# 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.

- 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.

ft Ho	ome	>	Settings » Integrations » HubSpot		
🐣 Co	ontacts	>	HubSpot Setup		
🌸 Sa	lles	>	SETUP	Account Connection	
🋷 Tio	ckets	>	Account Connection	Your HubSpot account is not connected.	
📑 Bil	lling	>	Sync Contacts by Held	Click here to log in and connect your HubSpot account.	
∱a§ Pa	yables	>	Contact Field Mapping		
🗘 Pr	ojects	>			
W2 HF	R	>			
М Ма	arketing	>			
€) Re	eports	>			
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## 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 Hub-Spot, 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.

🄀 Contacts 🗸 Conversations 🗸 Marketing 🗸 Sales 🗸 Service			
< Contacts 💄 Actions -	Activity Notes Emails Calls Tasks Meetings		Irack revenue opportunities for your contact by associating a deal.
	Filter by: Filter activity (21/25) • All users •		Create a new deal Add existing deal
aging	December 2020		Deal name *
Bob Loblaw 🖉			Bob Loblaw - New Deal
Lawyer	Litecycle change Aysling Testing updated the lifecycle stage for this contact to marketingqualifiedlead. View details 2	Dec 15, 2020 at 11:42	Pipeline *
2 . +			Sales Pipeline 👻
Note Email Call Log Task Meet	Lifecycle change	Deal stage *	
About this contact	Aysling Testing reset the lifecycle stage for this contact. View details 🖉		Closed won
First name	Page view	Dec 10, 2020 at 11:04	Amount
Bob Last name	Home - Sweets & Meats and 2 other pages		
Loblaw	> Session Details		Close date
Email tab@aysling.com, franz@maghub.com			<b>b</b> 12/31/2020
Phone number 123-444-3777	Big Form submission Bob Loblaw submitted #gform_9 on Contact Us - Sweets & Meats	Dec 10, 2020 at 11:08	Deal owner
Contact owner	Updated 3 properties		Aysling Testing
Aysling Testing			Deal type
12/04/2020	Page view	Dec 9, 2020 at 10:51	· ·
Lifecycle stage Marketing qualified lead	Home - Sweets & Meats		Associate deal with
Lead status			Company
HubSpot Lead Score	Task Overdue		Search companies
1 Destructions	Follow up with Bob Boblaw		Contact
			Bob Loblaw (tab/Baysling.com) ×
View all properties View property history	Assigned to Due date Type Priority		Add timeline activity from Bob Loblaw to this deal 0
<ul> <li>Website activity</li> </ul>	Reminder Queue Created by		Add line item Quantity
9 48	12/09/2020 - 1 8:00 AM - None - Aysling Testing		Add a line item 👻
SITE VISITS PAGES VIEWED	Regarding email: Hello, sent on Friday, December 4, 2020 9:11 PM		You can customize the properties 🖉 your team sees here.
			Create and add another
Most recent visit Thu, Dec 10, 2020 11:00 AM EST	Marketing Email	Dec 8, 2020 at 9:21	

• 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.

🍾 Contacts - Conversations - Marketing - Sales - Servi	xe∨ Automation∨ Reports∨	1 Manual and an		
< Contacts 💄	Activity Notes Emails Calls Tasks Meetings	The qualification of contacts to sal	es readiness. It can be set through in	nports, forms, workflows, and
Δ	Filter by: Filter activity (21/25) + All users +	manually on a per contact basis.		
Bob Loblaw 🗸	December 2020		Search prop	perty history Q
Lawyer	Page view Home - Sweets & Meets and 2 other pages	PROPERTY VALUE	SOURCE 0	DATE 0
Image: Note     Email     Call     Log     Task     Meet	> Session Details	Marketing qualified lead	tab@aysling.com Property was changed by a manual update to the record.	12/15/2020 at 11:42 PM EST
V About this contact	Form submission Bob BobLaw submitted #gform_9 on Contact Us - Sweets & Meats		tab®aysling.com Property was changed by a manual update to the record.	12/15/2020 at 11:42 PM EST
rits name Bob Last name Loblaw	Updated 3 properties	Sales qualified lead	tab@aysling.com Property was changed by a manual update to the record.	12/4/2020 at 9:10 PM EST
Email tab@aysling.com, franz@maghub.com Phone number	Page view Home - Sweets & Meats > Session Details		tab@aysling.com Property was changed by a manual update to the record.	12/4/2020 at 9:10 PM EST
123-444-3777 Contact owner Aysling Testing	Tak Overdee	Evangelist	tab@aysling.com Property was changed by a manual update to the record.	12/4/2020 at 9:10 PM EST
Last contacted 12/04/2020	Sollow up with Bob Boblaw	Sales qualified lead	tab@aysling.com Property was changed by a manual update to the record.	12/4/2020 at 3:00 PM EST
Degus saga Marketing qualified lead Lead status Abbico land form	Augused to         Date data         Type         Printy <ul></ul>	Lead	Forms Property changed by a submis- sion on a HubSpot form or through the Forms API.	12/4/2020 at 2:56 PM EST
1 Predictive Laad Score	Regarding email: Hello, sent on Friday, December 4, 2020 9:11 PM			
View all properties View property history	Marketing Email     Bob BobLaw (IrandBraghub.com) was sent For Bob			
• Website activity 9 48	There was an issue sending an email to this contact $\ $ An email to this recipient has bounced. Learn more, ${\cal C}$			
SITE VISITS PAGES VIEWED Most recent visit Thu: Dec 10, 2020 11:00 AM EST	Page view Home - Sweets & Meets and 3 other pages			

• 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.

🎽 Contacts 🗸 Conversations 🗸 Marketing 🗸 Sales 🗸 Servi	e v Automation v Reports v	Predictive Load Score
< Contacts 💄	Activity Notes Emails Calls Tasks Meetings	A score calculated by HubSpot that represents a contact's likelihood to become a customer
Bob Loblaw # Lanyer 20 00 4 + 0 6 Name Final Call Lass Ten Mert	Filter by: Filter activity (21/25) - All users + December 2020  Page view Home - Sweets & Meals and 2 other pages > Session Details	PROMENT VALUE SOURCE : DATE : There has never been a value set for this property.
<ul> <li>✓ About this contact</li> <li>First name</li> <li>Bob</li> </ul>	Form submission     Bob BobLaw submitted #glows, 9 on Contact Us - Sweets & Meass     Updated 3 properties	
Lain nime Loblaw Email tab@aysling.com, franz@maghub.com Phore number 123-444-3777	Page Ver Home - Sweets & Meets Sector Details	
Contact senser Anytring Testing Last contextual 12/04/02020 Utilityipion targe Sales quadified lead Lead status Hadigon Last Score 1		
Predictive Lead Score	Regarding email: Hello, sent on Friday, December 4, 2020 9:11 PM	

- 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 Hub-Spot 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 Hub-Spot 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.

Con	tact Information			Edit Additional	Contact Details			
Bob	Loblaw (#9041933)			Bio				
Coi Lav Un	Contact Change H	istory					×	
Em	Transaction	Field	Old Value	New Value	User	Date		
Sul	5fd992b7d1f0b	Last Name	Boblaw	Loblaw	Blake Coffee	12/15/2020 11:53:11pm		
Pri	5fd992b7d1f0b	Job Title	Lawyer	Lawyer	Blake Coffee	12/15/2020 11:53:11pm		
Lea	5fd992b7d1f0b	Cell Phone Number	123-444-3777	1234443777	Blake Coffee	12/15/2020 11:53:11pm		
Lea	5fd265b2e466b	Cell Phone Number	123-444-3333	123-444-3777	tab ADMIN	12/10/2020 01:15:14pm		
Cu	5fd262343325b	Cell Phone Number	000-000-0000	123-444-3333	tab ADMIN	12/10/2020 01:00:20pm		
Cre Up Cui	Showing 1 to 5 of 8	entries (filtered from 18,358 to	tal entries)				3 1 2 🔉	

• 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.

Bob Loblaw Disable Direct Sales										— Perform ar	Action -	v
Contact Overview	Files	Activities	Campaigns	MailChimp	Subscriptions	Cart Orders	Forecast	Orders	Pending Order	s Invoices		
Bob Loblaw is current	tly active.											
Contact Information					Edit	Additional Con	tact Details					Edit
Bob Loblaw (#904193 Customer XRef #: Edit Connected to MediaR Lawyer	i3) Iadar: No					Bio salesqualifi First Conversa	edlead rtion					
United States						Contact Us	- Sweets & M	eats: Agfon	m_9			
Email: bobboblaw@m Subscribed to Autom	aghub co ated Emai	m 🖘 ls: No				HubSpot Lead	Score					
Primary Phone: (123) Lead Source: Organic	464-3777	c -				Last HubSpot Tom HupSp	Email lot Testing					
Lead Status: Suspect						Last Marketin 2020-12-05	g Email Oper T02:08:38.82	ied 22				
Created By: tab ADM Updated By: Blake Co Current Dwner: tab A	N on 12/0 ffee on 13 DMIN	4/2020 03:1 2/15/2020 1	5:15pm 1:53:11pm 🕔			Last Page See https://www. Likelihood To 12.79	n v.sweetsandr Close	neatsmaga	zine.com/contact	-us/		
Client Center Informat Client Center Access:	tion Yes			💋 Edit	Permissions	Single tet 1232						

0	0	3
Contact info	Additional info	Dynamic Attributes
Bio (innov)	First Conversation [know]	HubSpot Lead Score [issnes]
salesqualifiedlead	Contact Us - Sweets & Meats: #gform_9	1
Last HubSpot Email (Server)	Last Marketing Email Opened (Issue)	Last Page Seen (ismos)
Tom HupSpot Testing	2020-12-05T02:08:38.822Z	https://www.sweetsandmeatsmagazine.com/contact-us/
Likelihood To Close [tensor]	Single Attribute [formas]	
12.79	- Select an Option -	If the data is not in
		vou site, it won't b

#### **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.

- 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-todate. 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.