

HubSpot CRM Integration Guide

Yeastar P-Series Appliance Edition







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About This Guide

Yeastar P-Series PBX System supports the integration with HubSpot CRM, which allows your HubSpot CRM users to get all the call details right in their CRM entries while keeping the voice traffic in Yeastar P-Series PBX System. This topic describes the requirements, key features, and terminologies related with the integration.

Requirements

HubSpot CRM

The integration with HubSpot CRM is supported on the following editions:

- Free CRM tool
- Starter plan
- Professional plan
- Enterprise plan

PBX server

- Plan: Enterprise Plan (EP) or Ultimate Plan (UP)
- Firmware: 37.7.0.16 or later

Key features

The integration of Yeastar P-Series PBX System and HubSpot CRM provides the following key features:

Click to Call

Users can launch calls by a single click on the detected numbers from HubSpot CRM via Yeastar Linkus Web Client.

Note:

This feature requires users to install <u>'Yeastar Linkus for Google'</u> Chrome extension and set up Linkus Web Client to work with the Chrome extension.

Call Popup

Automatically bring up the contact's profile on the web browser when users (with their Linkus Web Client or Linkus Desktop Client logged in) receive an inbound call from a CRM contact.

Call Journal

All the call activities get logged automatically to HubSpot CRM when a user ends calls with CRM contacts.

Contact Synchronization

Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from HubSpot CRM contacts.

Automatic Contact Creation

A new contact will automatically be created in CRM for unknown inbound calls or outbound calls.

Terminologies

The following table lists the terminologies of the HubSpot CRM integration.

Term	Description	
Developer account	An app developer account is used to create and manage apps, integrations, and developer test accounts. However, app developer accounts and their associated test accounts can NOT sync data or assets to or from another HubSpot account.	
	<i>i</i> Tip: You can click <u>here</u> to sign up a HubSpot developer account.	
Standard account	A standard account is the most common type of account. It's where you'll find all the tools, features, and settings included with your HubSpot plan.	
	<i>i</i> Tip: You can click <u>here</u> to sign up a HubSpot standard account.	
Super Admin	The system administrator that can access all the data and manage all the users in HubSpot CRM.	
User	The corporate staff who can only access specific data based on assigned per- missions (roles).	
PBX extension	The extension number for each staff. The staffs can register the extension on a phone or on Linkus clients, and use the extension to make and receive calls.	

Table 1.

Term	Description
Contact	The contact is an individual whose information is in your CRM database.
Company	The companies with which you have business dealings. Single or multiple con- tacts can be associated with a company.

Table 1. (continued)

Related information

Create a CRM application on HubSpot Integrate Yeastar P-Series PBX System with HubSpot CRM Set up Contact Synchronization from HubSpot CRM Set up Automatic Contact Creation for HubSpot CRM Use HubSpot CRM Integration Disable HubSpot CRM Integration Disconnect HubSpot CRM Integration

Set up Hubspot CRM Integration

Create a CRM application on HubSpot

You need to create an application on HubSpot for integration using a developer account, and configure the authorization settings.

Prerequisites

- To create an application, you need a developer account.
- You have subscribed Enterprise Plan (EP) or Ultimate Plan (UP) plan, and the FQDN is available.

Procedure

- <u>Step 1. Get authentication information on PBX</u>
- Step 2. Create and configure an application on HubSpot

Step 1. Get authentication information on PBX

- 1. Log in to PBX web portal, go to Integrations > CRM.
- 2. Click HubSpot.



3. In the **Network** section, take note of the **Redirect URL** as you will use it later on HubSpot.



Step 2. Create and configure an application on HubSpot

- 1. Log in to your HubSpot developer account.
- 2. Select Create an app.





3. In the **App Info** tab, configure basic information of the application.

App Info Auth	
Public app name * This name will appear in HubSpot tools, App Marketplace listings, and other material HubSpot-CRM-app	
App logo A square logo that will be used to identify your app. A logo is required to get your app certified and listed in the Marketplace. Learn more. 🗹	\$
Description	
This will be the description users see in the App Marketplace.	
	250 characters

- a. In the **Public app name** field, specify an application name, which will be used wherever your application is displayed for HubSpot users.
- b. **Optional:** Upload a logo and add descriptions for the application.
- 4. In the **Auth** tab, complete application authorization settings.
 - a. In the **Redirect URL** section, paste the <u>Redirect URL</u> obtained from the PBX.

Redirect URL	
Jsers must be redirected to this location after granting access to your	
app. If your install URL contains a redirect that's not listed here, users will	
get a connection error.	https:// /integration/callback/api/crm/hubspo
Redirect URLs must use HTTPS, unless they're on localhost.	

- b. In the **Scopes** section, define the permissions of data access or operation in HubSpot for your application.
 - i. In the **CRM** drop-down list, select the following scopes.

 CRM 		Write	Read
crm.lists			
crm.objects.co	ompanies	Image: A start of the start	
crm.objects.co	ontacts		
crm.objects.de	eals		
crm.objects.ov	wners		
crm.schemas.co	ompanies		
crm.schemas.co	ontacts		
crm.schemas.de	eals		

ii. In the Standard drop-down list, select the following scopes.



c. On the bottom column, click **Save**.

Result

The HubSpot CRM application is created. You can check and manage the application in the **Apps** page.

What to do next

• Go to the **App credentials** section in the **Auth** of the application to obtain the **Client ID** and **Client secret** for integration.

App credentials		
App ID This is your app's unique ID. You'll need it to make certain API calls.	838515	Сору
Client ID This ID is unique to your app and is used for initiating OAuth.	76 701	Сору
Client secret Used to establish and refresh OAuth authentication.	44 Ніde Сору	3ab

• Integrate Yeastar P-Series PBX System with HubSpot CRM.

Integrate Yeastar P-Series PBX System with HubSpot CRM

This topic describes how to integrate Yeastar P-Series PBX System with HubSpot CRM.

Prerequisites

- You have created a CRM application on HubSpot using a developer account.
- You need a standard account with Super Admin privilege for the integration.

Procedure

- Step 1. Make Authorization Request to HubSpot CRM
- <u>Step 2. Associate HubSpot CRM users with PBX extensions</u>

Step 1. Make Authorization Request to HubSpot CRM

- 1. Log in to PBX web portal, go to Integrations > CRM.
- 2. Click HubSpot.

Integrations / CRM				
	CRM			User Guide
	The CRM Integration is designed the integration in minutes with a signature of the integration of the integrated of the integration of the integra	o facilitate quick integration be tep: y-step configuration wizar	tween your Yeastar PBX and CRM is d and enjoy rich integration feature	account. Complete s that bring
	HubSpot	Salesforce	Zoho	Bitrix24

3. In the **Authorization** section, enter the application authorization information.

uthorization			
Client ID		* Client Secret	
	ø		ø

- **Client ID**: Paste the <u>Client ID</u> obtained from the created HubSpot application.
- Client Secret: Paste the <u>Client Secret</u> obtained from the created HubSpot application.
- 4. Click Save.
 - A new browser page is launched to prompt you to choose an account for integration.
- 5. Select a standard HubSpot account with Super Admin privilege, and click **Choose Ac-count**.

Important:

Do NOT select a developer account, otherwise the integration would fail.

	Þ
Connecting	HubSpot-CRM-app to HubSpot
lubSpot-CRM-app	
lubSpot-CRM-app	>
IubSpot-CRM-app	>
IubSpot-CRM-app hoose an account	DETAILS
hoose an account	DETAILS

The page will then show the permission grant request of the application.

6. Check the permissions and click **Connect app** to proceed with the authorization.

Note:

You can safely ignore the warning stating that "You're connecting an unverified app", as this app is created by yourself.

` \$
Connecting HubSpot-CRM-app to HubSpot
You're connecting an unverified app This app's details haven't been reviewed or verified by HubSpot. Make sure you trust the developer before connecting it to your account.
HubSpot-CRM-app
This app is requesting access to your HubSpot account. Continue connecting if you agree.
> 💄 Manage and view your CRM data
Basic OAuth functionality The basic scope required for OAuth.
Create, modify, and delete users on your account This app can manage users and user permissions on your HubSpot account. This includes creating new users, assigning permissions and roles, and deleting existing users.
View account data. View details about account users and their permissions.
+ Assign users to your teams. This can assign users to teams on your HubSpot account.
View teams for this account. See details about this account weams.

If the authorization succeeds, the web page will display Authorization succeeded!.



On the PBX configuration page, a pop-up window displays the authentication result.



7. Click OK to confirm.

The **Status** field displays **Connected**, indicating that the HubSpot CRM integration is successfully set up.

Step 2. Associate HubSpot CRM users with PBX extensions

1. On the CRM integration page, click \mathbb{C} beside the **HubSpot User** to synchronize the latest list of HubSpot CRM users.

HubSpot User O	Extension
Kristin Hale - kristinhale@sample.com	[None] V
Terrel Smith - terrelsmith@gmail.com	[None] .V
Dave Harris - sample@gmail.com	[None] V

2. Associate the HubSpot users with PBX extensions.

Associate automatically

If users bind the same email address to their HubSpot accounts and PBX extensions, you can implement automatic association of their HubSpot accounts and PBX extensions as follows:

- a. Click the Associate Automatically button.
- b. In the pop-up window, click **OK**.
- c. Click **Save**.

Associate manually

If a user binds different email addresses to his or her HubSpot account and PBX extension, you need to manually associate the user's HubSpot account and PBX extension.

- a. In the **Extension** drop-down list beside a desired HubSpot user, select the desired user's extension.
- b. Click Save.

Result

- The integration of Yeastar P-Series PBX System and HubSpot CRM is set up.
- HubSpot users can make or receive calls with their PBX extensions.

What to do next

- <u>Set up Contact Synchronization from HubSpot CRM</u>
- <u>Set up Automatic Contact Creation for HubSpot CRM</u>
- <u>Use HubSpot CRM Integration</u>

Set up Contact Synchronization from HubSpot CRM

After integrate with HubSpot CRM, you can enable a one-way contact synchronization on PBX to sync the HubSpot CRM contacts to a specific PBX phonebook.

Prerequisites

The <u>HubSpot CRM integration</u> is completed.

Procedure

- 1. Log in to PBX web portal, go to Integrations > CRM.
- 2. On the CRM integration page, select the checkbox of **Synchronize Contacts Auto**matically.
- 3. In the **Synchronize Contacts From** drop-down list, select the type(s) of contacts to be synchronized from HubSpot CRM.

* Synchronize Contacts From		
Contacts × Companies ×		~
Contacts	داس	~
Companies	Ŭ	~

4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from HubSpot CRM.

The contacts can only be syn	nchronized to an empty phonebook.
 Synchronize to Phonebook 	* Name

5. Click Save.

Result

The associated phonebook comes with a label of CRM.

(🕀 Add	T Delete		Q
		Phonebook Name 🍦	Total Contacts 🖕	Operations
	0	HubSpot_CRM_Phonebook CRM	0	◎ ■

When users receive an inbound call from a HubSpot CRM contact, the matched contact information will be synchronized to the Phonebook in Yeastar P-Series PBX System automatically.

Note:

This is a one-way sync to Yeastar P-Series PBX System, therefore the associated phonebook and the synced contacts are read-only.

Troubleshooting:

Fail to synchronize certain CRM contacts?

Incomplete information of CRM contacts can lead to synchronization failure. Make sure the following fields are filled in for the contacts, then perform the directory synchronization again:

- Either the First name or Last name field is filled in.
- Phone number field is filled in.

Set up Automatic Contact Creation for HubSpot CRM

After the integration with HubSpot CRM, you can set up automatic contact creation. If enabled, a new contact will be created on the CRM when the user receives a call from an unknown number or places a call to an unknown number. This feature helps you to build your contact database efficiently and ensure all contact information is captured.

Prerequisites

The <u>HubSpot CRM integration</u> is completed.

Procedure

- 1. Log in to PBX web portal, go to Integrations > CRM.
- 2. On the CRM integration page, select the checkbox of **Create New Contact Auto**matically.
- 3. In the **Call Type** drop-down list, select when will a contact be automatically created on HubSpot CRM.

* Call Type			
Inbound × Outbound ×		\sim	
Inbound	۲m	~	
Outbound		~	

- **Inbound**: Inbound call from an unknown number that doesn't match a Contact or Company already in the CRM.
- **Outbound**: Outbound call to an unknown number that doesn't match a Contact or Company already in the CRM.
- 4. Click Save.

Result

• When a call is placed to an unknown number, or a call is received from an unknown number, a new contact will be created on HubSpot CRM.



The name of the auto-created contact has a prefix of Automatic New Contact followed by the number.

Contacts × Conversations × Marketing × Sales	s v Service v Automation v Reports v
< Contacts Automatic New Contact <u>-001-</u> <u>55033011</u> ·	Search activities Q
A- Automatic New Cont	Activity Notes Emails Calls Tasks Meetings
	Filter by: Filter activity (21/21) - All users -
	This contact was created
 About this contact 	
Email	
Phone number	
001-55033011	

• If the <u>Contact Synchronization</u> feature is enabled, the new created contact will also be synchronized automatically into the phonebook in Yeastar P-Series PBX System.

Contact Name 👙	Company 🌲	Email 🖕	Business 🌲
Automatic New Contact -001-55033011			001-55033011

Use HubSpot CRM Integration

The integration with HubSpot CRM supports various features for your business dealings, bringing great convenience and efficiency. This topic shows the usage of the key features.

Click to Call

Prerequisites

Install <u>'Yeastar Linkus for Google'</u> Chrome extension and set up Linkus Web Client to work with the Chrome extension.

Procedure

Users can click on detected phone numbers on the HubSpot CRM web page, a call is then sent out directly via the associated PBX extension.

earch name, phone	, er Q Conta	ct owner 🔹 Create da	ate 👻 Last activity date 👻	Lead status 🔻	# Mor	💤 Yeastar Lin	kus for Google	• -	
NAME \$		EMAIL	PHONE NUMBER	¢ con	ITACT OWNER				
S sample	Preview	sample@example.co	Call 5503	303 with Linkus Web Cli	Kristin Hale		sam	ple	
Joe Pric	nett		<u>5503301</u> /	0	Kristin Hale		55033 Callin		
Brian Ha	lligan (Sample hnson (Sample	bh@hubspot.com emailmaria@hubspo	 t.com		Unassigned Unassigned				
					_				
						•			\bigcirc

Call Popup

Prerequisites

Keep at least one of the following clients logged in:

- Linkus Desktop Client
- Linkus Web Client

Note:

If users close web browser or Linkus Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension <u>'Yeastar Linkus for Google</u>', which allows for the call popup browser tab even when web browser is closed.

Procedure

When the HubSpot CRM user receives an inbound call from a contact, a new browser tab will be launched to show the CRM contact's information.





The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**.

	1 🗟 🖄
2 🖵	Pop-ups blocked:
	• https://m/0035e00000TqnLHAAZ
2	Always allow pop-ups and redirects from https://
- 7	O Continue blocking
	Manage Done 3
(and	and an and the same of the set of

Call Journal

After the HubSpot CRM integration, all outbound calls, incoming calls, and missed call records will be logged to CRM automatically, which helps users to keep track of every conversation.

Users can log in to the HubSpot CRM, go to the **Activity** tab in a contact detail page to view the call logs.

Contacts < Conversations < Marketing < Sale	es × Service × Automation × Reports ×	
< Contacts Actions ~	Search activities Q Expand all Coll Activity Notes Emails Calls Tasks Meetings Filter by: Filter activity (21/21) * All users * Upcoming Upcoming	lapse all
 About this contact 	✓ Call - Connected Actions ✓ Apr 22, 2022 at 12:58 AM Call: 21/04/2022 16:58:02 Incoming Call from <5503303 → to Kristin Hale<2005> 00:00:19	GMT+8
Email sample@example.com Phone number	Outcome Duration Connected - 0:19	
5503303 Contact owner	Add comment 2 associat	tions 👻
Kristin Hale Last contacted	Call Apr 22, 2022 at 1:06 AM Call: 21/04/2022 17:06:51 Missed Call from < <u>5503303</u> > to Kristin Hale<2005>	GMT+8

Contact Synchronization

Inbound calls from HubSpot contacts trigger a CRM contact lookup. It there exists the same number in HubSpot CRM, the matched contact will be synchronized to an associated PBX phonebook, and the synchronized contacts are read-only.

For more information, see <u>Set up Contact Synchronization from HubSpot CRM</u>.

Phonebook Name	honebook	
HubSpot_CRM_Phonebook		
Members	HubSpot/CDM	
Select Contacts	NAME EMAIL PHONE NUMBER CONTACT OWNER	\$
Specific Company Contacts	Sample Sample@example.com 5503303/ () Kristin Hale (€)
Add Delete		
Contact Name 🔶	Company (company (comp	

Automatic Contact Creation

A new contact will be created automatically in CRM when the HubSpot user receives a call from an unknown number, or when the user makes a call to an unknown number.

For more information, see <u>Set up Automatic Contact Creation for HubSpot CRM</u>.

Contacts ~ Conversations ~ Marketing ~ Sales	✓ Service ✓ Automation ✓ Reports ✓
< Contacts Automatic New Contact <u>-001-</u> <u>55033011</u> → tions ▼	Search activities Q
A- Automatic New Cont	Activity Notes Emails Calls Tasks Meetings
	Filter by: Filter activity (21/21) All users
	This contact was created
 About this contact 	
Email	
Phone number	
001-55033011	

Disable HubSpot CRM Integration

You can disable the HubSpot CRM integration on Yeastar P-Series PBX System at any time when you want to pause the CRM integration.

Procedure

- 1. Log in to PBX web portal, go to **Integrations > CRM**.
- 2. Turn off the **Enable Hubspot Integration** switch on the top.



3. Click Save.

Result

- The Status field displays Disabled.
- The CRM integration configurations are retained, and can be used directly the next time the integration is enabled again.

Disconnect HubSpot CRM Integration

If you want to integrate with another CRM account, you need to disconnect the current CRM integration first.

Procedure

- 1. Log in to PBX web portal, go to Integrations > CRM.
- 2. In the top-right corner, click Integrate with Another CRM.



3. In the pop-up window, click OK.

Result

- The HubSpot CRM integration is disconnected.
- All the CRM integration settings are cleared.
- The synchronized phonebook and contacts are retained on the PBX and can be edited now.