# fibreCRM

## HEART OF THE PRACTICE

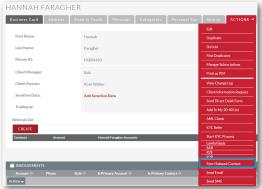Visit **support.fibrecrm.com** for more info or contact your CRM Manager

# HubSpot Integration: Sync CRM Records to HubSpot

**1.** To sync a **Person (Contact)/Lead** record with HubSpot navigate to the Person or Lead record and in the **Actions 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**.



**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.
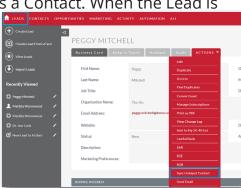


**3.** An **Organisation** can be created in HubSpot as a Company, along with a Person using the **Sync HubSpot Contact** option if there is an Involvement between the two records. In the Involvement the tickbox **Is Primary Account** must be ticked for the records to sync over together. If there is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



**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.



**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.