How to configure caller recognition and screen-pop for:

HubSpot

Supported versions: HubSpot
Contact replication method: API
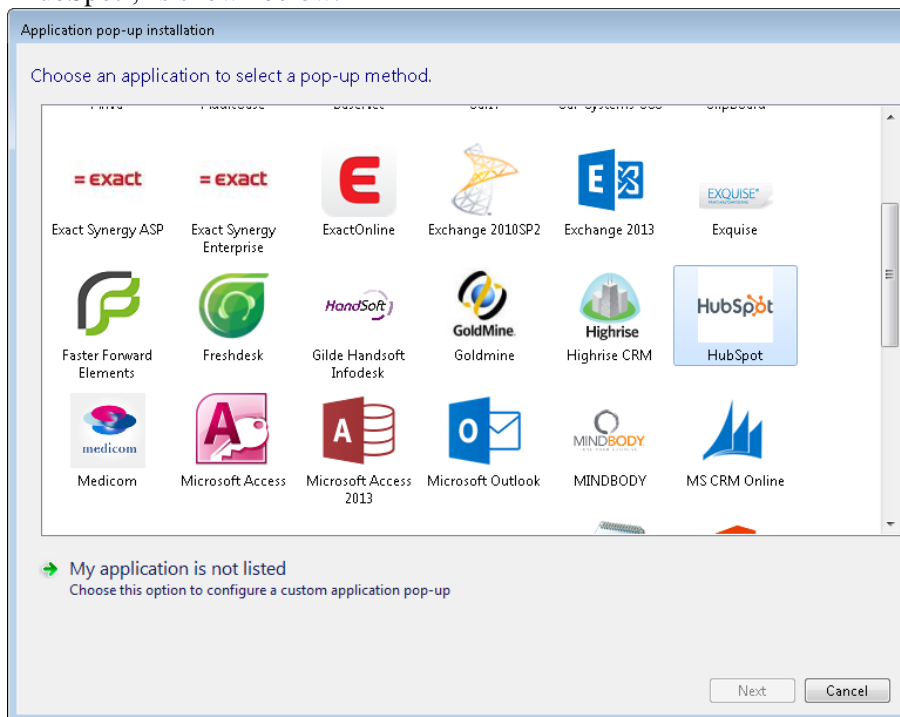Screen pop method: URL

Prerequisites

The HubSpot integration uses web services for contact data replication. To enable this, the Recognition Update service must be authorized via OAuth to read HubSpot data.
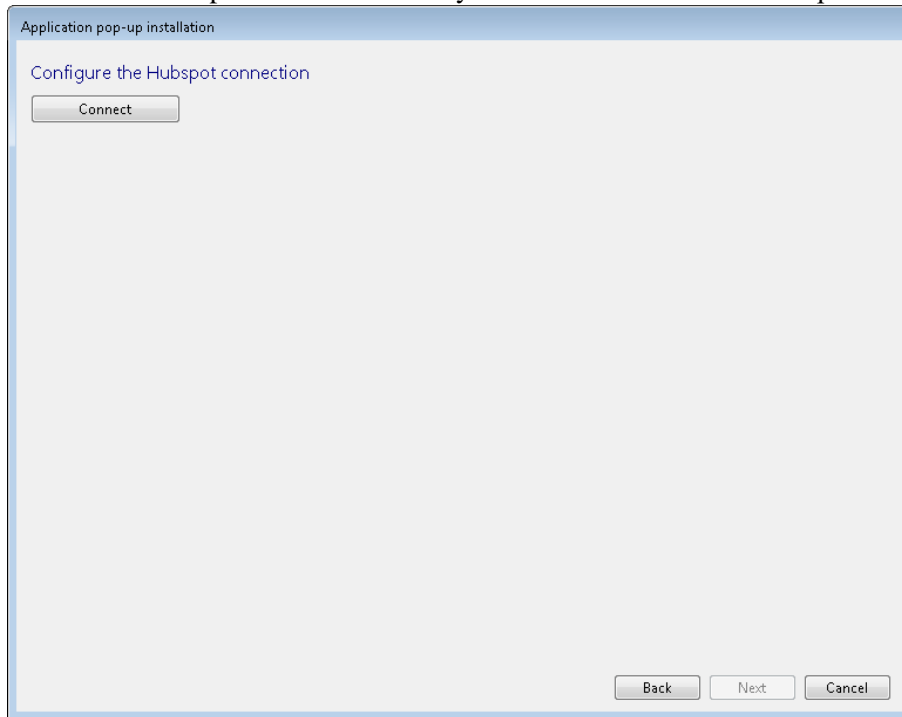
Notes

For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.
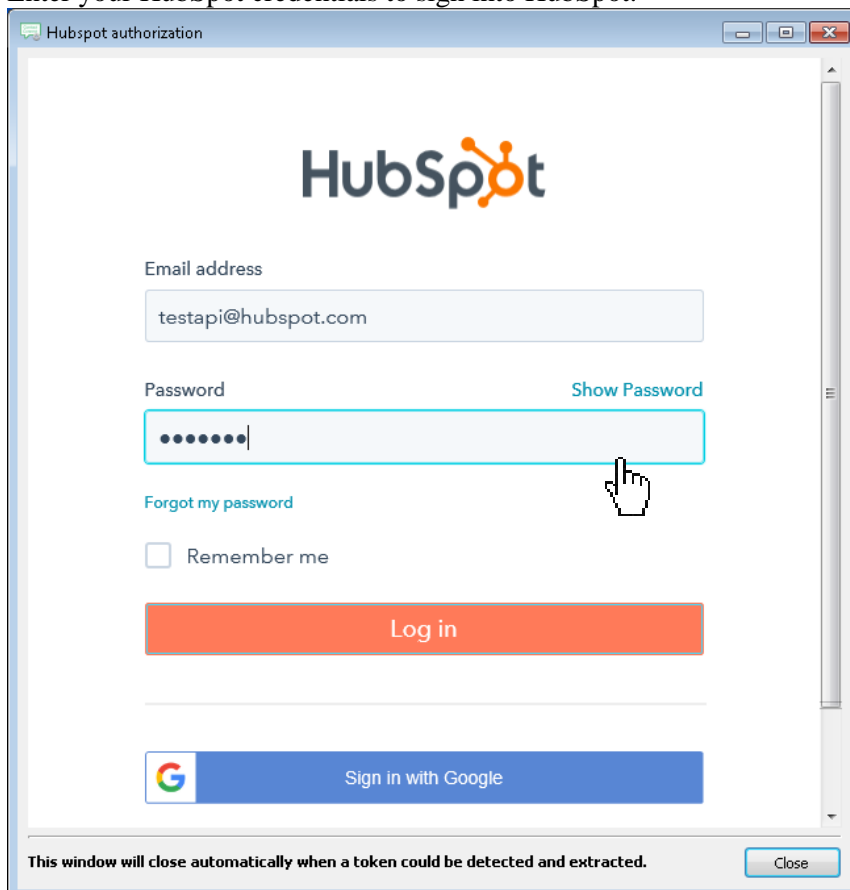
Configuration steps

1) Start by clicking 'add recognition' in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'HubSpot', as shown below.
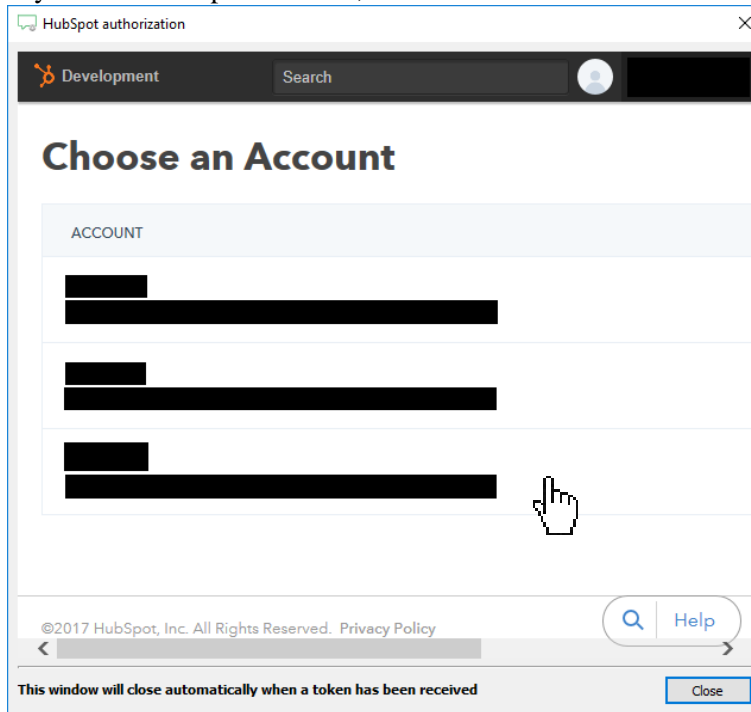
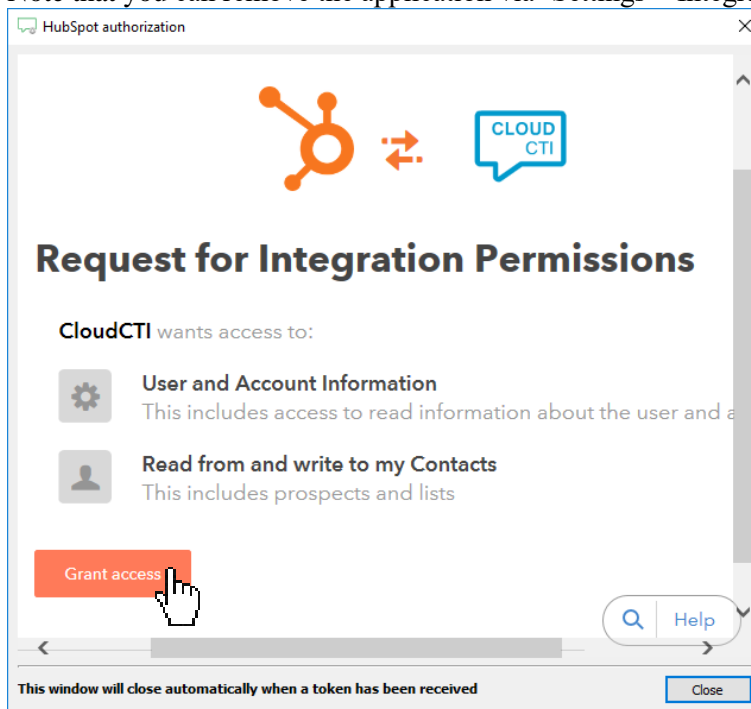2) Connect to HubSpot to authorize the synchronization of contact info press "Connect"

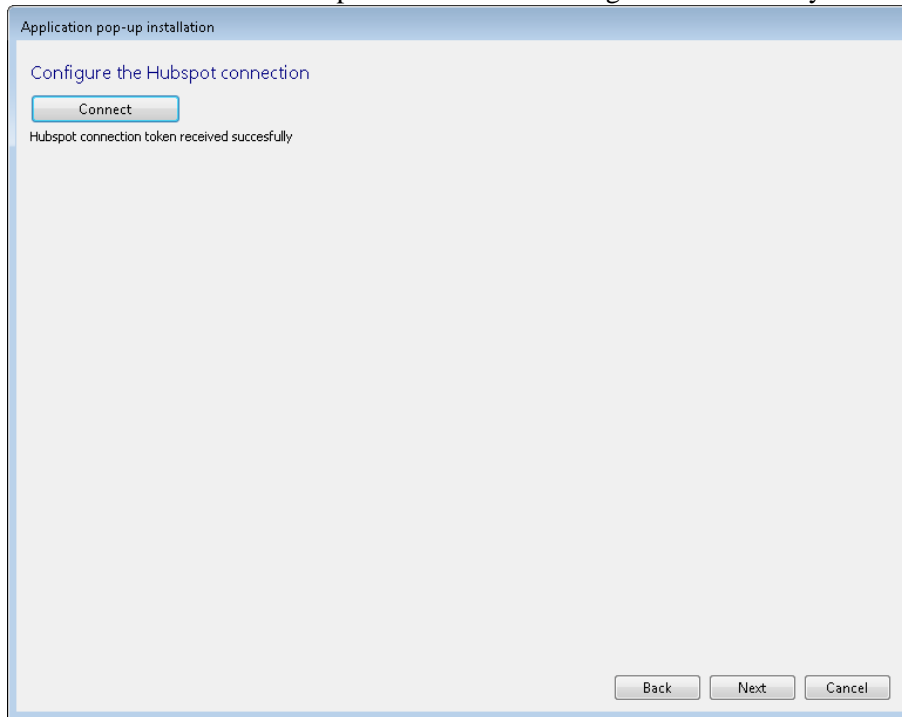3) Enter your HubSpot credentials to sign into HubSpot.

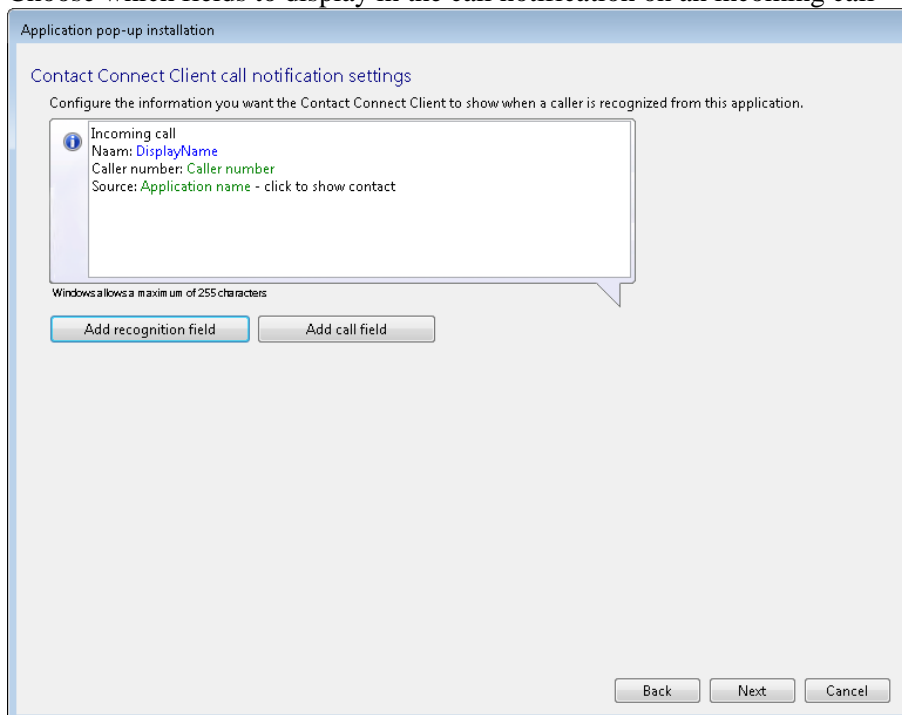4) If you have multiple accounts, select the account to use.

5) Grant access to retrieve data from your account.
Note that you can remove the application via 'Settings > Integrations' at any time.

6) The connection to the HubSpot API has been configured successfully. Click 'Next' to continue.

Application pop-up installation

Configure the Hubspot connection

Connect

Hubspot connection token received succesfully

Back   Next   Cancel

7) Choose which fields to display in the call notification on an incoming call

Application pop-up installation

Contact Connect Client call notification settings

Configure the information you want the Contact Connect Client to show when a caller is recognized from this application.

ⓘ Incoming call
Naam: DisplayName
Caller number: Caller number
Source: Application name - click to show contact

Windows allows a maximum of 255 characters

Add recognition field   Add call field

Back   Next   Cancel

8) Check the configuration summary and click finish to add the recognition from HubSpot

Application pop-up installation

Finish the application pop-up setup

Application
HubSpot

Recognition
Recognition from Hubspot

Action
Show contact in HubSpot:
$(PopUpUri)

Back   Finish   Cancel