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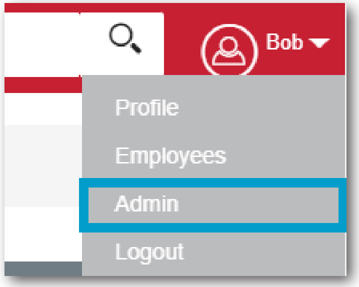
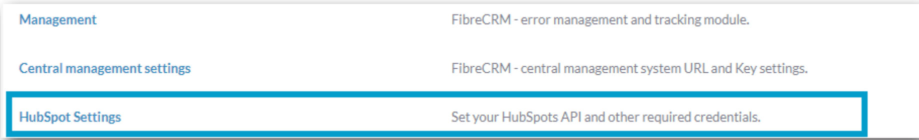
HubSpot Integration: Field Mapping

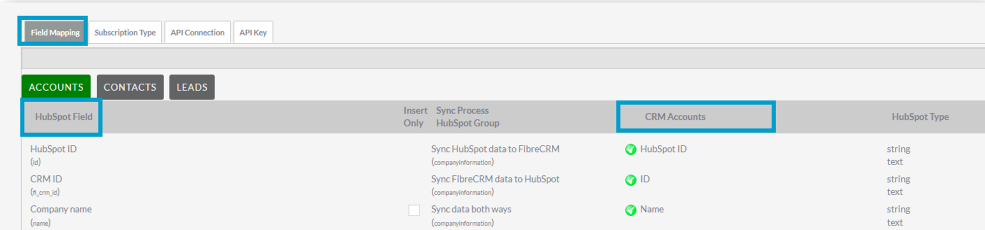
01. To set up the integration between your **FibreCRM** and **HubSpot** accounts navigate to your username in the top right hand corner and in the drop down menu select **Admin**.



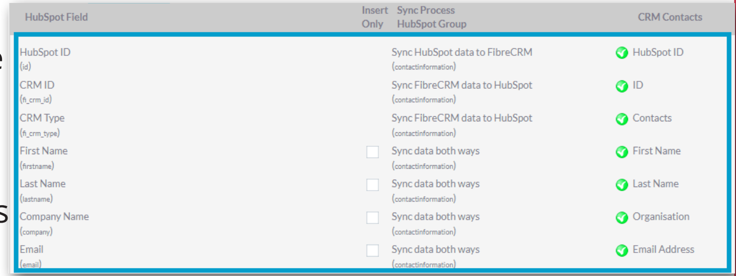
02. In **Admin** scroll down to the **FibreCRM Modules** section. In this section select **HubSpot Settings**.



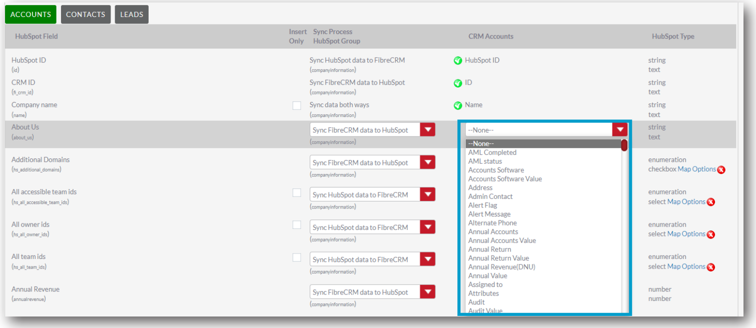
03. In the **Field Mapping** section, there are 3 module tabs you can field map across the CRM which sync data to and from Hubspot these are; **Organisations/Accounts**, **People/Contacts**, **Leads**. On the left hand side of each module is the **HubSpot Field** column which are the fields that can be seen in HubSpot. To the right hand side under the CRM **Accounts/Contacts/Leads** column is the CRM fields.



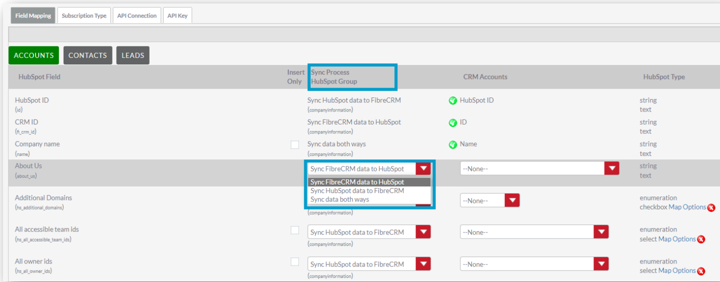
04. In each of the **Module** tab there are mandator fields that must always sync and can't be changed these can be seen at the top of the list of fields shown by a green tick and with no option to change.



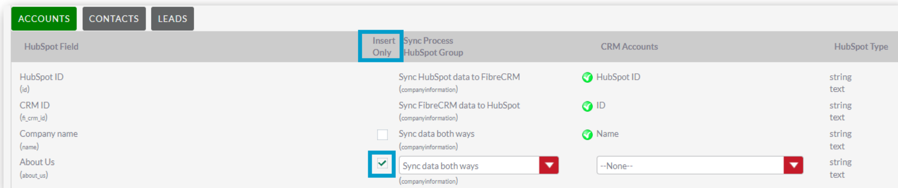
05. For the rest of the fields in all 3 tabs you can choose which ones you'd like to sync and map them with CRM accordingly. Use the list in the drop down box to select the field you would like it to sync to.



06. In the **Sync Process HubSpot Group** column you are able to choose select the data is synced. You can choose whether to **Sync Hubspot data to FibreCRM**, **Sync FibreCRM data to Hubspot** or **Sync data both ways**.



07. If you choose **Sync Hubspot data to FibreCRM** or **Sync Data Both Ways** for a field a tick box will appear in the Insert Only column. If the tick box is ticked, the field will only be updated if it is currently empty in CRM.



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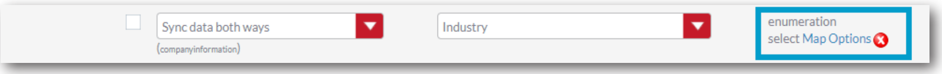
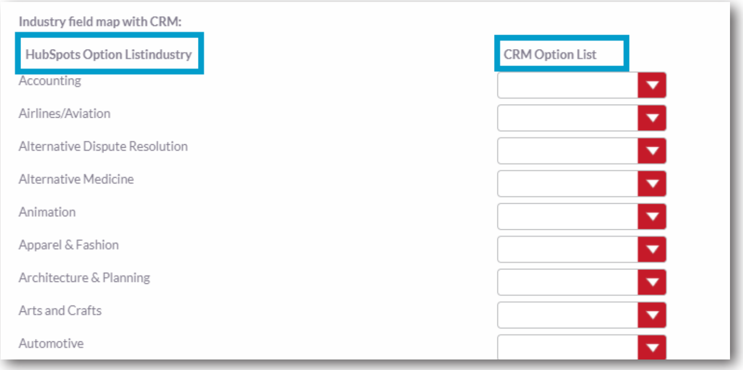
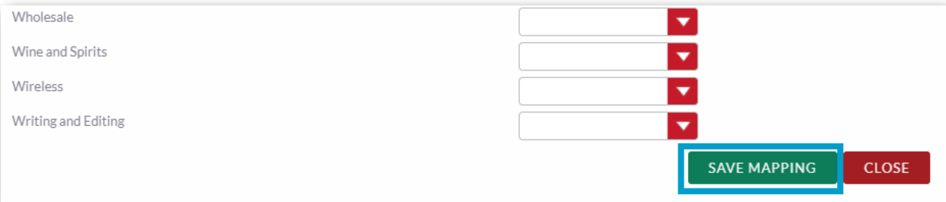
08. You can also map up drop down items. To do select a field in the HubSpot field column that you know has a drop down menu (for example Industry), then move across to the HubSpot Type column and select **Map Options**.



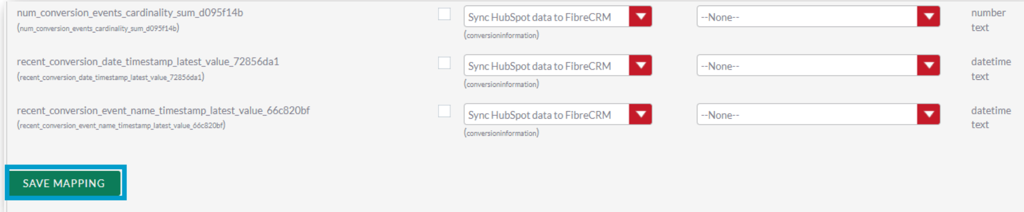
09. This will bring up a pop up box, on the left hand side you will have the **HubSpot Option List** of the drop down and on the right you have the **CRM Option List**. Use the drop down list to select which **CRM Option** matches the **HubSpot Option**.



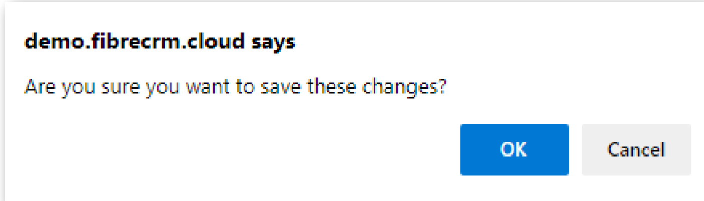
10. Once you've mapped all the options scroll down to the bottom of the pop up box and select **Save Mapping**. This will bring you back to the first field mapping screen.



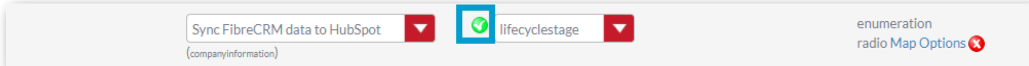
11. Make sure you map fields in the Organisations (Accounts), People (Contacts) and Leads tab. Once you've mapped all the fields you would like scroll down to the bottom of the page and click the **Save Mapping** button.



12. A pop up box will appear asking you would like to make the changes click **OK** and this will bring you back to CRM.



13. The fields that you selected to map will now display a green tick in the CRM column. If you need to make any changes, use the drop down boxes again to make those changes and select the **Save Mapping** button once more.



14. In the **Subscription Type** tab, you are able to Map subscription preferences between HubSpot and CRM. In the **HubSpot Preferences** column, the list of HubSpot's marketing email subscription preferences will be displayed. Map **CRM Marketing Preferences** using the drop down options to select which CRM Marketing preference the HubSpot option will map to. Once mapped, select the **Save Mapping** button.