SalesIntel HubSpot Configuration Guide

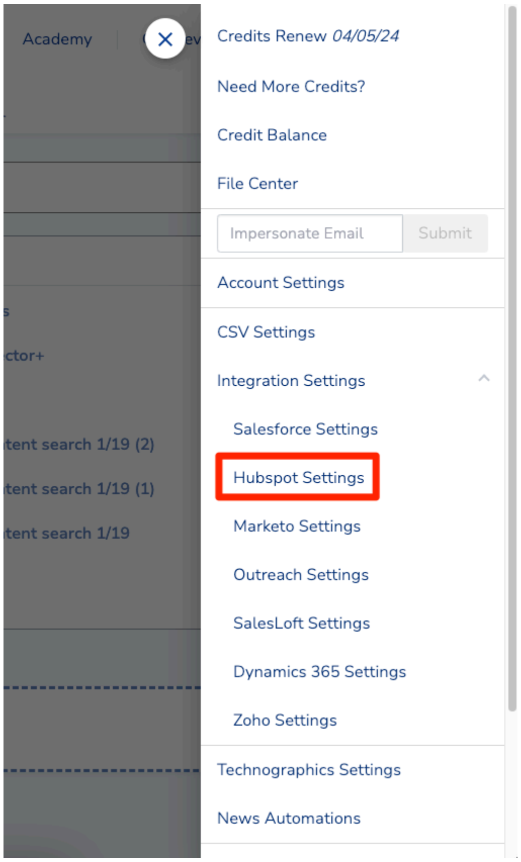
Setting Up the HubSpot Integration for New Contact Export and Enrichment

HubSpot Settings for SalesIntel

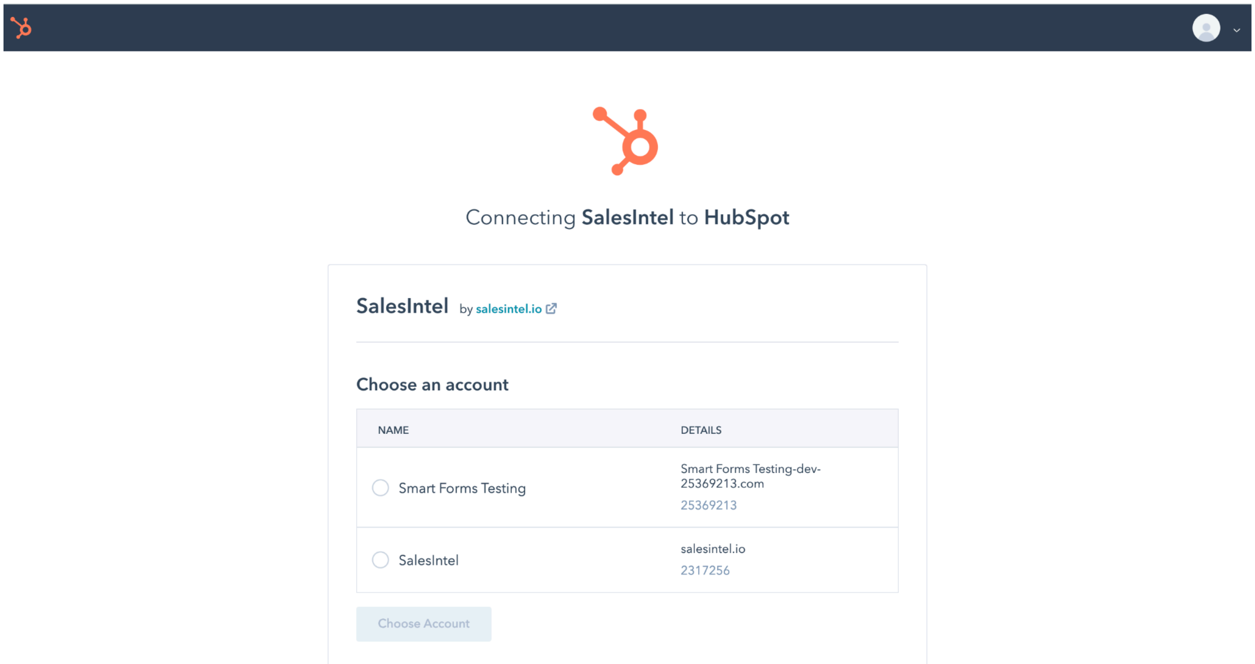
Connect SalesIntel to HubSpot

These steps are required to export new contacts to HubSpot from SalesIntel or to enrich existing HubSpot contacts with SalesIntel data.

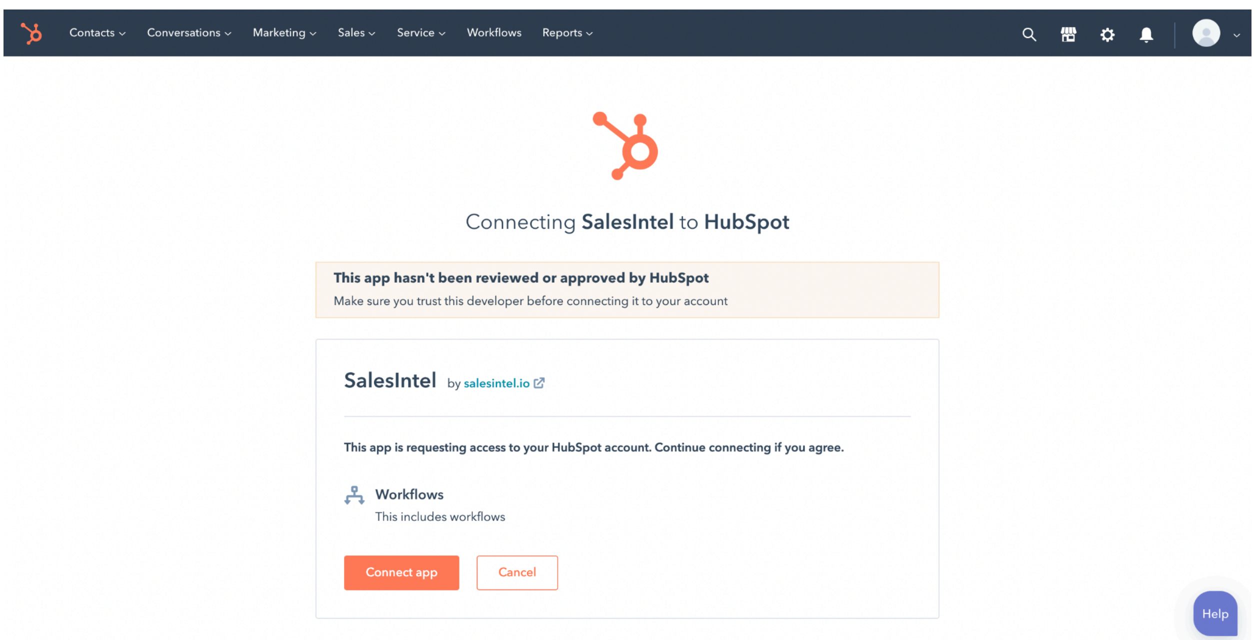
1. Login to SalesIntel at https://app.salesintel.io
2. Go to the HubSpot Settings for SalesIntel located under the 'Welcome' drop down menu



3. Connect SalesIntel by choosing your HubSpot account



4. Confirm the connection between SalesIntel and HubSpot account by clicking ‘Connect app’



General Settings

These steps are required to export new contacts to HubSpot from SalesIntel but are not used to enrich existing HubSpot contacts with SalesIntel data.

Once SalesIntel is connected to HubSpot, choose your HubSpot Settings for SalesIntel.

1. Choose whether you want to export contacts into HubSpot as Subscribers or Leads. Select Prompt to provide the option during each export.
2. For Duplicate Resolution, choose whether to 'Always Skip', 'Always Update', Append only blank records or select 'Prompt' to provide the option during each export.
3. Choose whether to 'Prompt' for Workflows, which allows the option for the Contact to be enrolled in a workflow when exported.
4. Choose whether to 'Prompt for Contact Owners', which allows a Contact Owners to be added on contact export.

Contact Mapping Options

These steps are required to export new contacts to HubSpot from SalesIntel or to enrich existing HubSpot contacts with SalesIntel data. The same mappings are followed for each procedure.

1. Go to 'Contact Mapping' tab in the sidebar
2. Choose the HubSpot field to which to map each SalesIntel field, or choose 'skip' to skip that field. Selecting 'Allow Overwrite' for the field applies only to mapped fields. If the field is mapped and 'Allow Overwrite' is enabled, data in that field for that HubSpot Contact may be overwritten with new SalesIntel data during the export and/or enrichment process. Without this setting, only new data will be appended when the field is currently empty. Click 'Save' to update the choices.

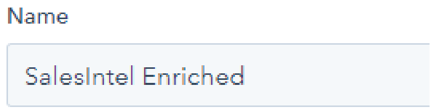
   This setting is where and how you can control what information flows into the Hubspot instance and what information takes precedent when conflicting information exists. If you have questions about what is the best strategy for this, contact your Success Manager or contact us at support@salesintel.io.

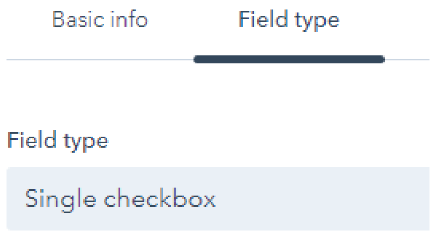
Enrichment Reporting Set Up

This step is required to enrich existing HubSpot contacts with SalesIntel data but have no impact on exporting new contacts.

1. Create four custom properties in HubSpot on Contacts, as follows:
   - SalesIntel Enriched (Single checkbox) **(REQUIRED)**
   - SalesIntel Changed Jobs (Single checkbox)
   - SalesIntel New Email (Single line text)
   - SalesIntel Old Email (Single line text)

   For example, the 'SalesIntel Enriched' field should look exactly like this:





These fields help track the changes that SalesIntel makes in your database. Every time a record is enriched, 'SalesIntel Enriched' is marked TRUE. If you already have the SalesIntel Salesforce managed package installed and you have a SFDC to HubSpot sync, you may already have this field in your Hubspot. You MUST create this Contact property or enrichment will fail.

The other three fields are used to track job changes. When enrichment is requested on a contact that has gone through a job change, a new record is created and these fields are set to record the change:

- A new contact is created (as a lead record) with the new information
- 'SalesIntel Changed Jobs' set to TRUE on the old contact
- 'SalesIntel New Email' set to the new contact's email address on the old contact record
- 'SalesIntel Old Email' set to the old contact's email address on the new contact record

This process allows the HubSpot admin to maintain both records as well as understand the relationship between them. Without these additional fields, enrichment will not fail, but this relationship will not be captured. The new contact record will still be created.

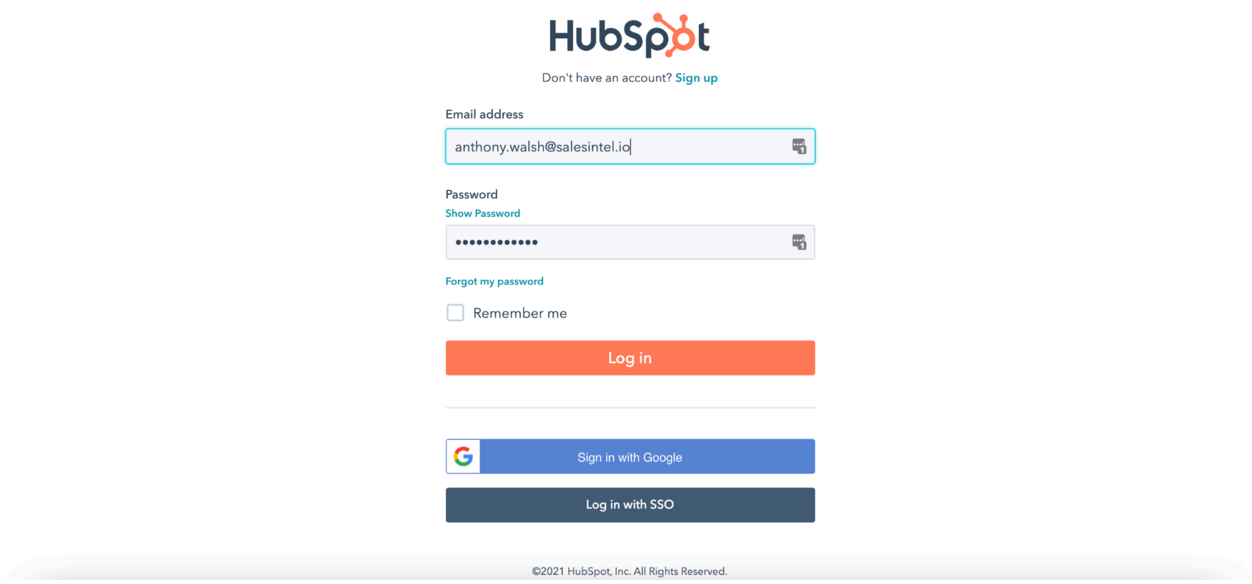
Creating Workflows with Webhooks for the Enrichment Process

The contact enrichment process is executed using HubSpot workflow automation. One or more workflows may be used to create a highly-customizable and repeatable process of different enrichment programs.

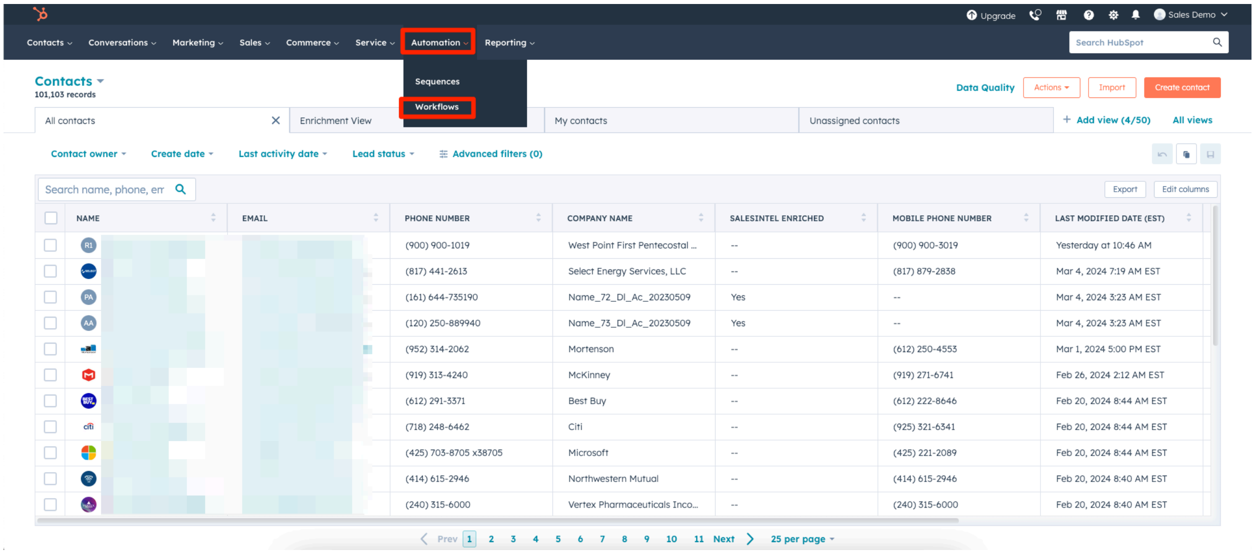
Contact Enrichment

Creating Enrichment Workflow

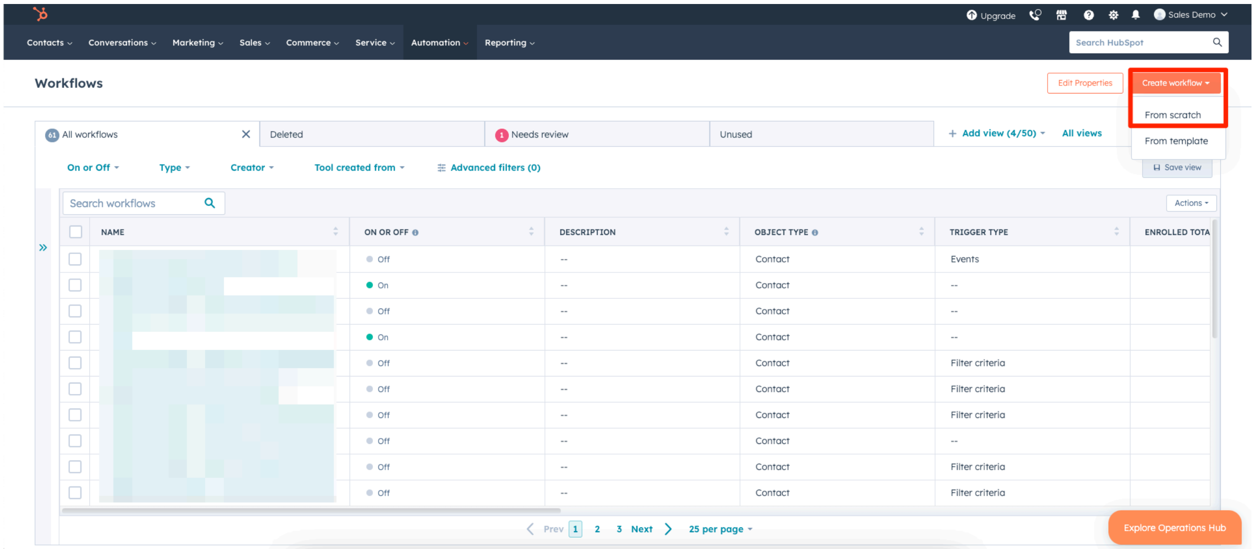
1. Login to your HubSpot account



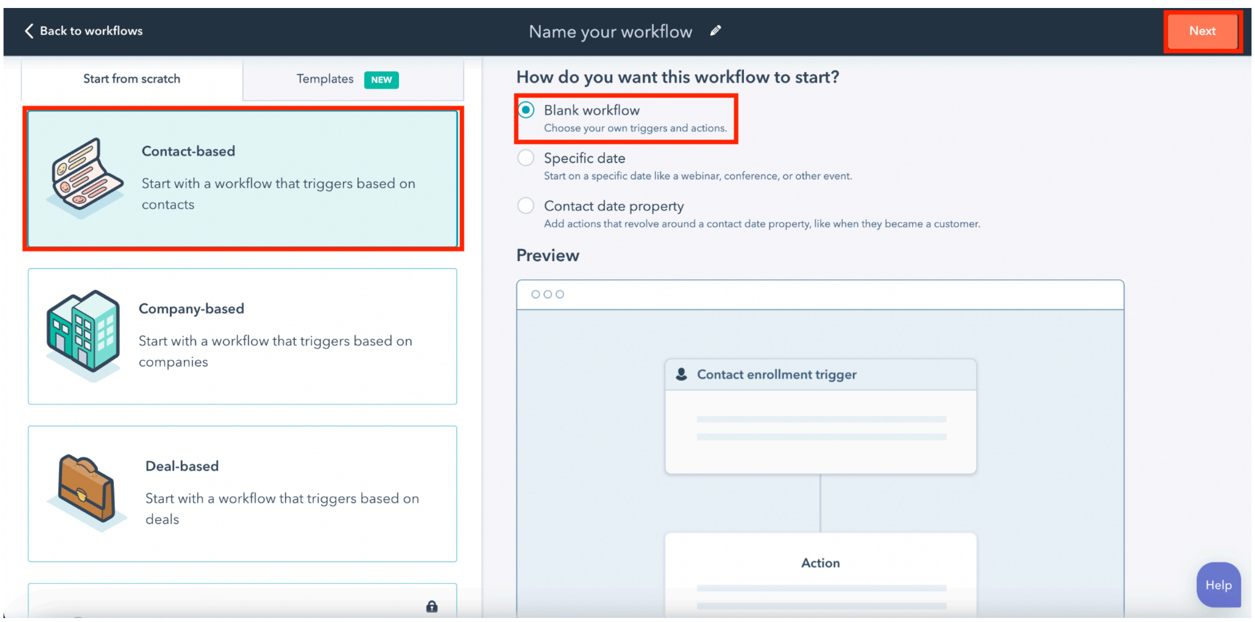
2. Go to the 'Automations' tab in the top menu and Select 'Workflows'



3. Click 'Create Workflow' > 'From Scratch' button in upper right corner

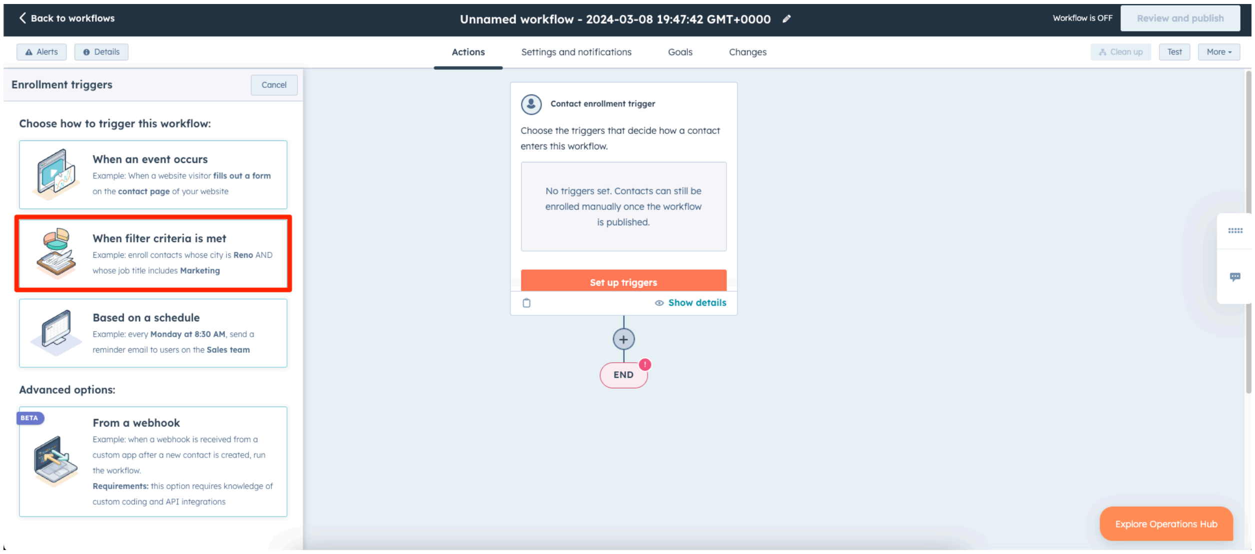


4. Select ‘Blank workflow’ to choose your own triggers and actions, then press ‘Next’

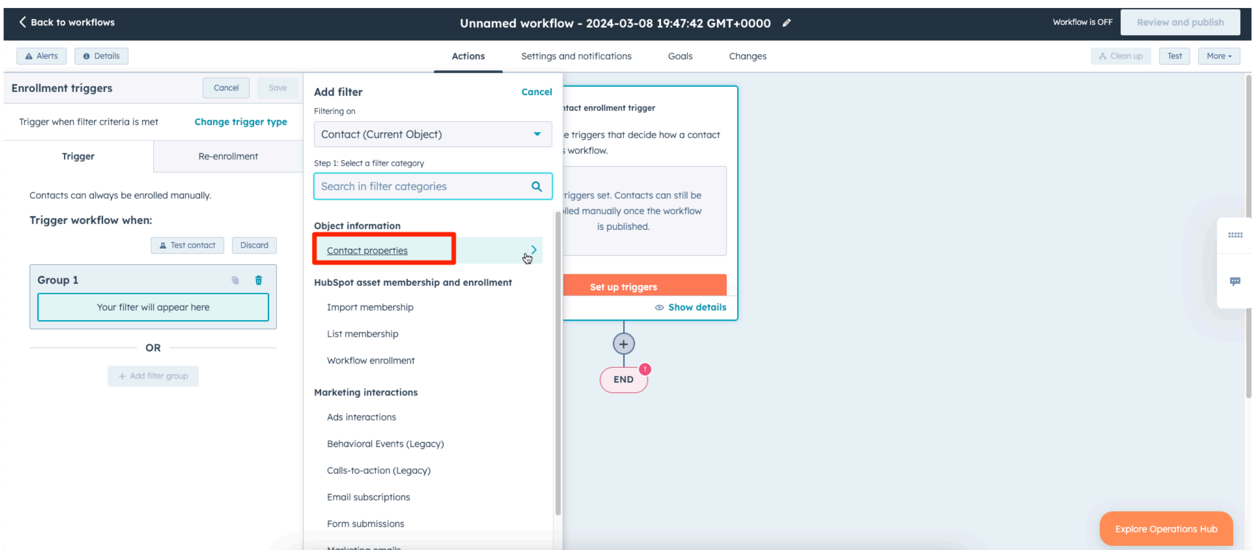


5. Click ‘Set up triggers’ to determine which contacts enter this workflow. This works similarly to any other Hubspot Workflow. You can enroll contacts from forms, specific lists, or by contact properties criteria.

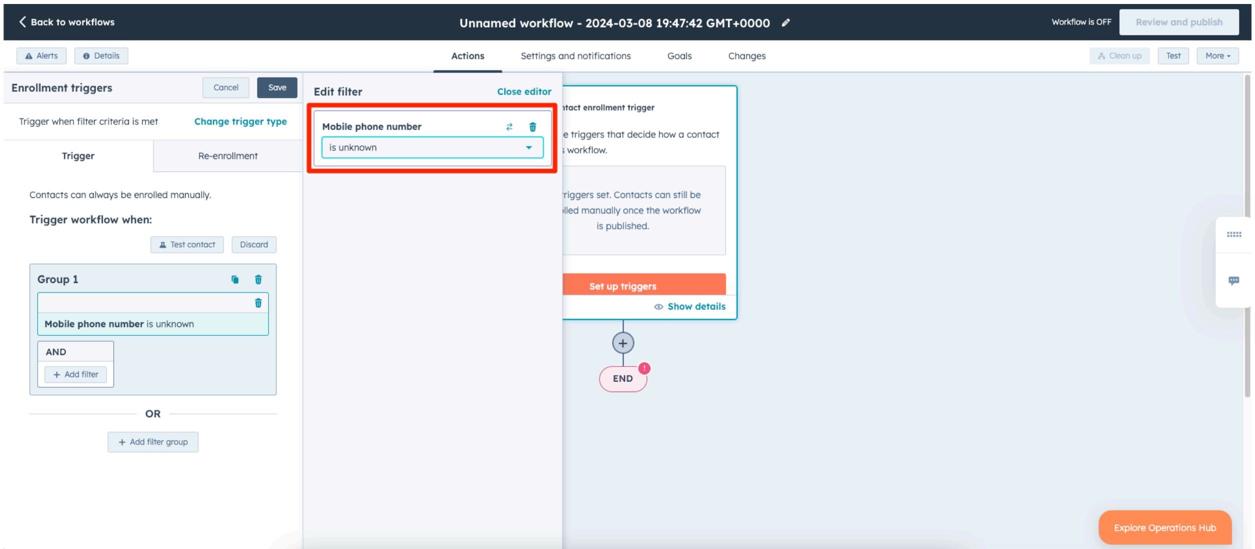
   For this example, we’ll select ‘When filter criteria is met’ and then choose ‘Contact Properties’ with unknown mobile fields, which will run the enrichment process only for contacts who don’t have a mobile number. This process can also be run for other fields, for contacts who completed a form, for contacts of a certain age, etc.



a. Select ‘contact properties’



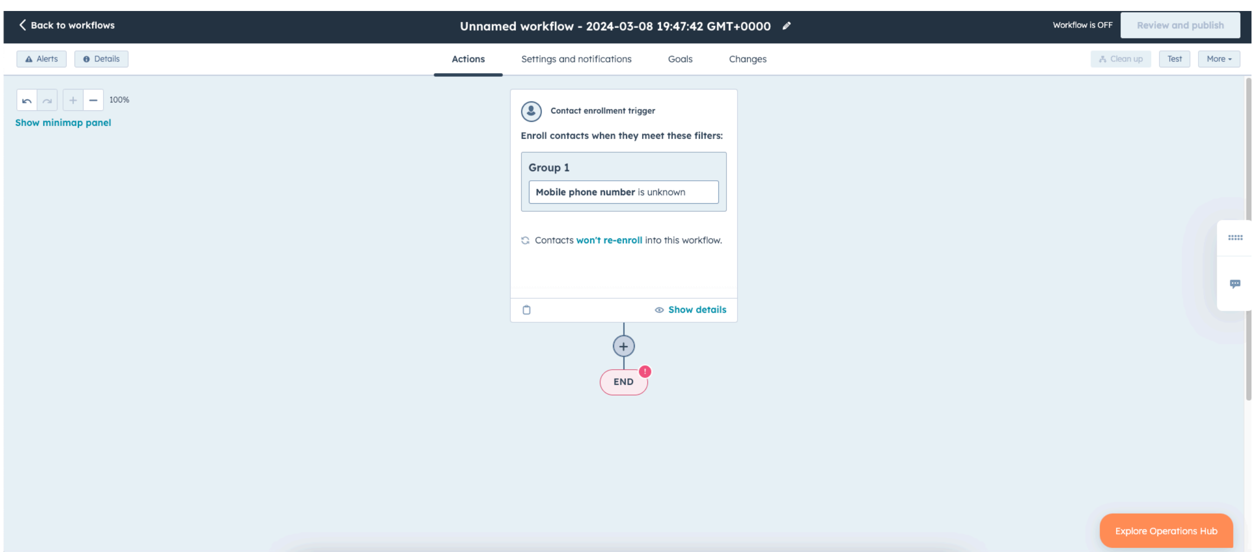
b. Search for the target field then select the value that represents when you want to update. In our example, I’ll select ‘is unknown’ to enter contacts that have missing information that I want to check for



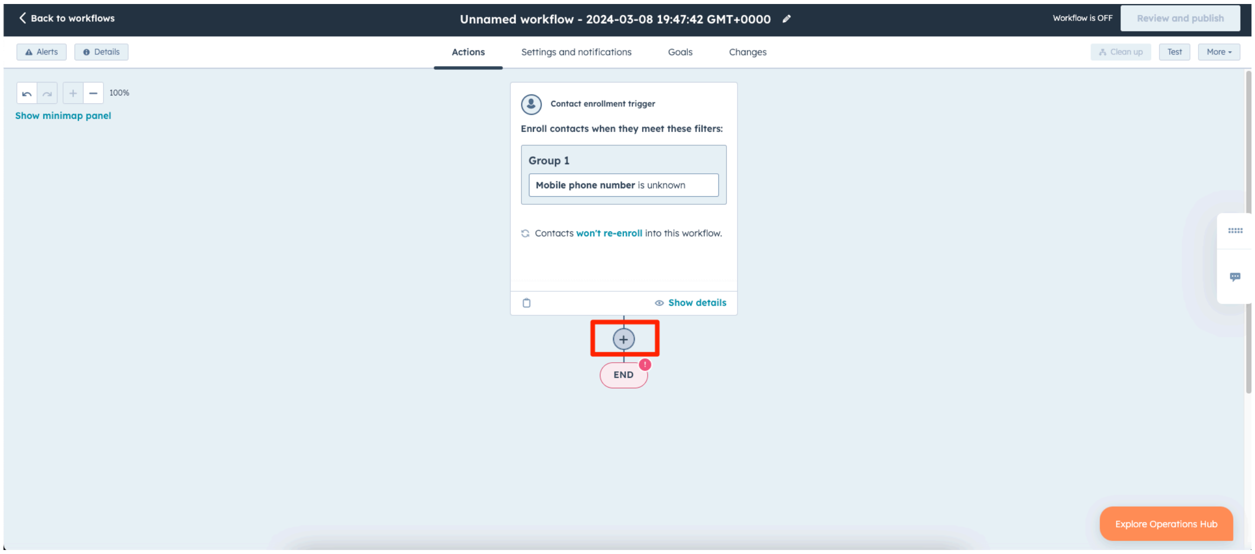
6. Enrichment triggers are completely at your discretion. Apply as few or as many that are needed to identify the contact records you'd like to be enriched.
    a. Tip: Our teams recommend setting up the following triggers
        i. Form Submission
        ii. Event Opt-In/Registration Lists
        iii. Any property that is Key to your sales team's success (Unknown = mobile number, job title, email etc.)

7. To automatically enrich records that meet your trigger criteria, go to "Re-enrollment" and click the first box (Allow contacts who meet the trigger ...).

8. Save the contact enrollment trigger(s)



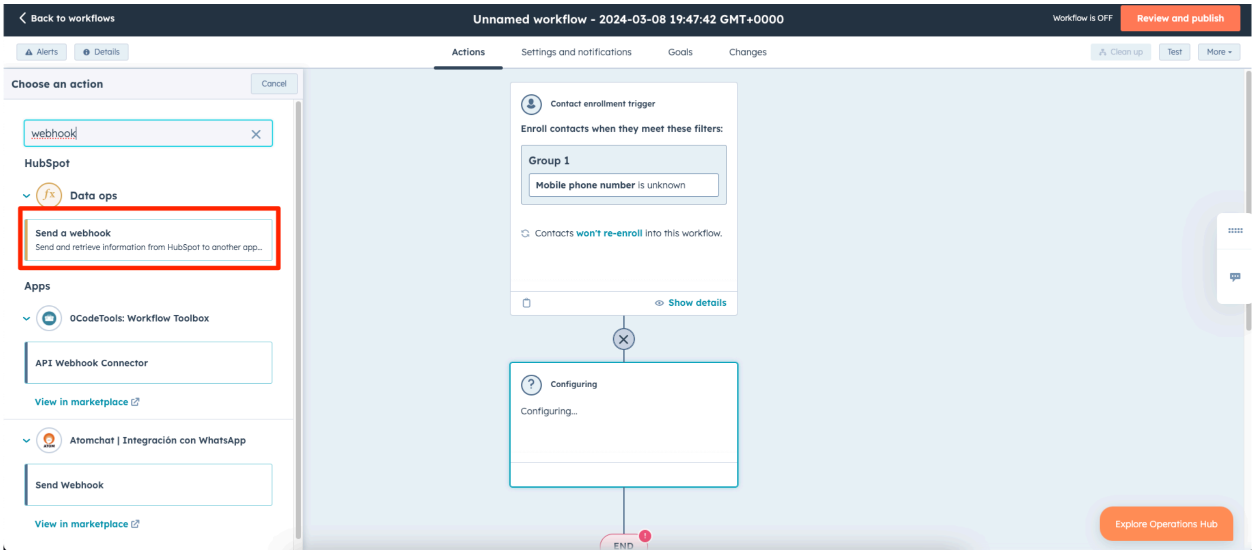
9. Click the plus sign below the Contact enrollment trigger to add your SalesIntel API key webook.



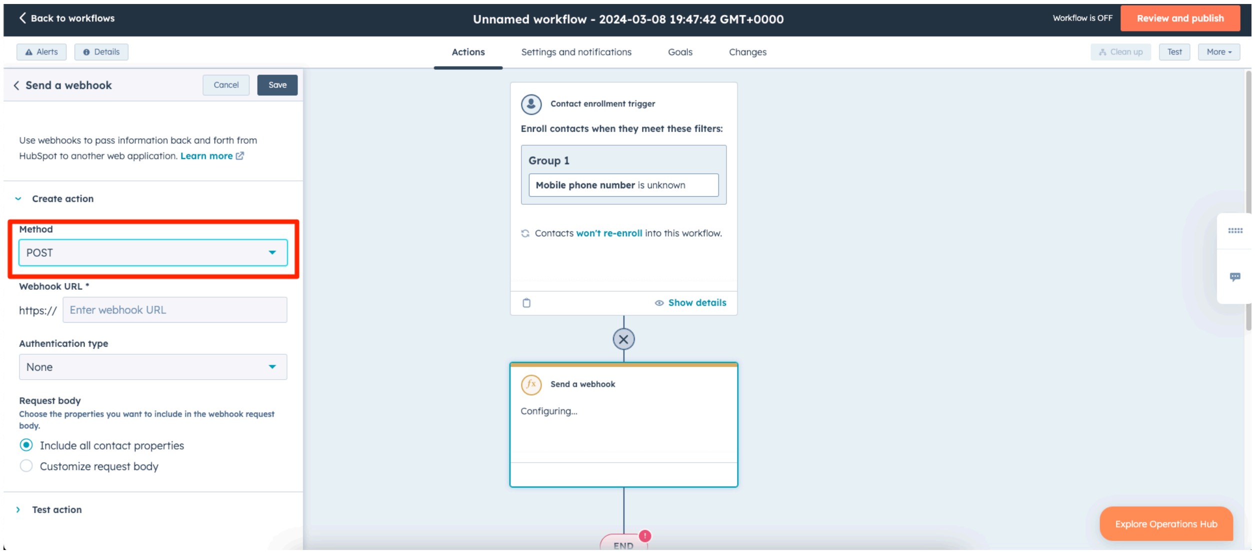
Posting to Webhook

1. Once you've created a new step in the workflow select 'Send a webhook' as an action

   Note: The Hubspot Webhook sends Email Addresses to our API with the API Key. SalesIntel associates the API Key with the Connector User and their field mappings and pushes data back to the Hubspot accordingly.



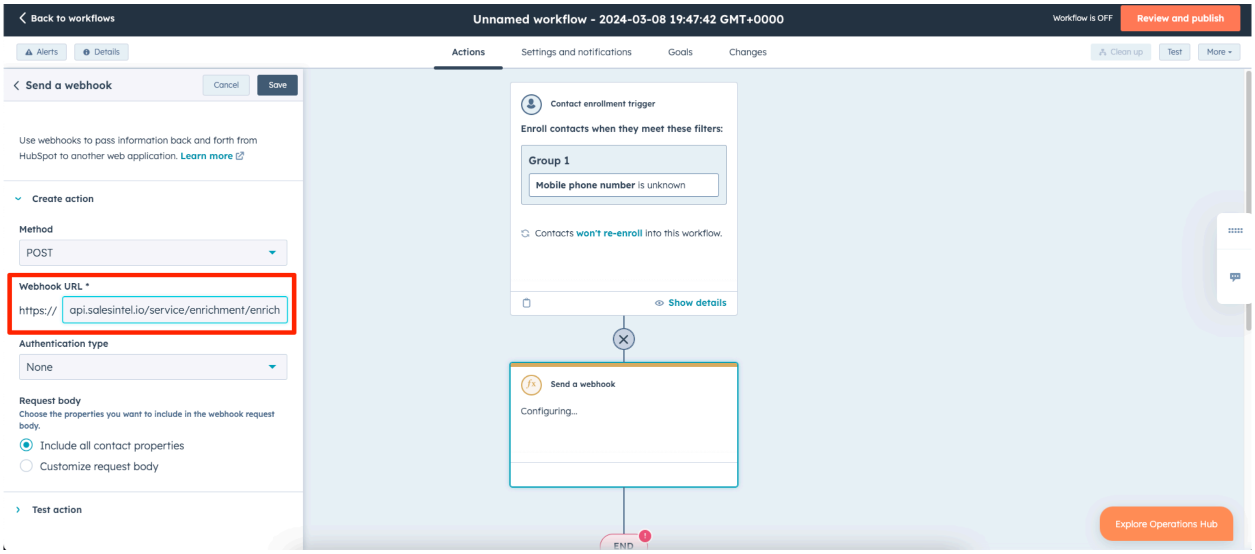
2. Select POST from the Method dropdown.



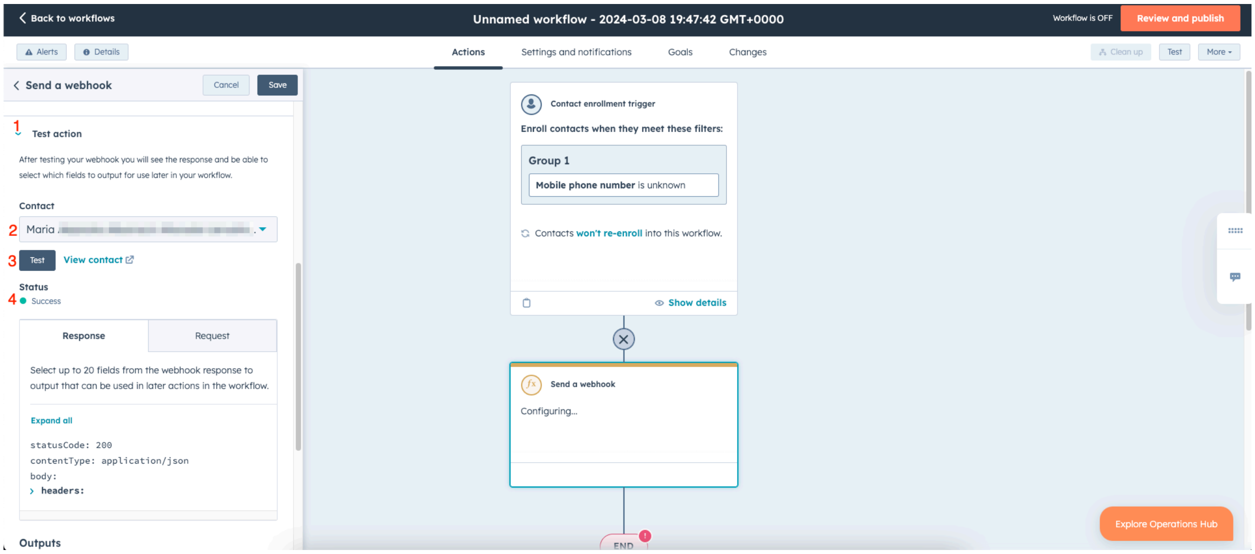
3. Enter the link below to the Webhook URL field, replacing the red API key with your own key.

 Note: This URL is incomplete without a user-specific API key provided by SalesIntel. **Please contact SalesIntel support to get a Hubspot Enrichment API Key.**

 https://api.salesintel.io/service/enrichment/enrich/hubspot/enrichContacts?apiKey=XXXXXXXtZjY1My00ZDI0LThiNDEtNmEzMzE0NXXXXXXX



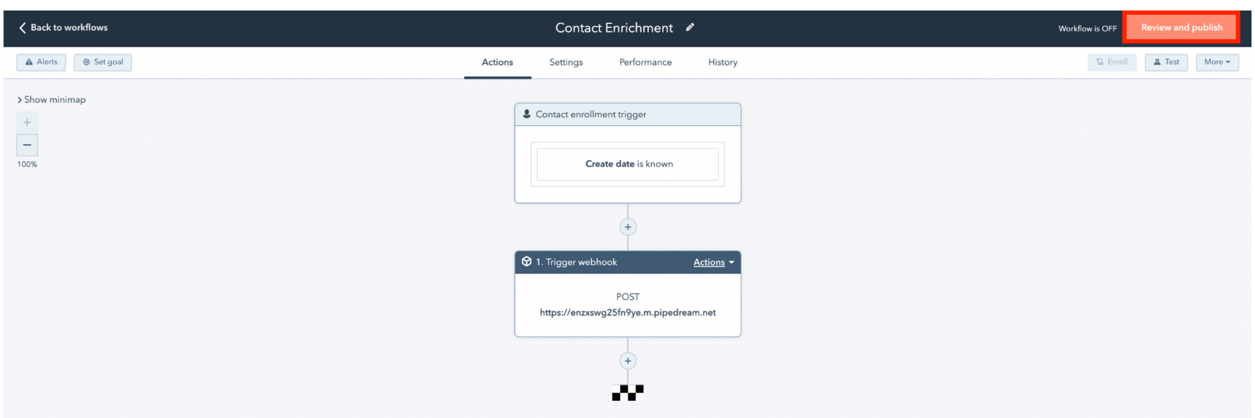
4. Run a Test by clicking the 'Test Action' section. Select an entry from your existing records and click 'Test'. The action should result in a 'Success' message, ensuring that your url and API Key works as expected.



If everything is working as expected, click Save in the upper-right of the panel.

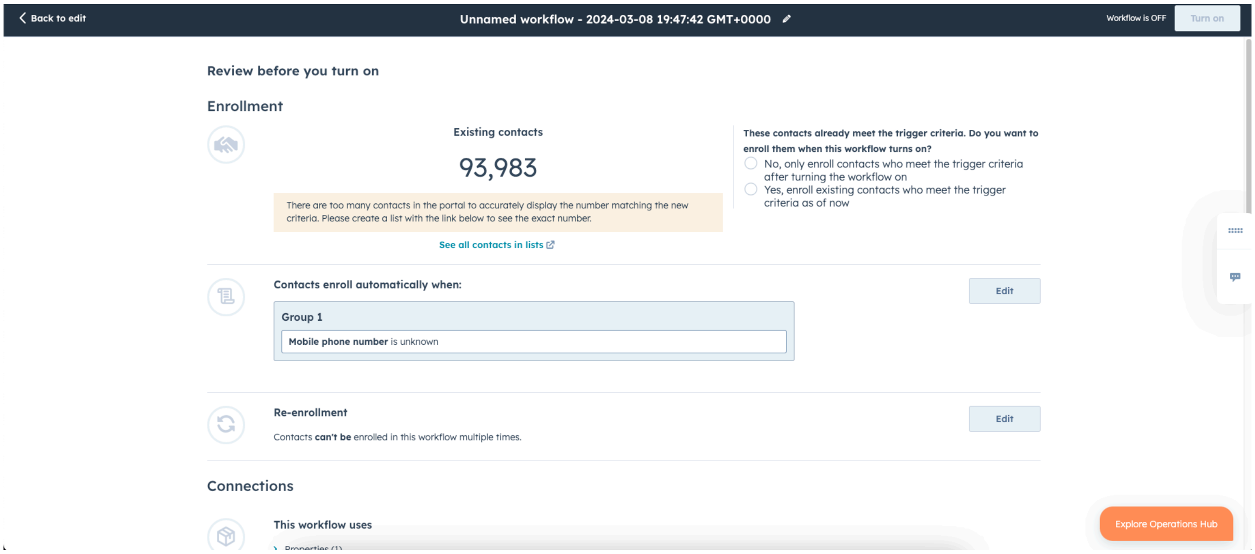
Reviewing & Publishing Workflow

1. Click 'Review and publish' button in upper right corner to finalize the workflow

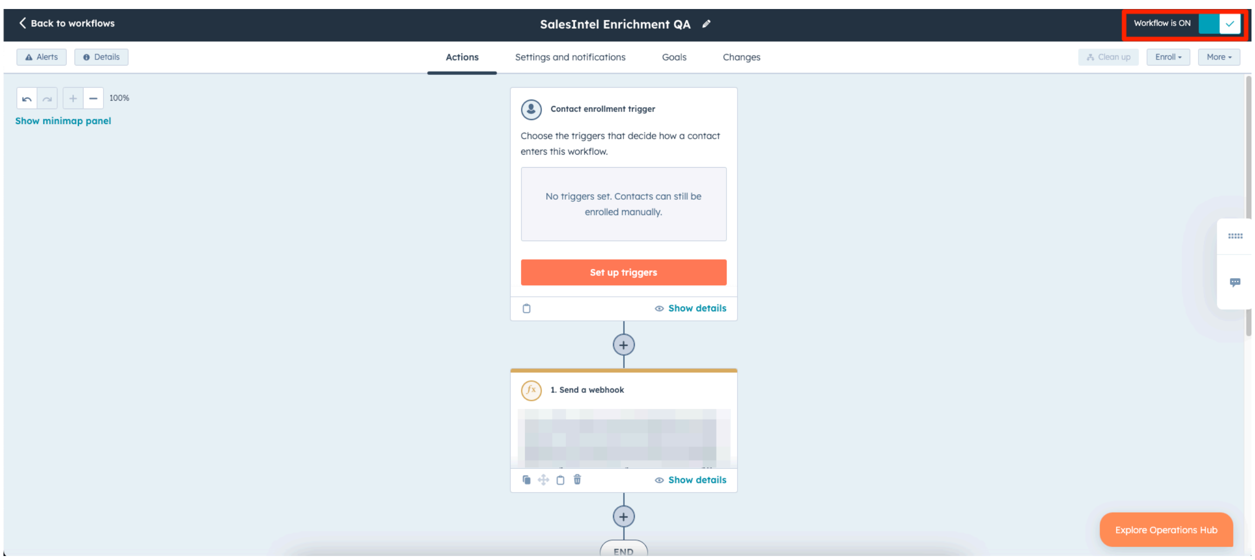


2. Choose yes or no for the following options:
    - Yes, to enroll contacts who meet the trigger criteria as of now (this will enroll your existing db immediately if they meet the filter)
    - No, to enroll contacts who meet the trigger criteria after the workflow is turned on (this will only enroll new and changed contacts after the workflow is enabled)

Then turn on the workflow with the button in the upper-right.



3. The workflow can be disabled by toggling off the button, in the upper-right corner

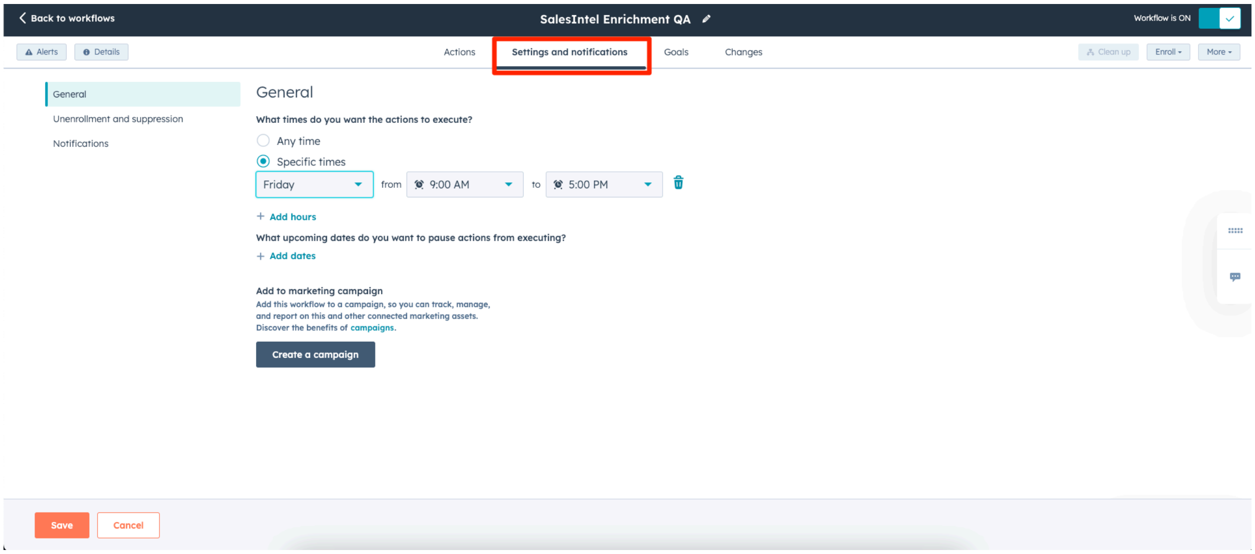


Schedule Your Enrichment

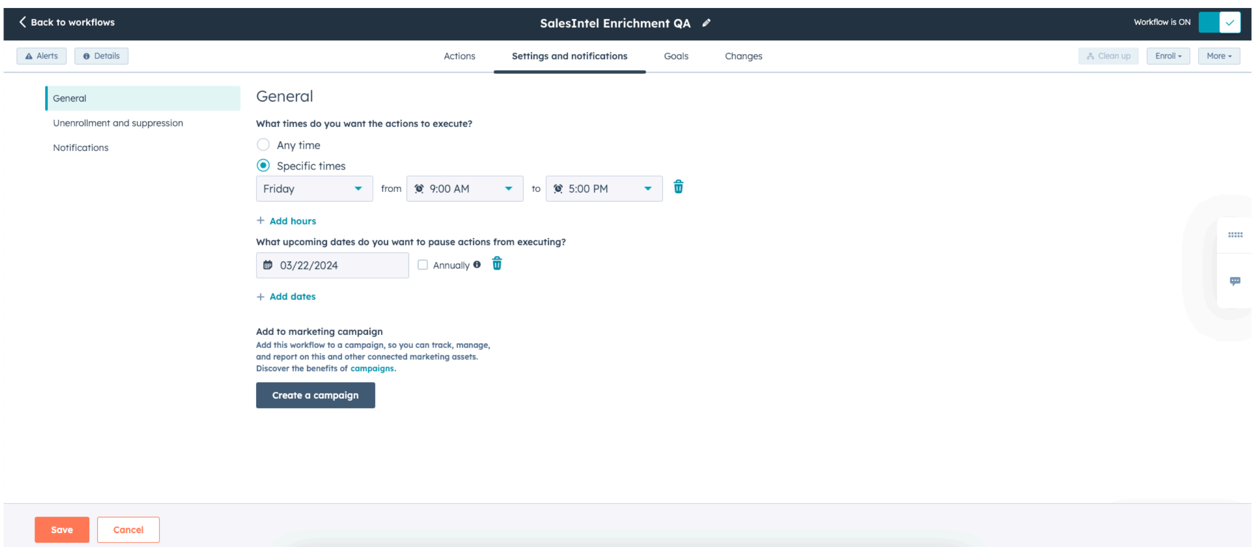
General Settings

1. Choose whether to execute action at any time or specific times

   Note: To schedule enrichment, pick a specific time to execute action



2. Select any dates for which you would like to pause execution



Performance & Reporting

Learn more about the details about tracking the performance of workflows by reviewing HubSpot's [Deep Drive into Your Workflow Performance](#).

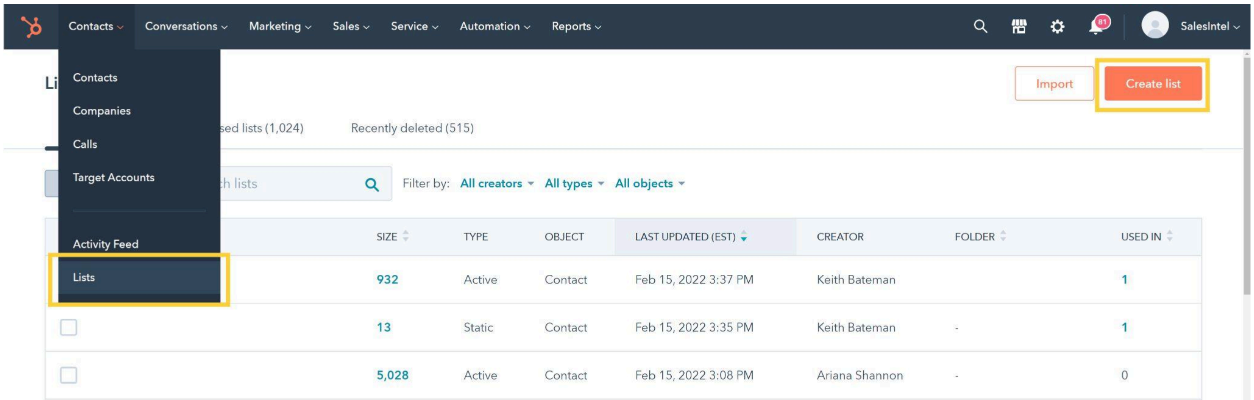
Reporting on SalesIntel Enrichment

1. In order to know which records were enriched by SalesIntel need to create the custom property 'SalesIntel Enriched' *before* running enrichment. Follow the directions in the

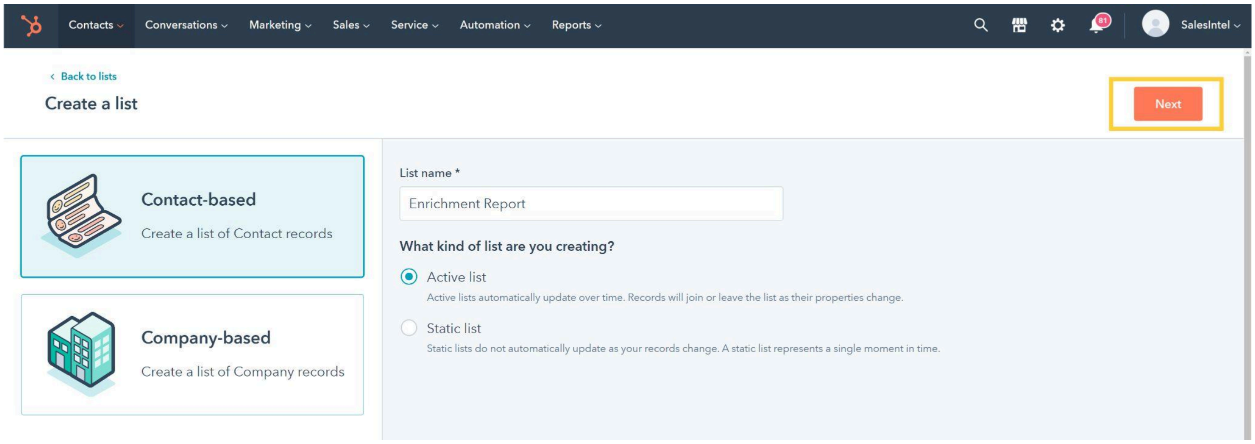
[Enrichment Reporting Set Up section](#) of this document to create the necessary fields. This is the checkbox SalesIntel will mark as TRUE every time it enriches a record.

2. Once you have this property created, you'll be able to view all enrichment history after the date it was implemented. The fastest way to review this information is by creating a Contact List.

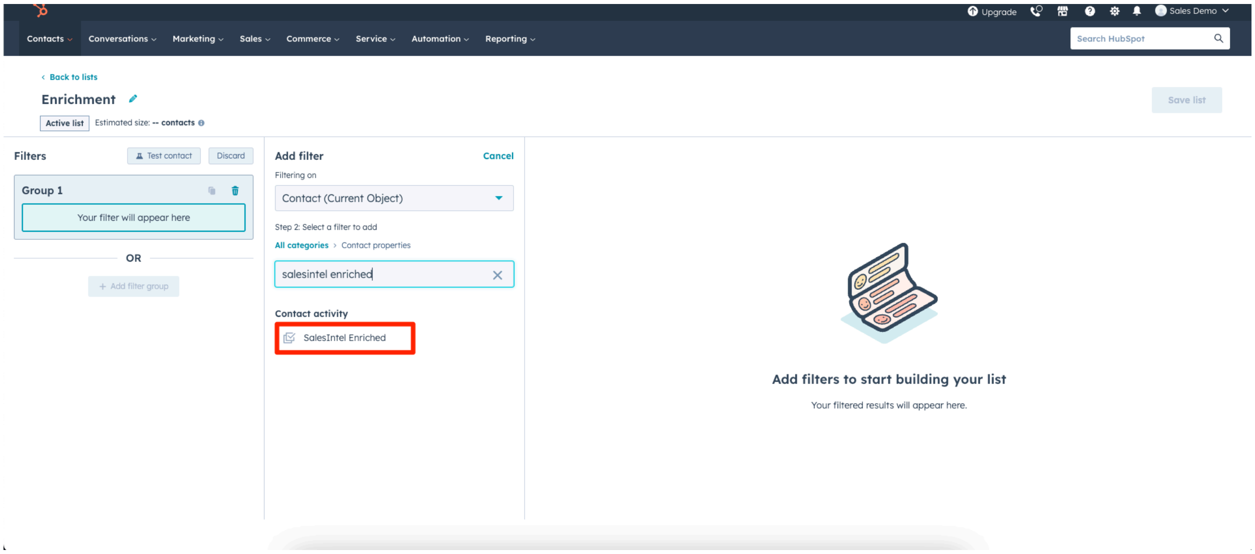
3. Go to 'Contacts', then select 'Lists' and finally 'Create List'



4. Create an 'Active List', give it an appropriate name, and click 'Next'



5. Set the list criteria as 'Contact Properties', search for 'SalesIntel Enriched' and select the appropriate field



6. Then set the criteria to 'is any of' 'Yes' then save the list.