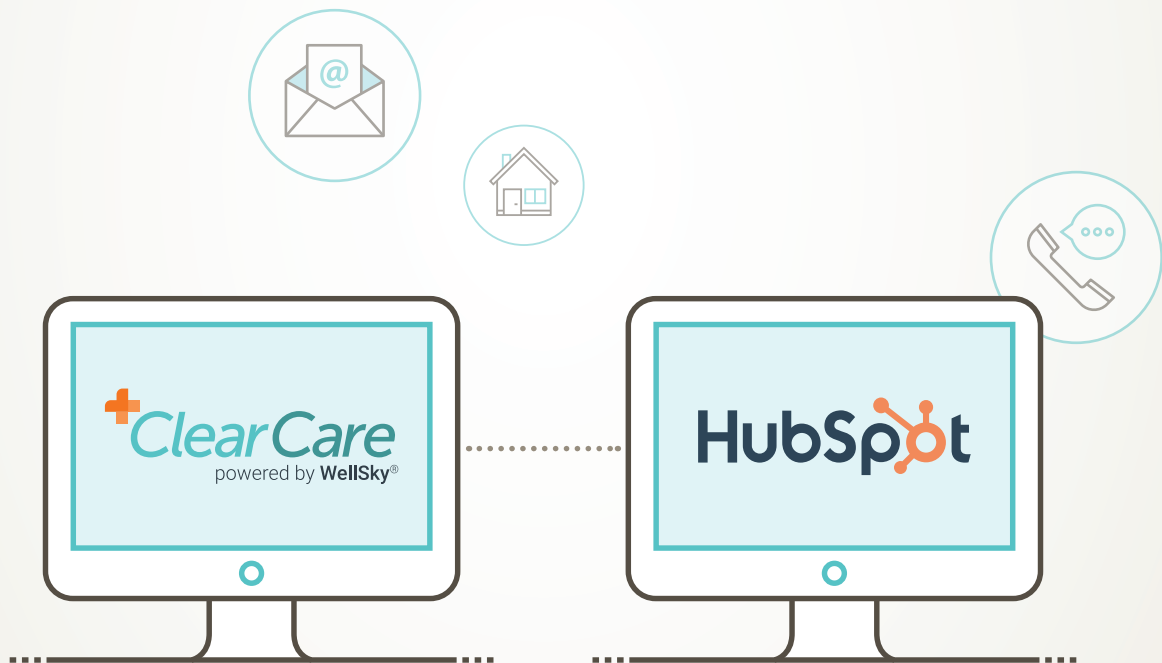


# ClearCare HubSpot Setup Guide



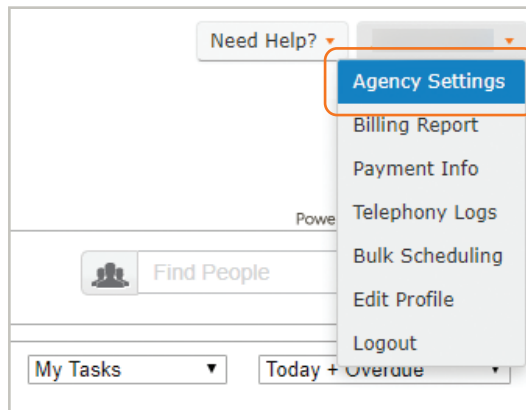


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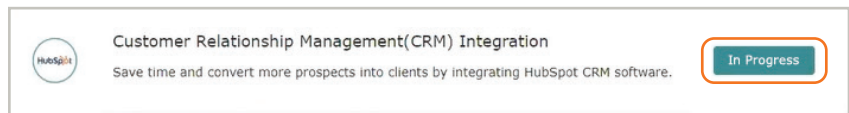
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# 1. Setup and Configuration

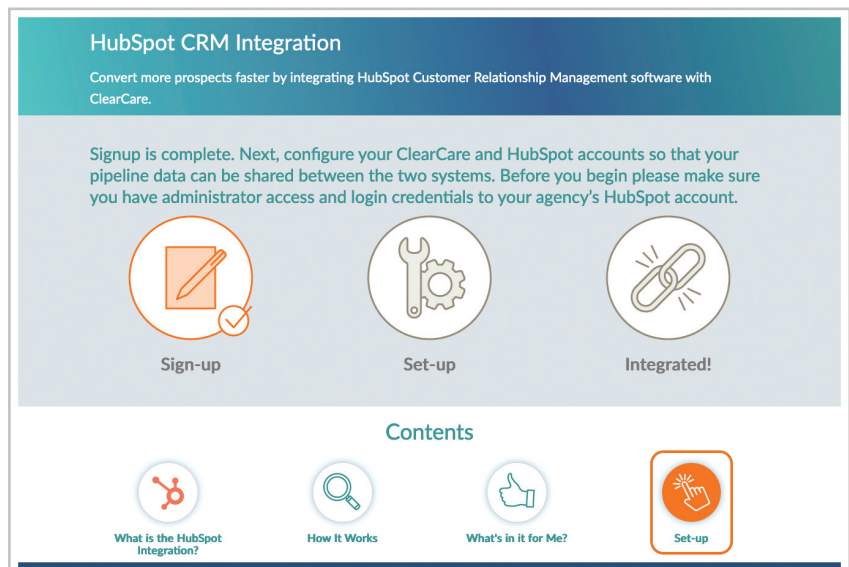
- Log in to ClearCare.
- Go to **Administrator > Agency Settings**.
- Select **Power Tools Integrations > Customer Relationship Management (CRM) Integration**.



- Select **In Progress**.



- **Overview:** Review the **Overview** page and click **Set-up** in the Contents section at the top.



- Then click the **Set-up** button.



Additional steps on next page.

# 1. Setup and Configuration (continued)

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

**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 Referrer property (ClearCare referrer)

The ClearCare referred property will list the Referral Sources that have been added in ClearCare. You can assign a referral source to the contact created.

## Creation of customized Sync property (ClearCare sync)

The ClearCare sync property will add a contact to the [ClearCare Sales Pipeline](#) in HubSpot. Contacts in HubSpot will not be automatically added to the [ClearCare Sales Pipeline](#). *When creating a contact, you must set the value of the ClearCare sync property to "Yes" to automatically create a deal for that contact under the [ClearCare Sales Pipeline](#) and add it as a Prospect in 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.

Additional steps on next page.

# 1. Setup and Configuration (continued)

## 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.

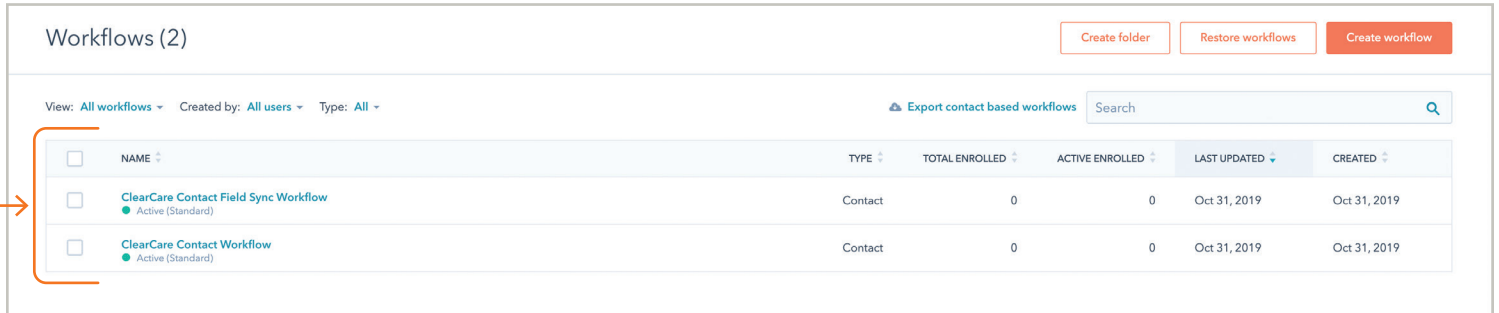
## 2. Manual Setup

### 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 Properties with Contacts](#)

### View workflows in HubSpot

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



Workflows (2)

Create folder Restore workflows Create workflow

View: All workflows Created by: All users Type: All

Export contact based workflows Search

<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**.

The screenshot shows the HubSpot Settings page, specifically the **Deals** section. On the left sidebar, the navigation menu includes **Settings**, **Sales**, and **Deals**. The **Deals** section is expanded, showing options like **Call & meeting types**, **Calling**, **Deals**, **Log emails in CRM**, **Meetings**, **Product library**, **Tasks**, **Service**, **Users & Teams**, and **Website**. The **Deals** section is highlighted with an orange arrow. The main content area shows the **Deal Pipelines and Stages** section. It includes three configuration boxes: **Set the properties your team sees on deal records**, **Set the properties your team sees when creating deals**, and **Sync lifecycle stages to associated contacts and companies**. Below these is a table of deal pipelines. The table has two columns: **PIPELINE** and **DEAL STAGES**. It lists two pipelines: **Sales Pipeline** with 7 stages and **ClearCare\_Sales\_Pipeline** with 12 stages. An orange arrow points to the **ClearCare\_Sales\_Pipeline** row. A callout box says: "You can select the **ClearCare\_Sales\_Pipeline** to view the deal stages."

PIPELINE	DEAL STAGES	Edit	Delete
Sales Pipeline	7	Edit	Delete
ClearCare_Sales_Pipeline	12	Edit	Delete

You can also view the deal stages by going to **Sales > Deals** and selecting the **ClearCare\_Sales\_Pipeline**.

The screenshot shows the HubSpot **Deals** view. At the top, there are tabs for **Table** and **Board**, a search bar, and buttons for **Actions**, **Import**, and **Create deal**. Below the tabs is a progress bar showing the stages of the sales process: **APPOINTMENT SCHEDULED** (0), **QUALIFIED TO BUY** (0), **PRESENTATION SCHEDULED** (0), **DECISION MAKER BOUGHT-IN** (0), **CONTRACT SENT** (0), and **CLOSED WON** (0). On the left, there is a sidebar with **All deals** and **All saved filters**. The **Pipeline** dropdown is set to **ClearCare\_Sales\_Pipeline**. The main content area shows a message: "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". There is also an illustration of a target with an arrow in the bullseye.

## 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, under the 'Start from scratch' tab, five workflow templates are listed: Contact-based, Company-based, Deal-based (highlighted with an orange arrow), Ticket-based, and Quote-based. The 'Deal-based' template description is 'Start with a blank workflow that enrolls and is triggered off deals'. Below these templates is a link: 'Not quite sure where to begin? Check out our Workflow user guide'. On the right, the 'Preview' section shows a workflow diagram with a 'Deal enrollment trigger' box connected to an 'Action' box. At the top of the interface, there is a header bar with 'Back to workflows' on the left, 'Name your workflow' with a pencil icon in the center (circled with an orange line), and a 'Next' button on the right. An orange line also connects the pencil icon to a callout box. A callout box at the bottom center contains the text 'Additional steps on next page.'.

Back to workflows

Name your workflow

Next

Start from scratch

Templates

**Contact-based**  
Start with a blank workflow that enrolls and is triggered off contacts

**Company-based**  
Start with a blank workflow that enrolls and is triggered off companies

**Deal-based**  
Start with a blank workflow that enrolls and is triggered off deals

**Ticket-based**  
Start with a blank workflow that enrolls and is triggered off tickets

**Quote-based**  
Start with a blank workflow that enrolls and is triggered off quotes

Not quite sure where to begin?  
[Check out our Workflow user guide](#)

**Preview**

Deal enrollment trigger

Action

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.)

Enrollment triggers

Trigger Re-enrollment

Trigger workflow when: Test criteria

Back

Filter type

☒ Deal

☐ Contact

☐ Company

☐ Activity

☐ Product

☐ Ticket

☐ Quote

Save Cancel

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

Enrollment triggers

Trigger Re-enrollment

Trigger workflow when: Test criteria

< Back

Deal

Search

Closed lost reason

Closed won reason

Create date

Deal Description

Deal ID

Deal name

Deal owner

☒ Deal stage

Deal type

HubSpot team

Last Meetings Tool Submission

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

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

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 Contact (ClearCare\_Sales\_Pipeline)

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

Additional steps on next page.

## 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**.

Additional steps on next page.

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

Name your workflow

Actions Settings History

Deals enrollment trigger

Deal stage is any of Closed-Lost (ClearCare\_Sales\_Pipeline), Initial Phone Call (Clear-Care\_Sales\_Pipeline), Assessment Performed (Clear-Care\_Sales\_Pipeline), Closed-Won (ClearCare\_Sales Pipeline), Collect

See more

+

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

Choose an action

Available actions Connect an app

Search actions

Workflow

- Delay
- If/then branch
- Go to other action **NEW**
- Enroll in another workflow
- Trigger webhook**

Internal communication

- Send internal email notification
- Send internal SMS
- Send in-app notification

External communication

- Send email

Assignment

- Rotate deal to owner

Create

- Create deal
- Create ticket
- Create task

Property management

- Set property value

Cancel

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

Trigger webhook

Method

POST

Webhook URL \*

https:// Enter webhook URL

☐ Use Request Signature

[Learn more about webhooks](#)

Save Cancel

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

Additional steps on next page.

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

Back to workflows

Name your workflow

Workflow is OFF **Review**

Alerts

Actions Settings History

Enroll Test More

100%

Deals enrollment trigger

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)

See more

Trigger webhook

POST

https://test.url

In the upper right, click **Review**.

Back to edit

Name your workflow

Workflow is OFF **Turn on**

Review before you turn on

Enrollment

Existing deals

These deals already meet the trigger criteria. Do you want to enroll them when this workflow turns on?

0

No, only enroll deals which meet the trigger criteria after turning the workflow on

Yes, enroll existing deals which meet the trigger criteria as of now

Deals enroll automatically when:

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

See more

Re-enrollment

Deals can be enrolled in this workflow multiple times.

Unenrollment

Timing

Workflow will execute

7 days a week, any time during the day

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	[REDACTED]	Viewed	[REDACTED]/*_****_****_****_*****
October 16, 2019 5:04 PM	[REDACTED]	Viewed	[REDACTED]/*_****_****_****_*****
September 13, 2019 12:07 PM	[REDACTED]	Viewed	[REDACTED]/*_****_****_****_*****
September 13, 2019 12:06 PM	[REDACTED]	Created	[REDACTED]/*_****_****_****_*****

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.

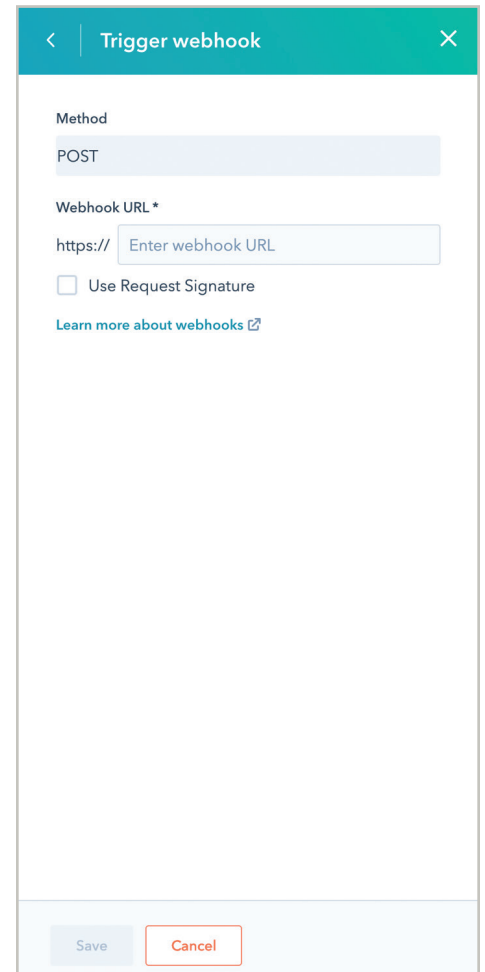
### Use cases for webhooks include:

- 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 modal window titled "Trigger webhook" with a teal header bar containing a back arrow, the title, and a close button. The form inside has the following fields and options:

- Method:** A dropdown menu with "POST" selected.
- Webhook URL \*:** A text input field with "https://" pre-filled and a placeholder "Enter webhook URL".
- Use Request Signature:** An unchecked checkbox.
- Learn more about webhooks:** A blue link with an external icon.
- Buttons:** "Save" (disabled) and "Cancel" (active) buttons at the bottom right.

## 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 'Contacts & Companies' section is selected, and the 'Contacts' tab is active. The main content area shows three settings for contacts. The second setting, '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 this '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. ☐

Additional steps on next page.

## 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.

**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

Search properties



#### Contact information

- ☐ Annual revenue
- ☐ City
- ☐ ClearCare location
- ☐ ClearCare prospect id
- ☐ ClearCare referrer
- ☐ ClearCare sync

Save

Cancel

Remove all properties

#### SELECTED PROPERTIES (6)

Email

First name

Last name

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

Street address

State/Region

Postal code

#### REQUIRED

☐☐☐☐☐☐



## 8. Associating Customized ClearCare 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 a 'Settings' header and a list of categories: Account Defaults, **Contacts & Companies** (highlighted), Conversations, Domains & URLs, Import & Export, Integrations, Marketing, Private Content, Properties, Reports, Sales, Service, Users & Teams, and Website. An orange arrow points from the 'Integrations' category to the 'Manage' button in the main content area. The main content area has three tabs: 'Contacts' (selected), 'Companies', and 'Privacy and consent'. Under the 'Contacts' tab, there are three sections: 1. 'Set the properties your team sees on contact records.' with a 'Manage' button. 2. 'Set the properties all users in your account see when creating contacts.' with a 'Manage' button highlighted by an orange box. 3. 'Assign company owner to contact by default.' with a toggle switch.

*Additional steps on next page.*

## 8. Associating Customized ClearCare 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 properties. In the results lists, select the following properties and click **Save** to add them to the contact object.
  - ClearCare location
  - ClearCare prospect id
  - ClearCare referrer
  - ClearCare sync

✕

### 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

When creating a contact, you must set the value of the ClearCare sync property to "Yes" to automatically create a deal for that contact under the [ClearCare\\_Sales\\_Pipeline](#) and add it as a Prospect in ClearCare.

Contact creator properties✕

ClearCare✕

Contact information

☒ ClearCare location

☒ ClearCare prospect id

☒ ClearCare referrer

☒ ClearCare sync

SELECTED PROPERTIES (7)

Email

First name

Last name

ClearCare location

ClearCare prospect id

ClearCare referrer

REQUIRED

☐

☐

☐

☐

☐

☐

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

Save

Cancel

Remove all properties

## 9. Two-Way Sync of the Contact/Prospect Profile and Demographic Properties between ClearCare and HubSpot

The integration supports a two-way sync of the following properties between ClearCare and HubSpot:

- First Name
- Last Name
- Email Address

Once the Contact and the Prospect get created and the sync between ClearCare and HubSpot happens, the user can update the value of these properties and both systems will be updated.

### Mapping of Demographic Fields between ClearCare and HubSpot

ClearCare	HubSpot
Address	Street Address
Address Line 2	Street address
City	City
Province/State	Sate/Region
Postal Code	Postal code
Home Phone	Phone number
Mobile Phone	Mobile phone number

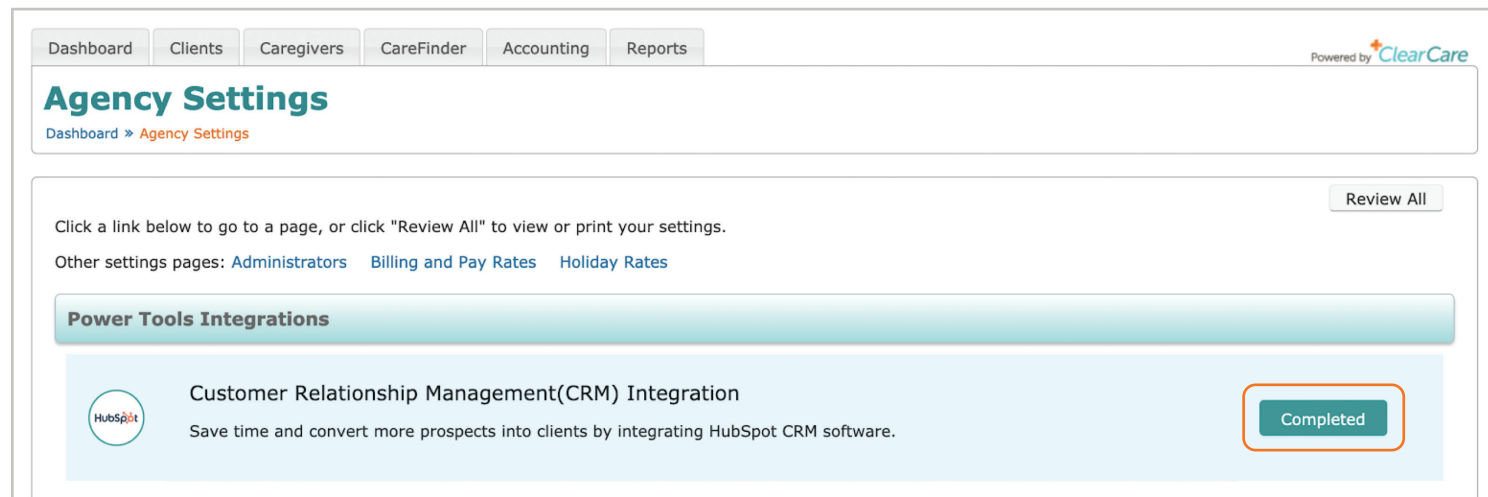
When the user updates any of these fields in either system, both systems will be updated.

## 10. Making Updates to the Integration

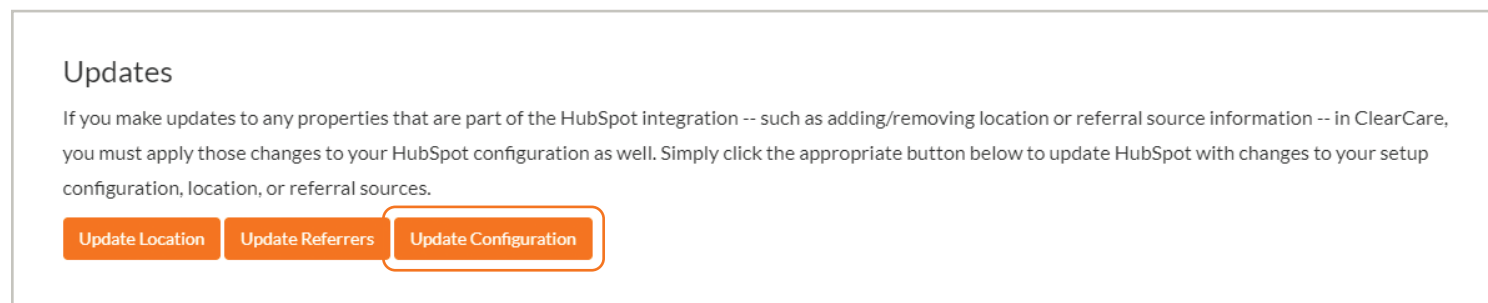
If a user (Agency Admin) makes updates to any properties that are part of the HubSpot integration in ClearCare, such as adding/removing location or referral source information, those changes need to be applied to the HubSpot configuration for the integration to work properly.

We've made it easy to update HubSpot with changes to the setup configuration, location, or referral sources.

- Under **Power Tools Integrations**, select the **Completed** button that appears in the **Customer Relationship Management (CRM) Integration** section.



- At the bottom of the page in the **Updates** section, select the **Update Configuration** button.



- Update Location:** If you add a new location in ClearCare, select this option to update the location list (of the customized property ClearCare\_location) in HubSpot.
- Update Referrers:** If you add a new referrer in ClearCare, select this option to update the referrer list (of the customized property ClearCare\_referrer) in HubSpot.
- Update Configuration:** Keep the setup up to date with configuration changes. If ClearCare updates the integration – for example, adds a customized property to the integration – select this option to update the integration configuration between ClearCare and HubSpot.