

## A) Installation

### 1) Extract the file

Additional Packages Required:

Try to install via pip.

- pyrecord
- voluptuous
- functools
- builtins
- copy
- requests
- future
- six

### 2) Install following setup files of given python modules

- HEQA15~Q - **python setup.py install**
- hubspot-contacts-1.0rc1

### 3) After installing all required Packages install Hubspot Module from odoo apps

## B) Configuration

### 1. Set Access Right:

First goto settings -> Users -> Users -> Select any user -> click on the **Hubspot Manager**

Settings

General Settings
Users & Companies
Translations
Technical

Administrator (hubspot\_17Feb)

Users / Administrator

SaveDiscard

1 / 2 <>

A warning can be set on a partner (Account)	<input type="checkbox"/>	A warning can be set on a product or a customer (Sale)	<input type="checkbox"/>
Addresses in Sales Orders	<input type="checkbox"/>	Advanced Pricelists	<input type="checkbox"/>
Allow the cash rounding management	<input type="checkbox"/>	Allow to define fiscal years of more or less than a year	<input type="checkbox"/>
Analytic Accounting	<input type="checkbox"/>	Analytic Accounting Tags	<input type="checkbox"/>
Basic Pricelists	<input type="checkbox"/>	Discount on lines	<input type="checkbox"/>
Lock Confirmed Sales	<input type="checkbox"/>	Manage Mass Mailing Campaigns	<input type="checkbox"/>
Manage Multiple Units of Measure	<input type="checkbox"/>	Manage Product Packaging	<input type="checkbox"/>
Manage Product Variants	<input type="checkbox"/>	Pro-forma Invoices	<input type="checkbox"/>
Quotation Templates	<input type="checkbox"/>	Show Full Accounting Features	<input type="checkbox"/>
Show Lead Menu	<input checked="" type="checkbox"/>	Tax display B2B	<input checked="" type="checkbox"/>
Tax display B2C	<input type="checkbox"/>		
<b>Extra Rights</b>			
Contact Creation	<input checked="" type="checkbox"/>	Multi Companies	<input type="checkbox"/>
Multi Currencies	<input type="checkbox"/>		
<b>Other</b>			
Access to Private Addresses	<input type="checkbox"/>	Hubspot Manager	<input checked="" type="checkbox"/>

## 2. Setup Hubspot Instance Into the Odoo

- To get API Key Go to Hubspot Integrations. You can see the Integration option under the Profile menu. Once you open it you will see the “**HubSpot API Key**” option. Click on that and select the ‘View key’ button, down there you will see your API key.

Menu

< Back to Deal

## Settings

**Your Preferences**

- Basic Info
- Notifications
- Security

**Account Setup**

- Account Defaults
- Users & Teams
- Integrations
- Connected Apps
- Settings beta options
- Ecommerce

## HubSpot API key

Use your HubSpot API key to access the same APIs that power all HubSpot tools. **This key gives developers full access to make changes to this account through HubSpot's API, including reading logged emails, connected email accounts and other third party data.** Keep it safe and don't share it publicly. For more information, see our [Privacy Policy](#).

Each key is specific to a HubSpot account, not an individual user, and only one key is allowed at a time. You can deactivate your API key and generate a new one at any time.

[Learn more about the HubSpot API key](#)

**Active API key**

● Last updated 4 days ago

889b8420-19ae-40a4-a808-706645

[Hide](#) [Copy](#)

[Call log](#) [Audit log](#)

Filter by [Method](#) [Response](#) [02/19/2021](#) to [02/19/2021](#)

- In Odoo Create Hubspot instance record add any instance name paste hubspot app. In case of multiple instance if you want to use current instance as a default instance then click on **Default Instance** checkbox

Edit

Create

Action ▾

1 / 1

&lt; &gt;

 Inactive Test Connection

## Hubspot Account1

Hubspot App ID

\*\*\*\*\*

Default Instance

☒

Contacts

Companies

Deals

Task

Note

Emails

Sync Contacts

☐Modified Date for  
Contact




### 3. Contact Synchronization settings


If sync contact checkbox is enabled then only the user can import/export contact between odoo and hubspot.

- If user wants to only import contact click on import contact checkbox
- If user wants to only export contact click on export contact checkbox
- Provided buttons to manually import or export contacts

Hubspot Instance

Hubspot InstanceHubspot Logger



 Administrator (hubspot\_17Feb) ▾


Hubspot Instance / Hubspot Account1

Save

Discard

1 / 1 < >

✓ Inactive

 Test Connection

Hubspot Account1

Hubspot App ID

.....

Default Instance

✓

Contacts

Companies

Deals

Task

Note

Emails

Sync Contacts

Import Contacts

Export Contacts

✓

✓

✓

Modified Date for Contact

10000000.0

Import Contacts

Export Contacts

#### 4. Company Synchronization settings




If sync company checkbox is enabled then only the user can import/export company between odoo and hubspot.


- If user wants to only import company click on import company checkbox
- If user wants to only export company click on export company checkbox
- Provided buttons to manually import or export company

Hubspot Instance

Hubspot Instance

Hubspot Logger

  2 

 Administrator (hubspot\_17Feb) ▾

Hubspot Instance / Hubspot Account1


Edit

Create

Action ▾

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✓ Inactive

 Test Connection

## Hubspot Account1

Hubspot App ID

\*\*\*\*\*

Default Instance

☒

Contacts

Companies

Deals

Task

Note

Emails

Sync Companies

☒

Import Company


☒


Export Company

☒

Modified Date for Company

1613710690936

 Import Companies

 Export Companies

## 5. Deal Synchronization settings

If sync deal checkbox is enabled then only the user can import/export deals between odoo and hubspot.

- If user wants to only import deal click on import deal checkbox
- If user wants to only export deal click on export deal checkbox
- Provided buttons to manually import or export deal

Hubspot Instance

Hubspot InstanceHubspot Logger

2

Administrator (hubspot\_17Feb)

Hubspot Instance / Hubspot Account1

EditCreate

Action

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Inactive

Test Connection

### Hubspot Account1

Hubspot App ID

\*\*\*\*\*

Default Instance

ContactsCompanies

Deals

TaskNoteEmails

Sync Deals

Import Deals

Export Deals

☒

☒

☒

Modified Date for Deals

1613715888350

Import Deals

Export Deals

## 6. Task Synchronization settings

If sync task checkbox is enabled then only the user can import/export tasks between odoo and hubspot.

- If user wants to only import task click on import task checkbox
- If user wants to only export task click on export task checkbox
- Provided buttons to manually import or export task

## Hubspot Account1

Hubspot App ID \*\*\*\*\*

Default Instance ☒

Contacts Companies Deals Task Note Emails

Sync Task ☒  
Import Task ☒  
Export Task ☒

Modified Date for Task 1613638252001

Import Task

Export Task

### 7. Note Synchronization settings

If the sync note checkbox is enabled then only the user can import/export notes between odoo and hubspot.

- If user wants to only import note click on import note checkbox
- If user wants to only export note click on export note checkbox
- Provided buttons to manually import or export note



## Hubspot Account1

Hubspot App ID \*\*\*\*\*

Default Instance ☒

Contacts Companies Deals Task Note Emails

Sync Note ☒  
Import Note ☒  
Export Note ☐

Modified Date for Note 1613628950264

Import Note

Export Note

### 8. Email Synchronization settings

If the sync email checkbox is enabled then only the user can import/export email between odoo and hubspot.

- If user wants to only import email click on import email checkbox
- If user wants to only export email click on export email checkbox
- Provided buttons to manually import or export email

# Hubspot Account1

Hubspot App ID\*\*\*\*\*

Default Instance☒

- ContactsCompaniesDealsTaskNoteEmails

- Sync Email☒
- Import Email☒
- Export Email☐

Modified Date for Email

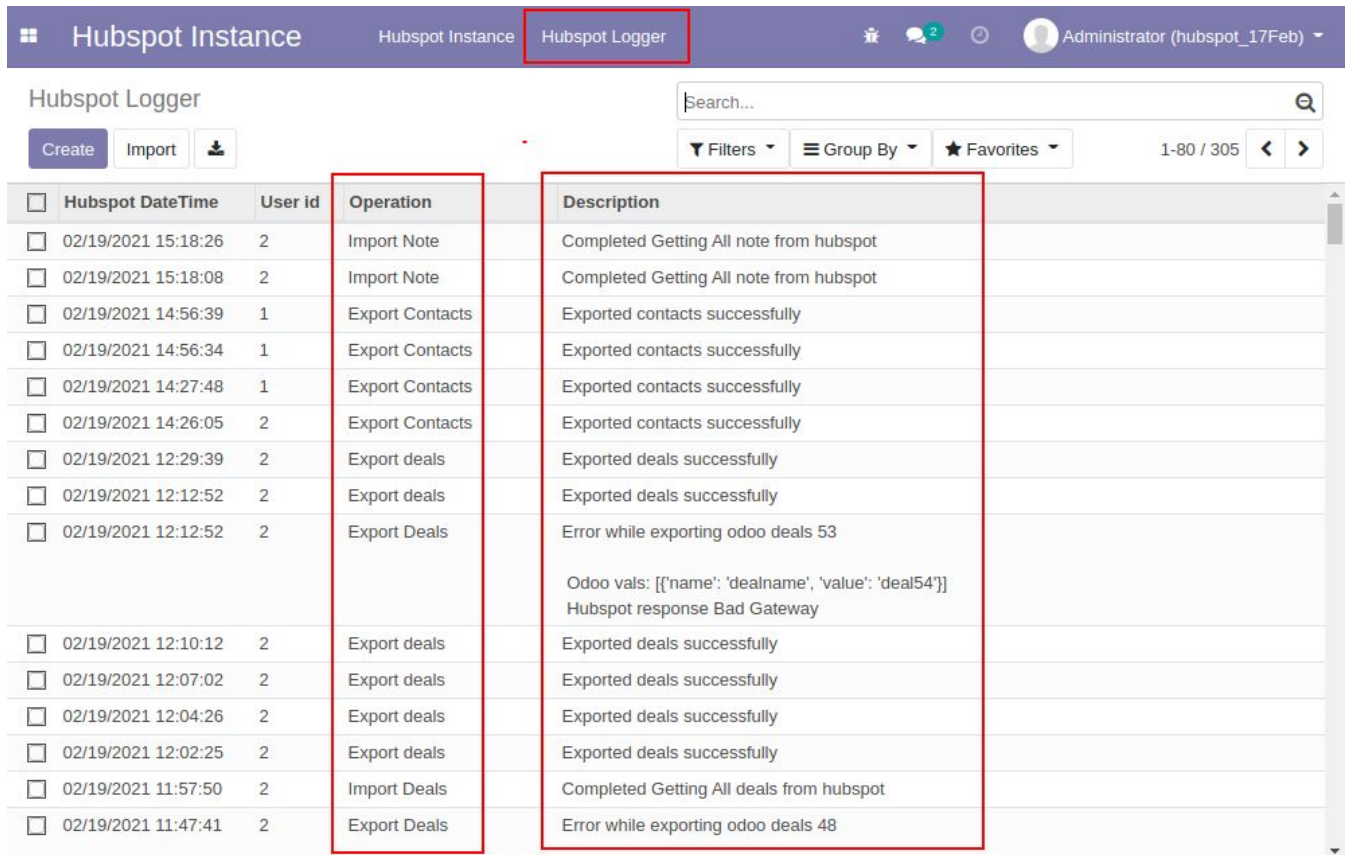
1613637883054

 Import Email

 Export Email

## C) Hubspot synchronization Log

Maintain every synchronization log success/fail so user can check exact reason if fail



<input type="checkbox"/>	Hubspot DateTime	User id	Operation	Description
<input type="checkbox"/>	02/19/2021 15:18:26	2	Import Note	Completed Getting All note from hubspot
<input type="checkbox"/>	02/19/2021 15:18:08	2	Import Note	Completed Getting All note from hubspot
<input type="checkbox"/>	02/19/2021 14:56:39	1	Export Contacts	Exported contacts successfully
<input type="checkbox"/>	02/19/2021 14:56:34	1	Export Contacts	Exported contacts successfully
<input type="checkbox"/>	02/19/2021 14:27:48	1	Export Contacts	Exported contacts successfully
<input type="checkbox"/>	02/19/2021 14:26:05	2	Export Contacts	Exported contacts successfully
<input type="checkbox"/>	02/19/2021 12:29:39	2	Export deals	Exported deals successfully
<input type="checkbox"/>	02/19/2021 12:12:52	2	Export deals	Exported deals successfully
<input type="checkbox"/>	02/19/2021 12:12:52	2	Export Deals	Error while exporting odoo deals 53  Odoo vals: [{"name": "dealname", "value": "deal54"}] Hubspot response Bad Gateway
<input type="checkbox"/>	02/19/2021 12:10:12	2	Export deals	Exported deals successfully
<input type="checkbox"/>	02/19/2021 12:07:02	2	Export deals	Exported deals successfully
<input type="checkbox"/>	02/19/2021 12:04:26	2	Export deals	Exported deals successfully
<input type="checkbox"/>	02/19/2021 12:02:25	2	Export deals	Exported deals successfully
<input type="checkbox"/>	02/19/2021 11:57:50	2	Import Deals	Completed Getting All deals from hubspot
<input type="checkbox"/>	02/19/2021 11:47:41	2	Export Deals	Error while exporting odoo deals 48

## D) Maintain automation by using scheduler

Added scheduler for every activity so all import export functionality will automatically execute.

Settings

General Settings

Users & Companies

Translations

Technical

2

Administrator (hubspot\_17Feb)

Scheduled Actions

Scheduled Action

hubspot x

All x

Search...

Filters

Group By

Favorites

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<input type="checkbox"/>	Priority	Action Name	Next Execution Date	Interval Number	Interval Unit	Number of Calls	Active
<input type="checkbox"/>	5	Export Companies To Hubspot	02/17/2021 18:15:19	2	Hours	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Export Contacts To Hubspot	02/17/2021 18:15:19	95	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Export Deals To Hubspot	02/18/2021 09:59:20	95	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Export Email To Hubspot	02/18/2021 09:59:20	95	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Export Note To Hubspot	02/18/2021 09:59:20	95	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Export Task To Hubspot	02/18/2021 09:59:20	95	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Import Companies From Hubspot	02/17/2021 18:15:19	1	Hours	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Import Contacts From Hubspot	02/17/2021 18:15:19	155	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Import Deals From Hubspot	02/18/2021 09:59:20	155	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Import Email From Hubspot	02/18/2021 09:59:20	155	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Import Note From Hubspot	02/18/2021 09:59:20	155	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	Import Task From Hubspot	02/18/2021 09:59:20	155	Minutes	-1	<input type="checkbox"/>
<input type="checkbox"/>	5	OdooHubspot - Users Auto Sync	02/17/2021 18:15:19	1	Days	-1	<input type="checkbox"/>

## E) Import/Export Contact

Added hubspot Id and Instance name so users can understand the current record is connected to which instance. Also we have maintained company and contact association(that is if any company is assigned then that company will also download)

After synchronization if any change in contact records either in odoo or hubspot that change will reflect to other system by using scheduler or user can manually import/export contacts between two systems



Added hubspot Id and Instance name so users can understand the current record is connected to which instance. Also we have maintained company and contact association(that is if any contact is assigned then that contact will also download)

After synchronization if any change in company records either in Odoo or hubspot that change will reflect to other system by using scheduler or user can manually import/export contacts between two systems

Contacts

ContactsConfiguration

2

Administrator (hubspot\_17Feb)

Contacts / Pragmatic Techsoft Pvt Ltd

EditCreate

Action

1 / 2

0 Opportunities

0 Meetings

0 Sales

\$ 0.00 Invoiced

Pragmatic Techsoft Pvt Ltd

Company Address

OFFICE NO 15, SUN SHREE WOODS  
COMMERCIAL PREMISES, NIBM RD  
NIBM  
Pune Maharashtra (IN) 411048  
India

Phone

(20) 41201035 SMS

Mobile

Email

Website Link

http://pragtech.co.in

Tags

Tax ID

Hubspot Id

5407852900

Hubspot Instance Name

Hubspot Account1

Contacts & Addresses

Sales & Purchase

Invoicing

Internal Notes

Trupti Doiphode  
trupti.doiphode@pragtech.co.in  
Mobile: 98653278

Related contact

You have 87 days left in your Developer Test Portal trial.

Menu

Pragmatic Techsoft Pvt Ltd  
pragtech.co.in

Note Email Call Log Task Meet

About this company

Name  
Pragmatic Techsoft Pvt Ltd

Company domain name  
pragtech.co.in

Industry

Activity Notes Emails More

Filter by: Filter activity (8/10) All users

February 2021

Email Feb 18, 2021 at 2:46 PM GMT+5:30  
dsfsdf

Trupti Doiphode  
to Trupti Doiphode

Reply Forward

Opens: 1 Clicks: 0

dsff  
dff

Email Feb 18, 2021 at 2:14 PM GMT+5:30  
test1\_email

Trupti Doiphode  
to Trupti Doiphode

Reply Forward

Opens: 1 Clicks: 0

Contacts (1)

Trupti Doiphode  
Pragmatic Techsoft Pvt Ltd  
trupti.doiphode@pra...

View all in filtered view

Deals (0)

Track the revenue opportunities associated with this record.

Tickets (0)

Track the customer requests associated with this record.

Attachments

Help

## G) Import/Export Deal

Added hubspot Id and Instance name so users can understand the current record is connected to which instance.

After synchronization if any change like changes in amount, name or other fields either in Odoo or hubspot that change will reflect to other systems. If any company is set to the deal then we pick that company as a contact for deal creation in odoo. If any contact is set to the deal then we pick that contact as a contact for deal creation in odoo. If both company and contacts are set then we select first contact.



Leads / Create website in odoo

Edit Create Action 1 / 50

### Create website in odoo

30.00 %

**Customer** Pragmatic Techsoft Pvt Ltd, Trupti Doiphode  
**Company Name** Pragmatic Techsoft Pvt Ltd  
**Address** OFFICE NO 15, SUN SHREE WOODS COMMERCIAL PREMISES, NIBM RD  
NIBM  
Pune Maharashtra (IN) 411048  
India  
**Website Language**  
**Salesperson** Trupti  
**Sales Team**

**Contact Name** Trupti Doiphode  
**Email** trupti.doiphode@pragtech.co.in  
**Email cc**  
**Job Position**  
**Phone**  
**Mobile** 98653278 SMS

**Priority** ☆☆☆  
**Tags**

Internal Notes Extra Info Hubspot Info

**Hubspot Id** 4194719303  
**Hubspot Instance Name** Hubspot Account1  
**Hubspot Deal Stage** Appointment scheduled  
**Hubspot Deal Type** New Business

### \$50,000 Create website in odoo

Close Date: 02/28/2021  
Stage: Appointment sched...

Note Email Call Log Task Meet

#### About this deal

Amount  
\$50,000.00  
Deal stage  
Appointment scheduled  
Close date  
02/28/2021

Activity Notes Emails Calls More

Filter by: Filter activity (10/12) All users

February 2021

**Deal activity** Feb 19, 2021 at 4:28 PM GMT+5:30  
Trupti Doiphode moved deal to Appointment scheduled. View details

**Deal created** Feb 19, 2021 at 4:28 PM GMT+5:30  
This deal was created by Trupti Doiphode

Pragmatic Techsoft Pvt Ltd  
pragtech.co.in  
(20) 41201035

Tickets (0)  
Track the customer requests associated with this record.

Contacts (1)  
Trupti Doiphode  
Pragmatic Techsoft Pvt Ltd  
trupti.doiphode@pra...

Help



## H) Import/Export Task Activity

Added hubspot Id and Instance name so users can understand the current record is connected to which instance.

After synchronization if any change in Task Activity records either in Odoo or hubspot that change will reflect to other system

**Contacts** | Configuration

Contacts / Pragmatic Techsoft Pvt Ltd, Trupti Doiphode

Edit Create Action

1 / 3

<b>Company Address</b>	OFFICE NO 15, SUN SHREE WOODS COMMERCIAL PREMISES, NIBM RD NIBM Pune Maharashtra (IN) 411048 India	<b>Job Position</b>	
<b>Tax ID</b>		<b>Phone</b>	98653278 SMS
<b>Hubspot Id</b>	151	<b>Mobile</b>	
<b>Hubspot Instance Name</b>	Hubspot Account1	<b>Email</b>	trupti.doiphode@pragtech.co.in
		<b>Website Link</b>	
		<b>Title</b>	
		<b>Tags</b>	

Contacts & Addresses Sales & Purchase Invoicing Internal Notes

Send message Log note Schedule activity

0 Following 2

Planned activities

**Due in 5 days:** "Website development planning" for Trupti

Schedule a meeting to plan odoo website development

✓ Mark Done ✎ Edit ✕ Cancel

You have 87 days left in your Developer Test Portal trial.

Menu

Activity Notes Emails More

Filter by: Filter activity (21/25) All users

Upcoming

Task

Website development planning

Assigned to

Trupti Doiphode  
(trupti.doiphode@pragtech.co.in)

Due date

02/24/2021 8:00 AM

Type Priority

To-do High

Reminder Queue

No reminder None

Company (1)

Pragmatic Techsoft Pvt Ltd  
pragtech.co.in  
(20) 41201035

Deals (1)

\$50,000.00 Create website in odoo

Stage: Appointment scheduled

Close date: February 28, 2021

Help

View all in filtered view

Trupti Doiphode  
Pragmatic Techsoft Pvt Ltd

Note Email Call Log Task

Meet

About this contact

First name  
Trupti

Last name  
Doiphode

## I) Imported Notes Sample

Added hubspot Id and Instance name so users can understand the current record is connected to which instance.

After synchronization if any change in Notes records either in Odoo or hubspot that change will reflect to other system

Contacts

Contacts / Pragmatic Techsoft Pvt Ltd, Trupti Doiphode

Edit Create Action

1 / 3

TAX ID		Tags
Hubspot Id	151	
Hubspot Instance Name	Hubspot Account1	

Contacts & Addresses Sales & Purchase Invoicing Internal Notes

Send message Log note Schedule activity

0 Following 2

Planned activities

Due in 5 days: "Website development planning" for Trupti

Schedule a meeting to plan odoo website development

Mark Done Edit Cancel

Today

Note by Administrator - now

Need to divide development in multiple task

Yesterday

Menu

Contacts

Trupti Doiphode

Pragmatic Techsoft Pvt Ltd

Note Email Call Log Task Meet

About this contact

First name

Trupti

Activity Notes Emails Calls More

Create Note

February 2021

Note Feb 19, 2021 at 4:38 PM GMT+5:30

Need to divide development in multiple task

Trupti Doiphode left a note

Add comment

Company (1)

Pragmatic Techsoft Pvt Ltd

pragtech.co.in

(20) 41201035

Deals (1)

\$50,000.00 Create website in odoo

Stage: Appointment scheduled

Close date: February

Help

## J) Imported Email Sample

Added hubspot Id and Instance name so users can understand the current record is connected to which instance.

After synchronization if any change in Notes records either in Odoo or hubspot that change will reflect to other system

Settings

General SettingsUsers & CompaniesTranslationsTechnical

Administrator (hubspot\_17Feb)

Emails / Need to send email for planning

EditCreate

Action

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Need to send email for planning

by Administrator on 02/19/2021 05:30:00

Reply

From

trupti.doiphode@pragtech.co.in

To

trupti.doiphode@pragtech.co.in

To (Partners)

Cc

Reply-To

trupti.doiphode@pragtech.co.in

Scheduled Send Date

Hubspot Id

11188746047

Hubspot Instance Name

Hubspot Account1

Body

Advanced

Attachments

Status

Auto Delete

Is Notification

Type

Outgoing mail server

Related Document Model

res.partner

Related Document ID

47

Headers

Message-Id

<618052403291089.1613734955.934799432754517-openerp-47-res.partner@pragmatic-desktop>

References

Inbound Mail Server

Headers


You have 87 days left in your Developer Test Portal trial.

Menu ▾

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---

< Contacts 👤    Actions ▾



**Trupti Doiphode** ✎  
Pragmatic Techsoft Pvt Ltd

Note Email Call Log Task

Meet

▼ About this contact

First name  
Trupti

Last name  
Doiphode

Activity    Notes    Emails    More ▾

Thread email replies    Log Email    Create Email

February 2021

✉ Email    Feb 19, 2021 at 5:11 PM GMT+5:30

**Need to send email for planning**

Trupti Doiphode to Trupti Doiphode ▾    Reply    Forward

● Sent


Hello,

For website development need to schedule meeting.

Thanks & Regards

[See less](#)

▼ Company (1) +


 **Pragmatic Techsoft Pvt Ltd**  
pragtech.co.in  
(20) 41201035

▼ Deals (1) +

**\$50,000.00 Create website in odoo**

Stage: **Appointment scheduled** ▾

Close date: February 28, 2021

 Help

[View all in filtered view](#)

For any further queries / customizations please contact Pragmatic Techsoft Pvt. Ltd.