HubSpot CRM Integration Guide

Yeastar P-Series Cloud Edition

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+86-592-5503309 sales@yeastar.com www.yeastar.com

Contents

About This Guide

Yeastar P-Series Cloud Edition 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 Cloud Edition. 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

Firmware: 84.21.0.66 or later

Key features

The integration of Yeastar P-Series Cloud Edition 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 'Yeastar Linkus for Google' 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 / answer an inbound call from a CRM contact, or finish a call with a CRM contact.

In addition, users are able to manually open the contact's profile from the call window during a call with a CRM contact.

Call Journal

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

Call Recording Playback

CRM users can view and play recordings stored in the PBX from corresponding call log in CRM interface.

Contact Synchronization

Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from / or initiating outbound calls to HubSpot CRM contacts.

Contact Creation

A new contact can be automatically or manually created in CRM for unknown inbound 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. **Tip:** You can click here 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. **Tip:** You can click here 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 permissions (roles).

Term	Description
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.
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 contacts can be associated with a company.

Related information

[Create a CRM application on HubSpot](#)
[Integrate Yeastar P-Series Cloud Edition with HubSpot CRM](#)
[Set up Contact Synchronization from HubSpot CRM](#)
[Set up Contact Creation for HubSpot CRM](#)
[Set up Call Popup](#)
[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

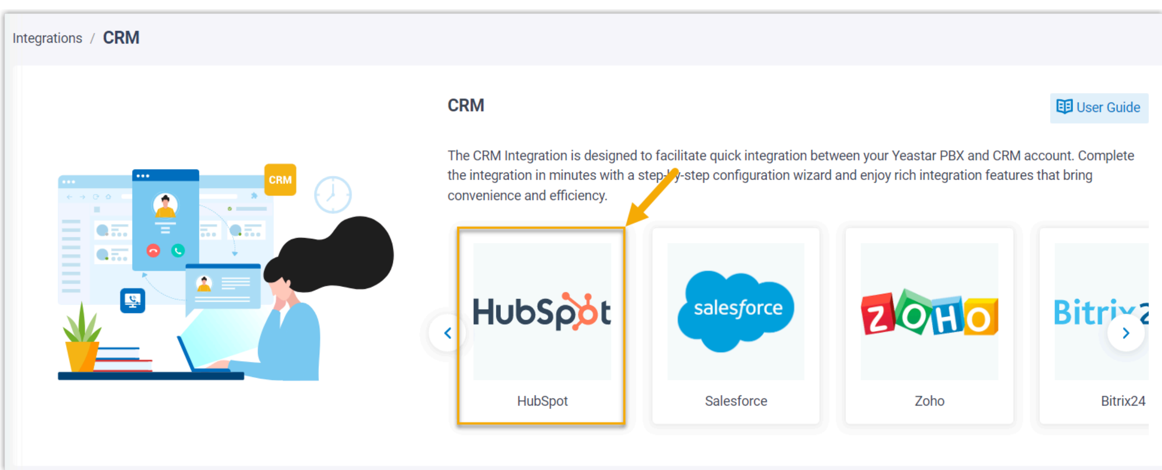
To create an application, you need a developer account.

Procedure

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

Step 1. Get authentication information on PBX

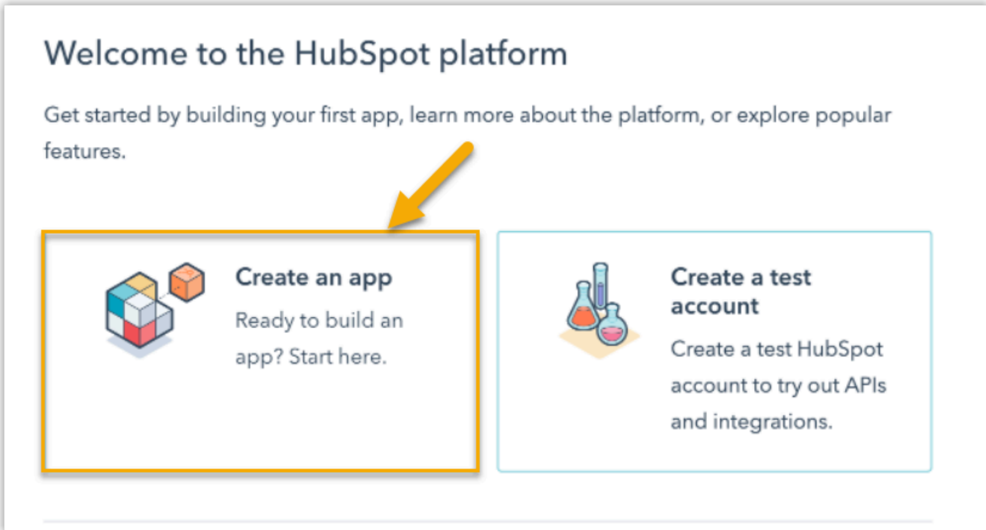
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. Click **HubSpot**.

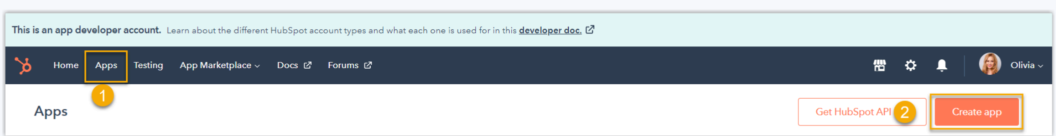


3. In the **Network** section, select and note down the **Redirect URL** as you will use it later on HubSpot.

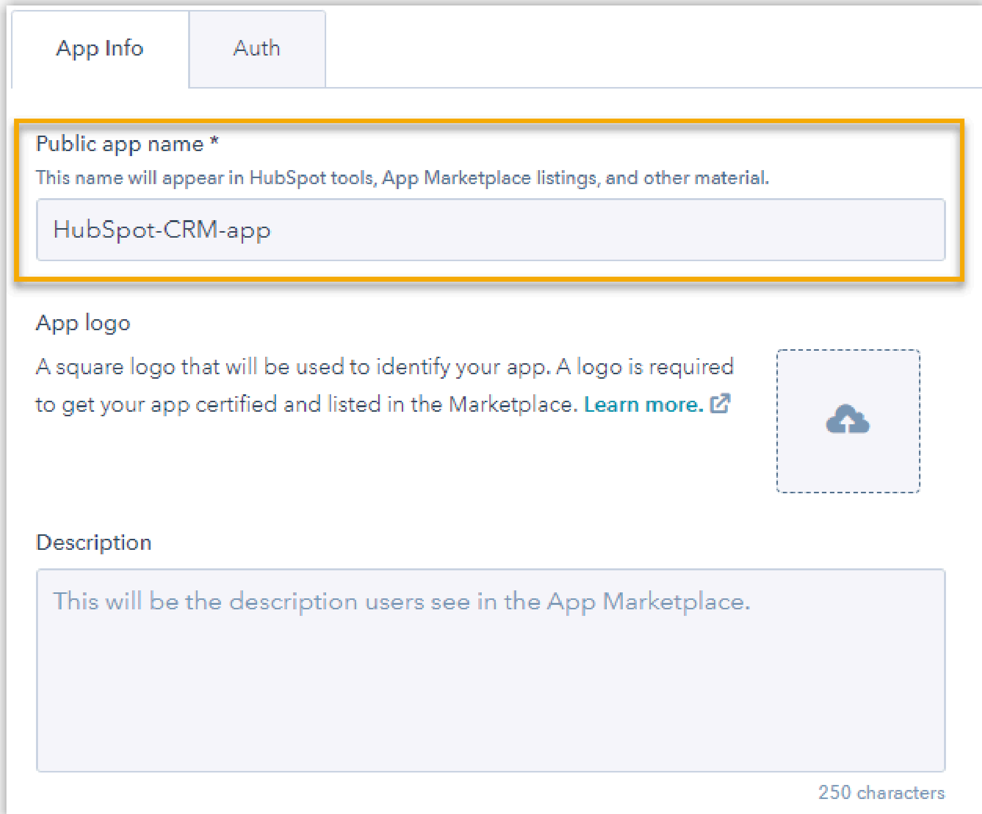
Step 2. Create and configure an application on HubSpot

1. Log in to your [HubSpot developer account](#).
2. Select **Create an app**.

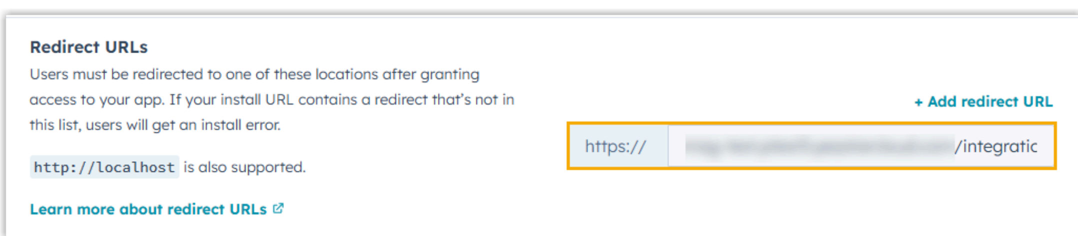


> **Tip:**
> You can also proceed on **Apps > Create app**.
>
> 
>

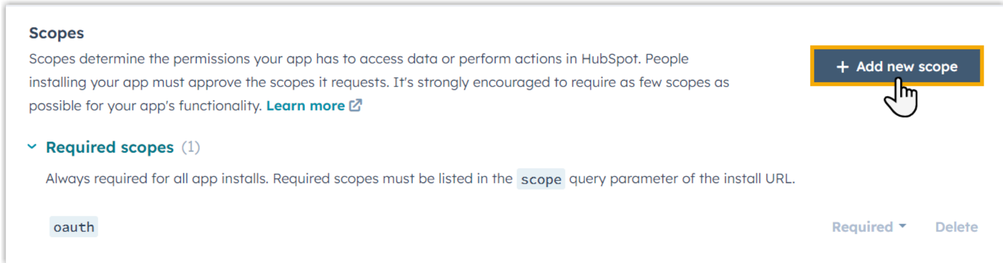
3. In the **App Info** tab, configure basic information of the application.



   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 description for the application.
4. In the **Auth** tab, complete application authorization settings.
   a. In the **Redirect URLs** section, paste the Redirect URL obtained from the PBX.

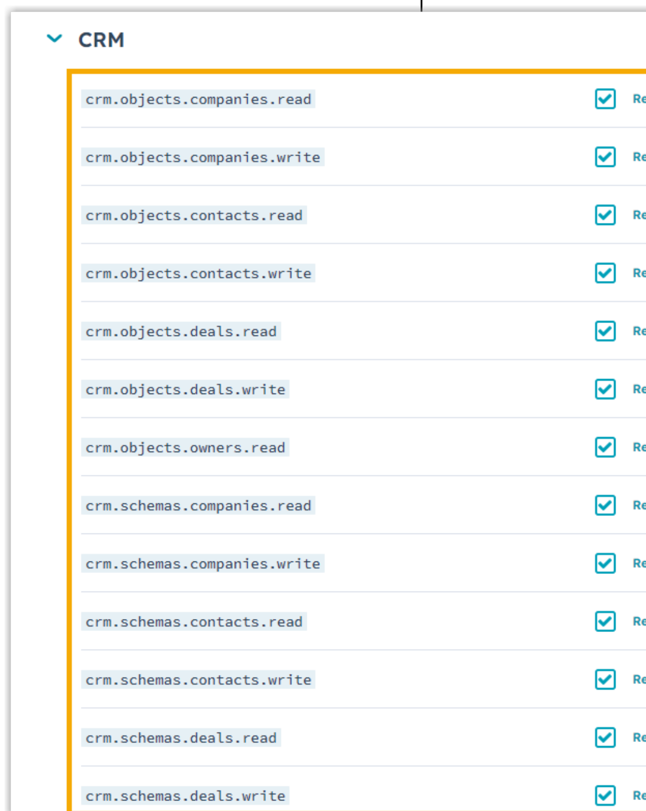


   b. In the **Scopes** section, define the permissions of data access or operation in HubSpot for your application.
      i. On the right of the page, click **Add new scope**.

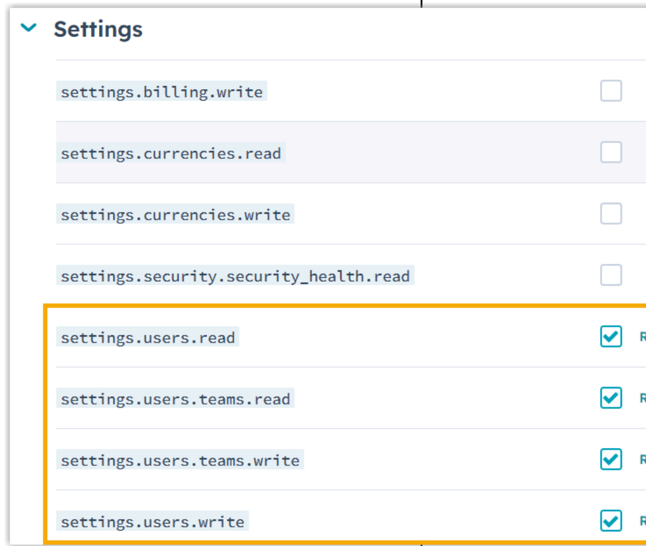


ii. In the pop-up window, search for and select the following scopes, then click **Update**.

Category	Scope
CRM	crm.objects.companies.read
	crm.objects.companies.write
	crm.objects.contacts.read
	crm.objects.contacts.write
	crm.objects.deals.read
	crm.objects.deals.write
	crm.objects.owners.read
	crm.schemas.companies.read
	crm.schemas.companies.write
	crm.schemas.contacts.read
	crm.schemas.contacts.write
	crm.schemas.deals.read
	crm.schemas.deals.write



Category	Scope
Settings	settings.users.read
	settings.users.teams.read
	settings.users.teams.write
	settings.users.write



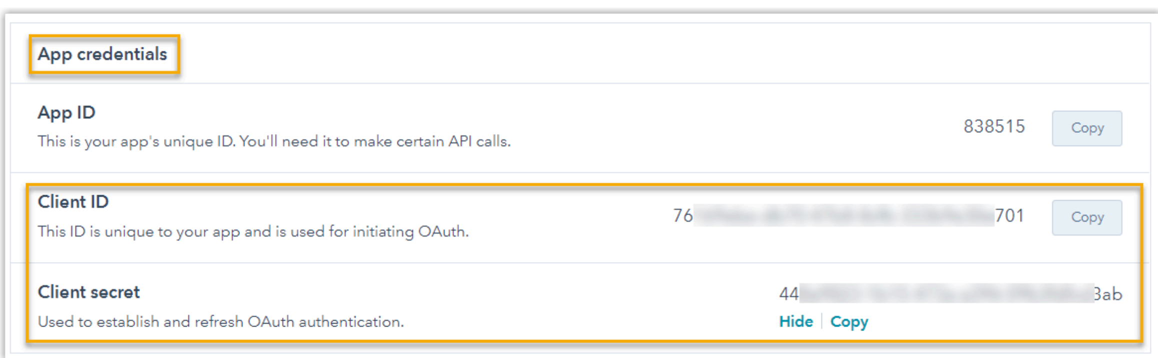
5. Click **Create app**.

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.



- [Integrate Yeastar P-Series Cloud Edition with HubSpot CRM](#).

Integrate Yeastar P-Series Cloud Edition with HubSpot CRM

This topic describes how to integrate Yeastar P-Series Cloud Edition with HubSpot CRM.

Prerequisites

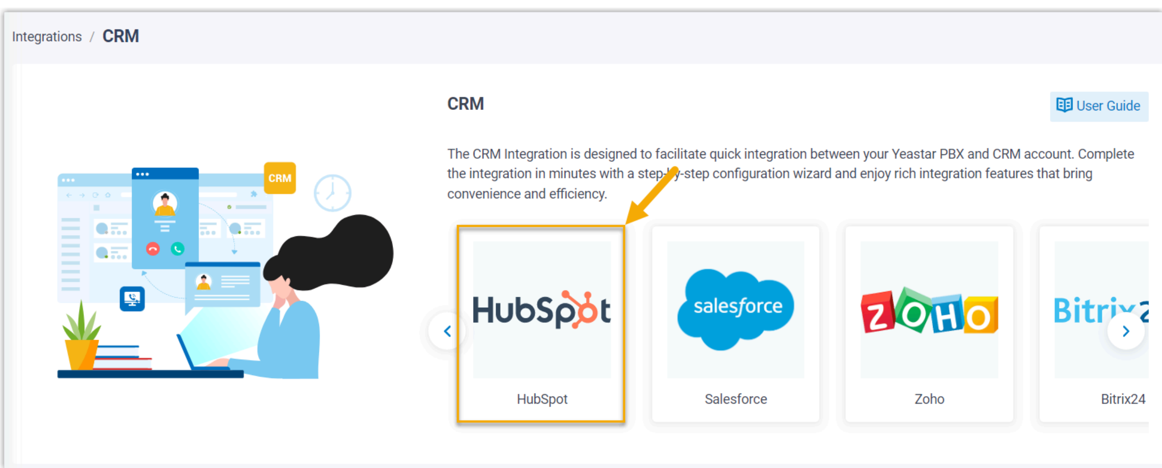
- You have created a CRM application on HubSpot using a developer account.
- You have logged in to a standard account with Super Admin privilege for the integration.

Procedure

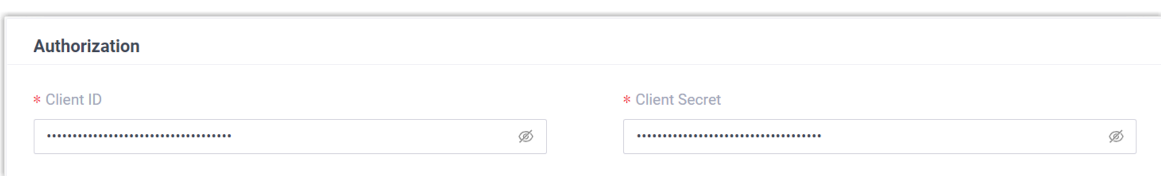
- Step 1. Make Authorization Request to HubSpot CRM
- Step 2. Associate HubSpot CRM users with PBX extensions

Step 1. Make Authorization Request to HubSpot CRM

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



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



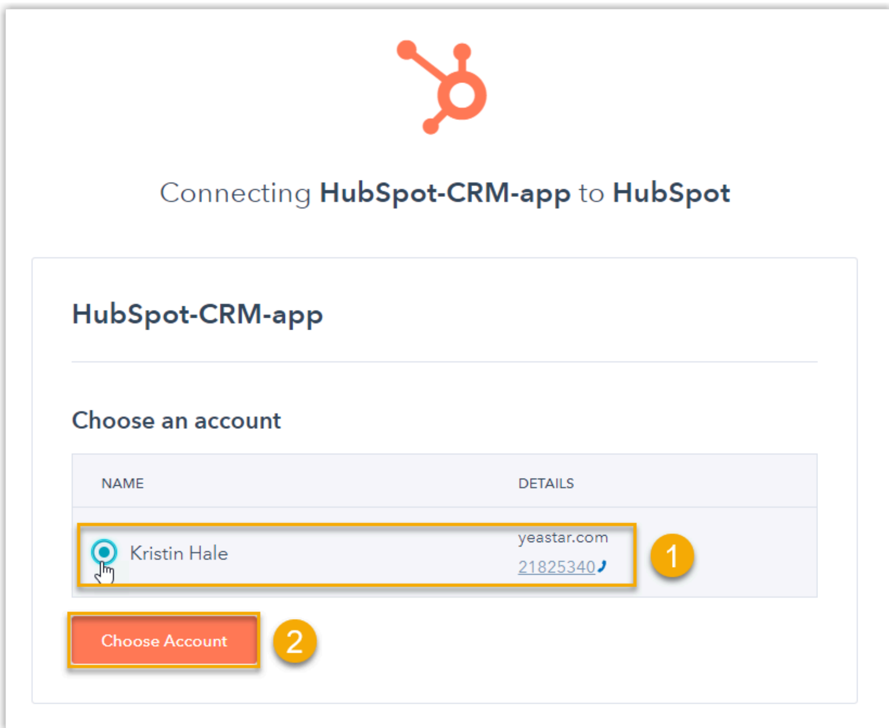
- **Client ID**: Paste the Client ID obtained from the created HubSpot application.
- **Client Secret**: Paste the Client Secret obtained from the created HubSpot application.

4. Click **Save**.

   A new browser page is launched to prompt you to choose an account for integration.

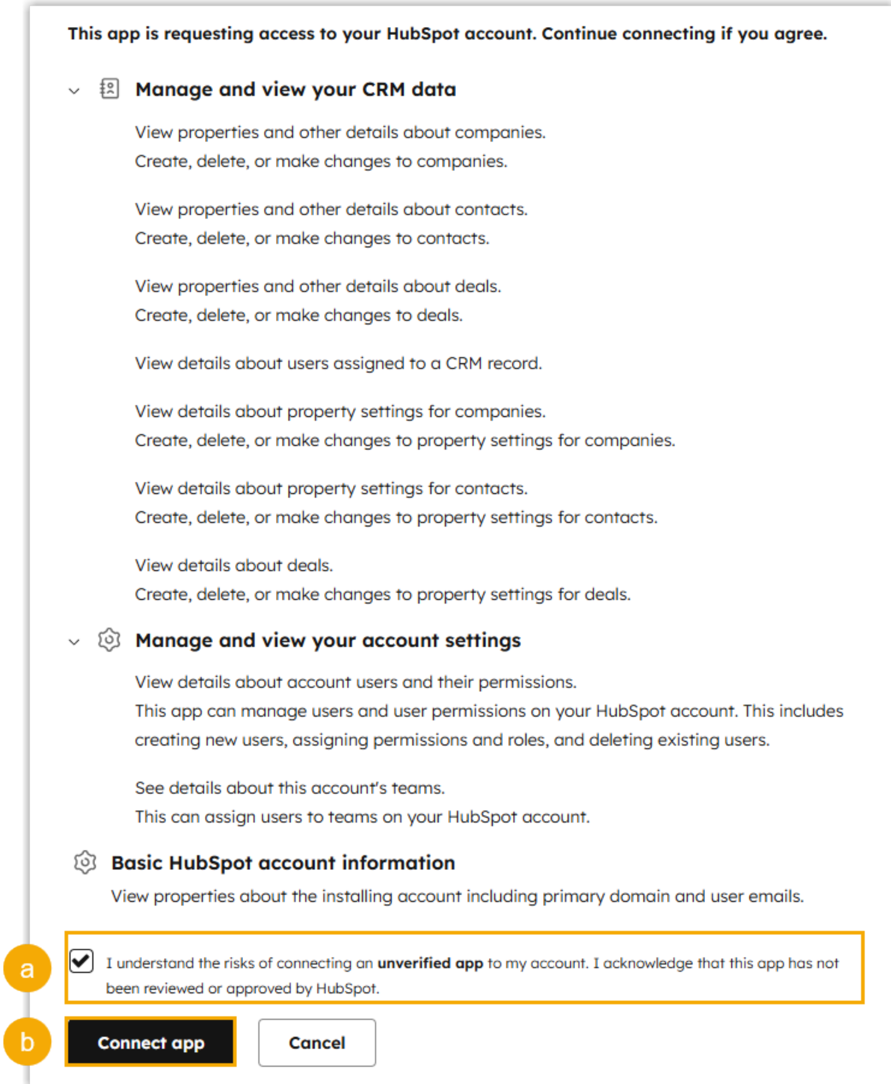
5. Select a standard HubSpot account with Super Admin privilege, and click **Choose Account**.

   > **Important:**
   > Do NOT select a developer account, otherwise the integration would fail.

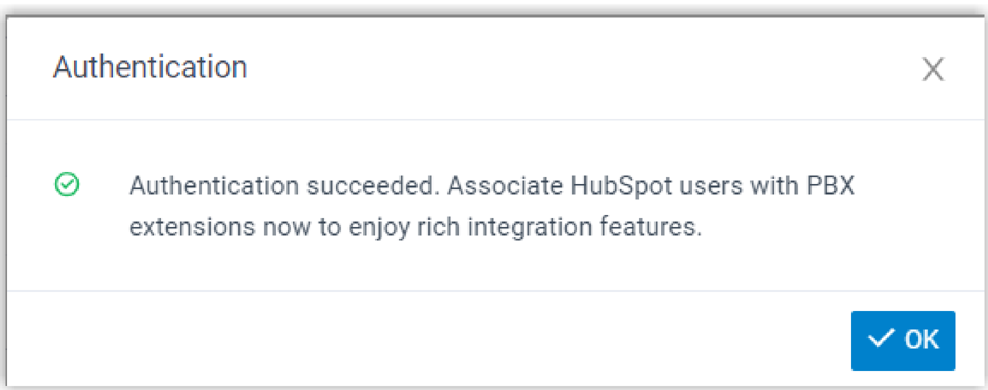
   

   The page will then show the permission grant request of the application.

6. Review the permissions, select the checkbox of the disclaimer, and click **Connect app** to proceed with the authorization.



You are redirected to the PBX management portal, a pop-up window displays the authentication result.

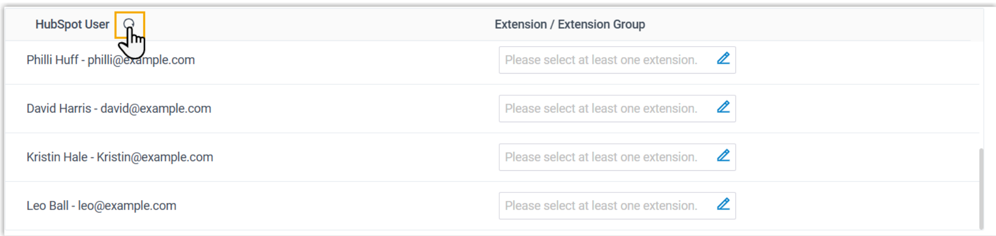


7. Click **OK** to confirm.

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

Step 2. Associate HubSpot CRM users with PBX extensions

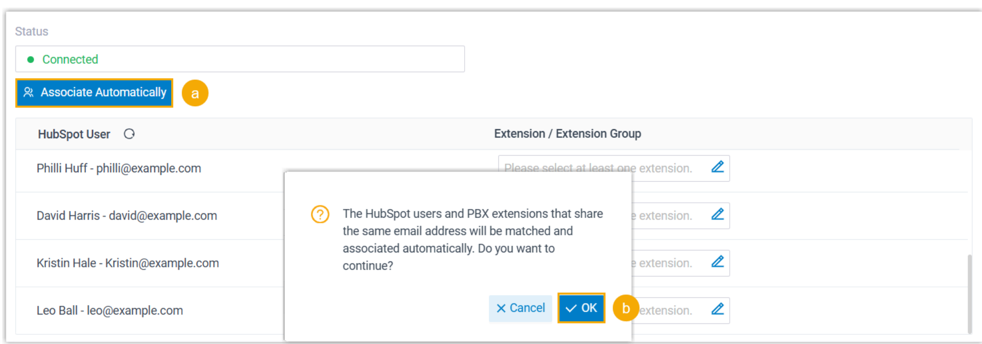
1. On the CRM integration page, click beside the **HubSpot User** to synchronize the latest list of HubSpot CRM users.



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:

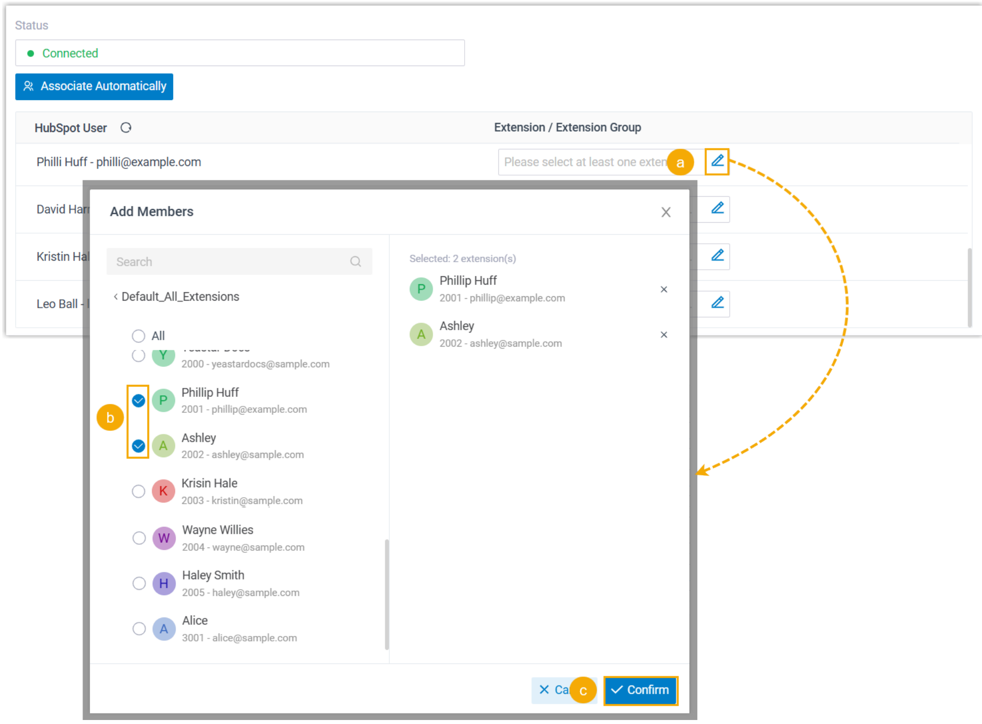


a. Click the **Associate Automatically** button.

b. In the pop-up window, click **OK**.

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, click ✎.
b. In the pop-up window, select the desired user's extension(s).
c. Click **Confirm**.

3. Click **Save**.

Result

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

What to do next

- [Set up Contact Synchronization from HubSpot CRM]()
- [Set up Contact Creation for HubSpot CRM]()
- [Set up Call Popup]()
- [Use HubSpot CRM Integration]()

Set up Contact Synchronization from HubSpot CRM

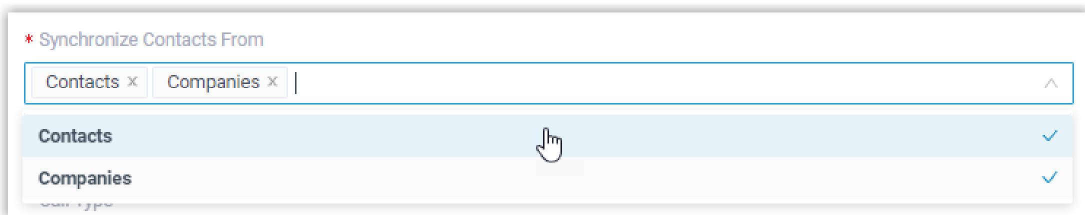
After integrate with HubSpot CRM, you can enable a one-way contact synchronization on PBX to sync the HubSpot CRM contacts to a specific PBX phonebook.

Prerequisites

The HubSpot CRM integration is completed.

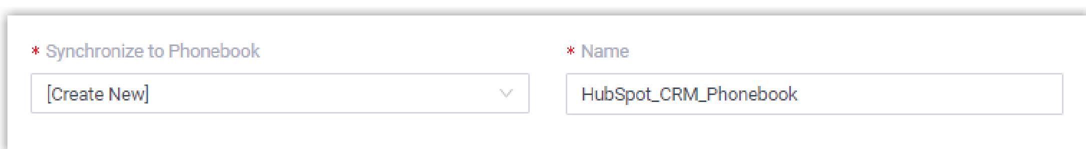
Procedure

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

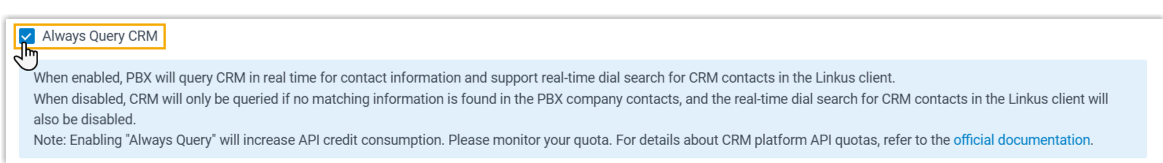


4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from HubSpot CRM.

> **Note:**
> The contacts can only be synchronized to an empty phonebook.



5. On the **Always Query CRM** option, decide whether to search contacts in the CRM real-time.



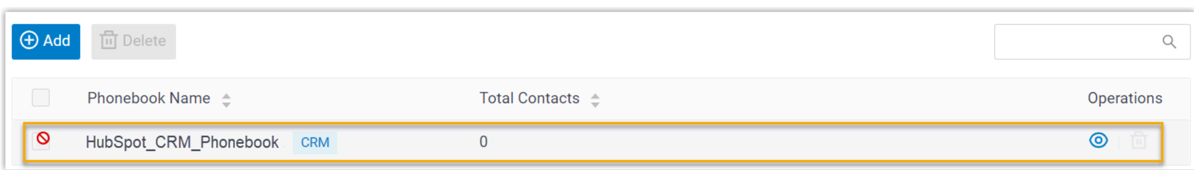
- If enabled, PBX will query CRM in real time for contact information, and support real-time dial search for CRM contacts in the Linkus clients of the associated extension users.
- If disabled, PBX will only query CRM when there is no matching information found in the PBX company contacts.

> **Note:**
> - Enabling this feature will increase API usage, so make sure to monitor your quota accordingly.
> - The real-time search is not supported when masked number is enabled.

6. Click **Save**.

Result

The associated phonebook comes with a label of CRM.



When users receive an inbound call from a specified type of HubSpot CRM contact, or place an outbound call to the contact, PBX will search for the contact's information, and automatically synchronize the matched contact's information from the CRM to the associated phonebook in Yeastar P-Series Cloud Edition.

> **Note:**
> This is a one-way sync to Yeastar P-Series Cloud Edition, 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 Contact Creation for HubSpot CRM

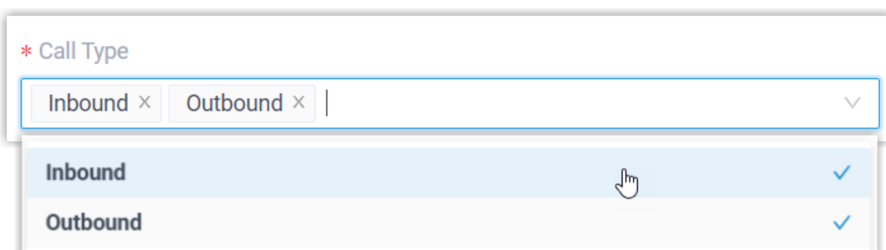
After the integration with HubSpot CRM, you can set up automatic or manual contact creation. If enabled, a new contact can be created on the CRM when the user receives a call from an unknown number or places a call to an unknown number. This feature helps you to build your contact database efficiently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

Prerequisites

The HubSpot CRM integration is completed.

Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Create New Contact**.
3. In the **Create Method** section, select the desired creation method according to your needs.
   - If you want the system to automatically create contacts in the CRM based on specified types of calls, do as follows:
     a. Select **Automatically**.
     b. In the **Call Type** drop-down list, select when will a contact be automatically created in the CRM.

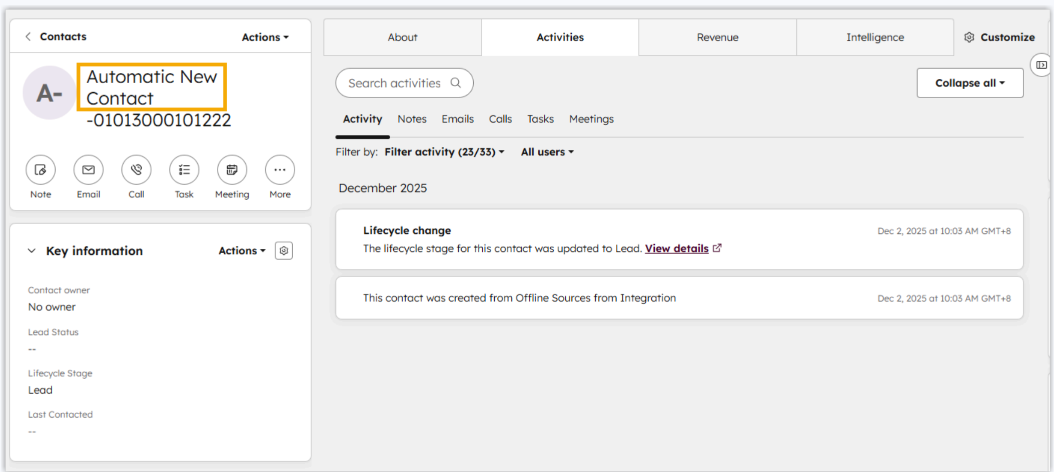
        - **Inbound**: Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
        - **Outbound**: Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
   - If you want to allow associated extension users to manually create contacts in the CRM during a call, select **Manually**.

4. Click **Save**.

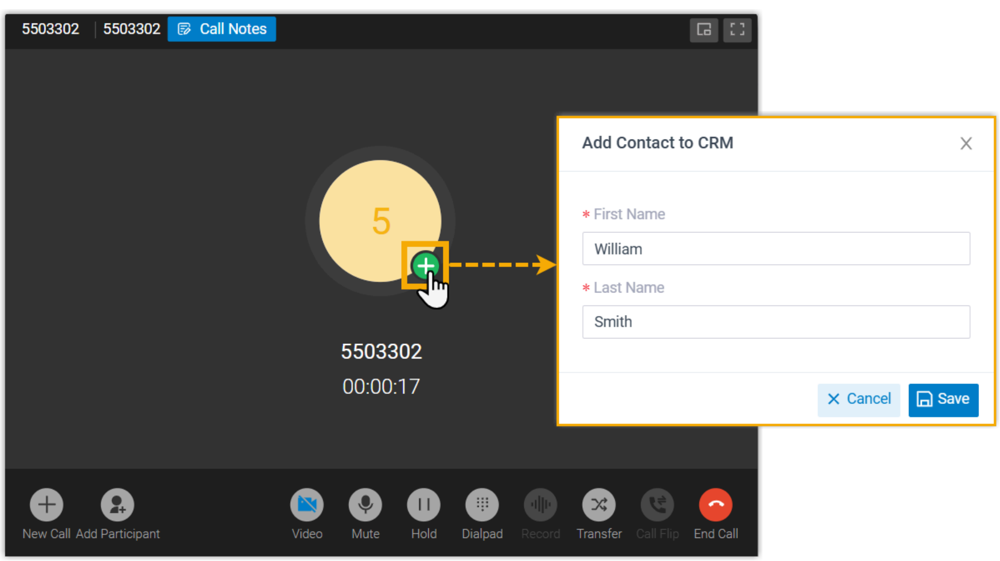
Result

- If automatic creation is configured, 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.

> **Note:**
> The name of the auto-created contact has a prefix of `Automatic New Contact` followed by the number.



- If manual creation is configured, the associated extension users can manually add an unknown number as a new contact or lead on the CRM.



Note:
If the Contact Synchronization feature is enabled, the new created contact will also be synchronized automatically into the phonebook in Yeastar P-Series Cloud Edition.

Set up Call Popup

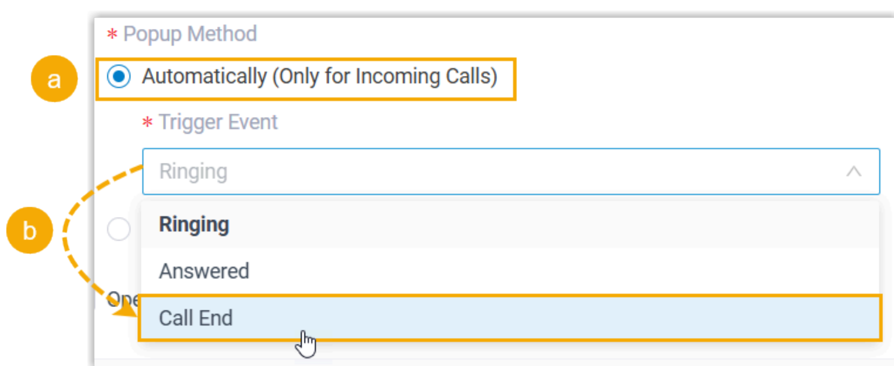
After the integration with HubSpot CRM, a web browser tab displaying CRM contact's information will be automatically launched when a CRM user receives an inbound call from a CRM contact by default. You can also configure the call popup to be triggered when a call is answered or ended as needed.

Prerequisites

The HubSpot CRM integration is completed.

Procedure

1. Log in to PBX web portal, go to **Extension and Trunk > Extension**.
2. Click to edit the extension associated with a CRM user.
3. In the **Linkus Clients** tab, scroll down to your desired Linkus client, then select the checkbox of **Open Contact URL Using System-Integrated CRM**.
4. In the **Popup Method** section, decide the method of call popup.
    - If you want the system to automatically open the CRM contact details page, do as follows:



a. Select **Automatically (Only for Incoming Calls)**.

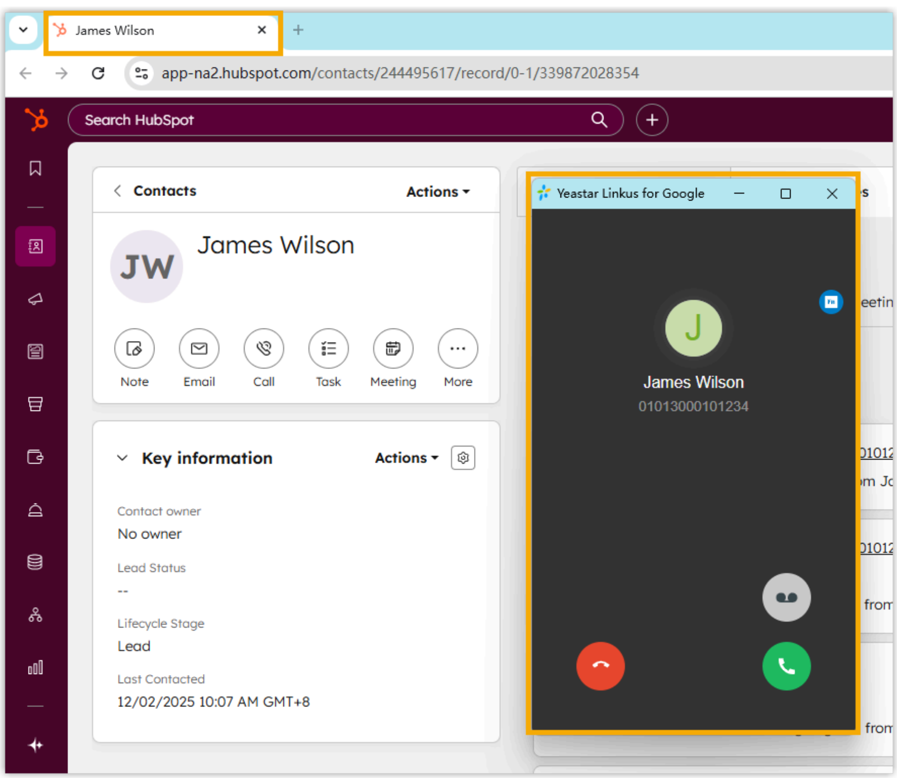
b. In the **Trigger Event** drop-down list, set when the call popup will be automatically triggered.
   - **Ringing**: A call popup will be triggered when a HubSpot user receives an inbound call from a CRM contact.
   - **Answered**: A call popup will be triggered when a HubSpot user answers an inbound call from a CRM contact.
   - **Call End**: A call popup will be triggered when a HubSpot user finishes a call with a CRM contact.

- If you want the associated extension user to manually open the contact's URL during a call with a CRM contact, select **Manually**.

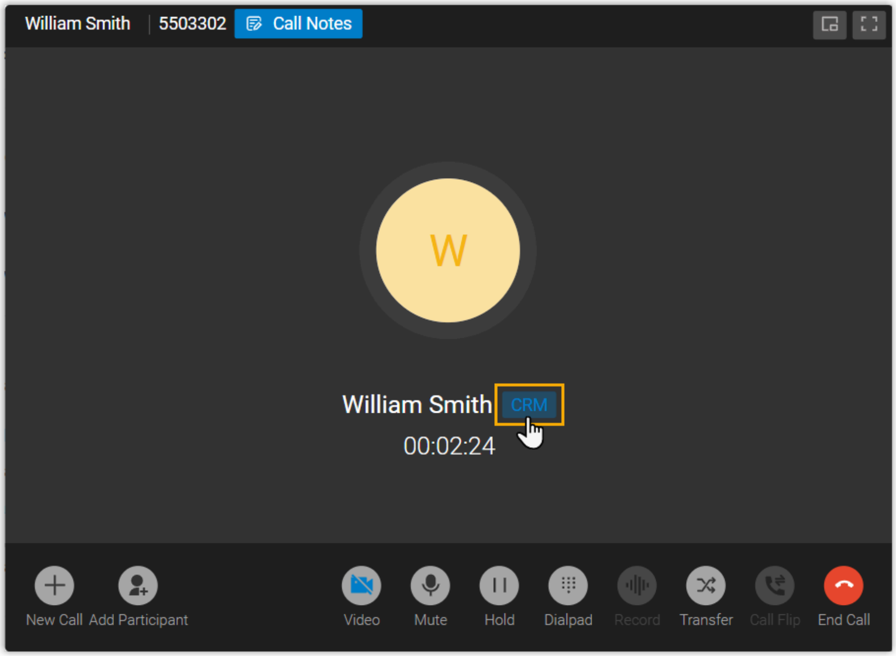
5. Click **Save**.

Result

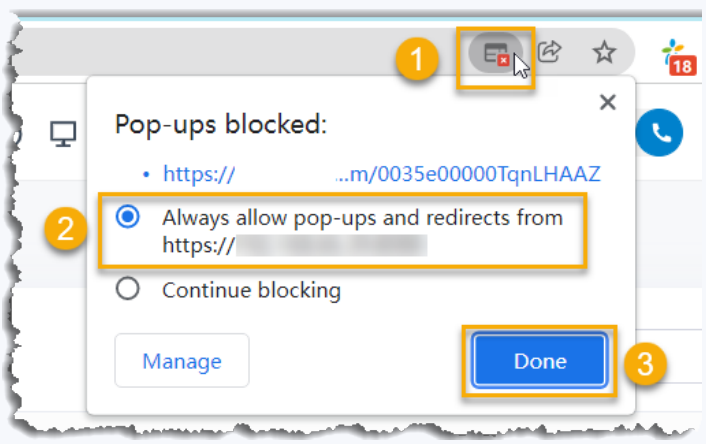
- If automatic call popup is configured, when the specified trigger event occurs on an inbound call from a CRM contact, a new browser tab will be launched to show the contact's information from the CRM.



- If manual call popup is configured, the associated extension users can click the `CRM` label on the call window to manually open the contact's details page during a call with the CRM contact.



Note:
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**.



Set up Call Journal to Hubspot CRM

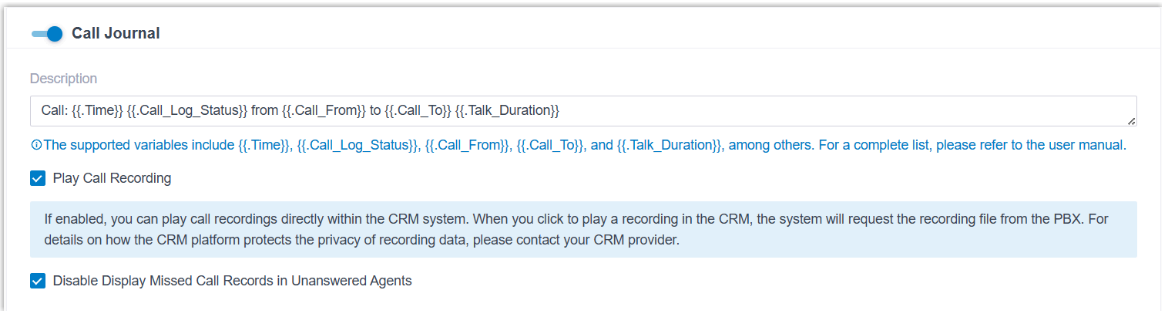
After the integration, you can set up call journal to automatically log all the call activities to HubSpot CRM when an associated user ends calls with CRM contacts.

Prerequisites

The [HubSpot CRM integration](#) is completed.

Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Call Journal**.
3. Configure the call journal settings according to your needs.

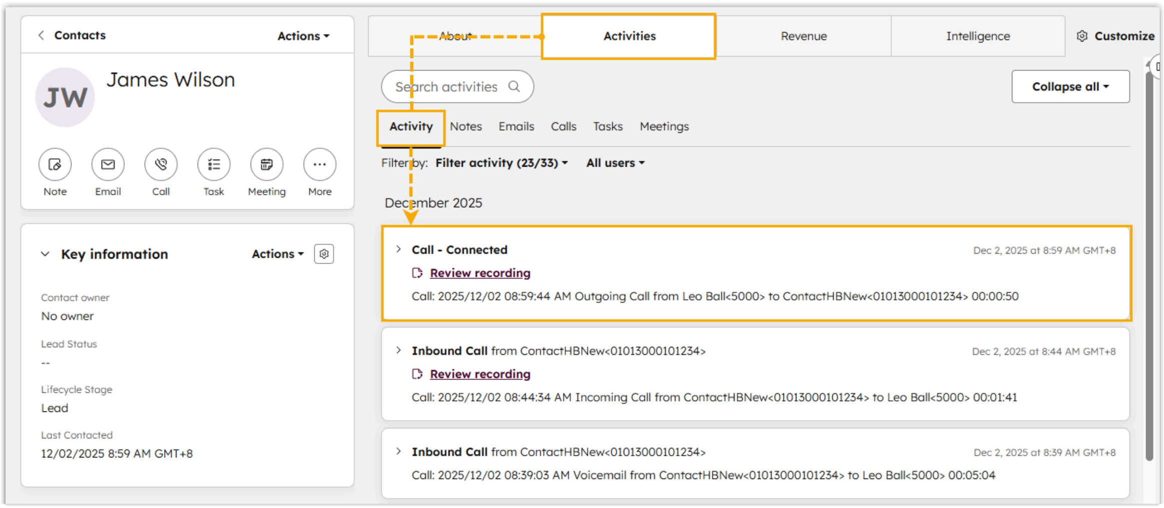


Setting	Description
Description	The description of the call log. **Note:** The contents can be composed of variables. For the supported variables, see XML Descriptions for Integration Template - Call Journal Scenario Variables.
Play Call Recording	If enabled, the CRM users who associated with extensions on PBX can directly view and play call recordings stored on the PBX within the CRM system. **Note:** When users click to play call recording in the CRM, the system will request recording file from the PBX. For details on how the CRM platform protects the privacy of recording data, please contact CRM provider.
Disable Display Missed Call Records in Unanswered Agents	If enabled, for queue and ring group calls, the PBX will only synchronize the call logs to the CRM of the agent who answers the call, while missed call logs for the same call are not synchronized to the CRM of agents who did not answer.

4. Click **Save**.

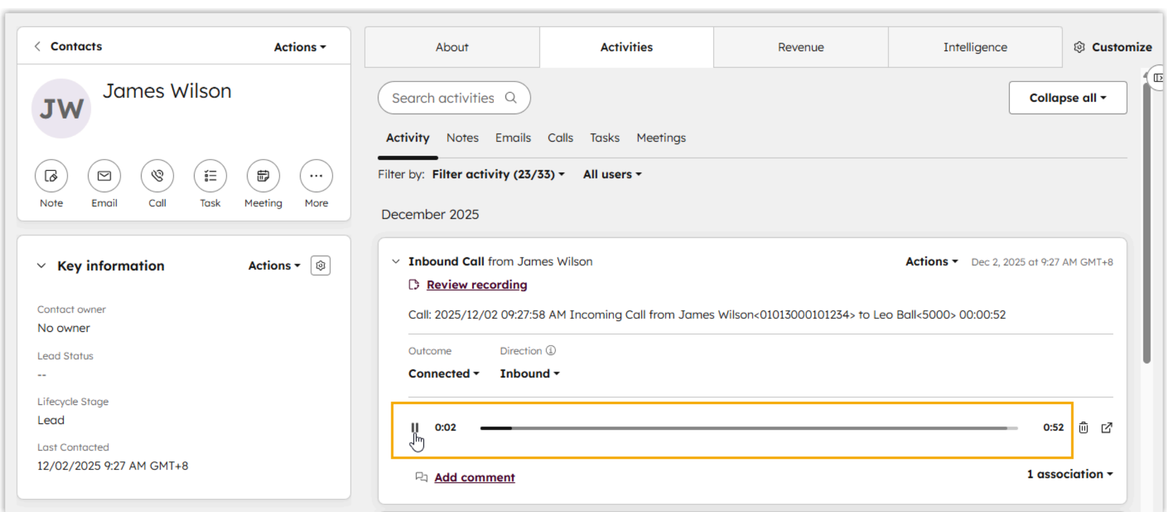
Result

- When the associated user ends a call with a CRM contact, the PBX will automatically synchronize the call log with the predefined subject and description.



- If **Play Call Recording** is enabled, the user can then view and play the recording directly from that synchronized activity.

> **Note:**
> If the recording file is deleted from the PBX, it will no longer be available for playback in the CRM.



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.

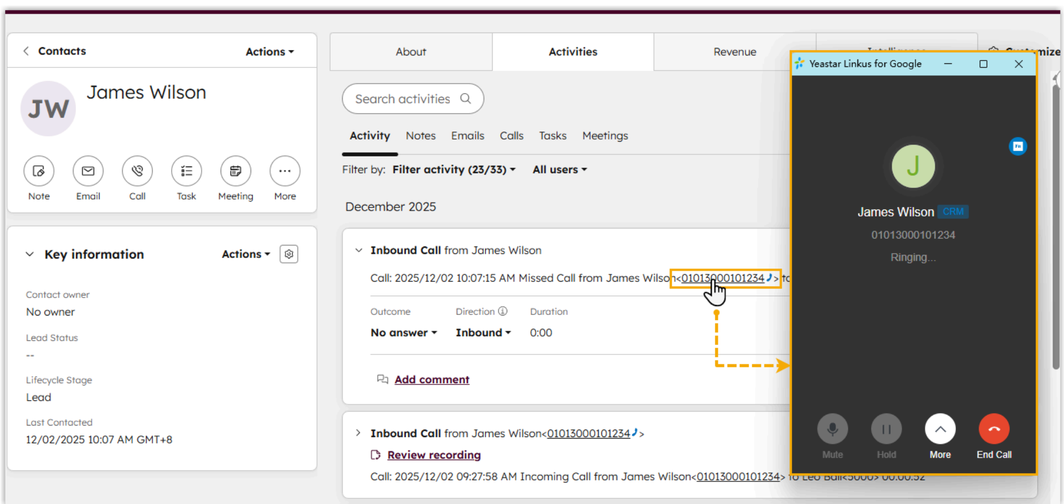
Click to Call

Prerequisites

Install ['Yeastar Linkus for Google'](#) 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.



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 exten-

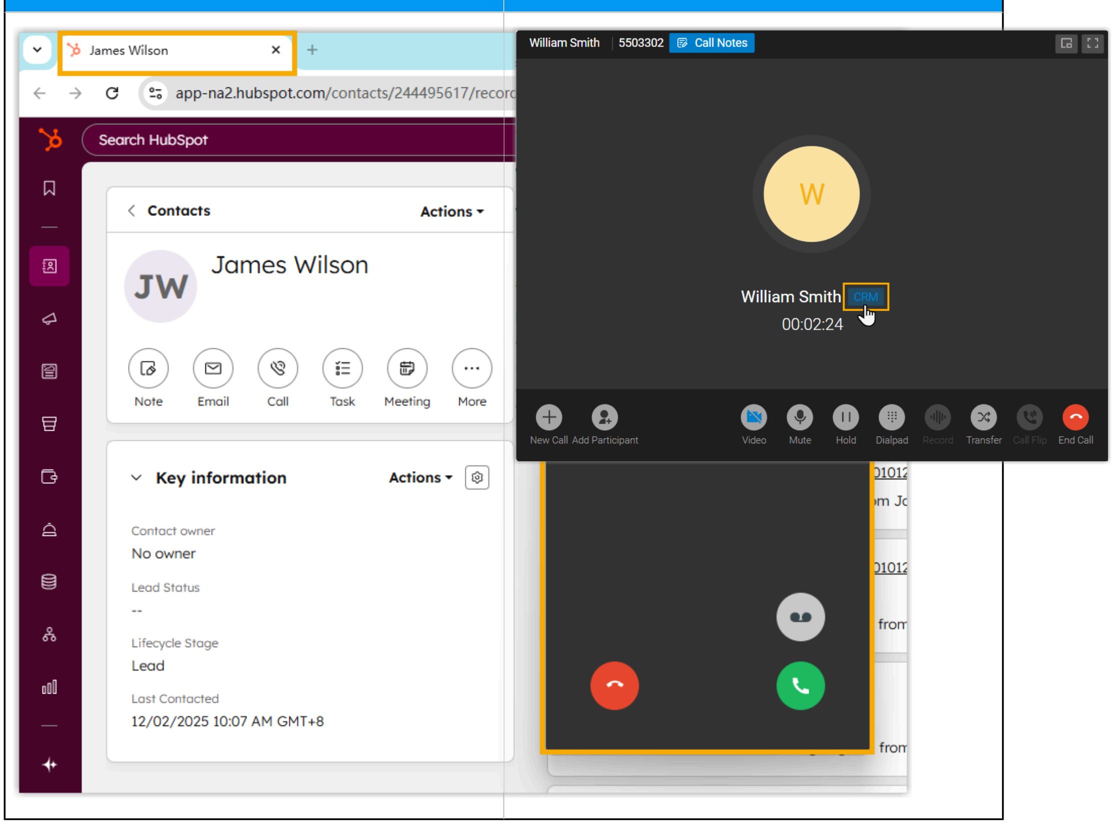
sion 'Yeastar Linkus for Google', which allows for the call pop-up browser tab even when web browser is closed.

Procedure

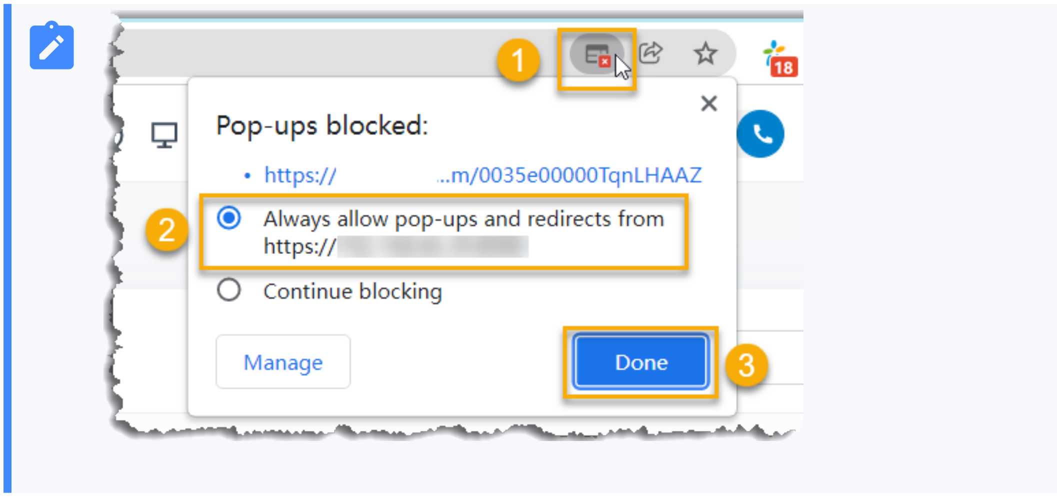
When HubSpot CRM users receive / answer an inbound call from a CRM contact, or finish a call with a CRM contact, a new browser tab will automatically be launched to show the CRM contact's information. Additionally, users can manually open the contact's information from the call window during the call.

Note:
For more information about the settings, see Set up Call Popup.

Automatic call popup	Manual call popup



Note:
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**.

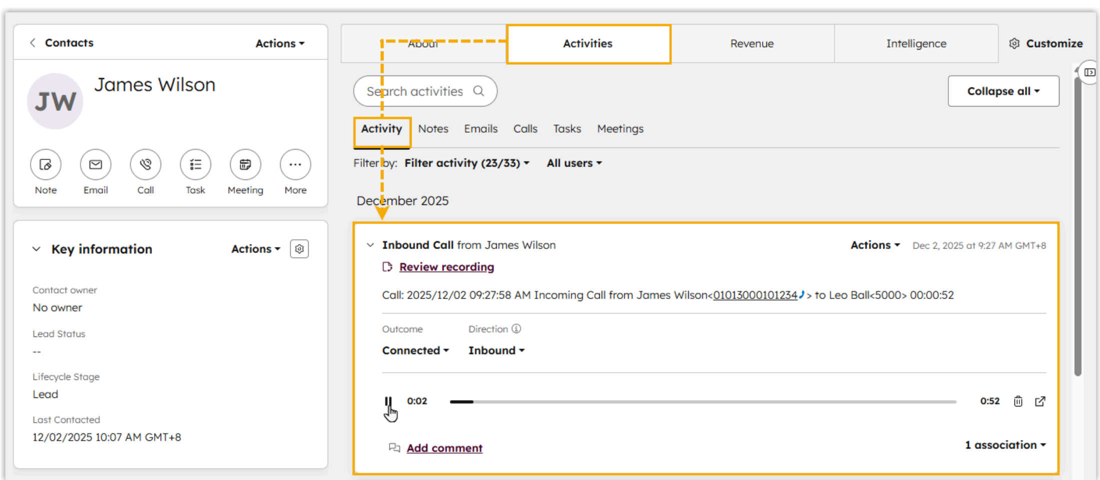


Call Journal

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 and the corresponding call recordings.

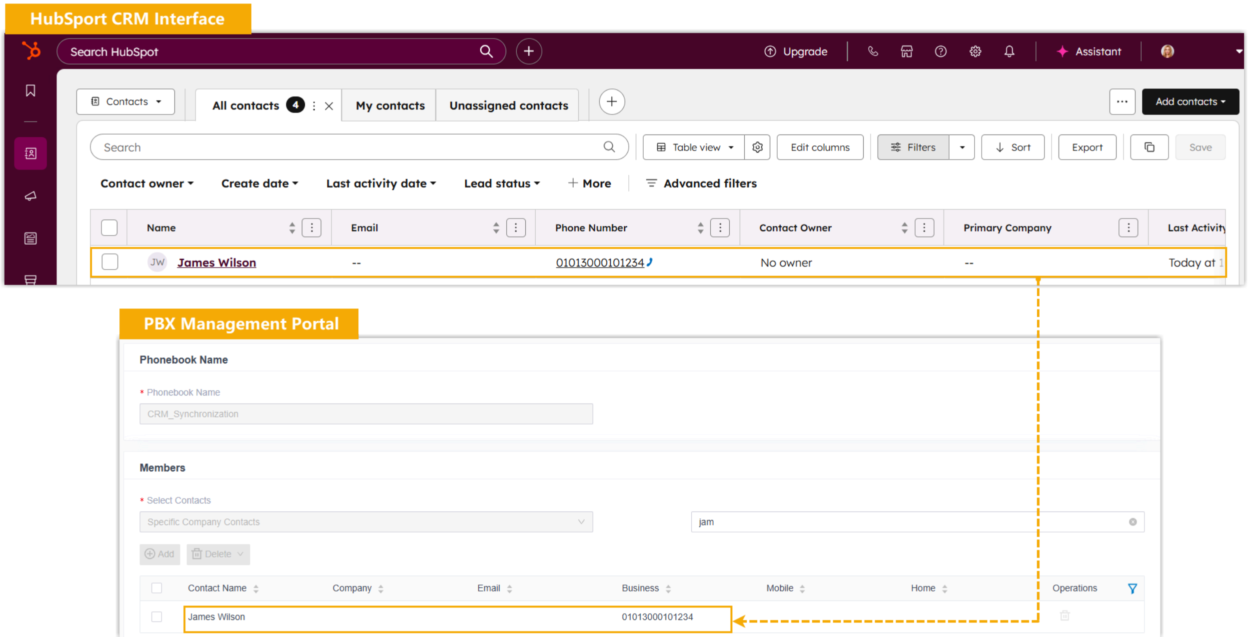
For more information, see [Set up Call Journal to Hubspot CRM](#).



Contact Synchronization

Either inbound calls from HubSpot contacts or outbound calls to the contacts will trigger a CRM contact lookup. If 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.

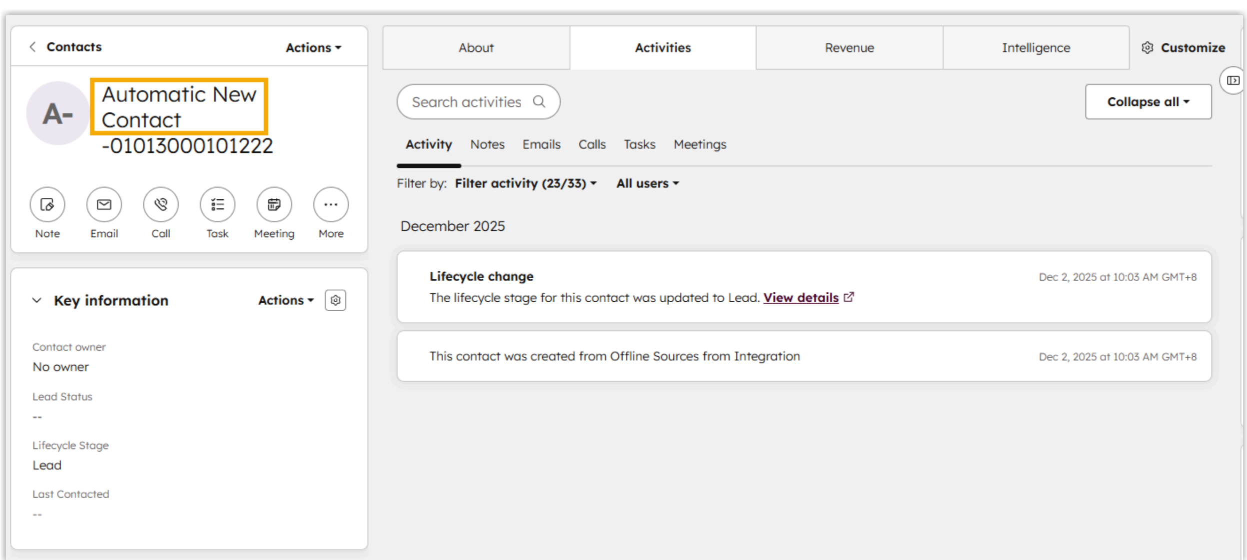
For more information, see Set up Contact Synchronization from HubSpot CRM.



Automatic Contact Creation

A new contact can be created automatically or manually 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 Set up Contact Creation for HubSpot CRM.

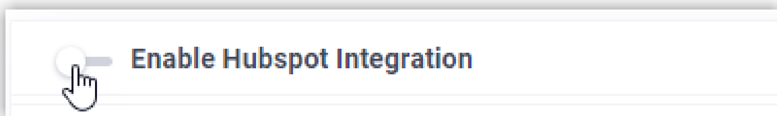


Disable HubSpot CRM Integration

You can disable the HubSpot CRM integration on Yeastar P-Series Cloud Edition 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

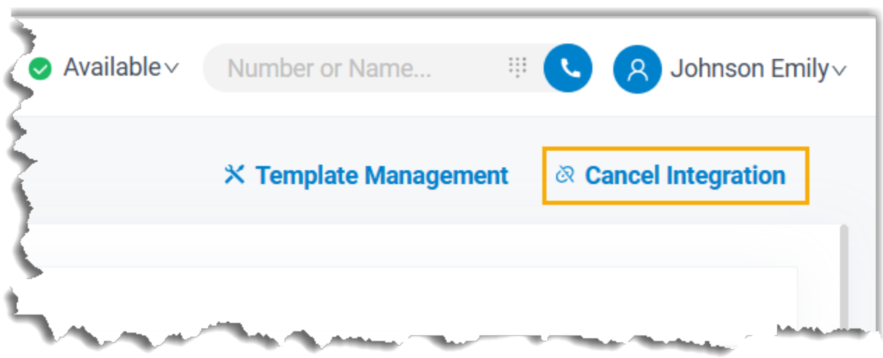
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained, and can be used directly the next time the integration is enabled again.

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. At the top-right corner, click **Cancel Integration**.



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.