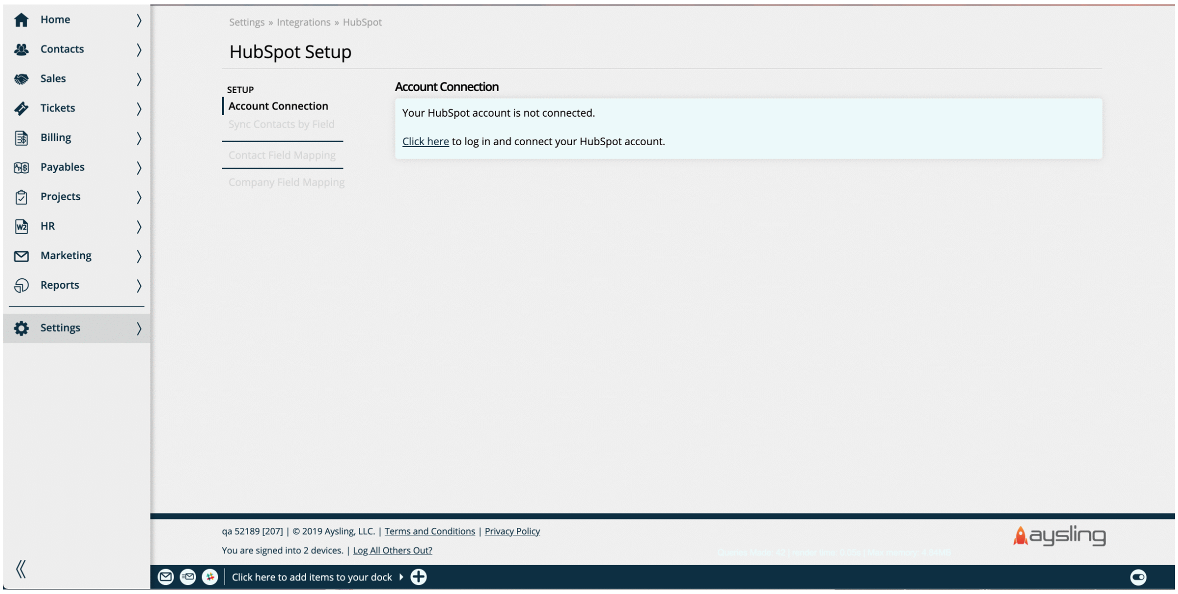
Connect your System with HubSpot

To start using the HubSpot integration you must have the Module enabled, the permission to use HubSpot, and an active HubSpot account. You will need your HubSpot user name and password credentials to login to HubSpot to confirm the sync.

1. Make sure you have the HubSpot permissions under the User Permissions > Administration > Integrations. The permission will give you the ability to access the HubSpot page under **Settings > Integrations > HubSpot.**
2. You will see a option to connect to HubSpot. When you click on the link, you will get redirected to login into your HubSpot account or select one of the accounts you are already logged into.

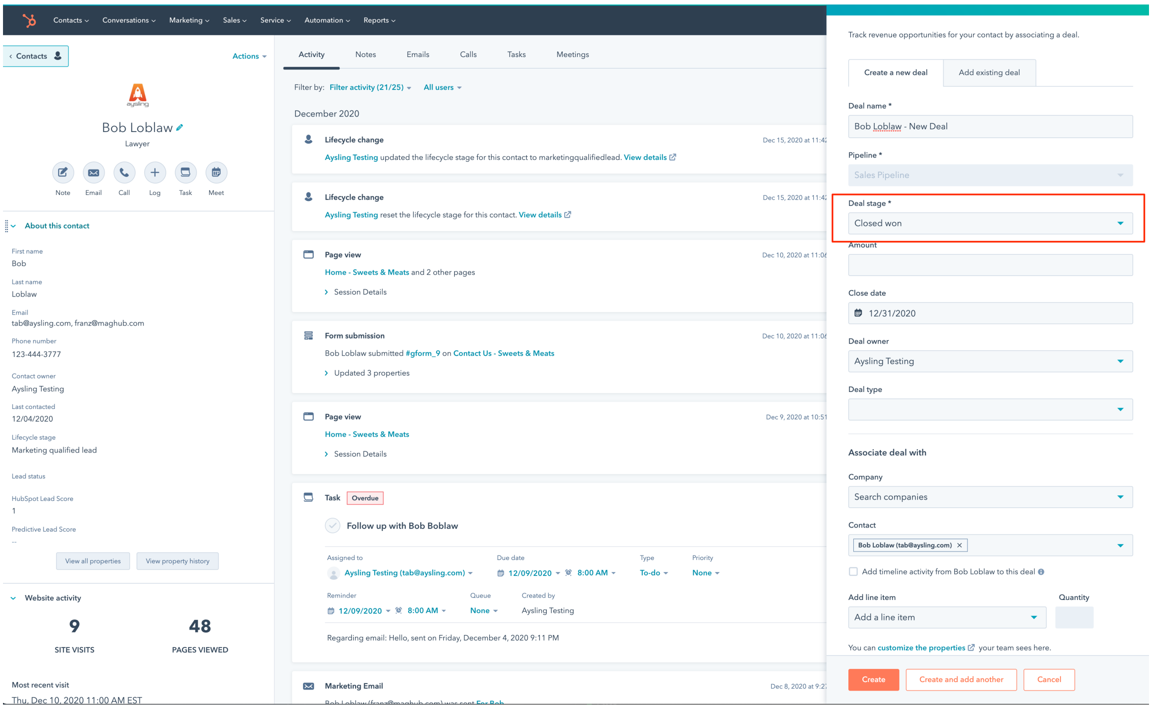


TIP

We recommend that you are already logged into your HubSpot before connecting to streamline the process.

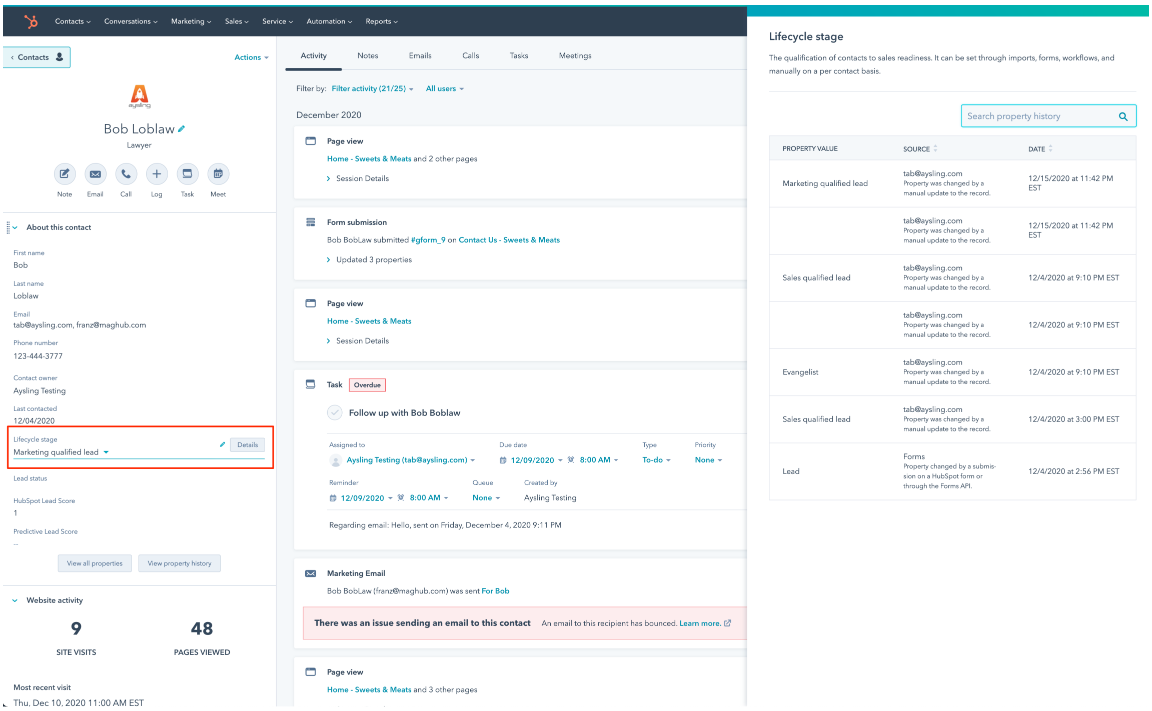
3. Your system will now be synced and the next step is to determine how contacts should sync between the two platforms. There are three different triggers that will determine when a contact will come over from HubSpot into
   - If you only want contacts in your system that are customers, you can sync with the contact date by using the Deal Closed option. Once a contact has a Deal with a Close Won status in HubSpot, will pull the contact from HubSpot and create a new contact in your site. The system will use your Mapping to determine which fields should be synced.

     Once a contact is synced, it will stay in the system, even if the deal was lost.



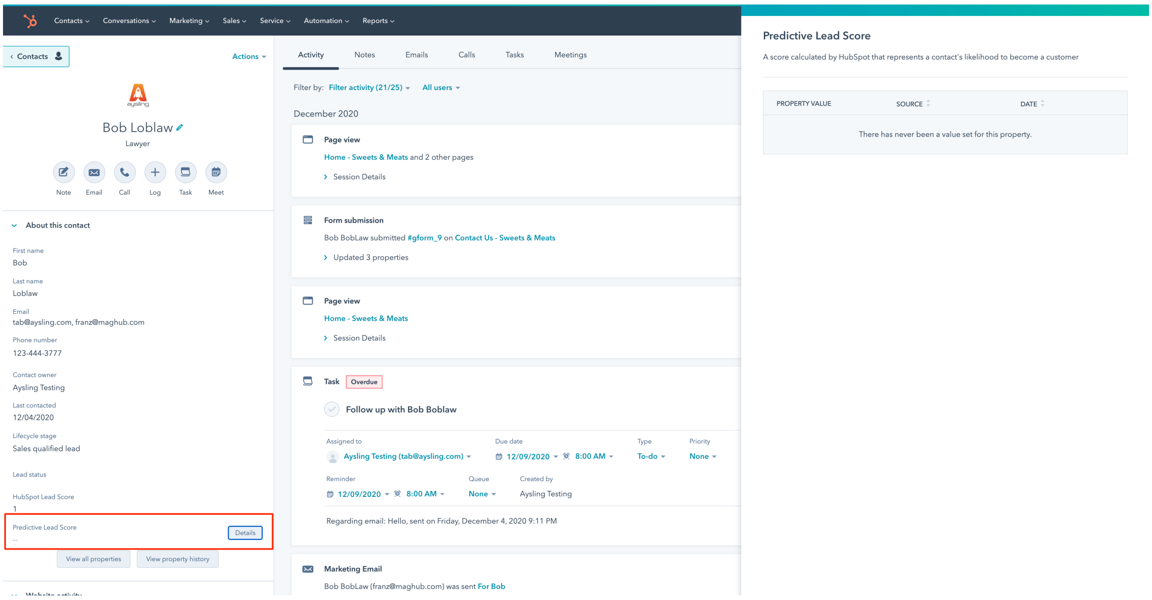
- The most common way to sync a contact to your system from HubSpot is by Lifecycle. HubSpot has a defined list of Lifecycles that can be tied to different workflows and settings within HubSpot. Most customers will set the desired Lifecycle stage to either Marketing qualified lead or Sales qualified lead. Once a contact in HubSpot has that status, the system will pull that contact into your site using your mappings.

  The assumption is that once a contact is either Marketing or Sales qualified, then it is time for your sales rep to start creating the order and closing the deal. Limiting the HubPost contacts based on Lifecycle will help to keep your database clean by not having all leads entered.



- You can take the Sync out of your hands (mostly) by using HubSpot's Predictive Lead Score to determine when a contact should go over to the system. You can set the minimum score you want and as soon as a contact reaches the threshold, the system will pull the contact into your site.

The Predictive Lead Score uses HubSpot's machine learning internal scoring capabilities to determine the score. Not all HubSpot accounts have this feature available. Please contact HubSpot support if you have any questions about using their Predictive Lead Score feature.



4. You can also choose to set a specific HubSpot property as a Sync Contact by Field. The system will ignore the criteria and just check if the proprty is set in HubSpot If the property is set, the system will pull in the contact. For example, you could create a HubSpot property called **Push To My System** and when it is set, the system will grab the contact. You can use this in conjunction with the Sync Criteria or on its own.
5. The next step is to go through mapping HubSpot fields to your Contact and Company fields.

Mapping your HubSpot Fields to your System

Before you start syncing contacts between your HubSpot account and , you can start mapping what fields you want to come over from HubSpot. The process of mapping fields is selecting the HubSpot field to populate a . You do not have to map to all fields, but some are required. You can also choose to add your own default data for a field for any new HubSpot contact. For example, you may want to set the Lead Source to Organic or HubSpot always. You can map both contact and company fields.

> **IMPORTANT**
> First Name, Last Name, and Email are preset and can't be changed. Those fields are required for both a HubSpot and contact. Once the data comes from HubSpot those fields will not update in your site again. And any changes made in your site will NOT go back to HubSpot.

1. Go to the Contact Mapping field section to starting mapping your HubSpot fields to your system fields.

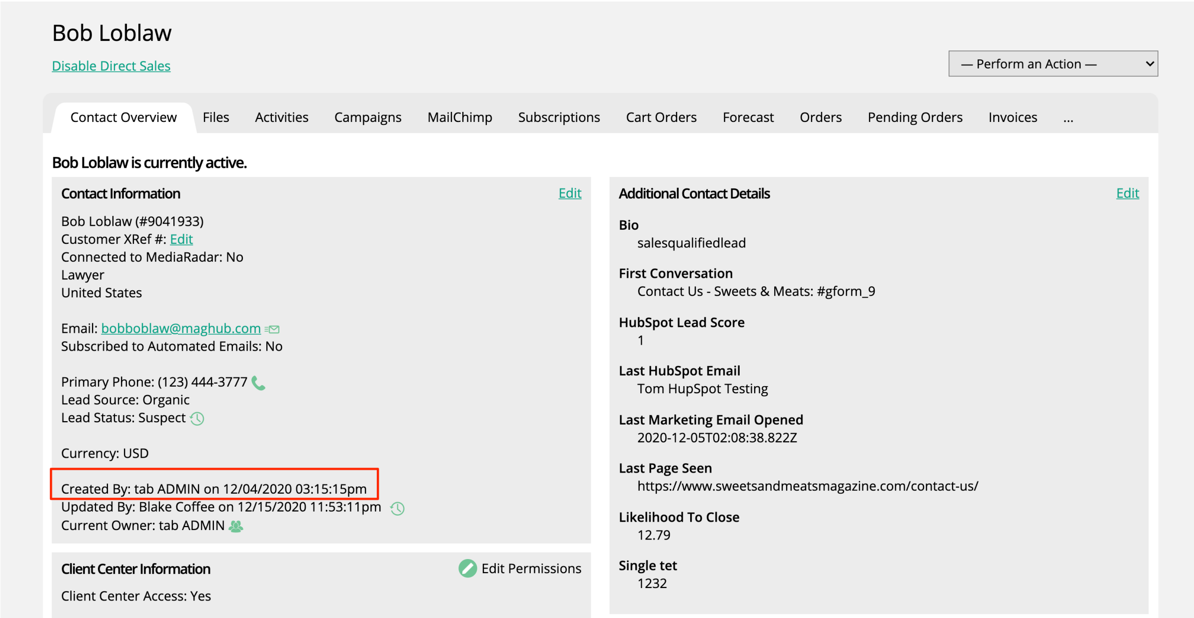
   > **DANGER**
   > Make sure to either map a HubSpot field or set a default to any required contact. If you don't, the system WILL NOT be able to create the contact.

2. Make sure to map fields with the same data types. For example, if you want to map a last email date from HubSpot to your site, you should create a Date type dynamic attribute. But if you want to add an email name, you should use a text field.
3. You also need to make sure if you use a multi-select or single select data set, that both HubSpot and your site have matching entries. For example, if you plan to map a HubSpot contact's life cycle to lead status, make sure you set up the same field names in your site as they are in HubSpot. The system can't set the lead status to Marketing qualified lead if Marketing qualified lead isn't an option in your site.
4. For dynamic attribute(s) values, the system will import data if it isn't already set up as an option. For example, if you have a attribute for Priority A, B, C but in HubSpot has an option D and it is used, the system will input the data of D into the system so the user can view it. But the attribute won't be usable in search. You will need to update the field in the system to make sure it works.
5. Once you map your fields you will need to determine how you want the data to sync between both systems. Data will flow from HubSpot automatically. You will have to push data from .
   - **Bi-Directional:** Data will both be pushed and pulled from MagHub to HubSpot. Updates in HubSpot will prompt an update in your system. When you push an update to HubSpot from the contact page or the bulk page the data will change in HubSpot.
   - **To** : Only changes in HubSpot will go over to your system. Once the data is in your site, your users can change the field but those changes will NOT go back over to HubSpot when you push an update.
   - **To HubSpot Only:** Only changes in your system will go over to HubSpot. Any changes in HubSpot to the field will NOT come back over.
6. You will only see these Sync Direction options when there is a value entered in the HubSpot Field Name column. Make sure to click Save when you are done mapping and setting your Sync Directions.

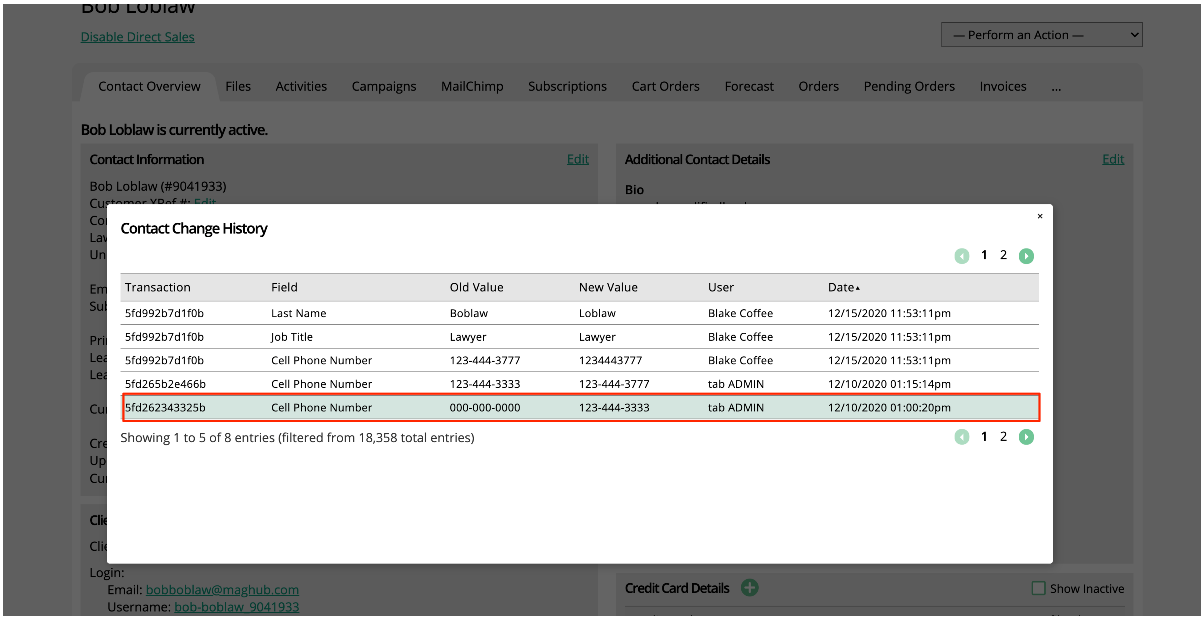
Viewing HubSpot Details on the Contact Details Page

Once a contact is connected with your site, it will show up as a new contact within the system. You can determine what fields you want show up on the contact details page by mapping hubspot fields to display and populating your dynamic attributes with HubSpot date. There are also a few things to know about a contact created via the Hubspot Integration .

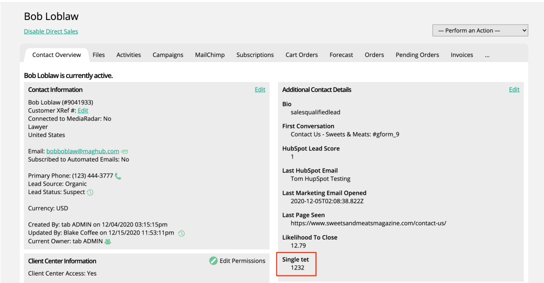
- Any contact created by the integration or updated by the integration will appear to be create/edited by the System Admin user.

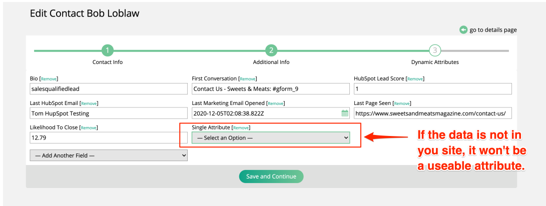


- The edit history will show modifications were done by the System Admin user when HubSpot has updated data. The attribute fields created or modified will not show up in the edit history at this time.



- It may be the case where an attribute appears on the overview page, but if you edit the attribute it doesn't show up. This is because the data in HubSpot isn't set up as a valid option in your system. Either make the update in your site to match the HubSpot entry or update HubSpot to not allow that option.





Choosing Display Options

With the HubSpot integration, you can set up five contact, and five company HubSpot properties to display on your contact and company pages in MagHub. To create these display properties, navigate to **Settings >Integrations >HubSpot,** and click on **Display Properties**. you can choose up to five HubSpot properties to display for your contacts, and up to five properties to display for your companies. We recommend using fields like last page seen or time on site; information that is helpful to know when on the contact and changes frequently.

IMPORTANT

These Display Properties are not editable on the contact and company pages, they are only viewable. If you want to leverage these properties in any other capacity in the system, you will need to map those fields, and potentially create new dynamic attributes. Follow the directions on the '**Mapping your HubSpot Fields to your System [6]**' help center page to learn about mapping.

1. There are actions on this page to Sync HubSpot Contact and Company Properties. These actions are used to make sure the HubSpot properties in the drop-down menus are up-to-date. For example, if you add a new contact property in HubSpot, that property will not automatically show up in the drop-down menu for your Contact Display Properties in . Click the ‘Sync HubSpot Contact Properties’ action to update your drop-down list and show the new property.
2. Use the drop-down menus to select which properties you want to view on each page. Make sure to click save when you are finished choosing the properties.
3. Once you have chosen Display Properties and saved, when you navigate to a contact or company’s record that is synced to a HubSpot record, you will see the Display Properties show up in the HubSpot Information box on the overview tab.