HubSpot Initial Set Up

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

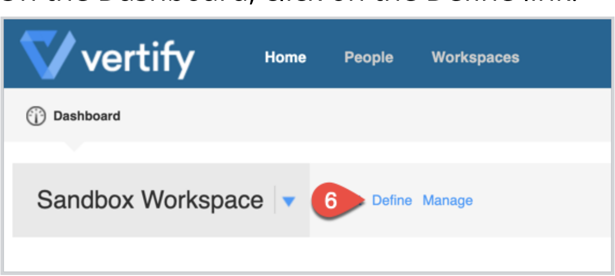
OVERVIEW

STEP 1: CREATING A USER ACCOUNT IN HUBSPOT

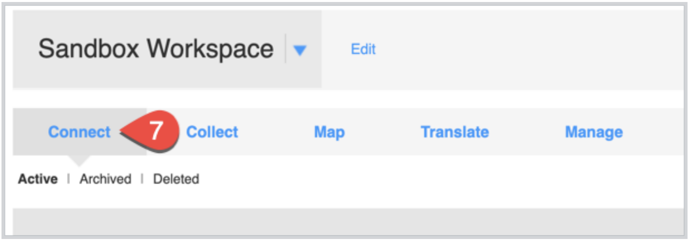
1. Please log into Hubspot with your normal credentials.
2. Create a new User Account in Hubspot that has Admin privileges.
    a. It should never be deactivated or deleted, and one that can be logged into in order to complete the connection process.
    b. Please use this naming convention for an email: 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 2: OAUTH SETUP IN VERTIFY

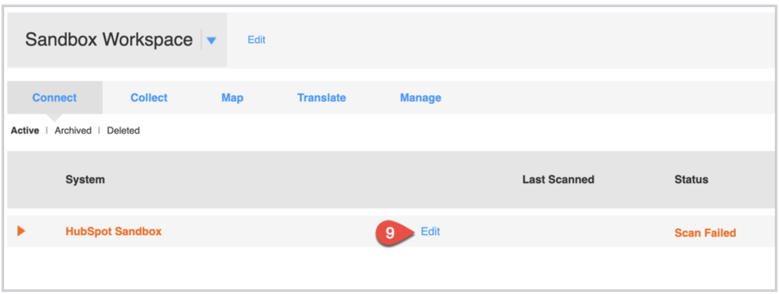
4. Please navigate to your Vertify tenant site, here: https://[TENANT].us.vertify.com/
5. Log in using the following username and password:
    a. Username: Your email address
    b. Password: Vertify1234! (you can change the password to one you'd like after log in).
6. On the Dashboard, click on the Define link.



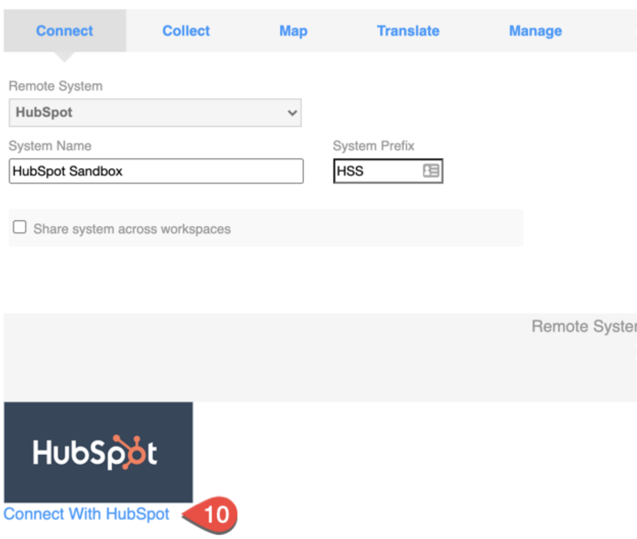
7. On the Define page, click on the Connect tab.



8. Hubspot will display on Connect tab (in orange) and the status will be 'Scan Failed' - that's normal.
9. Click Edit next to Hubspot.

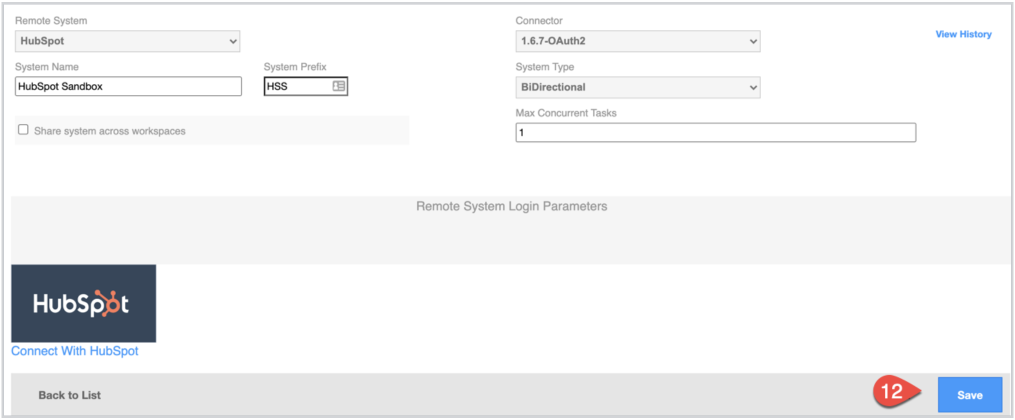


10. On the system connection page, a Hubspot box will display at the bottom with a link underneath that says "Connect With HubSpot" - right-click the link to open in a new tab.



11. 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.

12. Once these steps are completed, return to the Hubspot System page in Vertify (follow steps 3-6) and click Save at the bottom right-hand corner of the page.



13. Let your Vertify specialist know when this is completed, and they will test the connection.

STEP 3: CUSTOM FIELD CREATION

Custom fields are required to be created on the Lead and Contact 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.
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.