

BETA

ClearCare HubSpot Setup Guide

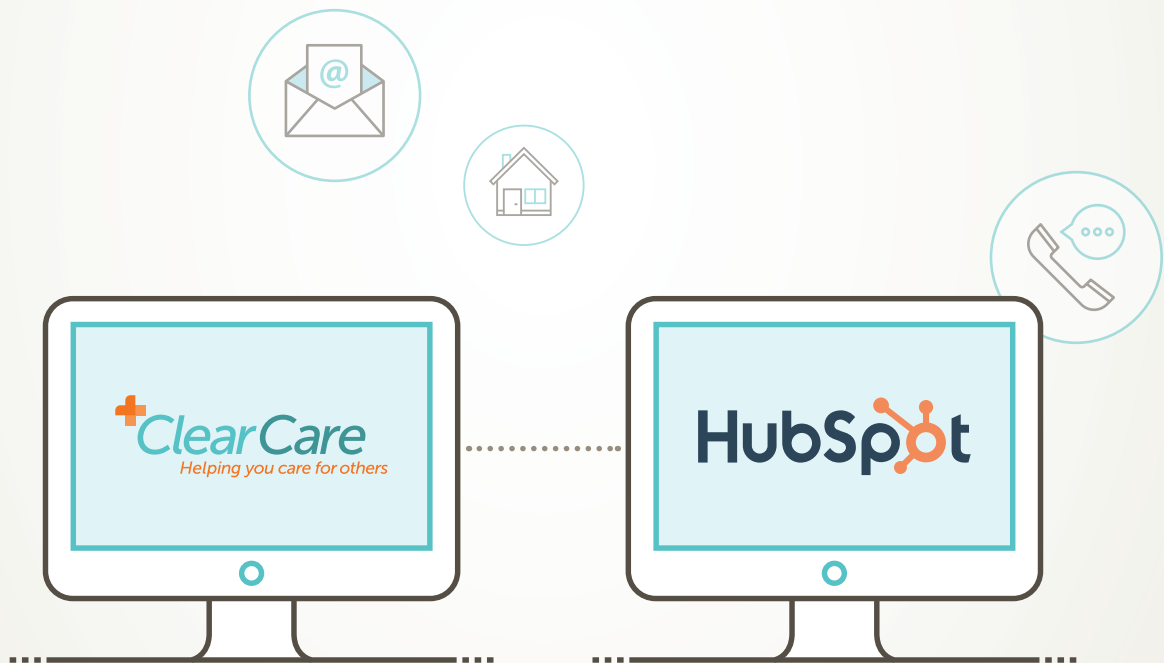


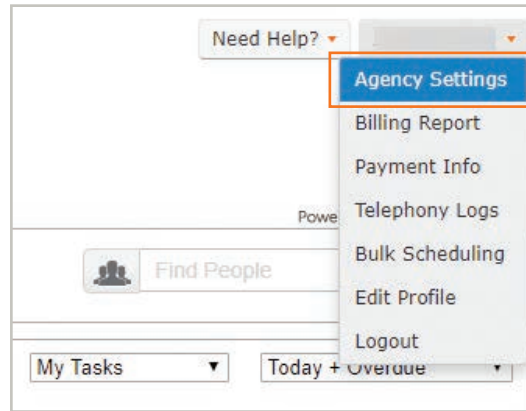


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1. Setup and Configuration

- Log in to ClearCare.
- Go to **Administrator > Agency Settings**.
- Select **Power Tools Integrations > Customer Relationship Management (CRM) Integration**.
- Select **Connect**.



Overview: Review the **Overview** page and select the **Integration Setup** button at the top. Then select the **Start ClearCare HubSpot integration setup** button.

Agreement: Check the box to allow ClearCare permission to modify and customize Contact and Deal properties in HubSpot and select **Continue**.

Additional steps on next page.

1. Setup and Configuration (continued)

HubSpot Access & Configuration: Enter your [HubSpot API key](#). Select **Connect** to connect ClearCare with HubSpot, then select **Configure HubSpot**.

ClearCare will configure HubSpot with a customized Sales_Pipeline to synchronize the creation of contacts and prospects and convert to client processes between HubSpot and ClearCare. ClearCare will create customized workflows and properties in your HubSpot instance. This will be automatically triggered by ClearCare and you can view the configurations and their statuses. After successful configuration, select **Continue**. If you need any help with configuration, contact ClearCare. The following configurations will be triggered by ClearCare.

Creation of customized ClearCare_Sales_Pipeline

This configuration will create a customized [ClearCare_Sales_Pipeline](#) in your HubSpot instance along with 12 deal stages. These deal stages will be exactly the same as that of ClearCare Prospect Statuses and there will be one-to-one mapping between deal stages and prospect statuses.

Creation of customized Prospect Id (ClearCare_Prospect Id)

ClearCare creates a customized **ClearCare Prospect Id** and associates it with the contact object in HubSpot. This Id helps the sync of the contact object from HubSpot to the Prospect in ClearCare and vice versa.

Creation of customized Location property (ClearCare location)

ClearCare will create a customized location property in your contact instance so you can link a contact to a location when creating a contact in HubSpot.

If your agency has more than one location, you will need to associate a location to the contact from the ClearCare customized location.

Creation & association of Webhook to Contact-based workflow to create a Prospect in ClearCare and a Deal in HubSpot

The contact-based workflow listens to the events in HubSpot. When you create a contact in HubSpot, the workflow will create a Prospect in ClearCare and check the New Lead Prospect Status. Simultaneously, it will put the deal in the New Lead Stage in the ClearCare_Sales_Pipeline.

ClearCare will automatically set the webhook to the workflow while creating it in HubSpot.

Creation & association of Webhook to Contact-based workflow to update the contact payload information between ClearCare and HubSpot

The workflow will listen to change of events in the contact fields of a Contact in HubSpot and sync the updated information to the Prospect payload in ClearCare:

ClearCare will automatically set the webhook to the workflow while creating it in HubSpot.

HubSpot [Webhook](#) Configuration:

- ClearCare will generate a webhook for the [deal-based workflow](#) to trigger deal stage mapping from HubSpot to prospect status in ClearCare.
- Copy the [webhook](#) to associate the webhook to the [deal-based workflow in HubSpot](#)
- Select **Finish** to complete the setup.

Setup Complete:

- This step indicates that the setup is complete.
- It will display the webhook for the deal-based workflow so if you have missed copying it in the **HubSpot Webhook Configuration** step, you can still copy it from here.

2. Manual Setup

Manual Setup in HubSpot after Setup is Complete between HubSpot & ClearCare

- [Create a deal-based workflow](#) in HubSpot and [associate the webhook](#) generated during HubSpot & ClearCare setup.
- **Contact Properties Configuration**
 - [Set Required Fields for Contacts in HubSpot](#)
 - [Associate Customized ClearCare Location and ClearCare Prospect Id Properties with Contacts](#)

View workflows in HubSpot

- You can view all the workflows under the Workflow tab of HubSpot.



The screenshot displays the HubSpot Workflows interface. At the top, there are buttons for 'Create folder', 'Restore workflows', and 'Create workflow'. Below these are filters for 'View: All workflows', 'Created by: All users', and 'Type: All'. There is also an 'Export contact based workflows' link and a search bar. The main table lists two workflows:

<input type="checkbox"/>	NAME	TYPE	TOTAL ENROLLED	ACTIVE ENROLLED	LAST UPDATED	CREATED
<input type="checkbox"/>	ClearCare Contact Field Sync Workflow Active (Standard)	Contact	0	0	Oct 31, 2019	Oct 31, 2019
<input type="checkbox"/>	ClearCare Contact Workflow Active (Standard)	Contact	0	0	Oct 31, 2019	Oct 31, 2019

3. ClearCare_Sales_Pipeline Setup

The Clear_Care_Sales Pipeline setup will be done automatically by ClearCare when you sign up for the integration. During the technical configuration, ClearCare will create the Sales Pipeline in HubSpot along with the deal stages under **Settings > Sales > Deals**.

Settings

Account Defaults

Contacts & Companies

Conversations

Domains & URLs

Import & Export

Integrations

Marketing

Private Content

Properties

Reports

Sales

Call & meeting types

Calling

Deals

Log emails in CRM

Meetings

Product library

Tasks

Service

Users & Teams

Website

Deals

Set the properties your team sees on deal records.
Choose the properties that will be displayed on all deal records for all users in your CRM. [Manage](#)

Set the properties your team sees when creating deals.
Choose the properties that will be displayed when any user in your CRM creates a deal, and which of those properties are required in order to create a deal. [Manage](#)

Sync lifecycle stages to associated contacts and companies.
When a deal is created, change the lifecycle stage of associated contacts and companies to Opportunity. When a deal is won, change the lifecycle stage of associated contacts and companies to Customer. ☒

Deal Pipelines and Stages

PIPELINE	DEAL STAGES	
Sales Pipeline	7	Edit Delete
ClearCare_Sales_Pipeline	12	Edit Delete
+ Add another pipeline		

You can select the **ClearCare_Sales_Pipeline** to view the deal stages.

You can also view the deal stages by going to **Sales > Deals** and selecting the **ClearCare_Sales_Pipeline**.

Deals

Table Board Search for a deal [Actions](#) [Import](#) [Create deal](#)

All deals

APPOINTMENT SCHEDULED 0 QUALIFIED TO BUY 0 PRESENTATION SCHEDULED 0 DECISION MAKER BOUGHT-IN 0 CONTRACT SENT 0 CLOSED WON 0

All saved filters >

Pipeline

Sales Pipeline

All

Sales Pipeline

ClearCare_Sales_Pipeline

Build a winning sales process.

Deals are the best way to keep track of how you are turning prospects into customers and how much money you are making over time.

Read: [How to design your sales process in HubSpot](#)

4. Deal-Based Workflow *Setup is done by Client*

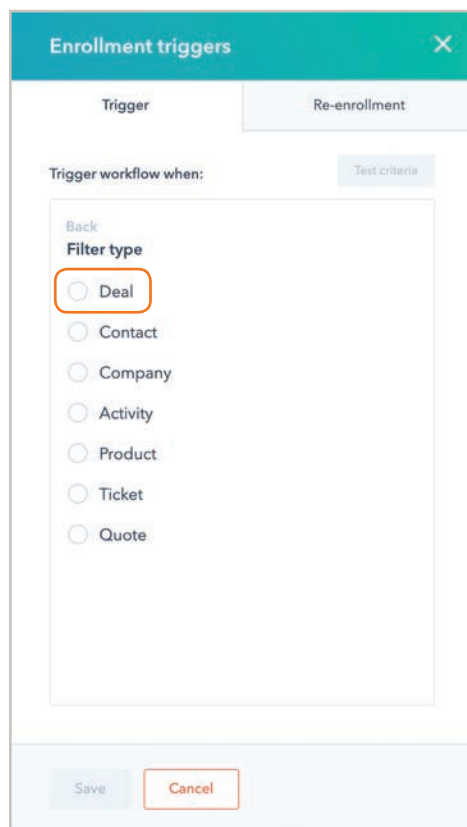
The workflow will be set up manually on the Deal property. The workflow will help to sync deal stages with prospect status between HubSpot and ClearCare. Follow the steps below to set up a deal-based workflow.

- In your HubSpot account, navigate to **Automation > Workflows**.
- In the upper right, click **Create workflow**.
- In the left panel, select the **Start from scratch** tab. In the right panel under *Choose type*, make sure **Start from scratch** is selected. Then, select **Deal-based** as your workflow type on the left.

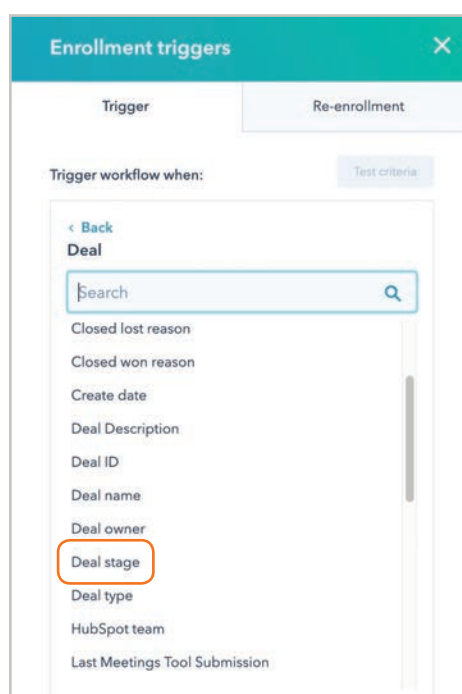
The screenshot displays the HubSpot Workflow creation interface. On the left, the 'Start from scratch' tab is selected, showing five workflow types: Contact-based, Company-based, Deal-based (highlighted with an orange arrow), Ticket-based, and Quote-based. The 'Deal-based' type is described as 'Start with a blank workflow that enrolls and is triggered off deals'. On the right, the 'Preview' pane shows a workflow diagram with a 'Deal enrollment trigger' step followed by an 'Action' step. At the top right, there is a field to 'Name your workflow' with a pencil icon and a 'Next' button. An orange line connects the pencil icon to a callout box that says: 'Click the pencil icon to name your workflow, then click Next. Additional steps on next page.'

4. Deal-Based Workflow *Setup is done by Client (continued)*

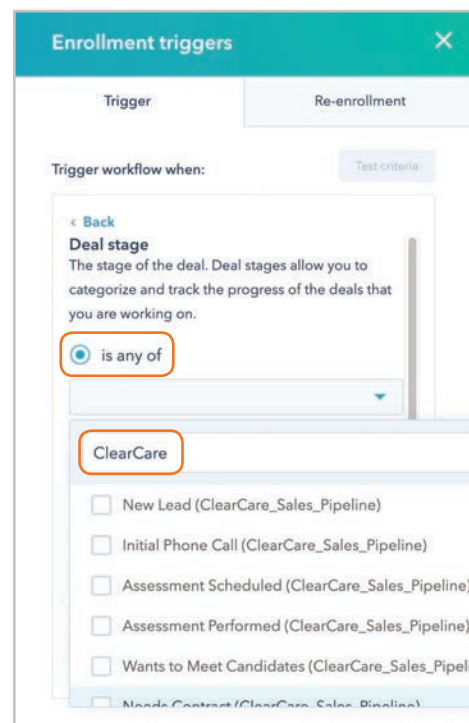
- In the workflow editor, click **Set enrollment triggers**.
- Select your trigger criteria. (Workflow enrollment triggers are set to automatically enroll objects into your workflow when they meet specific trigger criteria.)



Select **Deal** as the enrollment trigger criteria.



Select **Deal stage** as the enrollment trigger criteria.



Choose **is any of** as the filtering option and filter Deal stages by "ClearCare."

4. Deal-Based Workflow *Setup is done by Client (continued)*

Enrollment triggers

Trigger Re-enrollment

Trigger workflow when: [Test criteria](#)

< Back

Deal stage
The stage of the deal. Deal stages allow you to categorize and track the progress of the deals that you are working on.

☒ is any of

- Initial Phone Call (ClearCare_Sales_Pipeline)
- Assessment Scheduled (ClearCare_Sales_Pipeline)
- Assessment Performed (ClearCare_Sales_Pipeline)
- Wants to Meet Candidates (ClearCare_Sales_Pipeline)
- Needs Contract (ClearCare_Sales_Pipeline)
- Expecting Client Signature (ClearCare_Sales_Pipeline)
- Collect Payment Information (ClearCare_Sales_Pipeline)
- Ready to Schedule Care (ClearCare_Sales_Pipeline)

[Apply filter](#)

ClearCare

- ☐ New Lead (ClearCare_Sales_Pipeline)
- ☒ Initial Phone Call (ClearCare_Sales_Pipeline)
- ☒ Assessment Scheduled (ClearCare_Sales_Pipeline)
- ☒ Assessment Performed (ClearCare_Sales_Pipeline)
- ☒ Wants to Meet Candidates (ClearCare_Sales_Pipeline)
- ☒ Needs Contract (ClearCare_Sales_Pipeline)

Select all the ClearCare Stages except New Lead (ClearCare_Sales_Pipeline) and select **Apply filter**.

Enrollment triggers

Trigger Re-enrollment

Trigger workflow when: [Test criteria](#)

[Clone](#) [Delete](#)

Deal stage is any of Initial Phone Call (ClearCare_Sales_Pipeline), Assessment Scheduled (ClearCare_Sales_Pipeline), Wants to Meet Candidates (ClearCare_Sales_Pipeline), Needs Contract (ClearCare_Sales_Pipeline), Collect Payment Information (ClearCare_Sales_Pipeline), Expecting Client Signature (ClearCare_Sales_Pipeline), Ready to Schedule Care (ClearCare_Sales_Pipeline), Closed-Won (ClearCare_Sales_Pipeline), Closed-Lost (ClearCare_Sales_Pipeline), Care Started (ClearCare_Sales_Pipeline), or Assessment Performed (ClearCare_Sales_Pipeline)

[AND](#)

[OR](#)

[Save](#) [Cancel](#)

By default, a deal will only be enrolled in a workflow the first time it meets the enrollment triggers. To enable re-enrollment, click **Re-enrollment options**.

Enrollment triggers

Trigger Re-enrollment

Re-enrollment

Allow deals that meet the trigger criteria to re-enroll. [ON](#) ☒

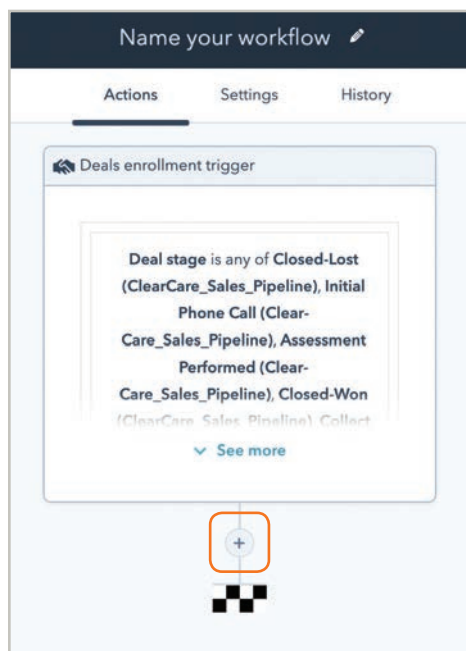
Re-enroll deals if they meet the trigger criteria and any of the following occurs:

- ☒ Deal is manually enrolled
- ☒ Deal stage is any of Initial Phone Call (ClearCare_Sales_Pipeline), Assessment Scheduled (ClearCare_Sales_Pipeline), Wants to Meet Candidates (ClearCare_Sales_Pipeline), Needs Contract (ClearCare_Sales_Pipeline), Collect Payment Information (ClearCare_Sales_Pipeline), Expecting Client Signature (ClearCare_Sales_Pipeline), Ready to Schedule Care (ClearCare_Sales_Pipeline), Closed-Won (ClearCare_Sales_Pipeline), Closed-Lost (ClearCare_Sales_Pipeline), Care Started (ClearCare_Sales_Pipeline), or Assessment Performed (ClearCare_Sales_Pipeline)

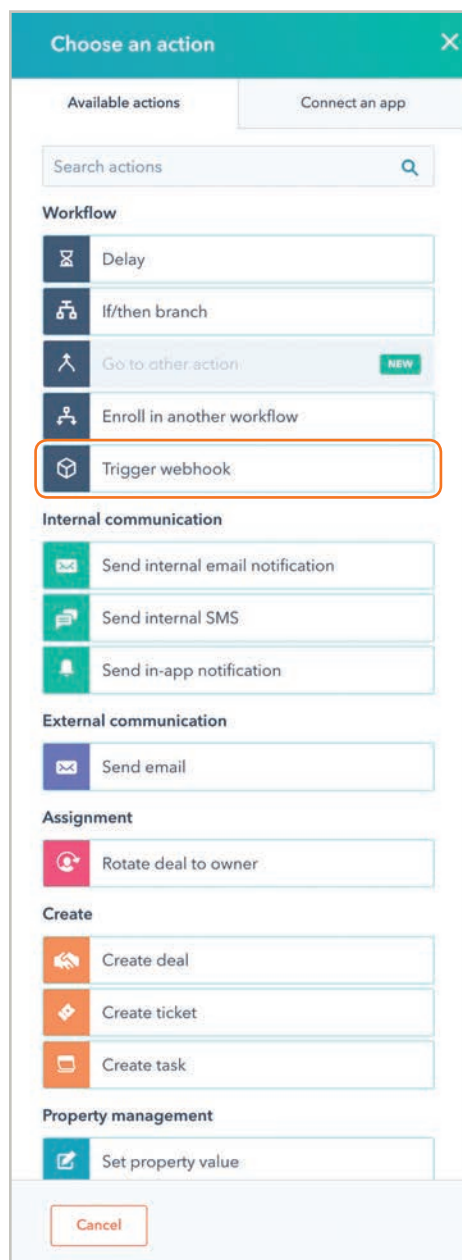
[Save](#) [Cancel](#)

Turn on **Allow deals that meet the trigger criteria to re-enroll** and click **Save**.

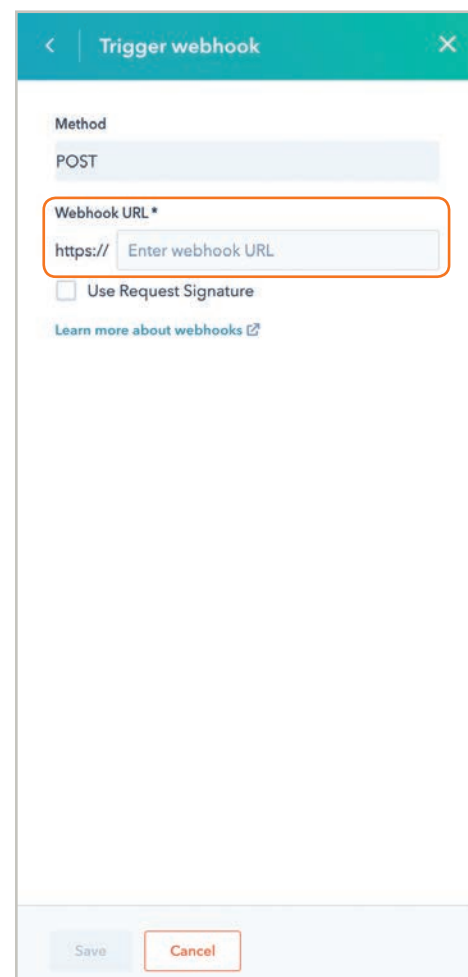
4. Deal-Based Workflow *Setup is done by Client (continued)*



Click the **plus (+)** icon to add the webhook URL.



In the right panel, select **Trigger webhook**.



Paste the Webhook URL and select **Save**.

4. Deal-Based Workflow *Setup is done by Client (continued)*

The screenshot shows the workflow builder interface. At the top, there's a header with 'Back to workflows', 'Name your workflow', and 'Workflow is OFF' with a 'Review' button. Below the header, there are tabs for 'Actions', 'Settings', and 'History'. The main area displays a workflow diagram with two steps: 'Deals enrollment trigger' and 'Trigger webhook'. The 'Deals enrollment trigger' step has a description: 'Deal stage is any of Care Started (ClearCare_Sales_Pipeline), Ready to Schedule Care (ClearCare_Sales_Pipeline), Needs Contract (ClearCare_Sales_Pipeline), Assessment Scheduled (ClearCare_Sales_Pipeline), Initial Phone Call (ClearCare_Sales_Pipeline), Closed-Won (ClearCare_Sales_Pipeline), Assessment Performed (ClearCare_Sales_Pipeline), Expecting Client Signature (ClearCare_Sales_Pipeline), Wants to Meet Candidates (ClearCare_Sales_Pipeline), Closed-Lost (ClearCare_Sales_Pipeline), or Collect Payment Information (ClearCare_Sales_Pipeline)'. The 'Trigger webhook' step is a POST request to 'https://test.url'. On the right side, there's a callout box that says 'In the upper right, click **Review**.'

The screenshot shows the workflow settings interface. At the top, there's a header with 'Back to edit', 'Name your workflow', and 'Workflow is OFF' with a 'Turn on' button. Below the header, there's a section titled 'Review before you turn on'. The 'Enrollment' section has a sub-section 'Existing deals' with a description: 'These deals already meet the trigger criteria. Do you want to enroll them when this workflow turns on?'. There are two radio buttons: 'No, only enroll deals which meet the trigger criteria after turning the workflow on' and 'Yes, enroll existing deals which meet the trigger criteria as of now'. The 'Yes' option is selected. There's a callout box that says 'Select **Yes, enroll existing deals which meet the trigger criteria as of now** to enroll existing deals that meet the enrollment triggers.' Below the 'Existing deals' section, there's a section titled 'Deals enroll automatically when:' with a description: 'Deal stage is any of Care Started (ClearCare_Sales_Pipeline), Ready to Schedule Care (ClearCare_Sales_Pipeline), Needs Contract (ClearCare_Sales_Pipeline), Assessment Scheduled (ClearCare_Sales_Pipeline), Initial Phone Call (ClearCare_Sales_Pipeline), Closed-Won (ClearCare_Sales_Pipeline), Assessment Performed (ClearCare_Sales_Pipeline), Expecting Client Signature (ClearCare_Sales_Pipeline), Wants to Meet Candidates (ClearCare_Sales_Pipeline), Closed-Lost (ClearCare_Sales_Pipeline), or Collect Payment Information (ClearCare_Sales_Pipeline)'. There's an 'Edit' button next to it. Below the 'Deals enroll automatically when:' section, there's a section titled 'Re-enrollment' with a description: 'Deals can be enrolled in this workflow multiple times.' and an 'Edit' button. Below the 'Re-enrollment' section, there's a section titled 'Unenrollment'. Below the 'Unenrollment' section, there's a section titled 'Timing' with a description: 'Workflow will execute 7 days a week, any time during the day' and an 'Edit' button. On the right side, there's a callout box that says 'Review the other workflow settings, then click **Turn on**.'

5. Access Your HubSpot API Key

If you are a Super Admin, you can access your HubSpot API key in the **Integrations** section of your account settings. With the HubSpot API key, your developers can create APIs that interact with information in your HubSpot account.

For security reasons, you should consider rotating your HubSpot API key every six months. Rotating your HubSpot API key will deactivate the existing API key and generate a new one. HubSpot will display the age of the API key and recommend when you should rotate your API key. Notifications about the API key will be sent to the Super Admin users and the users who last created or rotated the API key as follows:



- When the API key turns five months old, email notifications are sent.
- When the API key turns six months old, sidebar notifications are sent.
- When the API key has not been rotated in six months, both email and sidebar notifications will be sent every six months.

While this may create downtime and require effort, it helps add a layer of security.

To access your API key:

- In your HubSpot account, click the **Settings** (gear) icon in the main navigation bar.
- In the left sidebar menu, navigate to **Integrations > API key**.
- If a key has never been generated for your account, click **Generate API key**.

Active API key
Last updated 2 months ago ⓘ

.....
Show Copy

If you've already generated an API key, click **Show** to display your key.

Actions ▾

- With the key displayed, click Copy. You can then paste the key to provide it to your developers, or use it in your integrations.
- To rotate your HubSpot API key:
 - Click **Actions**, then select **Rotate key** or **Deactivate key**.
 - To deactivate the key, click **Deactivate this key now** and select the reCAPTCHA checkbox.
 - To rotate the key, click **Rotate and expire this key now** and select the reCAPTCHA checkbox. This will deactivate the key and create a new key. API calls using the deactivated HubSpot API key will now fail and any application using the key will no longer be able to access your information.
 - Click **Copy** and replace the deactivated API key used by your integrations with this new API key.

Audit log			
DATE	USER	ACTION	KEY
October 23, 2019 12:53 AM	Admin	Viewed	*****
October 16, 2019 5:04 PM	Admin	Viewed	*****
September 13, 2019 12:07 PM	Admin	Viewed	*****
September 13, 2019 12:06 PM	Admin	Created	*****

You can view a dated log of users who have viewed, created, or deactivated the account's API key in the Audit log section.

6. Webhooks Setup

Webhooks in workflows are used to pass information from HubSpot to ClearCare after an action is completed in HubSpot. Webhooks send data, notifications, alerts, and other real-time updates.

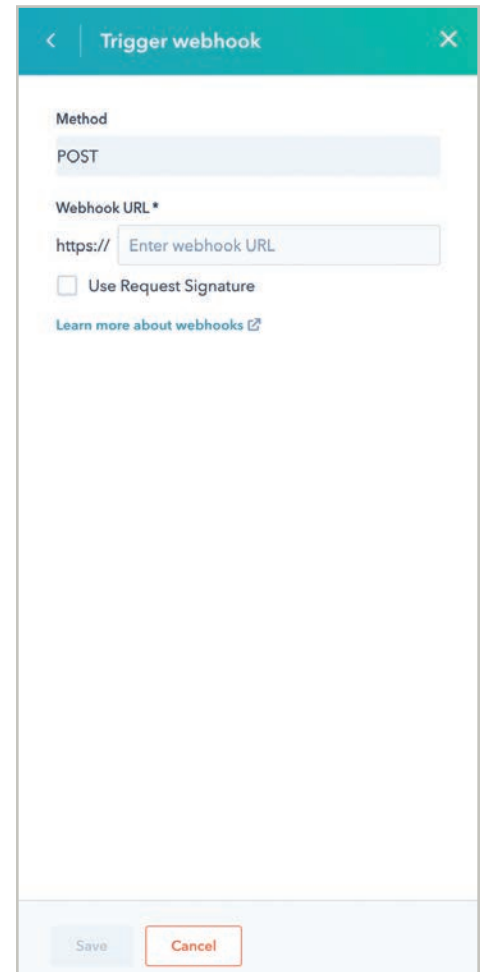
Use cases for webhooks include:

- Posting HubSpot contacts data to the ClearCare system when that contact fills out a form on your site.
- Sending deal data to ClearCare match deal stages with prospect statuses.

Set up a webhook in your workflow

- In your HubSpot account, navigate to **Automation > Workflows**.
- Click the name of the workflow.
- Click the **+** icon to add an action.
- In the right panel, select **Trigger a webhook**.
- Enter the **webhook URL**.
- Click **Save**.

Please note: Webhook URLs are restricted to a secure protocol and must begin with HTTPS.



The screenshot shows a 'Trigger webhook' configuration window. At the top, there is a teal header with a back arrow, the title 'Trigger webhook', and a close 'X' button. Below the header, the 'Method' is set to 'POST'. The 'Webhook URL' field is required and contains the text 'https://' followed by a placeholder 'Enter webhook URL'. There is an unchecked checkbox for 'Use Request Signature'. A link 'Learn more about webhooks' with an external link icon is present. At the bottom, there are 'Save' and 'Cancel' buttons.

7. Setting Required Fields for Contacts in HubSpot

The agency Admin needs to be aware of the required fields in ClearCare when creating a prospect. The agency Admin should make those required fields also required properties of a HubSpot contact so that when a contact gets created in HubSpot, a prospect in ClearCare will be created.

- Go to **Settings->Contacts & Companies > Contacts Tab**
- Next to **Set the properties all users in your account see when creating contacts**, click **Manage**.

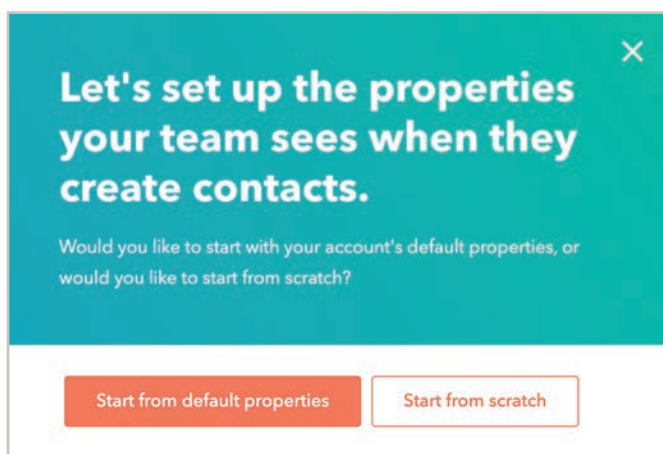
The screenshot shows the HubSpot Settings interface. On the left is a sidebar with various settings categories. The main area is titled 'Settings' and has tabs for 'Contacts', 'Companies', and 'Privacy and consent'. The 'Contacts' tab is selected. Under the 'Contacts' tab, there are three sections:

- Set the properties your team sees on contact records.** Choose the properties that will be displayed on all contact records for all users in your CRM. (Manage button)
- Set the properties all users in your account see when creating contacts.** Choose the properties that will be displayed when any user in your CRM creates a contact, and which of those properties are required in order to create a contact. (Manage button, highlighted with an orange box)
- Assign company owner to contact by default.** Any contact added to a company will have the same company owner. If a contact's owner is changed, this won't change the company owner unless the company's owner is blank. (Toggle switch)

An orange arrow points from the 'Integrations' menu item in the left sidebar to the 'Manage' button for the second section.

7. Setting Required Fields for Contacts in HubSpot (continued)

- You will then see the options to start from default contact properties or start from scratch.
- If you want to add more properties or modify contact properties, you can select either option. However, once you select an option, you will see a Required column alongside the properties. If you select the Required checkbox for a property it will become a Required Field.

The "Contact creator properties" interface. It has a teal header with the title and a close button (X). On the left is a search bar labeled "Search properties" with a magnifying glass icon. Below it is a list of properties under the heading "Contact information":

- ☐ Annual revenue
- ☐ City
- ☐ ClearCare location
- ☐ ClearCare prospect id
- ☐ Close date
- ☐ Company name

At the bottom left are three buttons: "Save", "Cancel", and "Remove all properties". On the right is a section titled "SELECTED PROPERTIES (8)". It contains a list of properties, each with a checkbox in the "REQUIRED" column:

- Email ☐
- First name ☐
- Last name ☐
- Street address ☐
- State/Region ☐
- Postal code ☐

Below the list is a note: "Contacts will need either an email address or name to be created." An orange box highlights the "REQUIRED" column and the checkboxes for the last three properties.

8. Associating Customized ClearCare Location and ClearCare Prospect Id Properties with Contacts in HubSpot

- Go to **Settings > Contacts & Companies > Contacts** tab
- Next to **Set the properties all users in your account see when creating contacts**, click **Manage**.

The screenshot shows the HubSpot Settings interface. On the left is a sidebar with various settings categories. The 'Contacts & Companies' category is selected, and the 'Contacts' sub-tab is active. The main content area shows three sections for configuring contact properties. The second section, 'Set the properties all users in your account see when creating contacts', has its 'Manage' button highlighted with an orange box. An orange arrow points from the 'Integrations' menu item in the sidebar to the 'Manage' button.

Settings

Account Defaults

Contacts & Companies

Conversations

Domains & URLs

Import & Export

Integrations

API key

Apps

Ecommerce

Email Integrations

Marketing

Private Content

Properties

Reports

Sales

Call & meeting types

Calling

Deals

Log emails in CRM

Meetings

Product library

Tasks

Service

Users & Teams

Website

Contacts Companies Privacy and consent

Contacts

Set the properties your team sees on contact records.
Choose the properties that will be displayed on all contact records for all users in your CRM. [Manage](#)

Set the properties all users in your account see when creating contacts.
Choose the properties that will be displayed when any user in your CRM creates a contact, and which of those properties are required in order to create a contact. [Manage](#)

Assign company owner to contact by default.
Any contact added to a company will have the same company owner. If a contact's owner is changed, this won't change the company owner unless the company's owner is blank. ☐

8. Associating Customized ClearCare Location and ClearCare Prospect Id Properties with Contacts in HubSpot (continued)

- You will then see the options to start from default contact properties or start from scratch.
- If you want to add more properties or modify contact properties, you can select either option. However, once you select an option, you will see a list of properties to associate with contacts. Search for ClearCare, and you will get the ClearCare location and ClearCare prospect id. Check the box for these properties and click Save.

Let's set up the properties your team sees when they create contacts.

Would you like to start with your account's default properties, or would you like to start from scratch?

Start from default properties

Start from scratch

Contact creator properties

ClearCare

Contact information

☒ ClearCare location

☒ ClearCare prospect id

SELECTED PROPERTIES (10)

Email

First name

Last name

Street address

State/Region

Postal code

REQUIRED

☐

☐

☐

☐

☐

☐

Contacts will need either an email address or name to be created.

Save

Cancel

Remove all properties