



HubSpot Setup Guide

This document outlines the required initial setup steps in the external system for the Verify integration.¹

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OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Verify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

STEP 1: CUSTOM FIELD CREATION

Custom fields are required to be created on the Lead and Contact Objects in HubSpot for the Verify integration.

Reference the API Name column in the table below for the list of how to title the fields, the needed data type, and the purpose of the field for context.

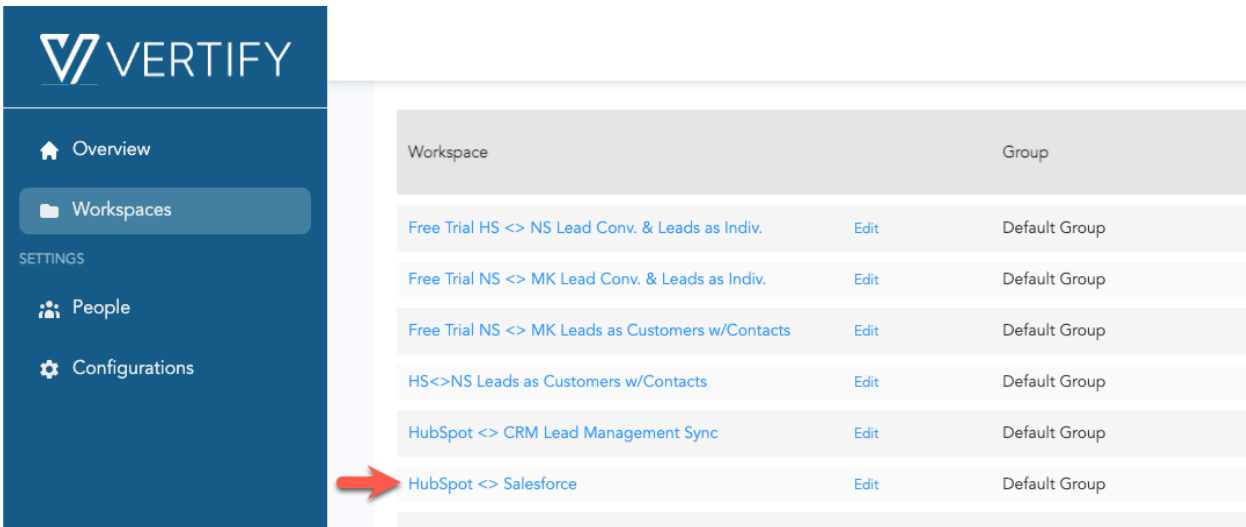
API Name	Data Type	Purpose
CRMContactId	String	This field will be used to house the CRM Contact's internalId, and for merging and lookup purposes in Verify.
CRMCompanyId	String	This field will be used to house the CRM Company's internalId, and for merging and lookup purposes in Verify.
CRMRecordType	String	This field will be used on the Contact to house the static value hard-coded by Verify. It's used to denote the type of record currently in sync with the CRM and for filtering in Verify.
SyncToMAP	Boolean	This field will be hard-coded by Verify or by a workflow in HubSpot. It is used to determine which records are eligible to move back to the MAP and for filtering in Verify.

STEP 2: CREATING A USER ACCOUNT IN HUBSPOT

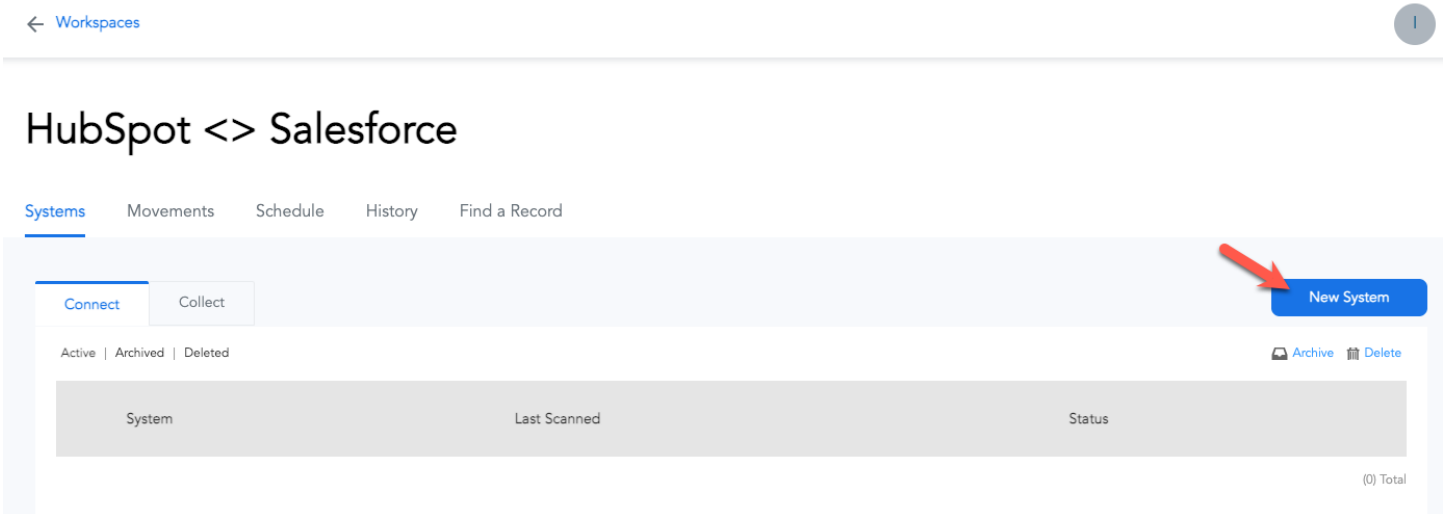
1. Please log into Hubspot with your normal credentials.
2. Create a new User Account in Hubspot that has Admin privileges.
 - a. It should never be deactivated or deleted, and one that can be logged into in order to complete the connection process.
 - b. Please use this naming convention for an email: passwords+TENANTNAME@verify.com
3. Once the user is created, please log out of your personal account, and log back in with the newly created credentials to ensure it's ready to be used.

STEP 3: OAUTH SETUP IN VERIFY

1. Navigate to your Verify tenant site provided by your Customer Success Manager.
 - a. Reach out to them directly if you have any questions or need assistance.
 - b. Follow the reset password link to pick a permanent password for your account.
2. On the main Dashboard, click Workspaces.
3. Click the Workspace link you want to create a system in.



4. Click New System



5. Select HubSpot from the Remote System dropdown menu, the latest version of the Connector should be defaulted, and then choose BiDirectional from the System Type dropdown.
6. Click Save.

Edit System

[Systems](#) [Movements](#) [Schedule](#) [History](#) [Find a Record](#)

System saved successfully

Remote System: HubSpot
System Name: HubSpot
System Prefix: HS
Connector: 2.3.5-OAuth2
System Type: BiDirectional
Max Concurrent Tasks: 1

Share system across workspaces:

Remote System Login Parameters

HubSpot
Connect With HubSpot

Cancel Save

7. A Hubspot box will display at the bottom with a link underneath that says "Connect With HubSpot".
8. If logged into the User Account created for the integration, it should navigate to a page that will have a "Grant Access" button to select.
 - a. If not logged into that account already, it will navigate to a page to log into the correct user account or choose the account to grant access to
9. Click the orange button to connect the Verify App with your HubSpot instance.
10. When you return back to Verify, click Save at the bottom right-hand corner of the page.
11. Click Connect - please note that the new Hubspot system will display in orange and the status will be 'Scan Failed'. That's normal!
12. Click the arrow on the far left-hand side to expand the error message, and click the check box. Press Scan again. When it completes, you should see a Scan Complete status update.

Connect Collect [New System](#)

Active | Archived | Deleted [Archive](#) [Delete](#)

System	Last Scanned	Status	
▼ HubSpot	Edit 2 minutes ago	Scan Complete	<input checked="" type="checkbox"/>

No errors detected

Scan

13. Let your Verify specialist know when this is completed!