

# HUBSPOT INTEGRATION

Unified Data for a Better Customer Experience

## Seamless CRM-to-ERP Integration

Lack of integration between your ERP and CRM systems can have a negative impact on the way you acquire, sell to, and service your customers. To ensure the best possible purchasing experience, sales, marketing, customer service, and other stakeholders need quick, convenient access to complete information across the entire customer journey - from the time a prospect is identified until a sale is made and goods are shipped.

Ensure that your customer and sales information is always in sync with the SalesPad<sup>®</sup> HubSpot Integration, a powerful integration for seamlessly sharing information in real-time between your ERP, order management, and CRM systems. You'll get a complete 360-degree view of the end-to-end customer lifecycle, with full visibility into all your marketing, sales, and order information.

-  Single source of customer truth
-  Accelerated sales cycles
-  End-to-end visibility on all customer touchpoints
-  Improved data quality
-  Enhanced collaboration between departments

## Key Features

The HubSpot Integration streamlines the exchange of vital prospect, customer, item and sales data. Leverage our Automation Agent to fully automate updates between systems when changes or additions occur.

Action Center	Settings	Audit	Company Link	Company Prospect Import	Company Customer Import	Customer Export	Prospect Updates Export	Customer Updates Export	Deal Export
<div style="display: flex; justify-content: space-between;"> <span>Export</span> <span>Import</span> </div>									
Filter:									
<div style="display: flex; align-items: center;"> <span>Expand</span> <span>Collapse</span> </div>									
<b>Account Details</b>									
HubSpot Access Token									
<b>API</b>									
Company Filter Script									
HubSpot Page Size <b>100</b>									
<b>Company Customer Import</b>									
Company Filter - Type									
Customer Address Import Mapping									
Customer Import Mapping									
Customer Post Import Script									
Customer Pre Import Script									
Prevent Matching To Prospects <b>True</b>									
Roll Back Customer Import Transaction On Error <b>True</b>									
Try To Match Before Importing <b>False</b>									
<b>Company Link</b>									
Company Filter - Type									



**With our HubSpot Integration, You Can**

- Rapidly, securely share data between SalesPad®, HubSpot, and Microsoft Dynamics GP
- Eliminate redundant data sets and time-consuming manual data syncing
- Track across the customer journey, from prospecting through sale and shipment
- Simplify information-sharing between teams and departments



HubSpot is a CRM platform with all the software, integrations, and resources you need to connect your marketing, sales, and customer service. HubSpot's connected platform enables you to grow your business faster by focusing on what matters most: your customers. More than 200,000 customers in 120 countries rely on HubSpot to deliver a best-in-class customer experience.

<b>HubSpot Companies ↔ SalesPad/GP Customers</b>
Link existing SalesPad/GP customers to existing HubSpot companies
Create SalesPad/GP customers for new HubSpot companies
Create HubSpot companies for new SalesPad/GP customers
Update HubSpot companies for updated SalesPad/GP customers
<b>HubSpot Companies ↔ SalesPad Prospects</b>
Link existing SalesPad prospects to existing HubSpot companies
Create SalesPad prospects for new HubSpot companies
Update HubSpot companies for updated SalesPad prospects
<b>HubSpot Products ↔ SalesPad/GP Item Masters</b>
Create HubSpot products for SalesPad/GP item masters
Update HubSpot products for updated SalesPad/GP item masters
<b>HubSpot Deals ↔ SalesPad/GP Sales Documents</b>
Create HubSpot deals for SalesPad/GP sales documents
Create HubSpot deal line items for SalesPad/GP sales lines

