Integrate HubSpot+Dynamics Features and Pricing

	Basic $250/month	Pro $500/month	Enterprise $900/month
One-time setup fee	$1,500	$2,500	$5,000
Total synced contacts included	10,000	50,000	250,000
Extra 50k contacts	$100/month	$100/month	$50/month
Features			
Fast syncing	✔	✔	✔
HubSpot fields and mini timeline in Dynamics	✔	✔	✔
Sync Dynamics Leads, Contacts, and Accounts with HubSpot Contacts	✔	✔	✔
Unlimited custom field mappings	✔	✔	✔
Sync opt-out status	✔	✔	✔
Closed-loop marketing and lifecycle management	✔	✔	✔
Sync CRM Option Sets to HubSpot Dropdowns	X	✔	✔
Sync Dynamics Owners to HubSpot Owners	X	✔	✔
Create Campaign Responses in Dynamics	X	✔	✔
Sync Dynamics Opportunities to HubSpot Deals	X	✔	✔
Sync Dynamics Accounts to HubSpot Companies	X	$100/month	✔
On-premise agent for CRMs behind a firewall	X	X	✔
Add-ons			
Sync static marketing lists from Dynamics to HubSpot	X	$50/mo	$50/mo
Sync dynamic marketing lists from Dynamics to HubSpot	X	$100/mo	$100/mo
Sync custom Dynamics entities to HubSpot Deals	X	$100/mo	$50/mo
Perform setup and testing in sandbox (one-time)	X	$1,000	$1,000

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Managed Setup and Support

With our managed HubSpot integration, there is:

- No software to learn
- No major time/resources needed to get started
- Hassle-free setup and support
- Best practices and years of experience delivering the highest quality sync

Our standard setup process takes 30-60 days and includes the following:

1. Dedicated account manager point of contact.
2. One hour kickoff meeting to review sync logic, customization options, and field mappings.
3. Provision dedicated cloud environment where the integration will run.
4. Provide Dynamics managed solution package to install all custom HubSpot fields and form customizations.
5. HubSpot setup including fields and lists used for the integration.
6. Development process includes all sync logic, customization options, and field mappings as scoped in the kickoff meeting.
7. Test all sync flows and process test data in a quality assurance phase.
8. Build and test in production environments.
9. Full initial sync to populate both systems with all eligible records.
10. One hour post-launch data review and integration training.

We support your integration to keep it running smoothly and support the evolution of your marketing automation. Managed support includes:

- Email-based support ticketing.
- Proactive updates to support changes to the HubSpot or Dynamics APIs.
- General troubleshooting and connection updates.
- Changes or additions to field mappings and included sync logic.

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Features

Fast syncing	The integration processes data every 5 minutes, and can be configured to run as fast as every 1 minute.
HubSpot fields and mini timeline in Dynamics	A managed solution package will be installed in Dynamics which creates custom HubSpot fields and an iframe for a mini timeline on the lead and contact forms. We recommend your CRM administrator installing this package in a test or sandbox environment first to ensure there are no conflicts with other customizations. HubSpot fields created in Dynamics include:

HubSpot Score	First Visit URL	Last Visit URL	First Referrer	Last Referrer
First Visit Timestamp	Last Visit Timestamp	Average Page Views	# Event Completions	# Page Views
# Visits	Persona	HubSpot Profile URL	Revenue Generated	Traffic Source
Opt Out Status	Is Eligible for Email	Emails Delivered	Emails Opened	Emails Clicked
Emails Bounced	First Email Send Date	Last Email Send Date	First Email Open Date	Last Email Open Date
First Email Click Date	Last Email Click Date	Last Email Name	Last Social Click	# Social Clicks
# Facebook Clicks	# Google Plus Clicks	# LinkedIn Clicks	# Twitter Clicks	Klout Score
Twitter Handle	Twitter Profile Photo	Twitter Bio		

Sync Dynamics Leads, Contacts, and Accounts with HubSpot Contacts

HubSpot to CRM

- New and updated HubSpot Contacts sync to Dynamics Leads and Contacts.
- You have control within HubSpot to choose which records are eligible to sync via an Inclusion List. Use conditions such as lead scoring, selected forms, and other conditional logic to qualify records to sync.
- If your organization does not use Dynamics Leads, we will sync exclusively to contacts.
- When a new contact is added to HubSpot, we search Dynamics for a lead or contact with a matching email address. If a match is found, we'll update it. If not, we'll create a new Dynamics lead or contact.
- If you prefer to create a new lead for every HubSpot form submission, this is an optional customization at no additional cost.

CRM to HubSpot

- New and updated Dynamics Leads and Contacts sync to HubSpot.
- Dynamics Contacts are synced along with their parent account fields, such as company name, status, and any other custom field mappings.
- You have the ability to filter which Dynamics leads and contacts are qualified to sync to HubSpot.
- The name and email address of the record owner sync to HubSpot for all versions. This allows

	you to send internal email notifications to the assigned owner, as well as send emails to contacts from their assigned owner.
Unlimited custom field mappings	• Sync custom fields between HubSpot Contacts and Dynamics Leads, Contacts, and Accounts. • You have control over which fields sync in which direction. • When mapping dropdown fields from HubSpot to Dynamics, you will need to provide the internal values of your Dynamics option sets. A CRM administrator may be required.
Sync opt-out status	• Stay compliant with spam laws by syncing opt-out status. • When a HubSpot contact opts out of all email, we will set the "Do Not Allow Bulk Email" field in Dynamics. • When the "Do Not Allow Bulk Email" field is set in Dynamics, we will opt out the HubSpot contact of all email. • After a HubSpot contact opts out, it is not possible to opt them back in without email confirmation from the contact.
Closed-loop marketing and lifecycle management	• We automatically sync Dynamics lead status, contact status, and account status to HubSpot. • Use HubSpot workflows to set the lifecycle stage of your HubSpot contact based on the Dynamics status. • Use the Sources report and other HubSpot reports to gain insights on your lead, opportunity, and customer conversion to close the loop on your marketing analytics.
Sync Dynamics Owners to HubSpot Owners	• After you set up users in HubSpot for each of your Dynamics users, our integration will sync record ownership via the HubSpot Owner field. • Sent internal email notifications to the assigned owner. • Send marketing emails to your contacts personalized from the assigned owner. • Assign new leads to owners directly within HubSpot workflows - either round-robin or other conditional assignment.
Create Campaign Responses in Dynamics	• We automatically populate a HubSpot dropdown with all Dynamics marketing campaigns. • Using HubSpot forms or workflows, you can automatically create campaign responses from HubSpot. • Marketing reports in Dynamics include campaign effectiveness, revenue generated per campaign, and leads by source campaign. • The perfect solution for organizations already using Dynamics campaign reporting, or for those with multi-channel marketing looking to report on ROI across all channels.
Sync Dynamics Opportunities to HubSpot Deals	• Unlock powerful marketing automation and reporting in HubSpot! We integrate all Dynamics Opportunities to HubSpot Deals, including opportunity status and any custom field mappings.

	- The opportunity may be associated to a primary contact or to all contacts under the opportunity's account. - Create smart lists, workflows, and lead scoring based on any opportunity/deal field. - Use the HubSpot Reporting Add-On to generate dashboards and custom reporting on both marketing and sales.
Sync Dynamics Accounts to HubSpot Companies	- Maintain your Company/Contact relationships in HubSpot to reflect Account/Contact relationships in Dynamics. - This is helpful for sales reps looking to use HubSpot CRM to track some of their sales efforts. - Sync any Dynamics Account field to the HubSpot Company.
On-premise agent for CRMs behind a firewall	- If your CRM is behind a firewall and not available via the public internet, our on-premise agent may be installed anywhere on your local network. This bypasses the need for firewall exceptions and will communicate with our cloud services to integrate Dynamics and HubSpot. - The on-premise agent is not required if your IT organization is able to add firewall exceptions for two IP addresses to our cloud integration platform.

Add-Ons

Sync static lists from Dynamics to HubSpot	- All static lists in Dynamics flagged to sync will be created in HubSpot with the same list name. - Any changes to list members (additions and deletions) will sync with the list members in HubSpot. - This is a one-way sync from Dynamics to HubSpot.
Sync dynamic lists from Dynamics to HubSpot	- All dynamic lists in Dynamics flagged to sync will be created in HubSpot with the same list name. - Any changes to list members (additions and deletions) will sync with the list members in HubSpot. - This is a one-way sync from Dynamics to HubSpot. - Sync time may vary based on the size of your list, anywhere from 30 minutes to several hours.
Sync custom Dynamics entities to HubSpot Deals	Do you have an entity not supported by our integration out of the box? Typically it's best to sync custom entities to HubSpot Deals. A deal can have many different types, helpful to separate opportunities from custom entities. A deal is associated with one or more contacts, so this is also helpful for one-to-many relationships.
Perform setup and testing in sandbox (one-time)	We recommend connecting the integration directly with your Dynamics production account in order to avoid potential issues syncing your live HubSpot data with sandbox Dynamics data. If your IT organization requires sandbox testing of the integration before moving to production, this service is available for a small one-time fee.