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## HubSpot Integration: Sync CRM Records to HubSpot

**1.** To sync a **Person (Contact)/Lead** record with HubSpot **Menu** select **Sync HubSpot Contact**. This will sync the record with all the fields you have mapped between FibreCRM and HubSpot. The record in HubSpot will be created as **Non Marketing Contact**.

The screenshot shows the 'Hannah Faragher' contact record in FibreCRM. The 'ACTIONS' menu is open, and 'Sync HubSpot Contact' is highlighted. The record details include: First Name: Hannah, Last Name: Faragher, Person ID: FAR04450, Client Manager: Bob, Client Partner: Rose Walker, Sensitive Data: Add Sensitive Data, Trading as: [blank], Referrals Out: [blank]. The 'ACTIONS' menu includes options like Edit, Duplicate, Delete, Find Duplicates, Manage Subscriptions, Print as PDF, View Change Log, Client Information Request, Send Direct Debit Form, Add to My 20-40 List, AMI Check, KYC Ref, Start KYC Process, Useful Tools, R2E, R2B, and Sync HubSpot Contact.

**2.** However if Marketing preferences have been/or are selected in CRM, the record will become a **Marketing Contact** in HubSpot. To add any **Marketing Preferences** select **Edit** from the **Actions Menu** of the record and then select from the tick box options. Select **Save & Close** once done.

The screenshot shows the 'Hannah Faragher' contact record in FibreCRM. The 'Marketing Preferences' section is expanded, showing 'Newsletter' as a selected preference. The record details include: Birth month: 7, Birth year: 1999, Birthdate: 01-07-1999, Age: 21, Gender: [blank], Nationality: [blank], Marital Status: [blank], Description: [blank], Marketing Preferences: Newsletter. The 'ACTIONS' menu is also visible, with 'Edit' highlighted.

**3.** An **Organisation** can be created in HubSpot as a **Company**, along with a **Person** using the **Sync HubSpot Contact** option if there is an **Involvement** between the two records. In the **Involvement** the tickbox **Is Primary Account** must be ticked for the records to sync over together. If there is no involvement navigate to the **Organisation** record and select **Sync HubSpot Company** in the **Actions Menu**.

The screenshot shows the 'ABC SERVICES LTD' company record in HubSpot. The 'ACTIONS' menu is open, and 'Sync HubSpot Company' is highlighted. The record details include: Name: ABC Services Ltd, Client ID: KN01992, Primary Contact: [blank], Office Phone: [blank], Website: http://, Business Description: [blank], Client Partner: [blank], Client Manager: Bob, Referrals Out: [blank]. The 'ACTIONS' menu includes options like Edit, Delete, Find Duplicates, Print as PDF, View Change Log, Send Direct Debit Form, Add to My 20-40 List, Business Search, KYC Ref, Start KYC Process, Sync HubSpot Company, and Send Email.

**4.** **Leads** can be created from a website form by HubSpot which will sync over to CRM. Or by creating a **Lead** as you normally do in CRM. If a **Lead** is created in CRM use the **Sync HubSpot Contact** from the **Actions Menu** to sync to HubSpot as a **Contact**. When the **Lead** is **Converted** to a **Person** record in CRM, the **Contact** will be synced to that **Person** record and no longer be connected to the **Lead** record. This is due to the fact that HubSpot can not have two records using the same email address.

The screenshot shows the 'PEGGY MITCHELL' lead record in HubSpot. The 'ACTIONS' menu is open, and 'Sync HubSpot Contact' is highlighted. The record details include: First Name: Peggy, Last Name: Mitchell, Job Title: [blank], Organisation Name: The Vic, Email Address: peggy.mitchell@demco.co, Website: [blank], Status: New, Description: [blank], Marketing Preferences: [blank]. The 'ACTIONS' menu includes options like Edit, Duplicate, Delete, Find Duplicates, Convert Lead, Manage Subscriptions, Print as PDF, View Change Log, Add to My 20-40 List, Useful Tools, SAR, R2E, R2B, and Sync HubSpot Contact.

**5.** To view activity of the person such as webpage views, forms filled in or marketing information navigate to the **HubSpot Activity Subpanel** in the **Lead** or **Person** record. This subpanel shows all the activity that can be seen in HubSpot.

Campaign Name	Type	Source	Created at	Portal Subscription Status	Date Modified
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_HUBSPOT_CUSTOMER	12/09/2021 12:48		12/09/2021 13:00
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_HUBSPOT_CUSTOMER	12/09/2021 11:15		12/09/2021 11:17
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_HUBSPOT_CUSTOMER	12/09/2021 11:15		12/09/2021 11:17
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_HUBSPOT_CUSTOMER	12/09/2021 11:15		12/09/2021 11:17
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_HUBSPOT_CUSTOMER	12/09/2021 11:15		12/09/2021 11:17
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_HUBSPOT_CUSTOMER	12/09/2021 11:15		12/09/2021 11:17
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_RECIPIENT	11/25/2021 09:17		12/08/2021 11:30
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_RECIPIENT	11/25/2021 09:17		12/08/2021 11:30
teethow@fibrecrm.com	STATUSCHANGE	SOURCE_RECIPIENT	11/25/2021 09:17	SUBSCRIBED	12/08/2021 11:30