CRM INFO

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

 Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'HubSpot', as shown below.

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2) Connect to HubSpot to authorize the synchronization of contact info press "Connect"

Application pop-up installation	
Configure the Hubspot connection	
Connect	
	Back Next Cancel

3) Enter your HubSpot credentials to sign into HubSpot.

Representation	
HubSpot	
Email address	
testapi@hubspot.com	
Password Show Passw	vord ≡
••••••	
Forgot my password	
Remember me	
Log in	•
G Sign in with Google	
This window will close automatically when a token could be detected and extracted.	Close



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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.

HubSpot authorization	×
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Request for Integration Permissions	
CloudCTI wants access to:	
User and Account Information This includes access to read information about the user and	a :
Read from and write to my Contacts This includes prospects and lists	
Grant access Q Help	
This window will close automatically when a token has been received	2



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
Constant Constant Olivert cell and Charling and the se
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
Windowsa liowsa maxim um 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