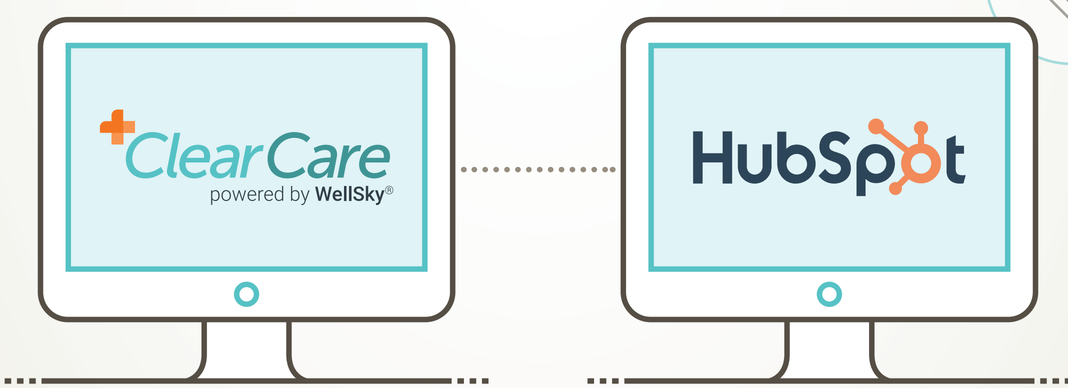
ClearCare HubSpot Setup Guide



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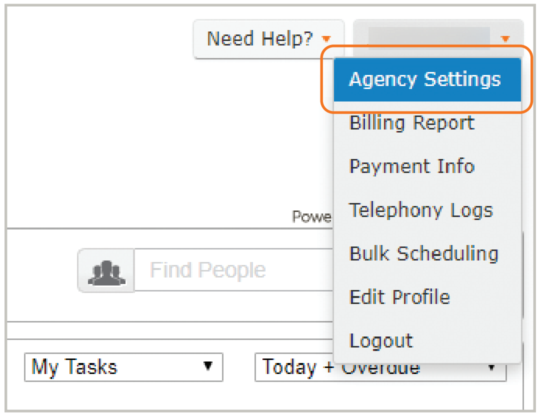
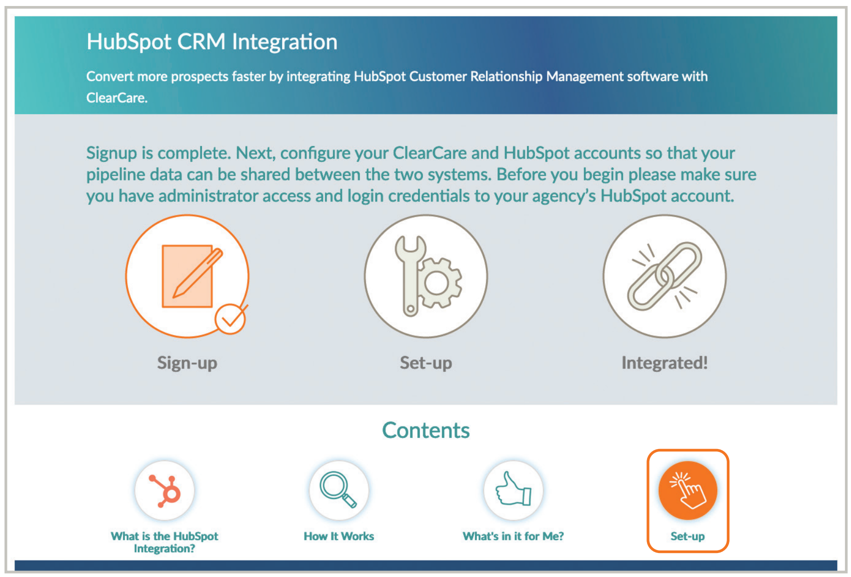
1. Setup and Configuration

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



- Select **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.

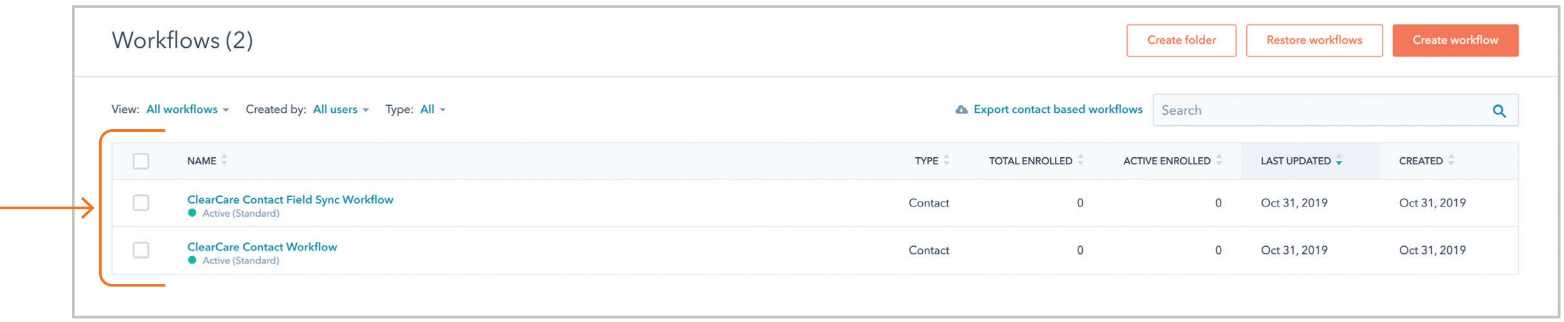
2. Manual Setup

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

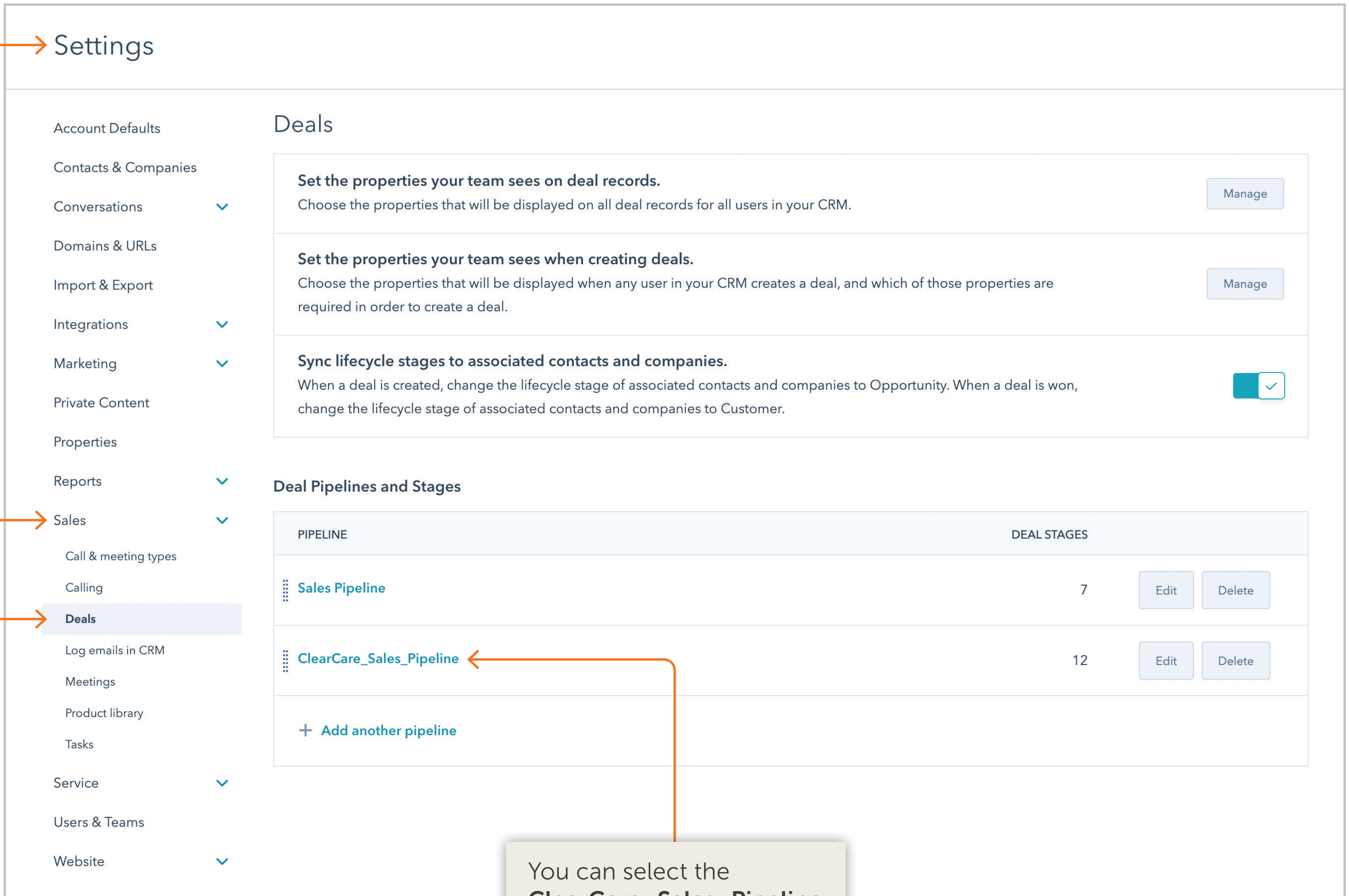
View workflows in HubSpot

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



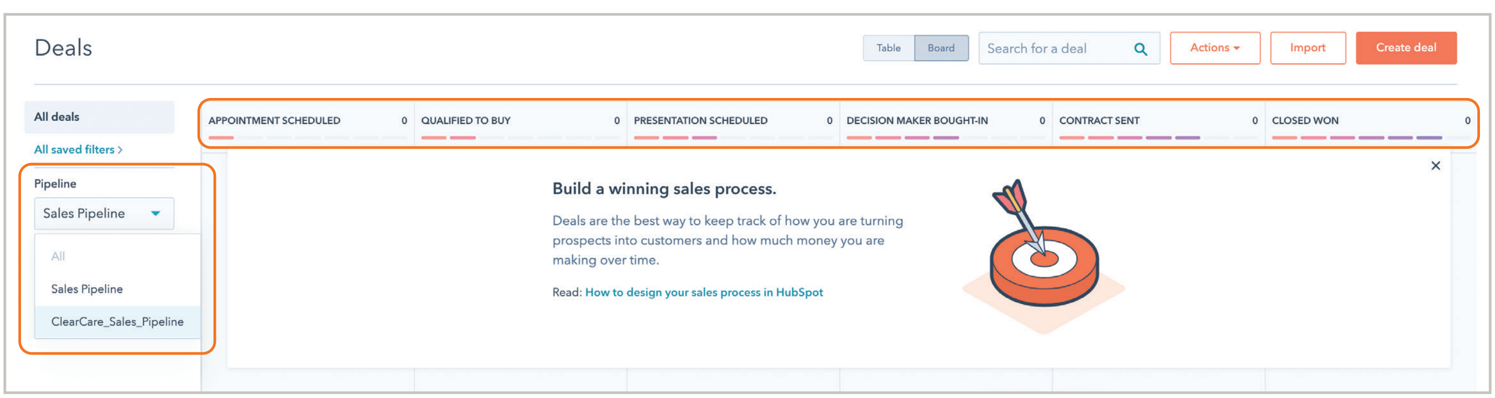
3. ClearCare_Sales_Pipeline Setup

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**.



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

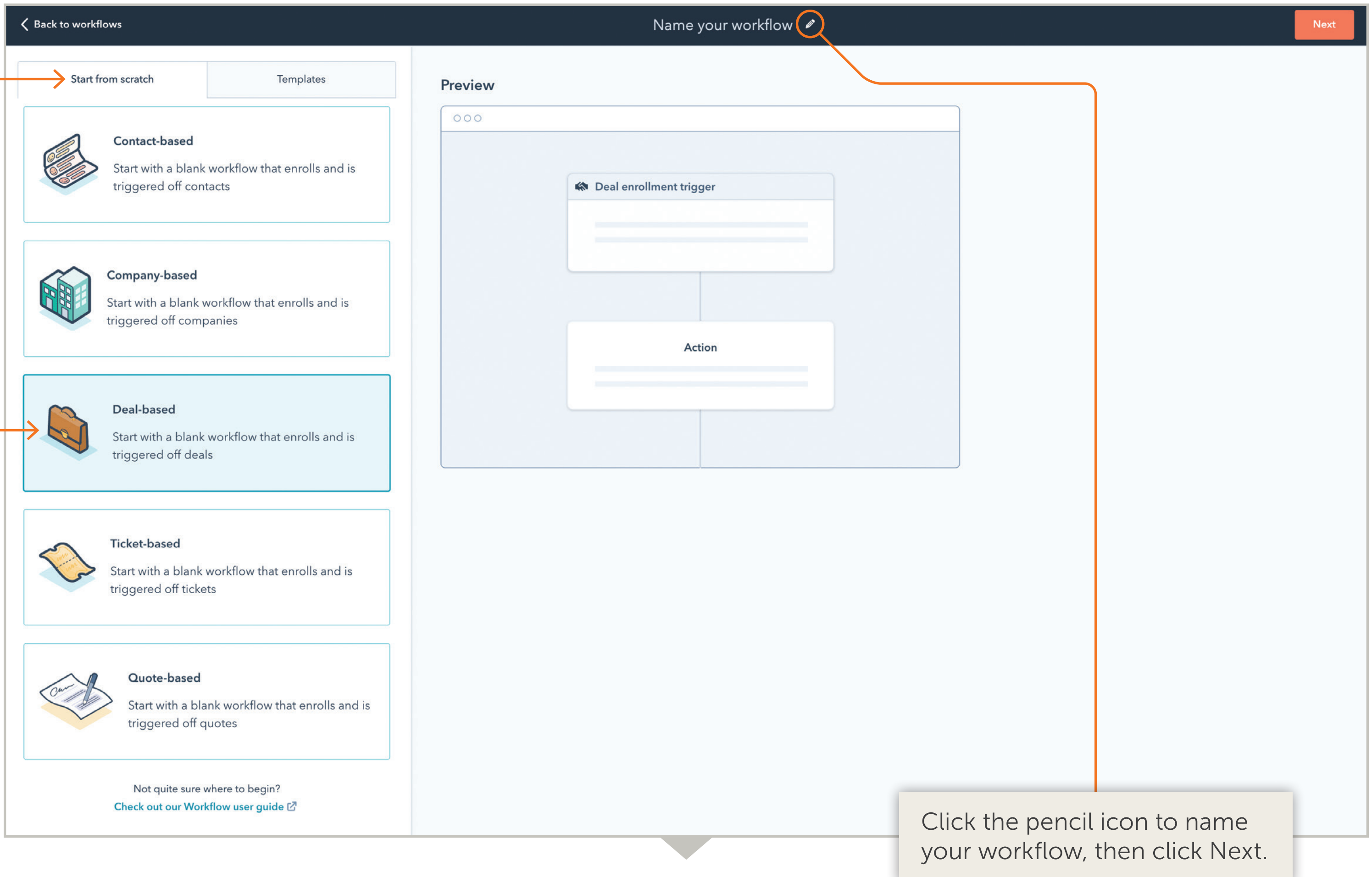
You can also view the deal stages by going to **Sales > Deals** and selecting the **ClearCare_Sales_Pipeline**.



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.

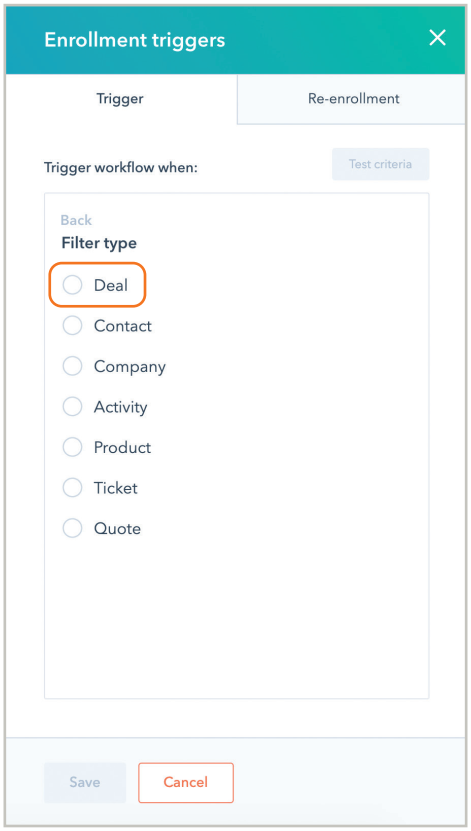
- In your HubSpot account, navigate to **Automation > Workflows**.
- In the upper right, click **Create workflow**.
- In the left panel, select the **Start from scratch** tab. In the right panel under *Choose type*, make sure **Start from scratch** is selected. Then, select **Deal-based** as your workflow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



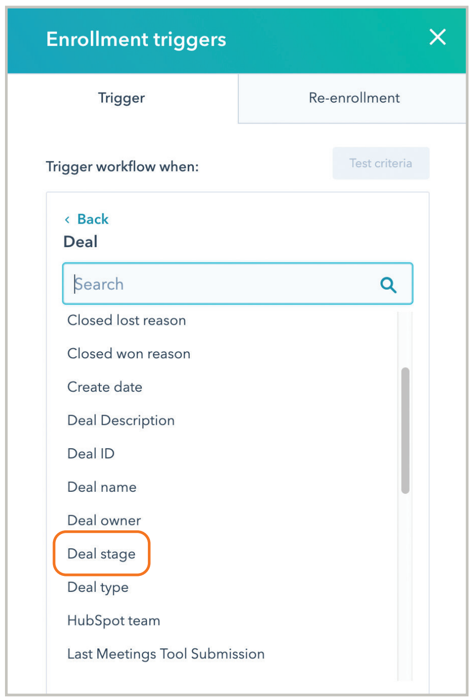
Additional steps on next page.

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

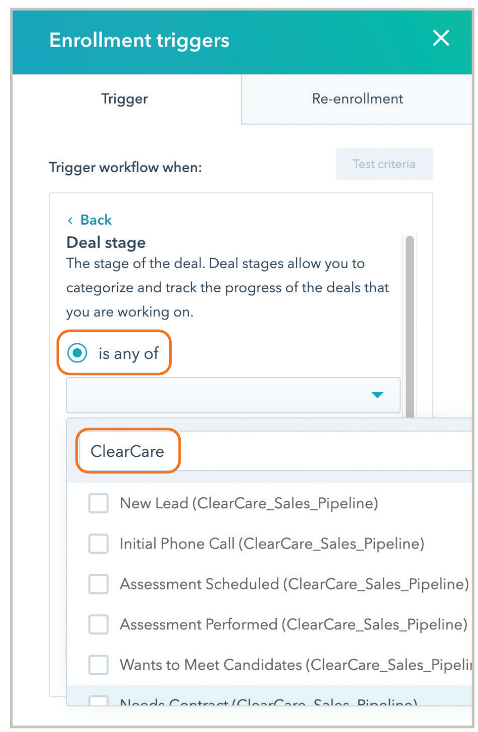
- In the workflow editor, click **Set enrollment triggers**.
- Select your trigger criteria. (Workflow enrollment triggers are set to automatically enroll objects into your workflow when they meet specific trigger criteria.)



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



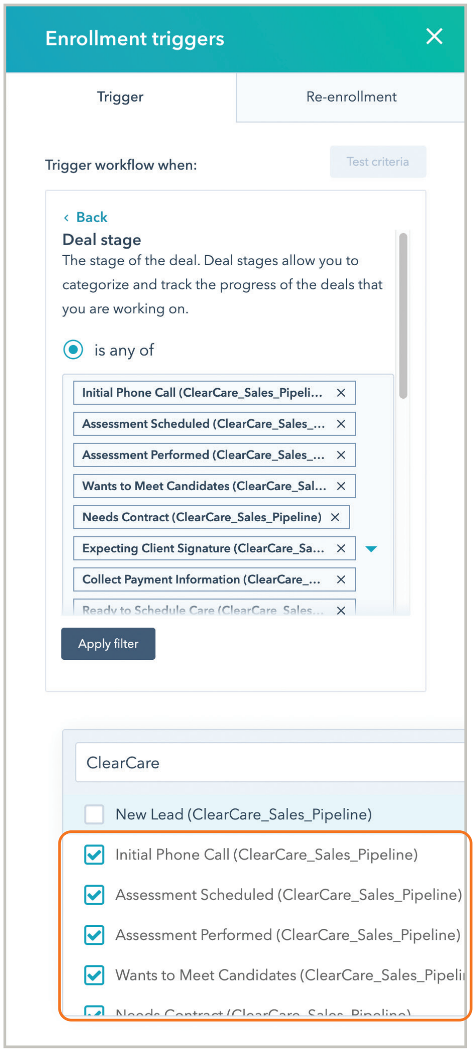
Select **Deal stage** as the enrollment trigger criteria.



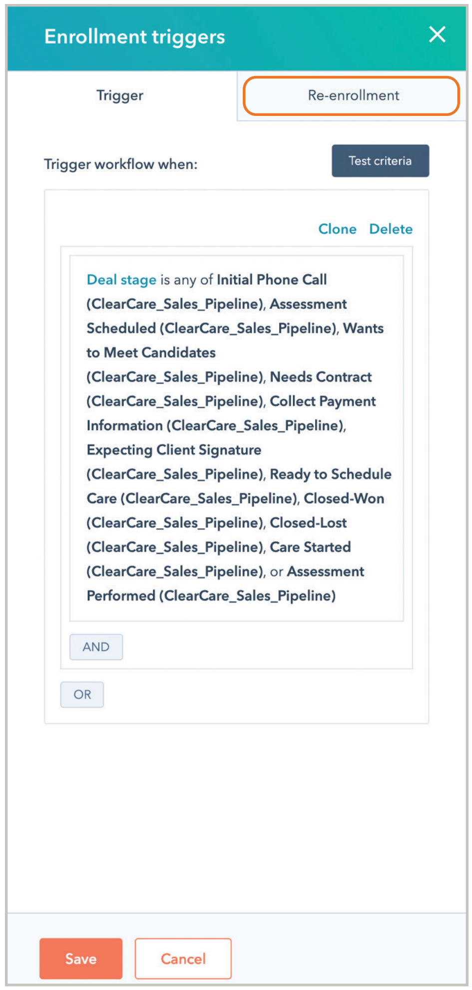
Choose **is any of** as the filtering option and filter Deal stages by "ClearCare."

Additional steps on next page.

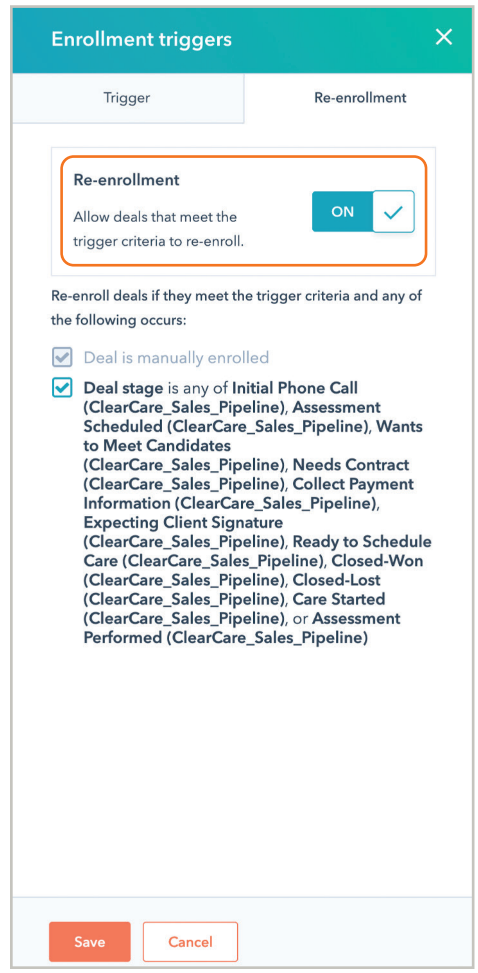
4. Deal-Based Workflow *Setup is done by Client* (continued)



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



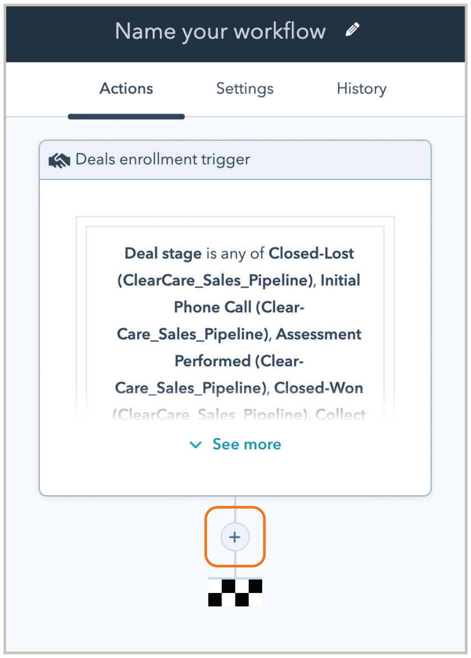
By default, a deal will only be enrolled in a workflow the first time it meets the enrollment triggers. To enable re-enrollment, click **Re-enrollment options**.



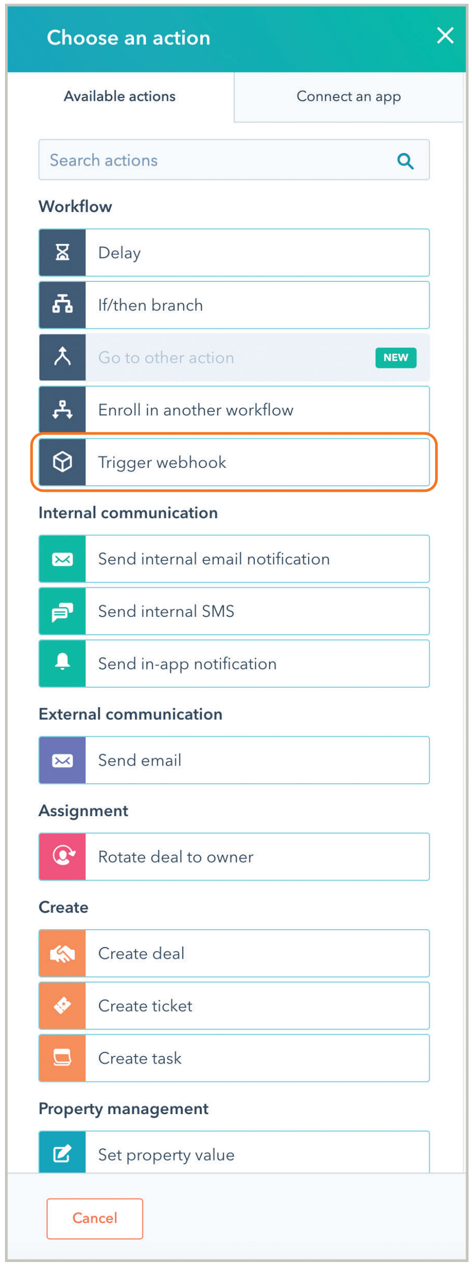
Turn on **Allow deals that meet the trigger criteria to re-enroll** and click **Save**.

Additional steps on next page.

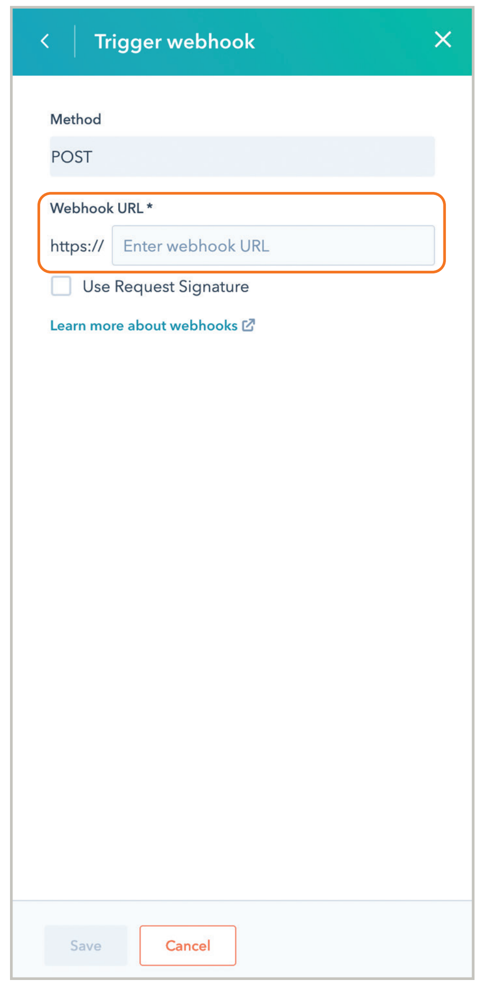
4. Deal-Based Workflow *Setup is done by Client* (continued)



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



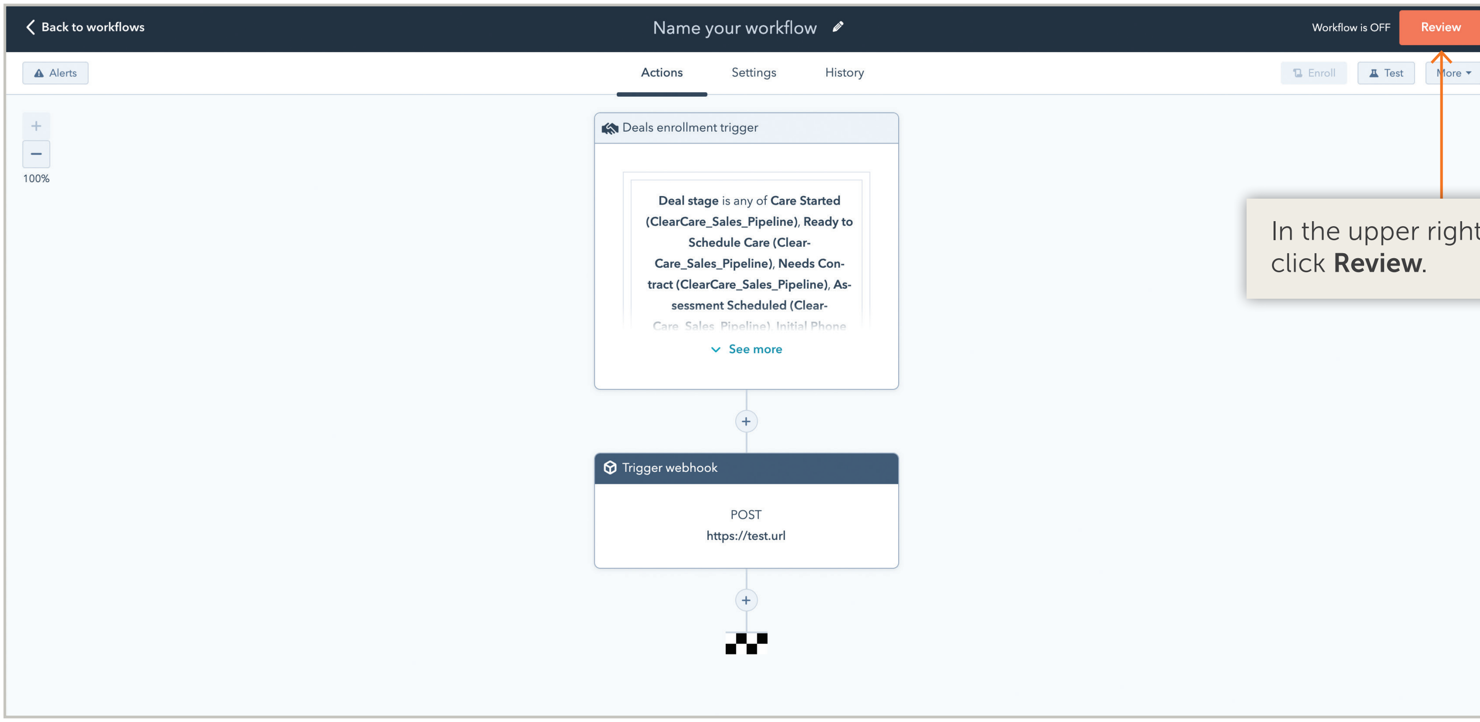
In the right panel, select **Trigger webhook**.



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

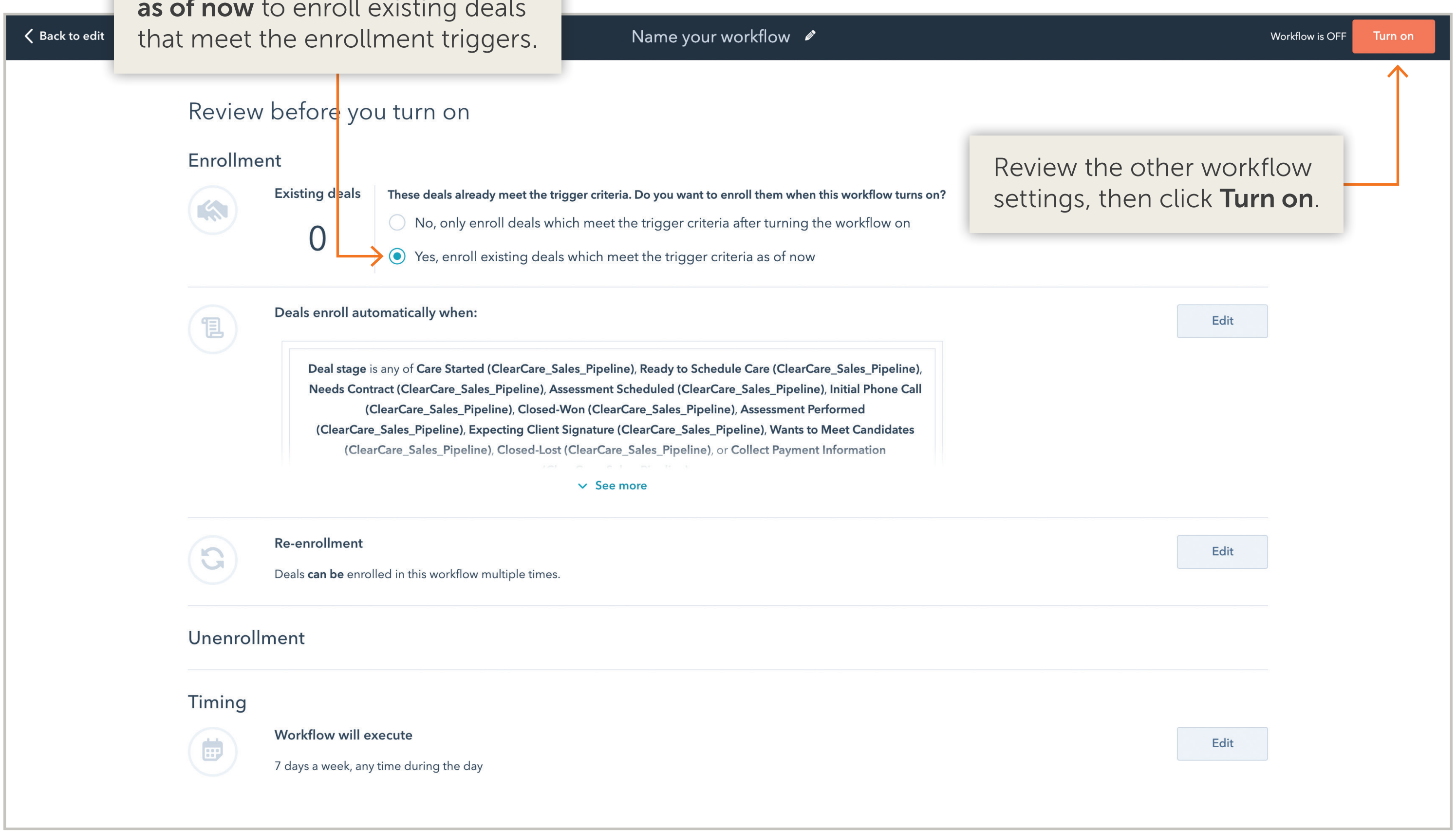
Additional steps on next page.

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



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

Select **Yes, enroll existing deals which meet the trigger criteria as of now** to enroll existing deals that meet the enrollment triggers.



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.

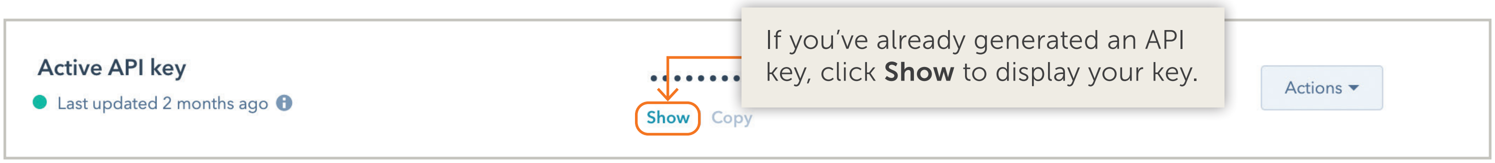
For security reasons, you should consider rotating your HubSpot API key every six months. Rotating your HubSpot API key will deactivate the existing API key and generate a new one. HubSpot will display the age of the API key and recommend when you should rotate your API key. Notifications about the API 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.

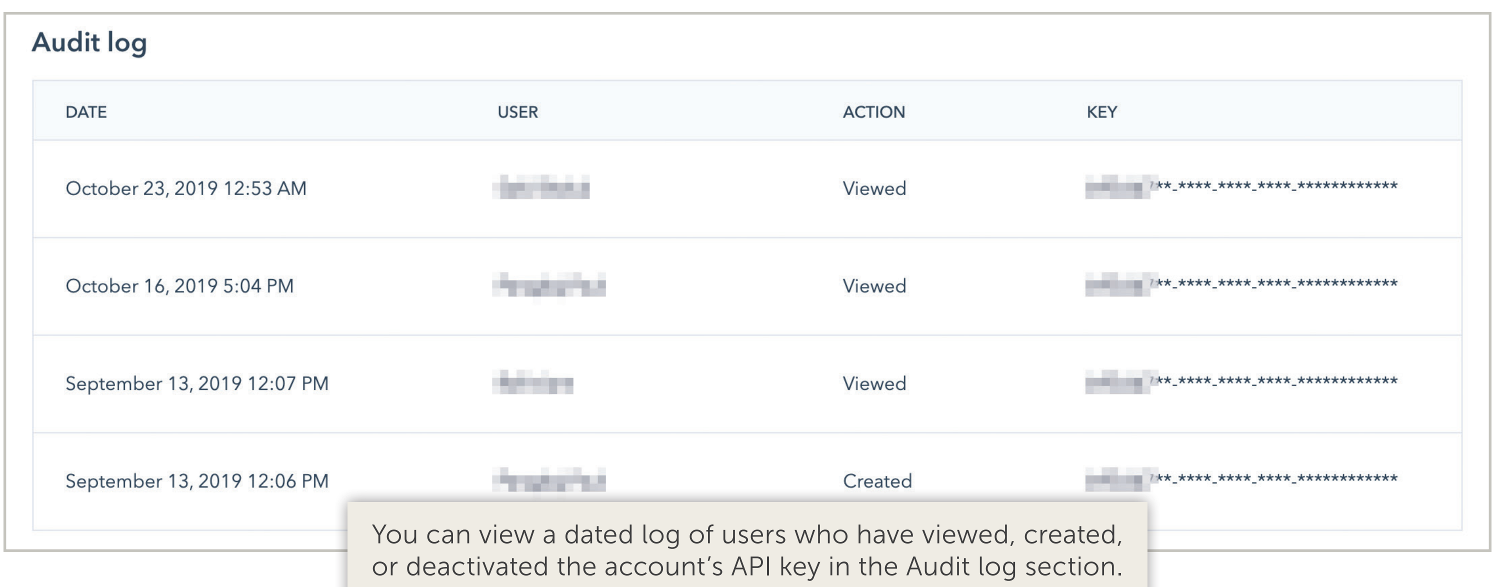
While this may create downtime and require effort, it helps add a layer of security.

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**.



- 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.



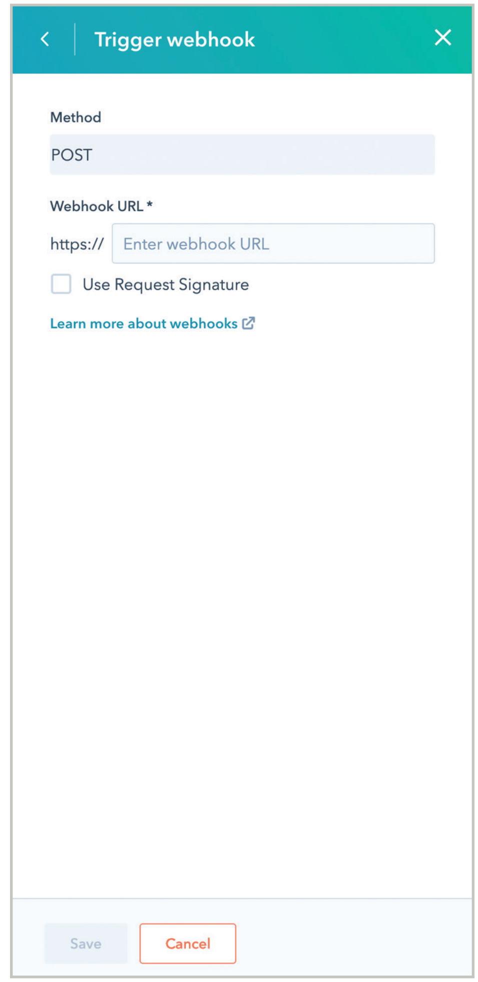
6. Webhooks Setup

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



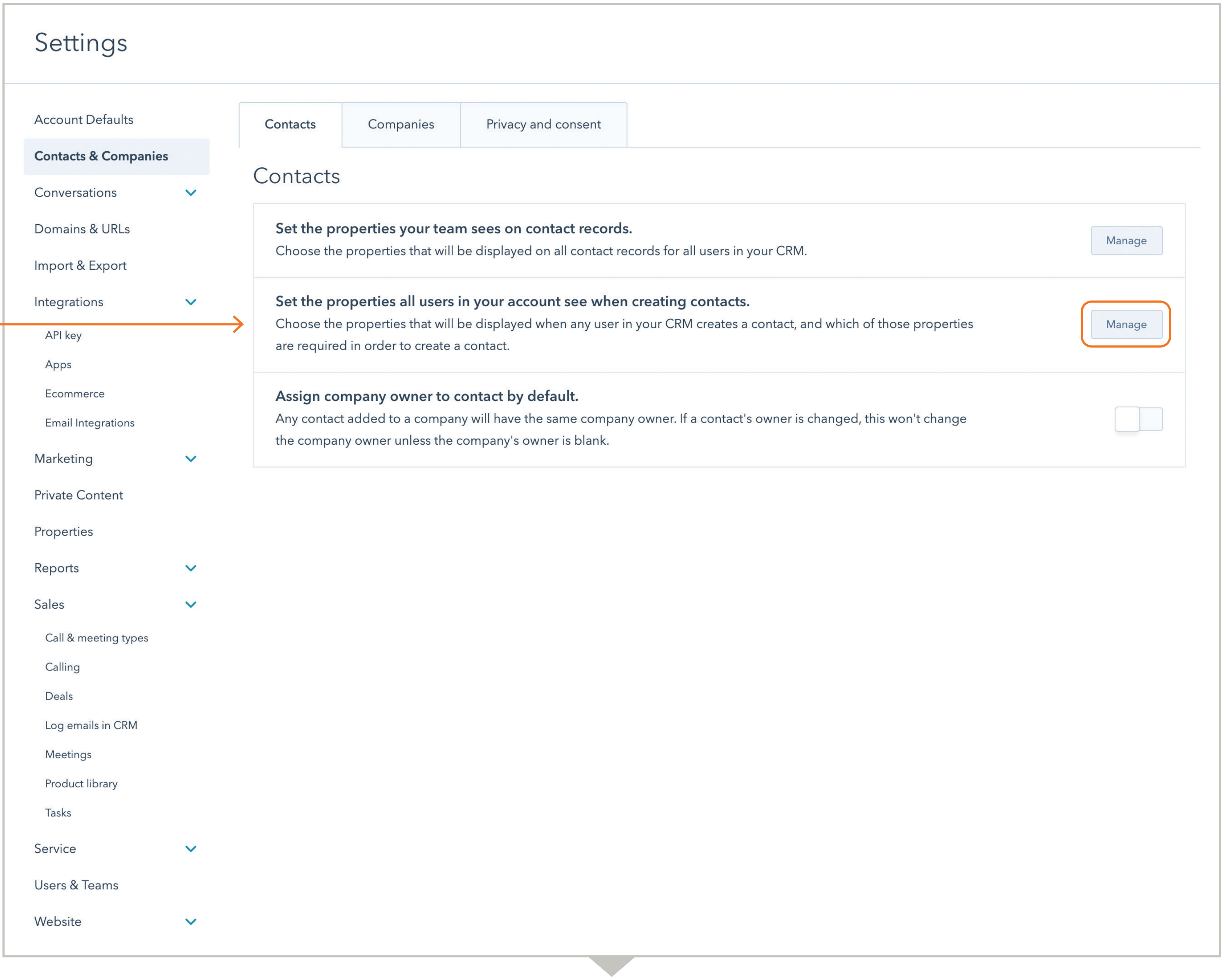
- In your HubSpot account, navigate to **Automation > Workflows**.
- Click the name of the workflow.
- Click the **+ icon** to add an action.
- In the right panel, select **Trigger a webhook**.
- Enter the **webhook URL**.
- Click **Save**.

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

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.

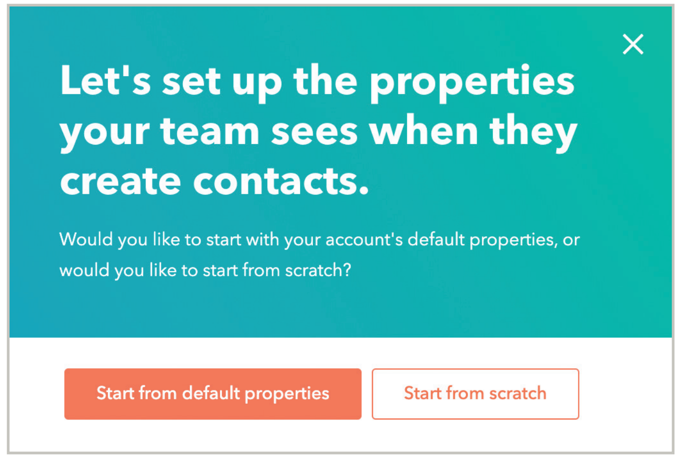
- Go to **Settings->Contacts & Companies > Contacts Tab**
- Next to **Set the properties all users in your account see when creating contacts**, click **Manage**.

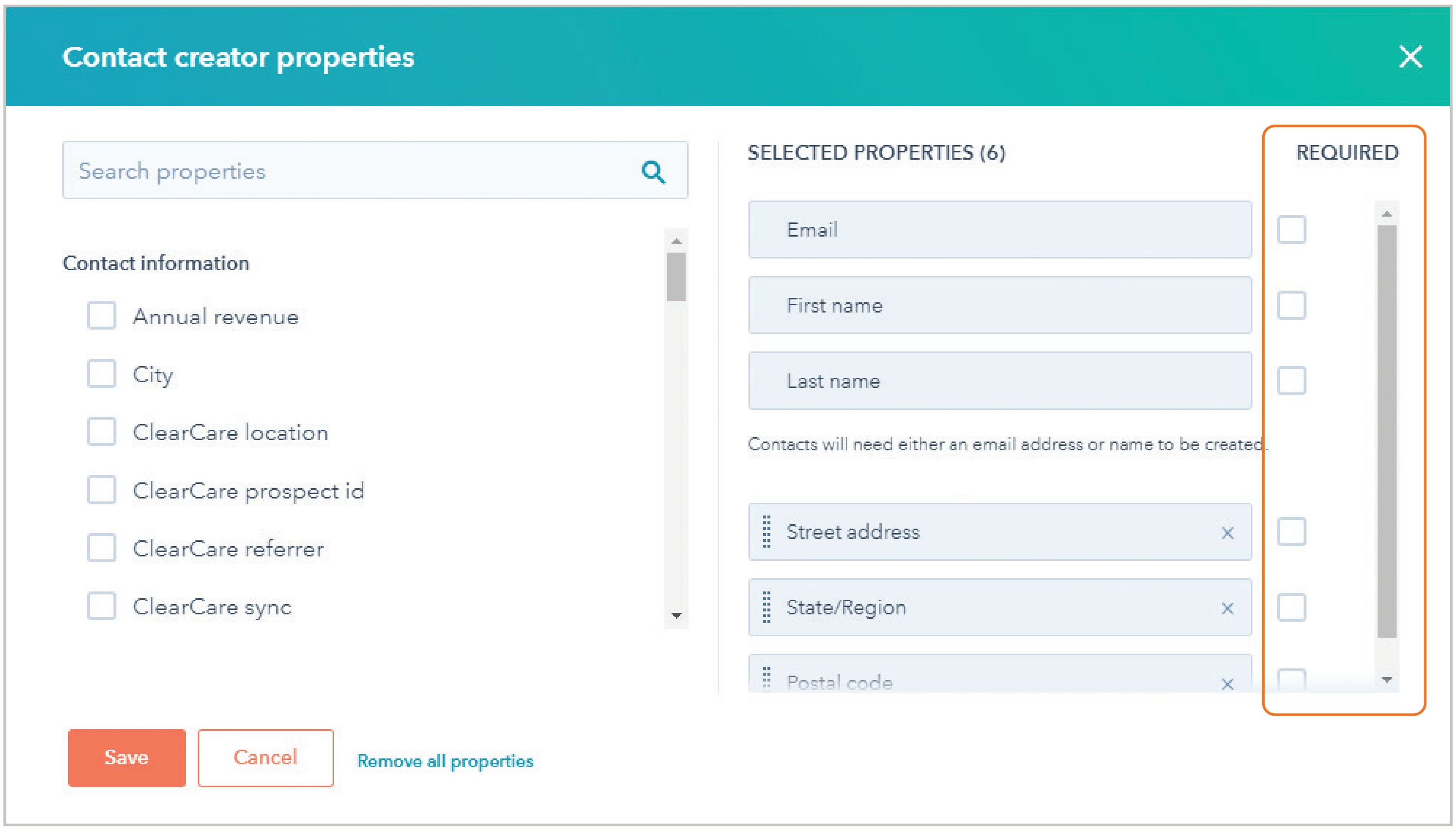


Additional steps on next page.

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

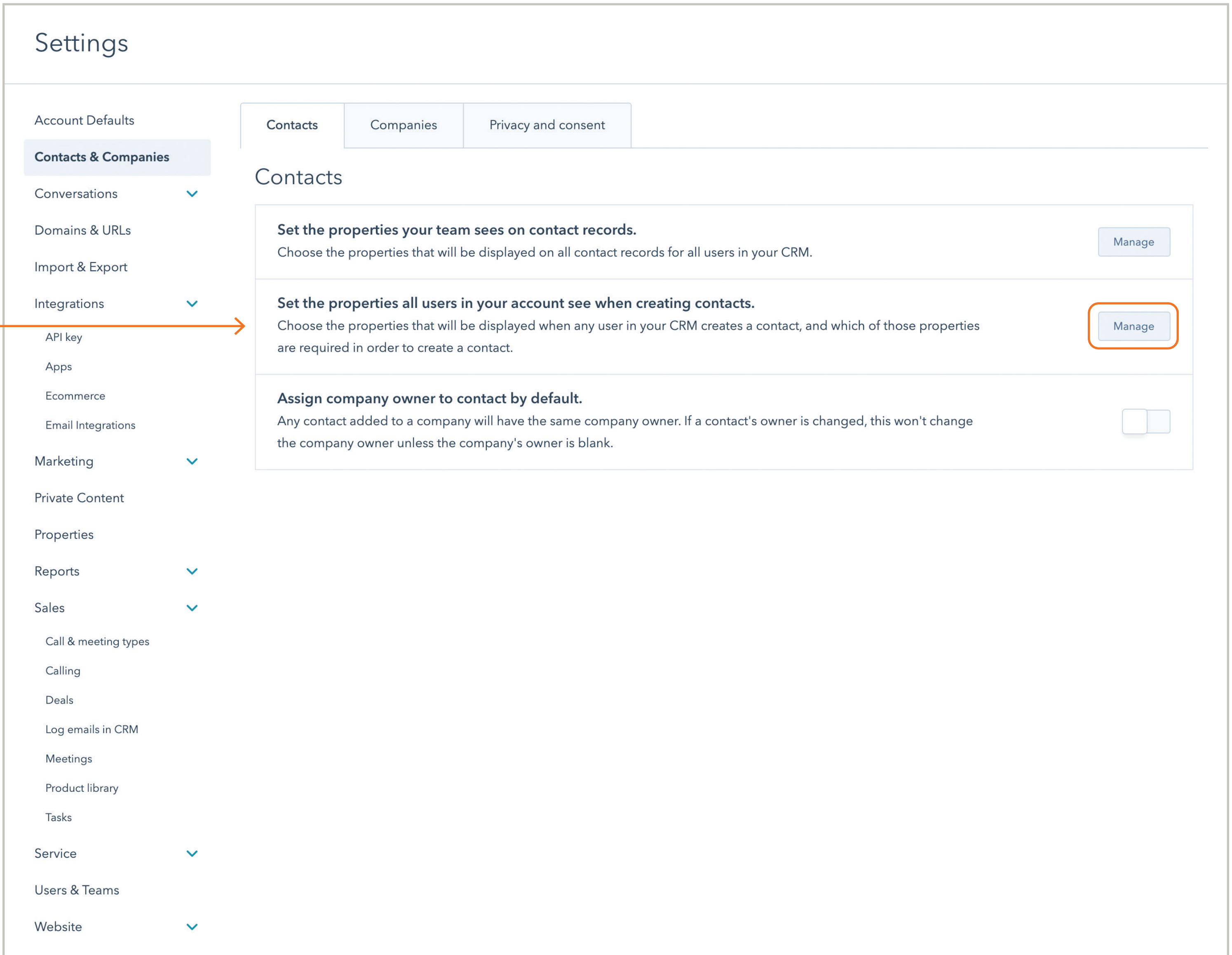
- You will then see the options to start from default contact properties or start from scratch.
- If you want to add more properties or modify contact properties, you can select either option. However, once you select an option, you will see a Required column alongside the properties. If you select the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





8. Associating Customized ClearCare Properties with Contacts in HubSpot

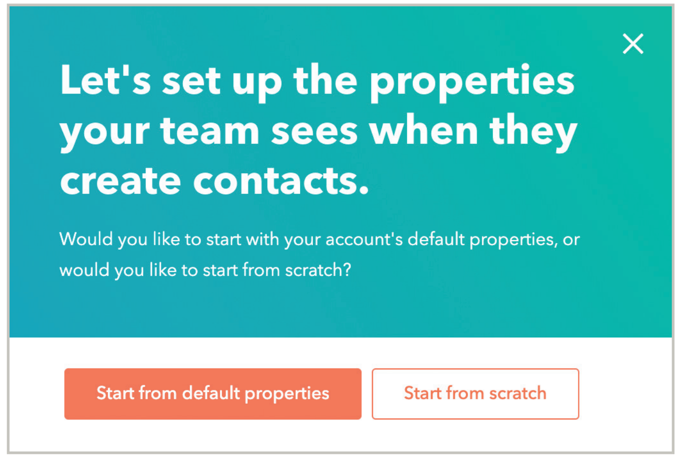
- Go to **Settings > Contacts & Companies > Contacts** tab
- Next to **Set the properties all users in your account see when creating contacts**, click **Manage**.



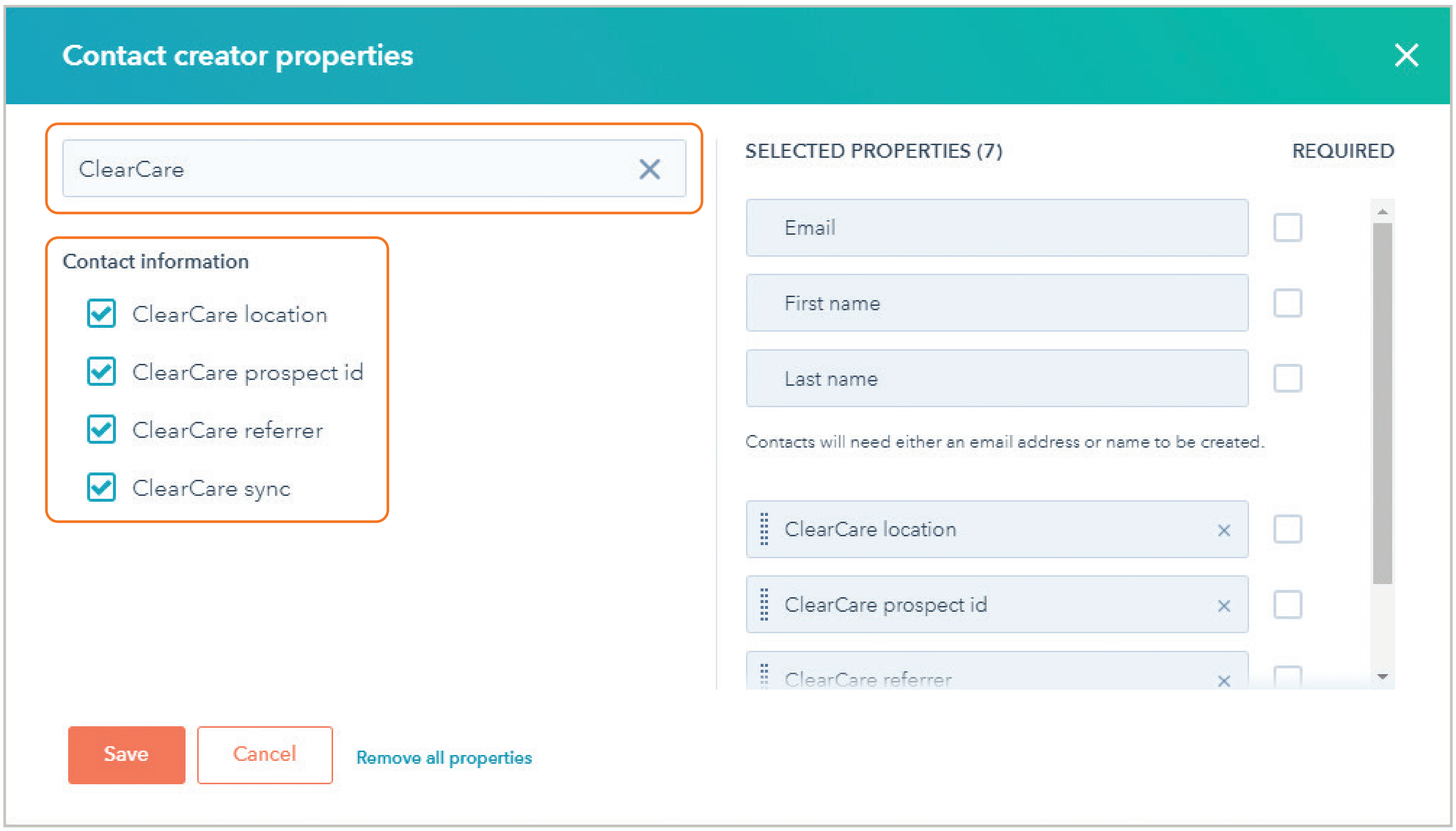
Additional steps on next page.

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



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.



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

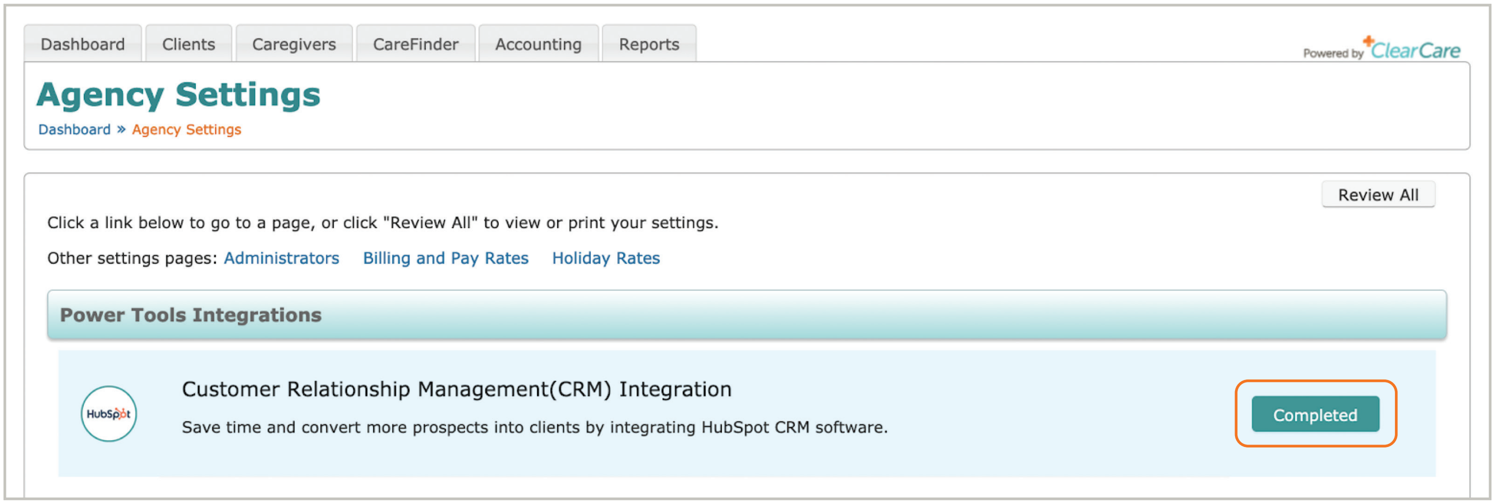
When the user updates any of these fields in either system, both systems will be updated.

10. Making Updates to the Integration

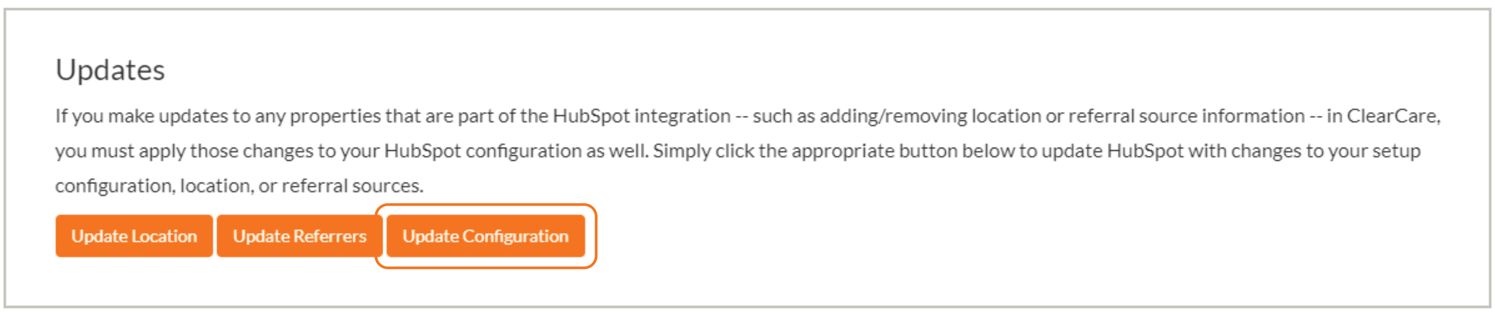
If a user (Agency Admin) makes updates to any properties that are part of the HubSpot integration in ClearCare, such as adding/removing location or referral source information, those changes need to be applied to the HubSpot configuration for the integration to work properly.

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.