

SalesIntel HubSpot Configuration Guide

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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



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Connecting Sal	esIntel to HubSpot
SalesIntel by salesintel.io 🗹	
Choose an account	
NAME	DETAILS
NAME Smart Forms Testing	DETAILS Smart Forms Testing-dev- 25369213.com 25369213
NAME Smart Forms Testing SalesIntel	DETAILS Smart Forms Testing-dev- 25369213.com 25369213 salesintel.io 2317256

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

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					nis includes v	workflows							
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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:



Name		
SalesIntel Enrich	ed	
Basic info	Field type	
_		
Field type		

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

	HubSoot	
	Don't have an account? Sign up	
Email add	ress	
anthon	y.walsh@salesintel.io	5
Password Show Passv	vord	
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Forgot my	password	
Rem	ember me	
	Log in	
G	Sign in with Google	
	Log in with SSO	
	©2021 HubSpot. Inc. All Rights Reserved.	

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

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	٢					(919) 313-4240	McKinney			(919) 271-6741	Feb 26, 2024 2:12 AM EST
	(19)					(612) 291-3371	Best Buy			(612) 222-8646	Feb 20, 2024 8:44 AM EST
	cft					(718) 248-6462	Citi			(925) 321-6341	Feb 20, 2024 8:44 AM EST
	•					(425) 703-8705 x38705	Microsoft			(425) 221-2089	Feb 20, 2024 8:44 AM EST
	0					(414) 615-2946	Northwestern Mutual			(414) 615-2946	Feb 20, 2024 8:40 AM EST
						(240) 315-6000	Vertex Pharmaceuticals Inco			(240) 315-6000	Feb 20, 2024 8:40 AM EST

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



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

C Back to workflows	Name your workflow 🕜	Next
Start from scratch Templates ILEW Contact-based Start with a workflow that triggers based on contacts	How do you want this workflow to start? Blank workflow Choose your own triggers and actions. Specific date Stat on a specific date like a webinar, conference, or other event. Contact date property Add actions that revolve around a contact date property, like when they became a customer. Preview	
Company-based Start with a workflow that triggers based on companies	Contact enrollment trigger	
Deal-based Start with a workflow that triggers based on deals	Action	Help

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'

K Back to workflows			Unnamed workf	low - 2024-03-08 19:47:42 GMT+0000 🖌	,	Workflow is OFF Review and publ
Alerts O Details			Actions Settings	and notifications Goals Changes		A Clean up Test N
Enrollment triggers	Cancel Save	Add filter	Cancel			
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mgger	Referrionment	Step 1: Select a filter category				
Contacts can always be enroll	led manually.	Search in filter categories	۹	riggers set. Contacts can still be		
Trigger workflow when:		Object information		illed manually once the workflow is published.		
	A Test contact Discard	Contact properties	e.			
Group 1	9.0	HubSpot asset membership an	id enrollment	Set up triggers		
Your filter will	appear here	Import membership		Show details		
		List membership		+		
0	R	Workflow enrollment				
+ Add filt		Marketing interactions		END		
		Ads interactions				
		Behavioral Events (Legacy)				
		Calls-to-action (Legacy)				
		Email subscriptions				
		Form submissions				Explore Operations Hi
		Marketing emails				

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



K Back to workflows	Unnamed workf	low - 2024-03-08 19:47:42 GMT+0000 🖋	Workflow is OFF	Review and	publish
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Enrollment triggers Cancel Save	Edit filter Close editor				
Trigger when filter criteria is met Change trigger type	Mobile phone number 🛛 🕏 🤠	ntact enrollment trigger			
Trigger Re-enrollment	is unknown 👻	s workflow.			
Contacts can always be enrolled manually. Trigger workflow when: A Test contact Discord		riggers set. Contacts can still be illed manually once the workflow is published.			
Group 1 🔹 🔋		Set up triggers			æ
Mobile phone number is unknown AND + Add filter		+ END 9			
OR + Add filter group			Ex	plore Operatio	ns Hub

- 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)

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Show minimap panel		Contact enrollment trigger roll contacts when they meet these filters: Froup 1 Mobile phone number is unknown Contacts won't re-enroll into this workflow.		xplore Operation	5 HLD



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

K Back to workflows	Unnamed workflow - 2024-03-08 19:47:42 GMT+0000 🖋	Workflow is OFF Review and publish
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Show minimop panel	Contact enrollment trigger Enroll contacts when they meet these filters: Group 1 Mobile phone number is unknown Contacts wont're-enroll into this workflow. Contacts wont're-enroll into this workflow. Contacts wont're-enroll into this workflow.	
		Explore Operations Hub

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.

K Back to workflows	Unna	med workflow - 2024-03-08 19:47:42 GMT+0000	Workflow is OFF Review and publish
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webhook × HubSpot		Enroll contacts when they meet these filters: Group 1	
~ (fx) Data ops		Mobile phone number is unknown	
Send a webhook Send and retrieve information from HubSpot to another app		Contacts won't re-enroll into this workflow.	
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API Webhook Connector		(?) Configuring	
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Send Webhook			
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2. Select POST from the Method dropdown.



K Back to workflows	Unno	amed workflow - 2024-03-08 19:47:42 GMT+0000	Workflow is OFF Review and publish
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< Send a webhook Cancel Sove		Contact enrollment trigger	
Use webhooks to pass information back and farth from HubSpot to another web application. Learn more 2		Enroll contacts when they meet these filters: Group 1	
 Create action 		Mobile phone number is unknown	
Method POST -		Contacts won't re-enroll into this workflow.	
Webhook URL *		O Show details	P
https:// Enter webhook URL Authentication type		×	
None		Send a webhook	
Request body Choose the properties you want to include in the webhook request body.		Configuring	
Include all contact properties Customize request body			
> Test action			Explore Operations Hub

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=XXXXXXtZjY1 My00ZDI0LThiNDEtNmEzMzE0NXXXXXX

K Back to workflows	Unnar	ned workflow - 2024-03-08 19:47:42 GMT+0000	Workflow is OFF	Review and publish
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Send a webhook Cancel Save		Contact enrolliment trigger		
Use webbooks to pass information back and forth from HubSpot to another web application. Learn more $\ensuremath{\mathcal{C}}$		Enroll contacts when they meet these filters: Group 1		
~ Create action		Mobile phone number is unknown		
Method POST T		C Contacts won't re-enroll into this workflow.		
Webhook URL * https:// api.salesintel.io/service/enrichment/enrich		O O Show details		
Authentication type		×		
None • Request body Choose the properties you want to include in the webhook request body. • • Include all contact properties Customize request body		Configuring		
> Test action			Ex	plore Operations Hub

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.



K Back to workflows	Unnamed workflow - 2024-03-08 19:47:42 GMT+0000	Workflow is OFF Review and publish
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1 Test action	Enroll contacts when they meet these filters:	
After testing your webhook you will see the response and be able to select which fields to output for use later in your workflow.	Group 1 Mobile phone number is unknown	
Contact		
2 Maria	C Contacts won't re-enroll into this workflow.	
3 Test View contact 12		
Status 4 • Success	O Show details	
Response Request	*	
Select up to 20 fields from the webhook response to output that can be used in later actions in the workflow.	Send a webhook	
Expand all	Configuring	
statusCode: 200 contentType: application/json body: > headers:		
Outputs		Explore Operations Hub

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.



K Back to edit		Unnamed workflow - 2024-03-08 19:47:42 GMT+0000 🖋					
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	Enrollme	ent					
		Existing contacts	These contacts already meet the trigger criteria. Do you want to				
	- Terry	93,983	No, only enroll contacts who meet the trigger criteria after turning the workflow on Yes enroll existing contacts who meet the trigger				
		There are too many contacts in the portal to accurately display the number matching the new criteria. Please create a list with the link below to see the exact number.	criteria as of now				
		See all contacts in lists 🖉					
	1	Contacts enroll automatically when:	Edit	P			
		Group 1					
		Mobile phone number is unknown					
	(\mathbf{a})	Re-enrollment	Edit				
	G	Contacts can't be enrolled in this workflow multiple times.					
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		This workflow uses		Explore Operations Hub			
L	(Ψ)	Dranartiae (1)					

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

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In a + = 100% Show minimap panel		Contact enrollment trigger Choose the triggers that decide how a cont enters this workflow. No triggers set. Contacts can still be enrolled manually.	act		
		Set up triggers			æ
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		(s) 1. Send a webhook			
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		+ END		Explore Operations Hub	

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



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General Unerrollment and suppression Notifications	Ceneral What times do you want the actions to execute? Any time Specific times Friday from 9,00 AM to 10 \$5,000 + Add hours What upcoming dates do you want to pause actions from executing? + Add dates Add to marketing campaign Add this workflow to a competion, so you can track, manage, and report on this and other connected marketing assets. Discover the basefits of campaigns. Create a campaign	I ▼ 0		Ţ
Save				

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

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Performance & Reporting

Learn more about the details about tracking the performance of workflows by reviewing HubSpot's <u>Deep Drive into Your Workflow Performance</u>.

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



<u>Enrichment Reporting Set Up section</u> 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'

>>	Contacts v Conversation	ns ~ Marketing ~	Sales ∽ Serv	vice - Automation	∽ Reports ∽			५ 🖽 🕻	🔉 🧔 📃 SalesIntel 🗸
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ſ	Lists		932	Active	Contact	Feb 15, 2022 3:37 PM	Keith Bateman		1
			13	Static	Contact	Feb 15, 2022 3:35 PM	Keith Bateman	÷	1
			5,028	Active	Contact	Feb 15, 2022 3:08 PM	Ariana Shannon		0
			5,028	Active	Contact	Feb 15, 2022 3:08 PM	Ariana Shannon		0

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

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C	Back to lists	t					Ľ	Next
	Z	Contact-based Create a list of Contact records	List name * Enrichment Report What kind of list are you creating? Active list					
		Company-based Create a list of Company records	Active lists automatically update over time. Records will join or leave the list as their properties change. Static list Static list do not automatically update as your records change. A static list represents a single moment in time.					

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



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Contacts \lor Conversations \lor Marketing \lor Sales	 Commerce < Service < Automation < Reportir 	g v Search HubSpot Q
Contacts Conversations Marketing Sales « Back to lists Enrichment Lative list Estimated size: - contacts Discord Filters Itest contact Discord Vour filter will appear here OR Add filter group	Commerce Service Automation Reporting Add filter Cancel Filtering on Contact (Current Object) Step 2: Select a filter to add All categories > Contact properties salesintel enriched X Contact activity SolesIntel Enriched	و۔ و معرک مراجع معرک مراجع معرک معرک معرک معرک معرک معرک معرک معر

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

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Filters Discord	Edit filter	Close editor	This is only a preview of your list. Save this list to begin processing the full results.			
Group 1 9 9 SalesIntel Enriched is any of Yes AND + Add filter OR + Add filter group	SelesIntel Enriched Is any of Yes x	2 8 ~ ~	Updating list preview			