VERTIFY

HubSpot Setup Guide

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

TABLE OF CONTENTS

SETUP GUIDE OVERVIEW

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

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 Company, Contact, and Opportunity (optional) Objects in HubSpot for the Vertify 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 Vertify.
CRMCompanyId	String	This field will be used to house the CRM Company's internalId, and for merging and lookup purposes in Vertify.
CRMOppId	String	*This is optional, unless integrating Opportunities and Deals. This field will be used to house the CRM Opportunity's internalId, and for merging and lookup purposes in Vertify.
CRMRecordType	String	This field will be used on the Contact to house the static value hard-coded by Vertify. It's used to denote the type of record currently in sync with the CRM and for filtering in Vertify.
SyncToMAP	Boolean	This field will be hard-coded by Vertify 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 Vertify.

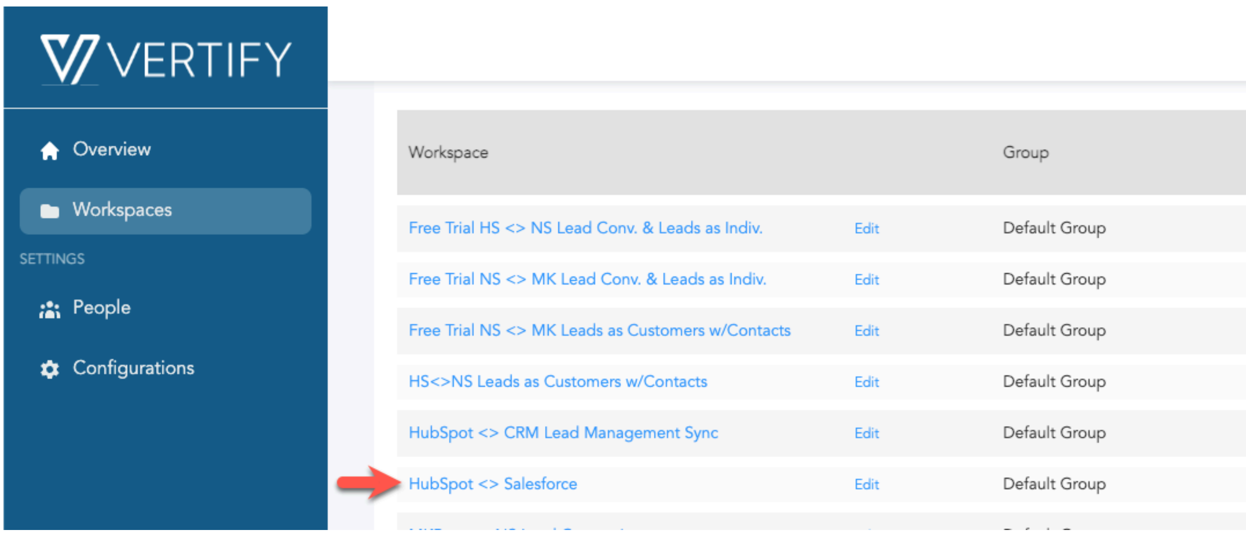
STEP 2: CREATING A USER ACCOUNT IN HUBSPOT

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@vertify.com

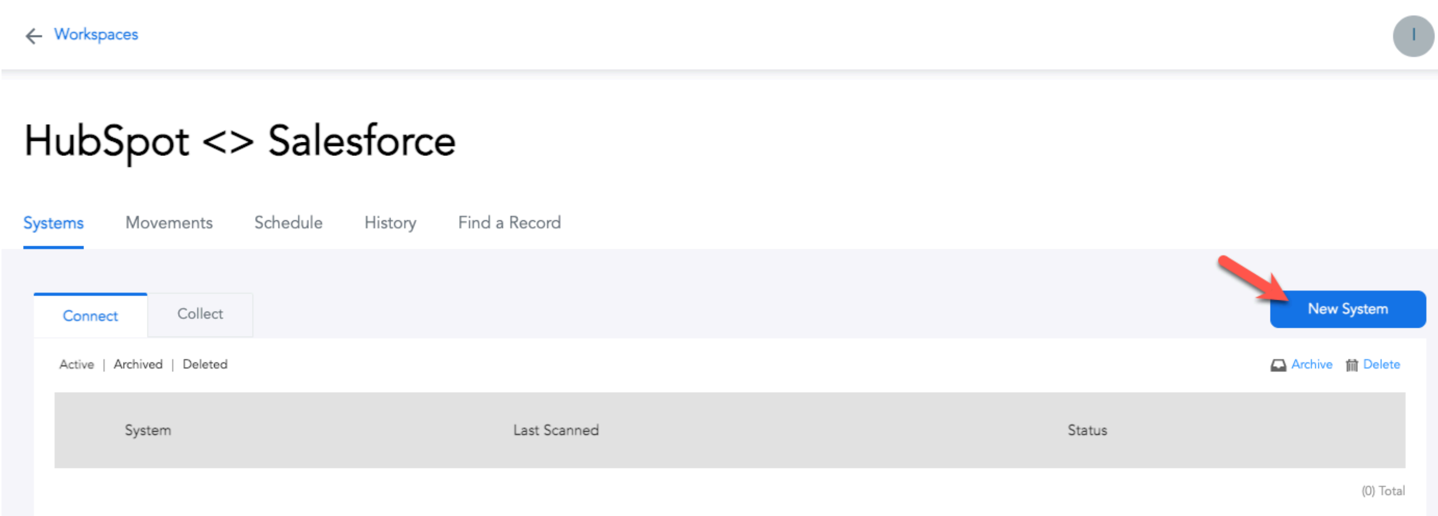
3. Once the user is created, please log out of your personal account, and log back in with the newly created credentials to ensure it's ready to be used.

STEP 3: OAUTH SETUP IN VERTIFY

1. Navigate to your Vertify 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.

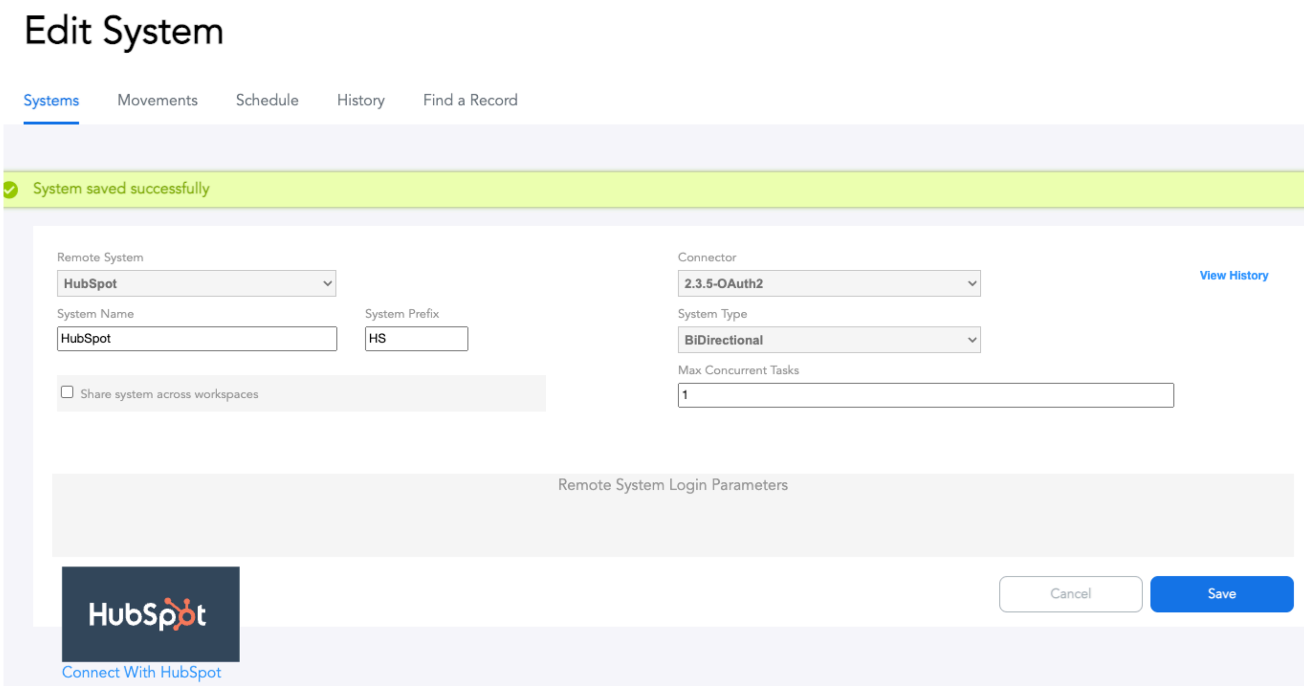


4. Click **New System**

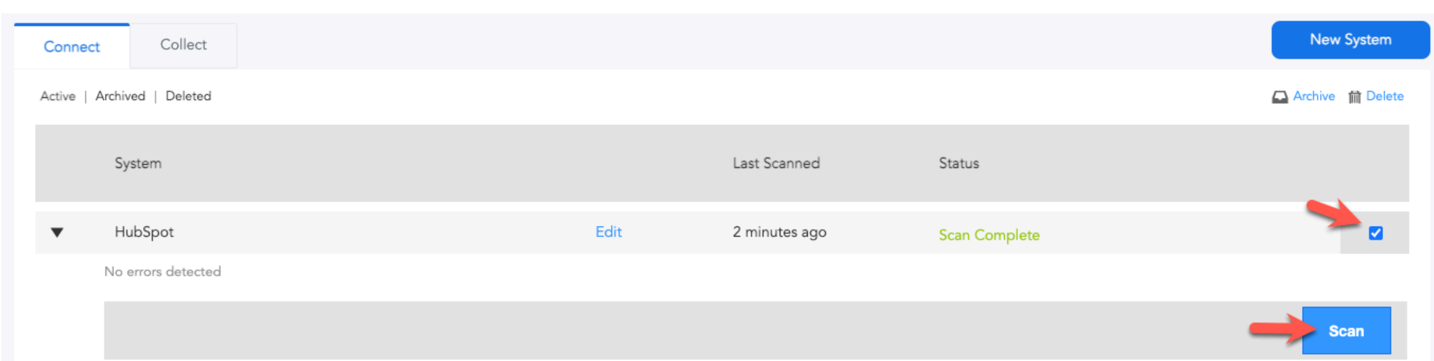


5. Select **HubSpot** from the Remote System dropdown menu, the **latest version of the Connector** should be defaulted, and then choose **BiDirectional** from the System Type dropdown.

6. Click Save.



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 Vertify App with your HubSpot instance.
10. When you return back to Vertify, 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.



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