

HubSpot Connector Setup Guide

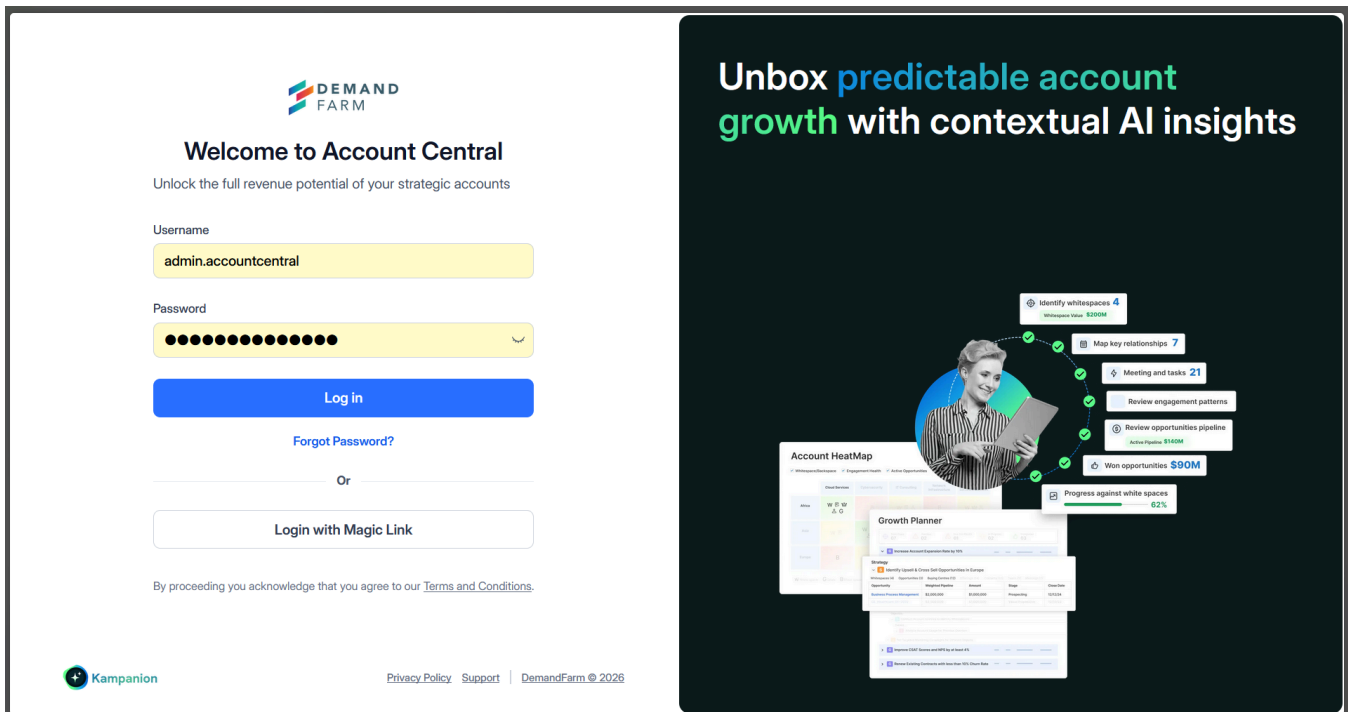
Overview

This document provides a step-by-step guide to setting up the HubSpot connector in Account Central. This integration facilitates the automated synchronization of data from HubSpot into Account Central.

Configuration Steps

Step 1: Login to Account Central

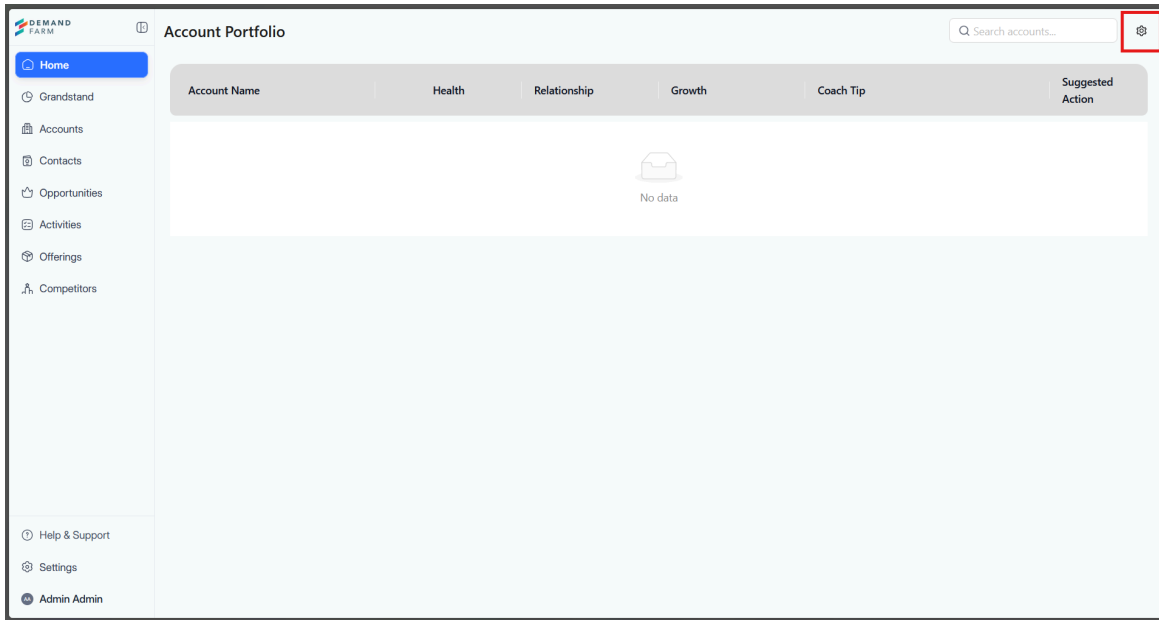
Navigate to the Account Central login page. Enter your credentials (Username and Password) and click the Log in button to access the platform.



The image shows two side-by-side screenshots from the DemandFarm Account Central platform. The left screenshot is the login page, featuring the Demand Farm logo, a welcome message, and a login form with fields for Username (admin.accountcentral) and Password. The right screenshot is a dashboard overview with a dark background, displaying various analytics and action items such as 'Unbox predictable account growth with contextual AI insights', 'Account HeatMap', 'Growth Planner', and 'Progress against white spaces 62%'.

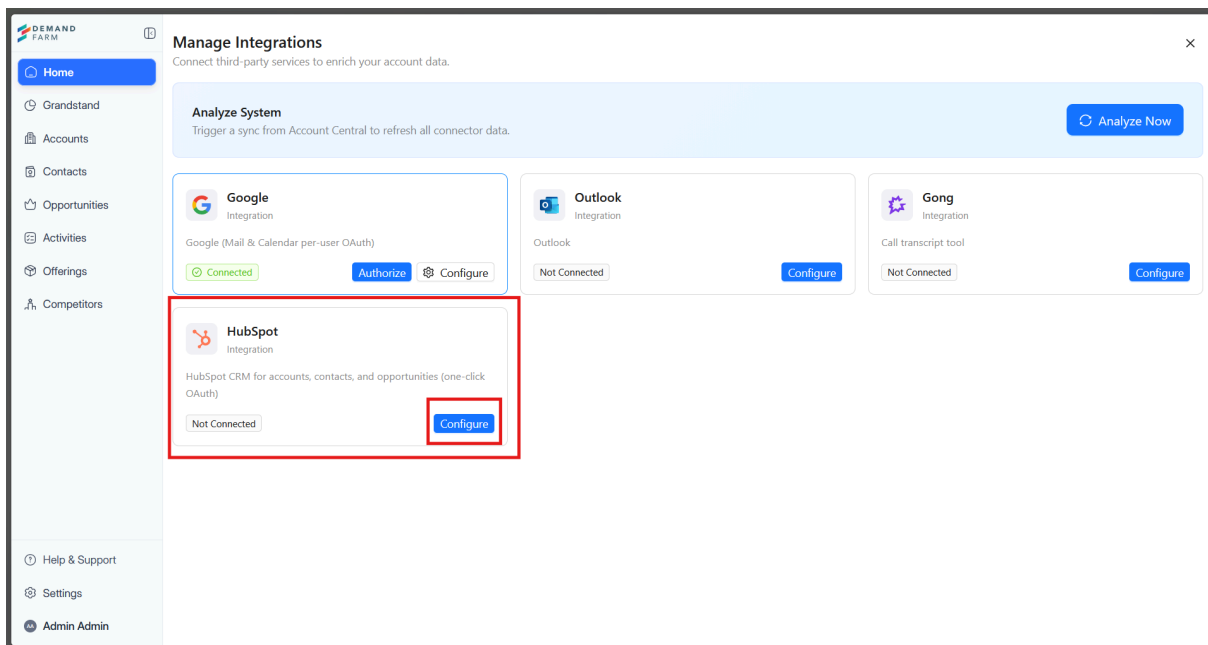
Step 2: Access Settings

In the Account Central's home page, click on the **Settings** icon located in the top right corner.



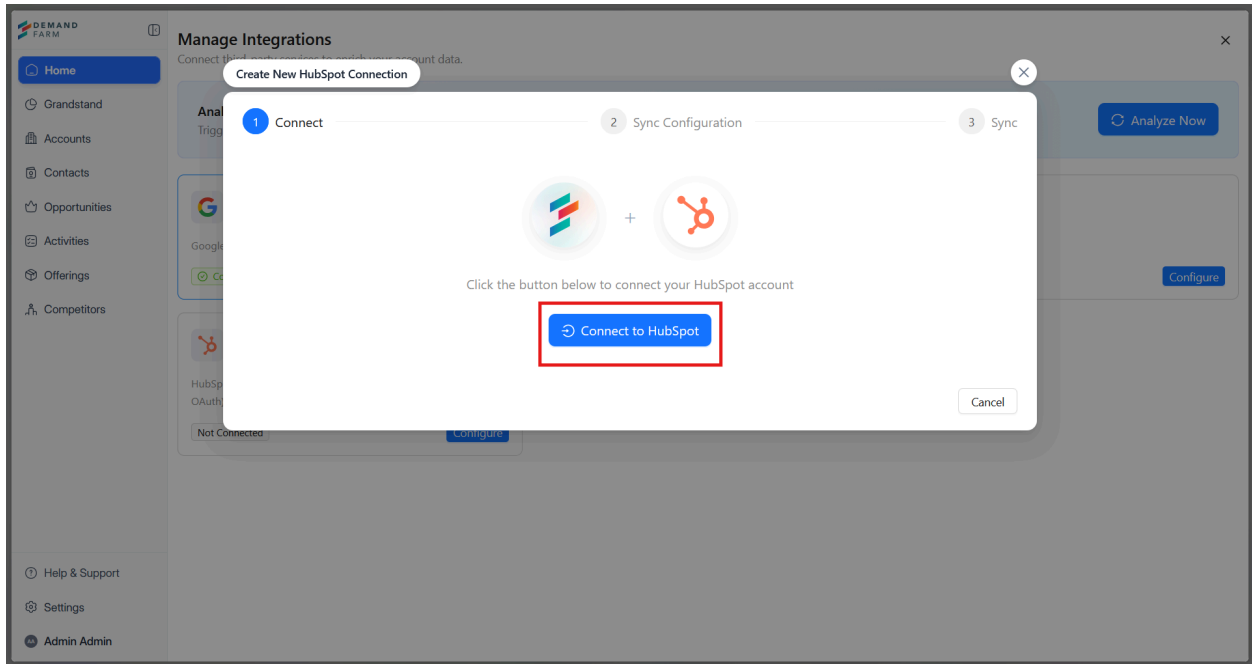
Step 3: Configure HubSpot Integration

You will be redirected to the **Manage Integrations** page. Locate the **HubSpot** integration card and click on the blue **Configure** button.



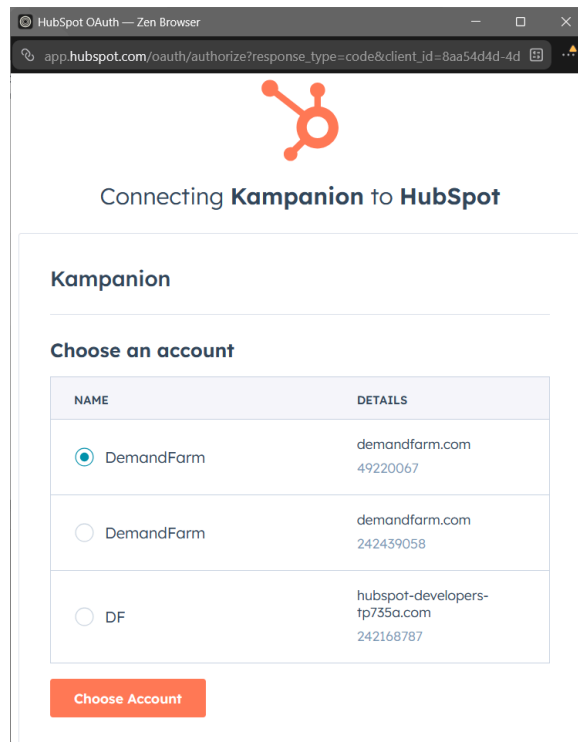
Step 4: Connect to HubSpot Authentication

A modal window titled **Create New HubSpot Connection** will appear. Click on the blue **Connect to HubSpot** button. This will redirect you to the HubSpot login page to authorize the connection.



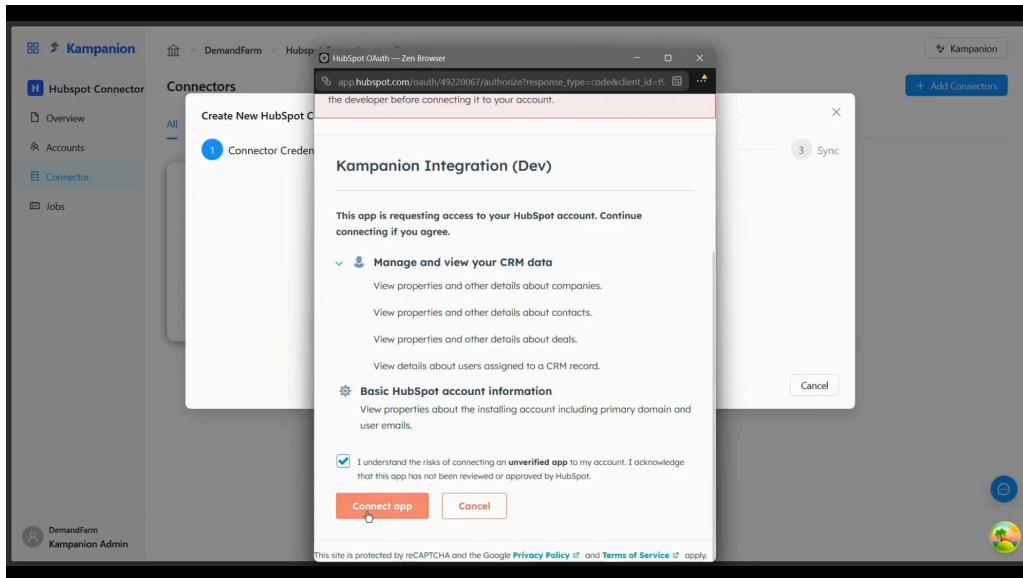
Step 5: Select HubSpot Account

A pop-up window will appear listing the HubSpot accounts associated with your credentials. Select the appropriate account you wish to connect (e.g., DemandFarm) and click **Choose Account** to proceed.



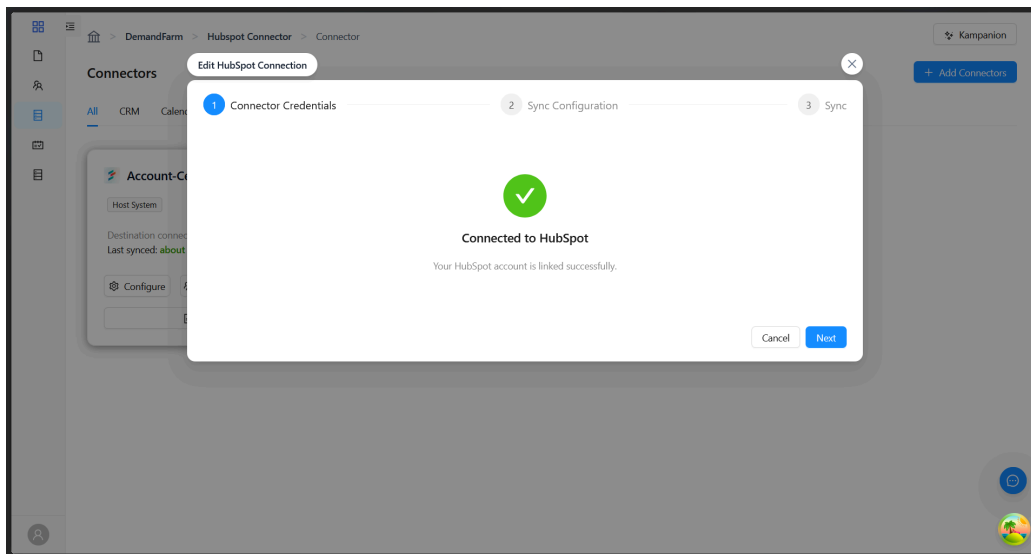
Step 6: Authorize App Connection

You will be presented with a permission request screen detailing the access rights required by the Kampanion Integration (e.g., manage and view CRM data). Review the details and click the orange **Connect app** button to finalize the authorization.



Step 7: Verify Connection

Upon successful authorization, you will be redirected back to the Kampanion setup wizard. You should see a green checkmark indicating **Connected to HubSpot**. Click the blue **Next** button to proceed to the Sync Configuration settings.



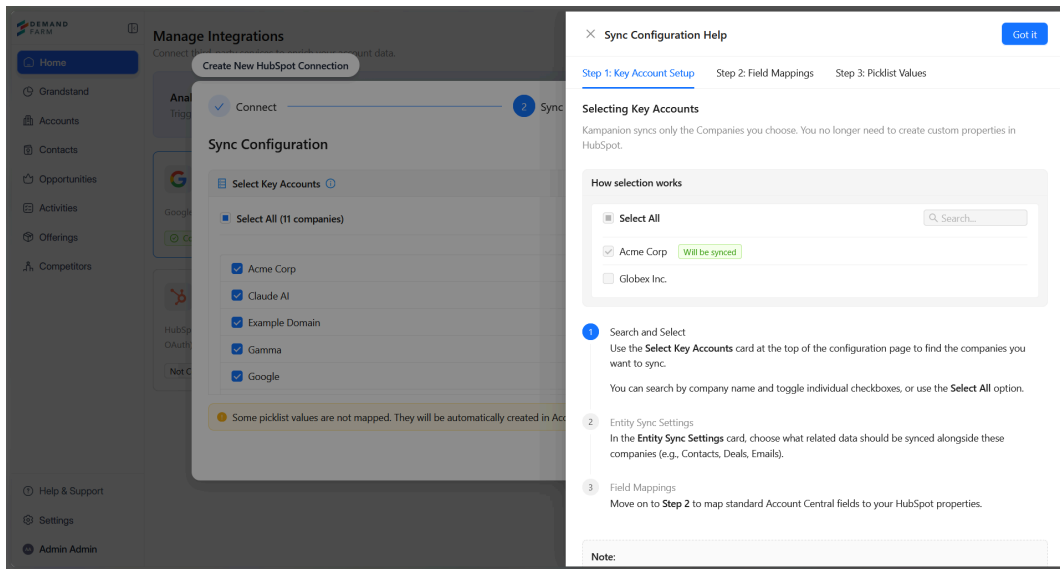
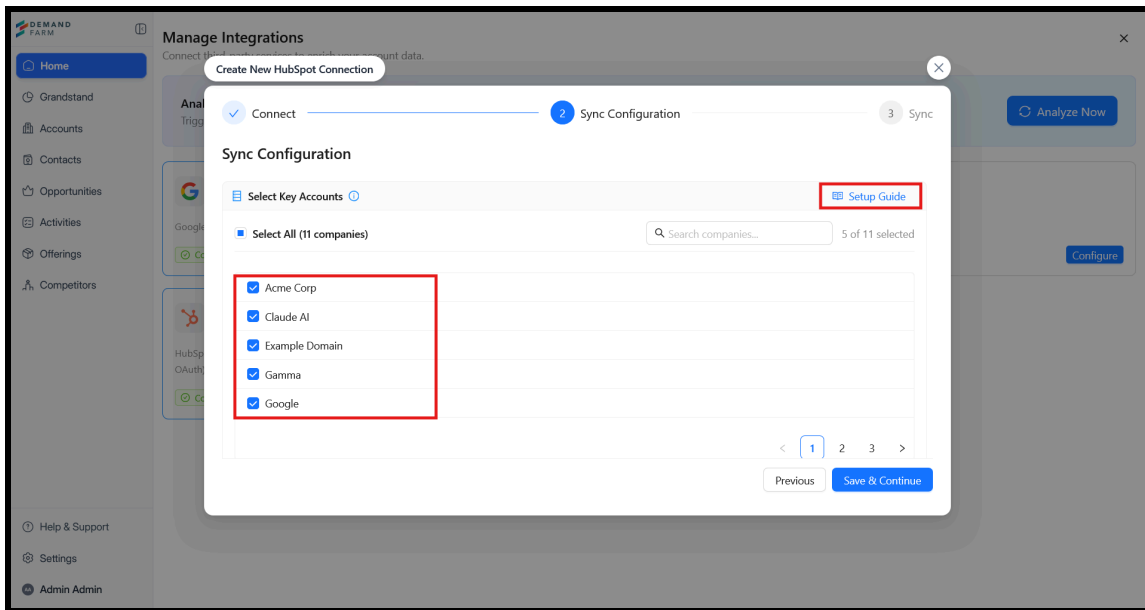
Step 8: Select Key Accounts

In the **Sync Configuration** step, you define which companies are synced to Kampanion. Locate the **Select Key Accounts** section.

You can now explicitly choose which companies to sync by checking the box next to their name. You can use the search bar to locate specific companies, or use the **Select All** option to sync all available

companies.

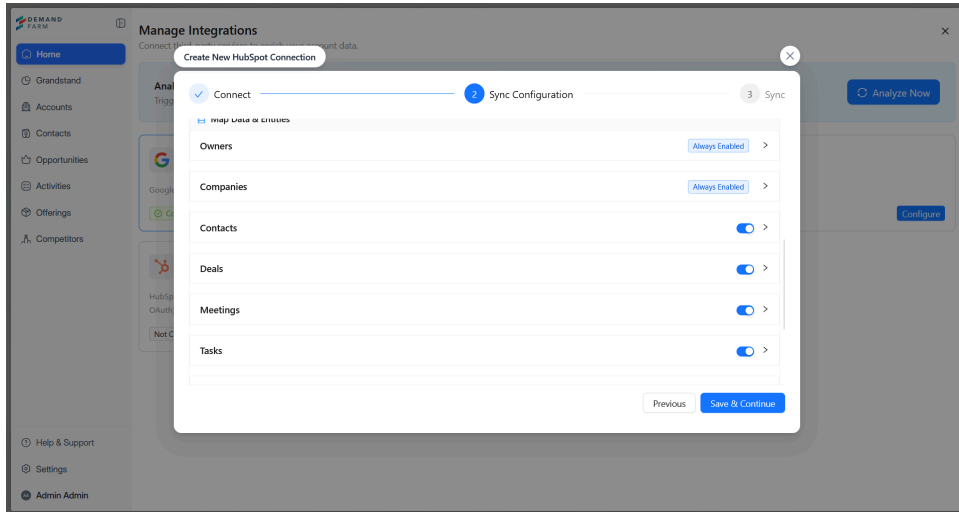
If you need further clarification on how this selection works, click on the **Setup Guide** link on the right side. This will open a **Sync Configuration Help** panel with detailed instructions.



Step 9: Map Data & Entities

Scroll down to the **Map Data & Entities** section to choose which objects will sync.

- **Always Enabled:** The **Owners** and **Companies** entities are mandatory for the integration and cannot be disabled.
- **Optional Entities:** Use the toggle switches to enable or disable synchronization for **Contacts, Deals, Meetings, Tasks, Notes, and Emails**.

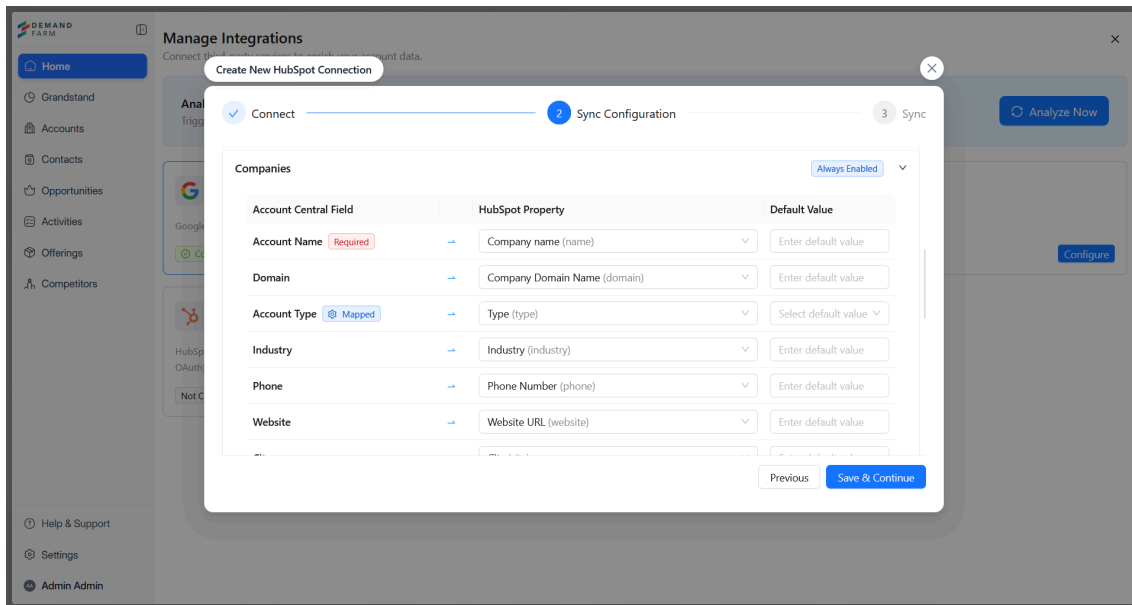


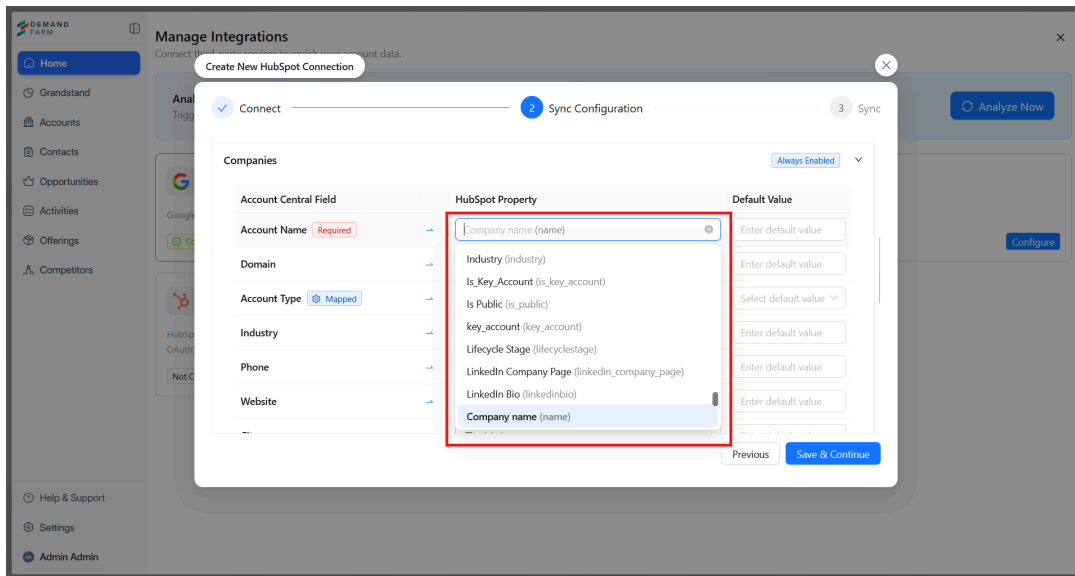
Step 10: Configure Field Mappings (Optional)

Note: This step is optional. If not configured, the default mappings provided by the system will be used.

You can customize the specific data fields that sync for each entity. Click on the arrow next to an entity (e.g., **Companies**) to expand its mapping options.

- **Field Mapping:** The table shows the **Account Central Field** on the left and the corresponding **HubSpot Property** on the right. Default mappings are pre-populated. To override them, select a different property from the dropdown list.
- **Default Values:** You can also specify a **Default Value** for any field. This value will be used if the source data is missing or to enforce a standard value for all synced records.



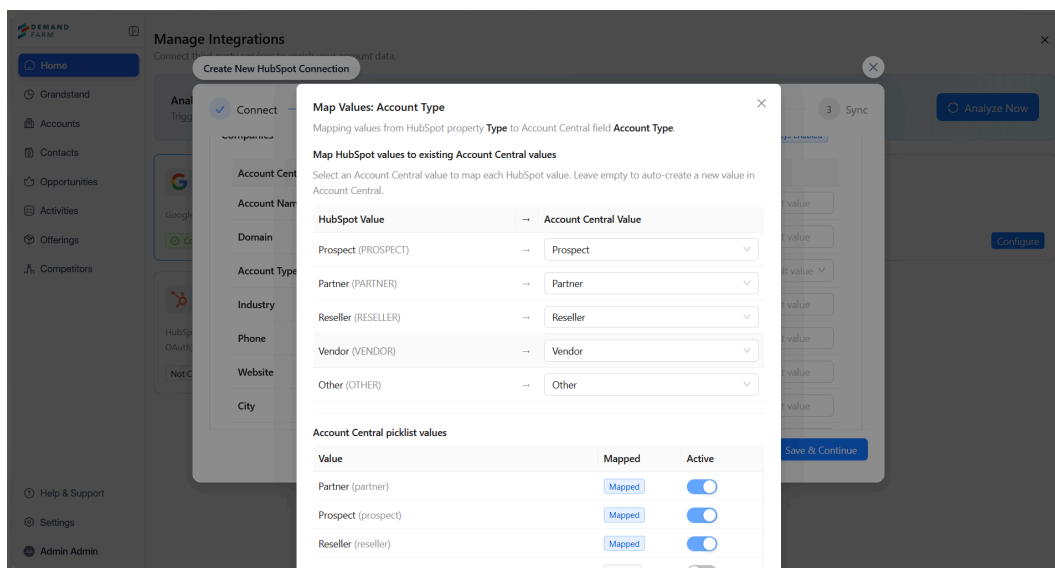
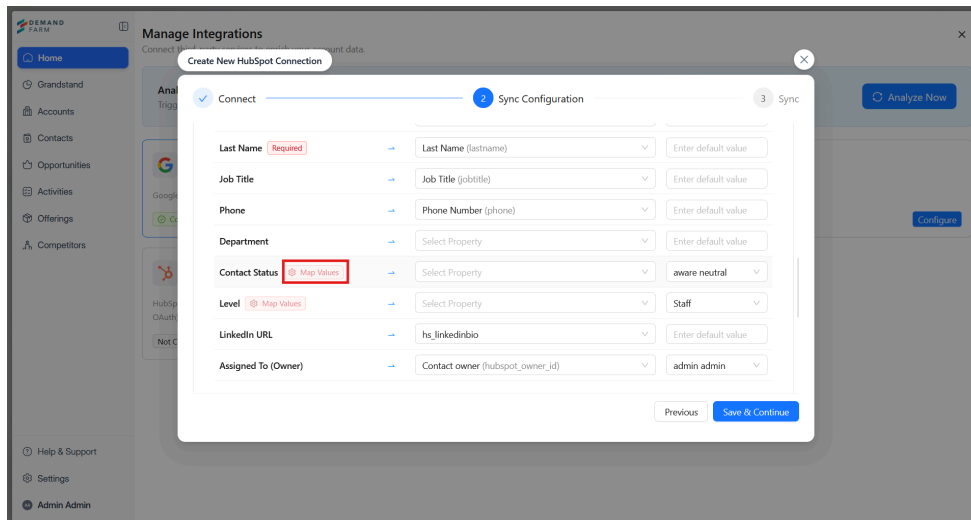


Step 11: Map Picklist Values (Optional)

Note: This step is optional. If not configured, the default mappings will be used. Additionally, if no corresponding picklist values are found in Account Central, they will be automatically created.

For fields that are picklists (dropdowns) in Account Central, you can map specific HubSpot options to corresponding Account Central options.

- **Open Mapping Modal:** Locate a field with a **Map Values** button (e.g., Contact Status or Account Type) and click it.
- **Configure Values:** A modal will appear showing the mapping between HubSpot values (left) and Account Central values (right).
 - **Auto-mapping:** If the values are similar, the system will attempt to map them automatically.
 - **Manual mapping:** You can manually select the correct Account Central value from the dropdown for any unmapped items.
 - **Note:** If you do not map specific picklist options, the corresponding HubSpot values will be automatically created as new options in Account Central.

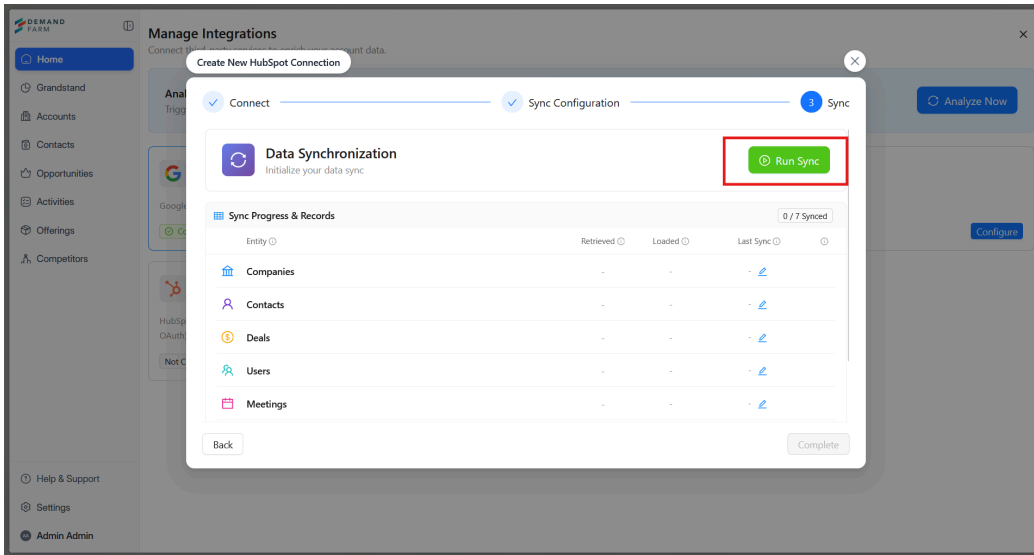


Step 12: Save Configuration

Once all entities are selected, field mappings are configured, and picklist values are aligned, click the **Save & Continue** button. This will take you to the final **Sync** tab.

Step 13: Run Initial Sync

In the **Sync** step you can run the connector to sync Hubspot data to Account Central. Click the green **Run Sync** button to immediately initiate the data synchronization process.



Step 14: Review Sync Status & Complete

As the sync runs, you will see the real-time status of each entity in the **Sync Progress & Records** table.

- **Retrieved:** Indicates the number of records fetched from HubSpot.
- **Loaded:** Indicates the number of records successfully written to Account Central.

Once the sync is finished and you have verified the counts, click the **Complete** button to close the setup wizard.

