

celigo

Installing a HubSpot Template

Guide



Installing a HubSpot Template

Quickstart Templates are pre-built integrations and come packaged with all the components that you need to integrate two or more applications (including connections, exports, imports, flows, data mappings, etc.) You can install a Quickstart Template in your integrator.io platform and modify it to fit your custom integration requirements.

Before you set up the Quickstart Template

- Refer to your Quickstart Template Readme to know the prerequisites for your template.
- You'll find the link to your Template Readme to the right side of your setup page.
- Keep your login credentials for the applications you're integrating ready:
 - OAuth tokens
 - API keys
 - Base URLs

Choose & install your HubSpot Template

Note: Each Quickstart Template has certain prerequisites to run the Quickstart Template out of the box. To understand the prerequisites for your Template, click the Readme link on the right of your setup page.

- 1 ■ Sign up or Sign In to your integrator.io account.
- 2 ■ At the top, click **Marketplace**, then click the Hubspot tile. You will see all of the Hubspot templates:
 - Hubspot to Acumatica
 - Hubspot to NetSuite
 - Hubspot to Salesforce
 - Hubspot to Microsoft Dynamics 365
 - Hubspot to Zoho CRM
 - Hubspot to SugarCRM
- 3 ■ Click on the **Install** link to the bottom of the Quickstart Template tile to begin the installation process.
- 4 ■ The Install Wizard displays the list of components that it would create in your integrator.io account once the Quickstart Template is successfully installed.
- 5 ■ Click **Install Integration**.
- 6 ■ Read the Disclaimer carefully and click **Proceed**.
- 7 ■ You'll be redirected to the Setup page.

Set up the template and finish the installation

Note: You will need to set up the connections to the applications you want to integrate using your App credentials.

- 1 Click the **Click to Configure** link to open the connection settings.
- 2 Enter your credentials. Click **Test** or **Validate** to test your connection.
- 3 Click **Save**.
- 4 Repeat steps 2 to 4 to configure the remaining connections on the Setup page to complete the installation process.

Congratulations! You've successfully installed the Quickstart Template on your integrator.io account.

Post-install readme

After you've finished installing your template, you'll be redirected to a Readme page. Please read the readme document carefully. Your template-specific Readme page has information about:

- Pre-requisites
- Setup

Integrate HubSpot with NetSuite

This section only applies if you are trying to integrate HubSpot with NetSuite. If you're integrating HubSpot with a NetSuite App, you need to install the Celigo Integrator bundle as mentioned below.

Prerequisites: Enable SuiteTalk (Web Services) and SuiteScript

Note: The bundle ID for each Integrator bundle will differ based on the Quickstart Template that you choose to install.

- 1 ■ On your setup page click **Click to Install**.
- 2 ■ You'll be redirected to your App login page, enter your login credentials. Click **Install**. The installation process could take a while.
- 3 ■ Once the Celigo Integrator bundle is successfully installed in your NetSuite account, switch over to your Integrator.io account.
- 4 ■ Click **Verify Now**.

Set up your Hubspot connection

API guide link: <https://developers.hubspot.com/docs/overview>

Link to authentication page: <https://developers.hubspot.com/docs/methods/auth/oauth-overview>



Authentication type: Token

Connection ✕

Name:

Connection Type:

Authentication Type:

HAPI Key:  

▼ Advanced Settings:

Borrow Concurrency From:

Concurrency Level:

- Name: Required:** Name the connection.
- Connection type: Required:** The form will automatically select Hubspot.
- Authentication Type:** Select Token if your service relies on token-based authentication. The token may exist in the header, URL, or body of the HTTP request. This method also supports refreshing tokens if the service being called supports it.

Authentication type: OAUTH 2.0

Connection

Name: HubSpot Connection

Connection Type: HubSpot

Authentication Type: OAuth 2.0

Configure Scopes

▼ Advanced Settings:

Borrow Concurrency From: Optional

Concurrency Level: 10

Save & Authorize

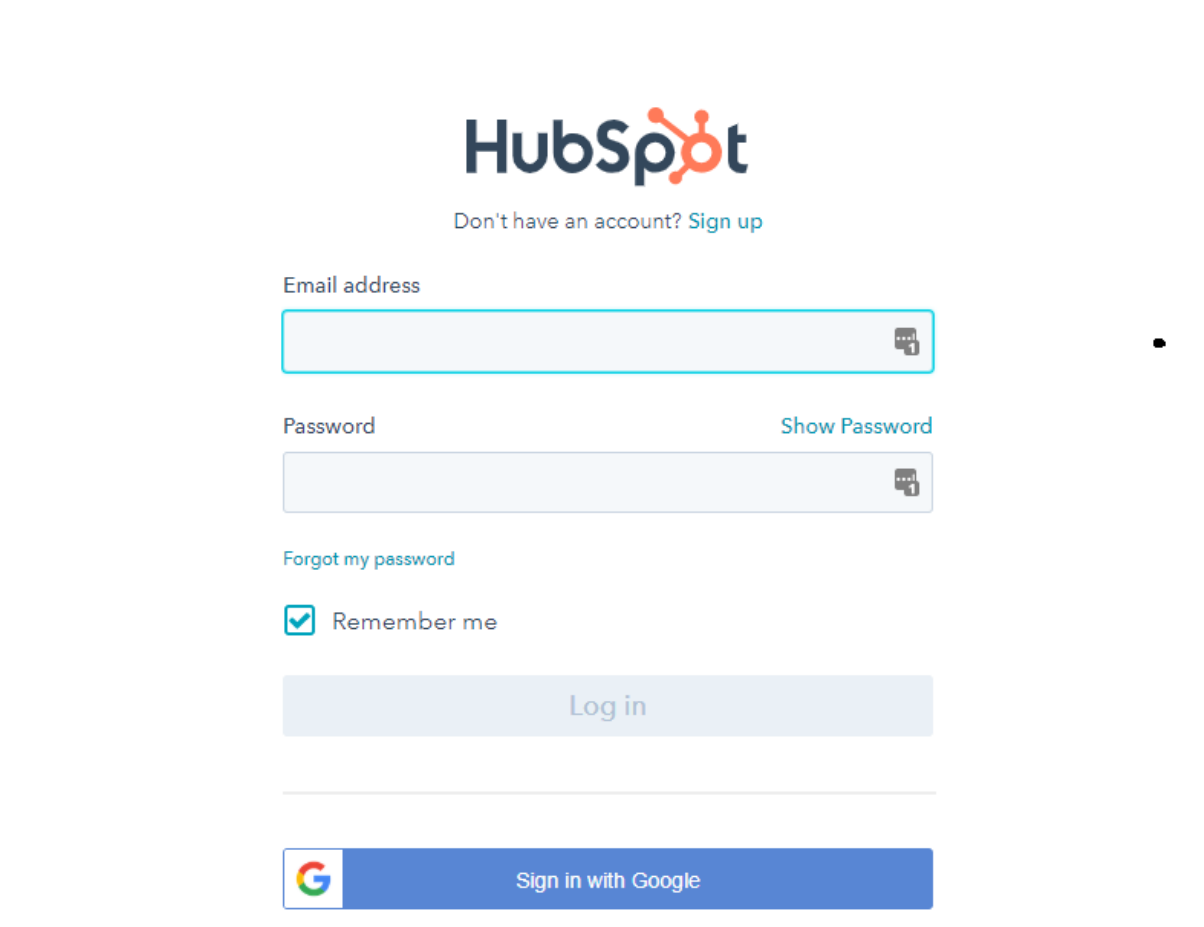
- 1 **Name: Required:** Name the connection.
- 2 **Connection type: Required:** The form will automatically select Hubspot.
- 3 **Authentication Type:** Select this OAuth 2.0 if your application supports the OAuth 2.0 authentication.
- 4 **Configure Scopes:** OAuth 2.0 scopes provide a way to limit the amount of access that is granted to an access token. For example, an access token issued to a client app may be granted READ and WRITE access to protected resources, or just READ access.

- 5 **(Optional) Borrow concurrency level:** This field lets the user borrow the same number of disparate operations performed at a given time as another app if they need several apps in their integrations to use the same level.

Note: Selecting another app from the dropdown will change the form.

- 6 **Concurrency level: Optional:** The user can opt to set their own concurrency level.

- 7 Click **Save & Authorize**. The following page displays:



HubSpot

Don't have an account? [Sign up](#)


Email address

Password [Show Password](#)

[Forgot my password](#)

Remember me

[Log in](#)

 [Sign in with Google](#)

8 ■ **Email address:** Enter your registered email address.

9 ■ Configure static map for Address: State in mapping according to your business requirements.



Read from and write to my HubDB

This includes access to HubDB



Read from and write to my Social

This includes Social Inbox



Read from and write to my Files

This includes access to File Manager



Read from and write to my Contacts

This includes prospects and lists



Read from and write to my Content

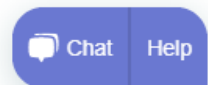
This includes sites, landing pages, CTA, email, blog, campaigns



Read from and write to my Forms

This includes access to the Forms API

Grant access



10 ■ Click **Grant access** to establish the connection!



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