

PROCESS DOCUMENTATION AND TRAINING

ARC#6441 – CSR INTEGRATION WITH HUBSPOT

Nam Le 2021-2022

Business case:

Advanced Machine and Engineering and HENNIG have external sales engineers using HubSpot to track Deals. They would like to integrate with HubSpot with GSS so Deals in HubSpot and quote information/Status is updates back and forth as described in the proposed process flows below. The integration covers the following flows:

1. Deal is created in HubSpot
2. Deal is edited in HubSpot
3. Deal is from a new Company in HubSpot
4. Deal associates with a new Contact in HubSpot
5. Opportunity is created in Global Shop
6. Opportunity is edited and saved in Global Shop
7. Opportunity is from a new Customer in Global Shop
8. Opportunity associates with a new Contact in Global Shop
9. New Customer is added in Global Shop

Solution:

Create an automated program (ARC 6441) running in the DB Server to perform the flows listed above. The program is attached into Online Update and will run with Online Update's set interval. 6441 is 100% automated, therefore, Global Shop users do not need to do any extra work to utilize this Integration.

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I. FIELD MAPPINGS

1. HubSpot Deal to Global Shop Opportunity

HubSpot Deal	GlobalShop Opportunity
Deal ID (unique, primary key)	Description ([DealID] Deal Name)
Deal Name	Description ([DealID] Deal Name)
Amount, replaced with "Expected Revenue"	Expected Revenue
Deal Owner	Salesperson
Deal Stage	Status
Create Date	Creation Date
Close Date	Expiration Date
Business Unit	Funnel
Business Unit (values)	Internal Assignment
Probability	Probability
Company	Customer
Original Source Type	Lead Source
Deal Description	Notes
Bill To Address	Address
City	City
State	State
Country	Country
Zip Code	Zip Code
Contacts	Contact
Contact Phone	Phone
Contact Email	Email

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Opportunities

☐ Show Closed
 All Opportunities
 Name
 Find

Drag a column header here to group by that column

Company ID	OID	Status	Lead Source	Description	Exp
02124	7380	3-Quote Cr...	Direct Traff...	[7854306376] Test Ethan 1	
00049	7379	2-Gathering...	Organic Sea...	[7854419628] Nam TEST 1	
02131	7378	3-Quote Cr...	Referrals	[7820782874] Test 123 Update	
02124	7377	3-Quote Cr...	Other Camp...	[7821917503] Ethan Test 123	
00050	7376	3-Quote Cr...	Offline Sour...	[7811296807] The Greyson ...	
02124	7375	5-Followed-...	Other Camp...	[7810292902] Feb Sales Opp	
17555	7374	5-Followed-...	Offline Sour...	[7729666331] This is a TEST ...	
00049	7373	3-Quote Cr...	Other Camp...	[7634636687] DEAL FROM G...	
17555	7372	3-Quote Cr...	Offline Sour...	[7634657071] [7634657071]...	
00077	7371			FEDERAL MOGUL OPP JAN	
02132	7370	3-Quote Cr...	Offline Sour...	[7592247641] ABCBAKERY J...	
00049	7369	3-Quote Cr...	Offline Sour...	AME HEART JAN 17	
00050	7368	3-Quote Cr...		ACME IND Jan 17	
00050	7367		Organic Soc...	Deal Name Update	
00049	7366	3-Quote Cr...		Jan 17 Test no2	
03878	7365	3-Quote Cr...	Organic Soc...	Jan 17 Opp from GSS	
17555	7364	3-Quote Cr...	Offline Sour...	[7589315845] Jan 17 Test 1	
03686	7363				
13260	7362	3-Quote Cr...		sales sales 10%	
17555	7361	3-Quote Cr...	Email Marke...	[7533995011] A DEAL WITH ...	
02982	7360			3M SOURCING JAN OPP	
17555	7359			SALES JAN 14	
01711	7358	3-Quote Cr...		Opp From GSS Jan 14	
01711	7357	3-Quote Cr...	Paid Social ...	Opp from GSS Jan 14	
02126	7356	3-Quote Cr...	Other Camp...	[7533378961] Test Co No.3 j...	

Opportunity Information

OID: 7378 [7820782874] Test 123 Update

Internal Assignment: Brock Shattuck
 Expected Revenue: \$111,222,333.00

Type: Existing Business
 Status: 3-Quote Created

Salesperson:
 Projected Close Date: 2/28/2022

Company: TEST 2 INC. - 102131 (C)
 Ship To:

Contact:

Opportunity Group:
 Workflow:

Funnel: Apron/Roll-up Covers
 Probability: 4-Quote Sent (50%)

Lead Source: Referrals

Creation Date: 2/4/2022
 Expiration Date: 2/28/2022

Quote:

Sales Order:

Deal information 23 properties

- Business Unit: Apron/Roll-up Covers
- Close date: 02/28/2022
- Create date: 02/04/2022
- Deal Description: New Notes
- Deal ID: 7820782874
- Deal Split Added: False
- Deal name: [7820782874] Test 123 Update
- Deal owner: ✓
- Deal type: New Business ✓
- Expected Revenue (NOT USED):
- Expected Revenues: \$111,222,333.00 ✓
- Forecast amount: ...

2. HubSpot Company to Global Shop Customer

HubSpot Company	GlobalShop Customer
Company ID	CustomerID
Name	Customer Name
Company Owner	Salesperson
Contact(s)	Primary Contact
Domain	Web Address
Phone Number	Phone
Street Address	Address
City	City
State	State
Country	Country
Zip Code	Zip Code

3. HubSpot Contact to Global Shop Contact

HubSpot Contact	GlobalShop Contact
First Name	First
Last Name	Last
Email (unique, Primary Key)	Email
Phone Number	Phone
Mobile Phone	Secondary Phone
Job Title	Job Title
Company Name	Company

4. Other maps

4.1. HS Deal Owners-GSS Salesperson

in table GCG_6441_DEALOWNER.[OWNERID] to [SALESPERSONCODE]

GCG_6441_DEALOWNER		
OWNERID	EMAIL	SALESPERSONCODE
50866442	CAMERON@HENNIG.AME.COM	M00
50866442	CAMERON@HENNIG.AME.COM	MMA
50866442	CAMERON@HENNIG.AME.COM	MMS
72993559	jimgabel@hennig.ame.com	O00
72993559	jimgabel@hennig.ame.com	OBR
84223847	stevegolonka@ame.com	T00
84223847	stevegolonka@ame.com	TJP
73014917	billbowen@hennig.ame.com	W00
73014917	billbowen@hennig.ame.com	WDG
73014917	billbowen@hennig.ame.com	WAM
136266678	nle@gssmail.com	NAM
136226848	ethan@ame.com	ETH

4.2.HS Deal Stages-GSS Opportunity Statuses

in table GCG_6441_STAGE_STTS. [STAGEID] to [STATUSID]

GCG_6441_Stage_Stts			
GS_STATUS	STATUSID	HS_STAGE	STAGEID
1-Initial Contact	32769	Initial Contact	13442735
2-Gathering Requirements	32770	Gathering Requirements	13442736
3-Synced to GSS	32771	Sync To GSS	11866488
4-Quote Created	32772	Quote Created	11864754
5-Quote Sent	32773	Quote Sent	13442737
6-Followed-up	32774	Followed-up	13442738
7-Closed Won	32775	Closed won	closedwon
8-Closed Lost	32776	Closed lost	closedlost

4.3.HS DealID – GSS Opportunity ID (OID)

In table GCG_6441_HS_QT_HRD_XREF. [HS_DEALID] to [QUOTE_NO]

GCG_6441_HS_QT_HDR_XREF	
QUOTE_NO	HS_DEALID
7380	7854306376
7379	7854419628
7377	7821917503
7378	7820782874
7376	7811296807
7375	7810292902
7374	7729666331
7373	7634636687
7372	7634657071

4.4.HS Company ID – GSS Customer ID

In table GCG_6441_HS_CUSTOMER_REF. [HS_COMP_ID] to [COMP_ID]

GCG_6441_HS_CUSTOMER_REF	
COMP_ID	HS_COMP_ID
102138	7870190986
102137	7869853860
999999	7868161446
102124	7824915242
000077	7687049219

4.5.Business Unit – Internal Assignment

AME

If BU/Funnel = <u>Workholding</u>	then Internal Assignment = Colleen <u>Tryggestad</u>
If BU/Funnel = Fluid Power	then Internal Assignment = Becky Weed
If BU/Funnel = Machine Components	then Internal Assignment = Sandra McNeely
If BU/Funnel = Job Shop	then Internal Assignment = Michelle <u>Shervey</u>
If BU/Funnel = Tool Clamping	then Internal Assignment = Alicia Ortiz

HENNIG

If BU/Funnel = Chip Conveyor	then Internal Assignment = Don Kahler
If BU/Funnel = Coolant Filtration	then Internal Assignment = Don Kahler
If BU/Funnel = Coolant Tank	then Internal Assignment = Don Kahler
If BU/Funnel = Telescopic Steel Covers (TSC)	then Internal Assignment = Enoch <u>Sarabia</u>
If BU/Funnel = Bellow Covers	then Internal Assignment = Enoch <u>Sarabia</u>
If BU/Funnel = Apron/Roll-up Covers	then Internal Assignment = Brock Shattuck
If BU/Funnel = Walk-on/Pit Covers	then Internal Assignment = Brock Shattuck
If BU/Funnel = XY Shield (Face Shield)	then Internal Assignment = Brock Shattuck
If BU/Funnel = Cable Carriers	then Internal Assignment = Brock Shattuck
If BU/Funnel = Telescopic Springs	then Internal Assignment = Enoch <u>Sarabia</u>
If BU/Funnel = Wiper Systems (TSC)	then Internal Assignment = Enoch <u>Sarabia</u>
If BU/Funnel = Wiper Systems (Other)	then Internal Assignment = Enoch <u>Sarabia</u>
If BU/Funnel = Machine Enclosures	then Internal Assignment = Ken Davis Jr.
If BU/Funnel = Generator Enclosures and Fuel Tanks	then Internal Assignment = blank.
If BU/Funnel = Machine Roof Bellow Covers	then Internal Assignment = Brock Shattuck
If BU/Funnel = Lift-Table Bellows	then Internal Assignment = Enoch <u>Sarabia</u>
If BU/Funnel = Platforms/Stairs/Guarding/Fencing	then Internal Assignment = Ken Davis Jr.
If BU/Funnel = Service & Repair	then Internal Assignment = Enoch <u>Sarabia</u>

FLows DETAIL

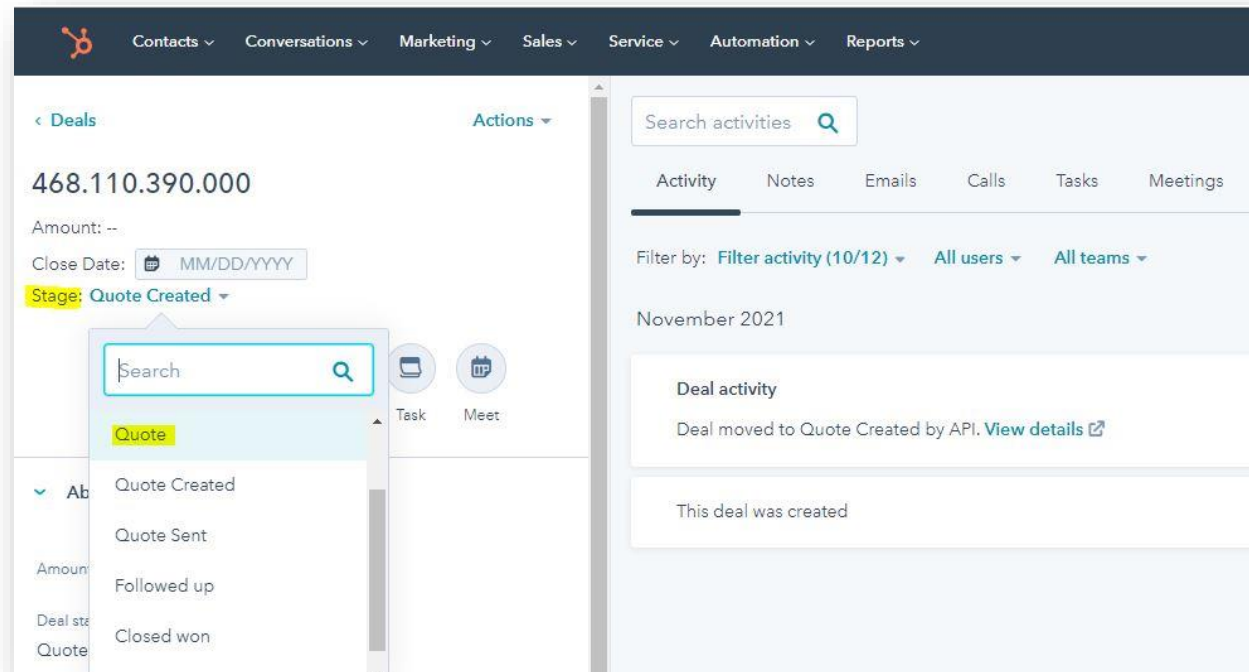
1. HubSpot Deals to Global Shop Quote

The program will look for any Deals in HubSpot that are recently created or edited and sync them into GSS.

- Flow 1: If the Deal is new, it will be created as a new Opportunity.
- Flow 2: If the Deal exists, it will be updated with current data.

In the case that the Company and/or Contact associated to the Deal do not exist in Global Shop:

- Flow 3: the Company will be created in Global Shop as a new Customer.
- Flow 4: the Contact will be created and added as a new Customer Contact.



- Deals are synced regardless of Deal Stage -

2. Global Shop Opportunity to HubSpot Deals

The program will look for any newly-created and recently-edited Opportunities in CRM to sync to HubSpot. No further action is required from Global Shop users.

- Flow 5: If the Opportunity is new, it will be created as a new Deal in HubSpot
- Flow 6: If the Opportunity is edited, the program will update the related Deal in HubSpot.
- Flow 7: New Customer will be created in HubSpot as a new Company
- Flow 8: New Contact will be created in HubSpot and assigned to the Company
- Flow 9: Any newly-created Customer in GSS will be synced to HS. This is one-way only. New Companies/Prospects in HS are only synced via transactions (Deals)

II. SETUP IN GLOBAL SHOP

1. System Support > Administration > Company Options (Standard) > Accounts Receivable Options
Option for “Automatically Number Customers and Prospect” need to be turned on

Accounts Receivable Options (Standard)

Company Name: ADVANCED MACHINE & ENGINEERING

Fiscal Year Month End: 12

General Payment Terms: NET30

☐ Allow Terms Discount on Freight

☐ Allow Terms Discount on Taxes

☐ Exclude Terms Discount on Shipping Charges

☒ Print Credit

☒ General Ledger Used

☐ Automatically Number Customers and Prospects

☐ Do not Zero Fill Number to the Left of the Entered Number

Last Customer Number:

☐ Use Different Number Range For Prospects

Last Prospect Number:

☐ Require Input of Batch Target Amount

☒ Automatic Batch Numbering

Initial Batch Number R 3915

☐ Use Factor Processing

Due From Factor Account:

Credit Hold Password:

☐ Prohibit Customer Add From Customer Browser

☐ Override Exchange Rates in Cash Receipts

☐ Allow Entering Payments in the Base/Company Currency

☐ Use Shipment No as Packing List in Cash Receivable Batches

☐ Store Credit Card Numbers on Customers

☐ Copy Customer Master Data to Additional Ship-To

Default Carrier:

Service Type:

☐ Exclude Open Order Balances in Credit Limit Calculation

☐ Retrieve Tracking Consignment Invoice Number

OPTAR-OPTSR

OPTAR-070920.1212

2. System Support > Administration > Company Options (Standard) > Quoting Options Maintenance

Quote Number Generation must set to “N) Don’t ask – AUTO” and Current Quote Number must be entered.

Quoting Options Maintenance (Standard)

Save Exit

☒ Extend Quotes When Printing
☐ Print Item Taxes on Quote
☐ Total Extended Quotes
☐ Print Ship-to Address on Quote
☐ Print Item Due Dates on Quote
☐ Print Contact On Attention Line
☐ Populate Info 1 and Info 2 in Quote from Inventory
 Default Scrap % on Estimates (i.e. 5.00):
☐ Hide Won/Loss Button On Quote Header
☐ On Quote Lines, Accept Non-Inventory Parts
☐ Refresh Customer Data When Quote is Won
☐ Create Contract Part Pricing from Quote Won/Loss
☐ Do Not Update Quantity for Sales Order BOM Component Lines When Quote is Won
☐ Use Sub Line Features For Copy, Insert, and Save in Quick Quote Lines Screen
☐ Apply Parent Quantity to Copied Sub Lines

Quote Number Generation: N) Don't ask - AUTO

Initial or Current Quote Number: 0000111

Move Quote to Sales Order: Y

☐ Add Won Quote Lines to Existing Sales Order
☐ Don't Reprice Line Items In Quote Copy
☐ Ask Before Repricing when Quantity Changes
 Initial or Current Customer RFQ Number: 3999999
☐ Manually Number Customer RFQ
☐ Allow Zero Quantity on Quick Quote Lines
☐ Log Changes to Routers
 Days to Keep Logs:

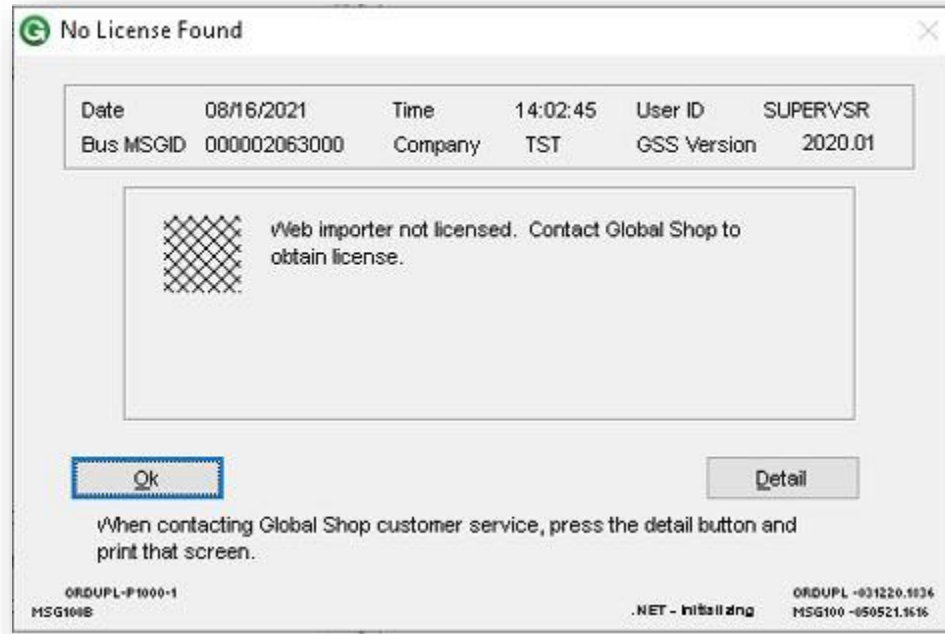
Options for Moving the Quote Through the System

Reference: YOUR RFQ
 Delivery: 3 WEEKS AGO
 Quote Expiration: NET 30
 FOB Point: ORIGIN

Quote User Fields

Header User Fields		Line User Fields	
Field Label	Prints	Field Label	Prints
User 1: USER FIELD 1	<input type="checkbox"/> Quote	User 1: USER FIELD 1	<input type="checkbox"/> Quote
User 2: USER FIELD 2	<input type="checkbox"/> Quote	User 2: USER FIELD 2	<input type="checkbox"/> Quote

3. Contact Global Shop team to get a license for Web Import



III. SETUP IN HUBSPOT

1. Custom Properties for Deal

- Expected Revenue (single-line text): Calculated Average for all Quote Lines
- GSSREF (single-line text): References for GSS Quote ID
- Deal Stage: add "Quote" and "Quote Created" stages in options

2. Custom Properties for Company

- GSSCompID (single-line text): References for existing GSS Customer ID

IV. MASTER DATA IMPORT

1. Cross-Reference for Existing GSS Customer – HS Companies

2. Cross-Reference for Existing Salesperson – Deal owner

Before activate the integration, cross-references for existing entities listed above need to be input into related Database tables. See section VI for more information.

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	A	B	F	G	J
1	Company ID	Company name	Phone Number	City	GSSCompID
2	6976662099	PROGRESS MACHINE AND TOOL INC	2317983410	SPRING LAKE	17784
3	6976899852	RTI CLARO INC	4507862001		14291
4	6976693879	HITACHI ASTEMO OHIO MFG INC	7409651133	SUNBURY	101934
5	6976713607	BORLA PERFORMANCE INDUSTRIES I	USA4239794000	JOHNSON CITY	101932
6	6976918384	WIRE SAW SOLUTIONS GROUP LLC	6106251490	BETHLEHEM	101930
7	6976680961	JOSTENS	6516884123	EAGAN	101929
8	6976703364	HUNT & HUNT LTD	7134132500	HOUSTON	101927
9	6976908924	KNT MFG.	5106517163	NEWARK	101926
10	6976958118	METAL ALLOY FABRICATION	5872298592		101924
11	6976929550	PLASTIC SUPPLIERS INC	6146198557	COLUMBUS	101923
12	6976703314	BRADKEN	2205194555455		101921
13	6976891437	AUTOMATION INDUSTRIAL INC.	3202191764	RAPID CITY	101920
14	6976703361	ROUSH INDUSTRIES	7342169422	FARMINGTON	101918
15	6976662061	WM W MEYER & SONS INC	8479180111	LIBERTYVILLE	101916

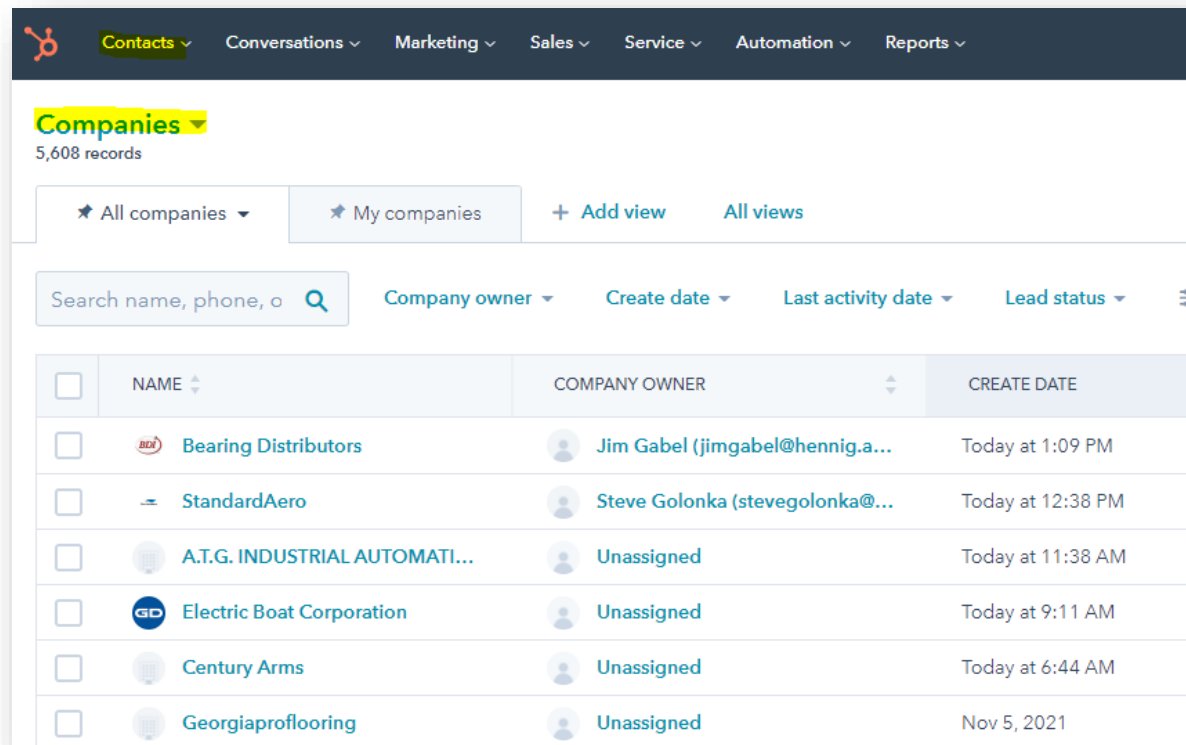
V. GSS-HS CROSS-REFERENCES FOR EXISTING ENTITIES

1. Cross-Reference for Existing GSS Customers-HS Companies













GSS Customers and HS Companies are linked by a Custom Field called “GSSCompID” in HS. This field carries the Customer Code in GSS toward HS.

This task can be done by either uploading the info into HS or filling in an Excel file. We can export all HS Companies into an Excel file, then add a Column for GSSCompID.

This cross-reference is applied to existing customers only. For new customers, the program will auto-generate the identifications.



The screenshot shows the HubSpot interface for the 'Companies' list. The top navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The 'Companies' section is active, showing 5,608 records. Below the header, there are view filters: 'All companies', 'My companies', and '+ Add view'. A search bar is present with the placeholder 'Search name, phone, o'. To the right of the search bar are filters for 'Company owner', 'Create date', 'Last activity date', and 'Lead status'. The table below has columns for 'NAME', 'COMPANY OWNER', and 'CREATE DATE'. The first two columns have a checkbox on the left. The table lists several companies, including 'Bearing Distributors', 'StandardAero', 'A.T.G. INDUSTRIAL AUTOMATI...', 'Electric Boat Corporation', 'Century Arms', and 'Georgiaproflooring'.

<input type="checkbox"/>	NAME	COMPANY OWNER	CREATE DATE
<input type="checkbox"/>	 Bearing Distributors	 Jim Gabel (jimgabel@hennig.a...	Today at 1:09 PM
<input type="checkbox"/>	 StandardAero	 Steve Golonka (stevegolonka@...	Today at 12:38 PM
<input type="checkbox"/>	 A.T.G. INDUSTRIAL AUTOMATI...	 Unassigned	Today at 11:38 AM
<input type="checkbox"/>	 Electric Boat Corporation	 Unassigned	Today at 9:11 AM
<input type="checkbox"/>	 Century Arms	 Unassigned	Today at 6:44 AM
<input type="checkbox"/>	 Georgiaproflooring	 Unassigned	Nov 5, 2021

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Potential Revenue - Machine D&B

Potential Revenue - Tool Clamping

Potential Revenue - Workholding

GSSComplD

Total open deal value
--

Rep

Target Account Owner(s)

[View all properties](#) [View property history](#)

Company name
WINDY CITY WIRE

✓ Company owner
Cameron Schubert

Country/Region
US

Create date
09/21/2021 1:00 PM CDT

Date of last meeting booked in meetings tool
--

✓ Description

First contact create date
--

First deal created date
--

✓ **GSSComplD**
WIN18

HubSpot team

✓ Industry

Is public

Key Account

Last Booked Meeting Date
--

Last Engagement Date

2. Cross-References for Existing Salesperson-Deal Owner

This info can be filled into a spreadsheet of 4 columns: Code, Salesperson, Email, HS Internal Value

Code and **Salesperson** can be found in the Quote entry screen (*please see screenshot*)

Email is the email for that salesperson used in HubSpot: **Settings** (*the Gear icon*) > **Users & Teams**

GSS-Salespersons and HS-Deal Owners do not need to be 1-to-1.

- You can link 4 salespersons into 1 HS-Owner. For example, "CS" , "E00" , "E01" , and "E02" are Cameron Schubert, which will link to the email cameron@ame.com in HS.
- Some salespersons do not need to have a HS account. For example, "JP" - Jim Park. When a quote is created with this salesperson, that quote will come to HS as a Deal without an Owner.
- Alternatively, you can choose a default Deal Owner for all those salespersons that are not in HS.

Open Quote Header Maintenance

Quote: 0406719 Customer: GID01 ShipTo ID: Language: USD Currency: USD

Bill To Address: ☐ Non US
 FIVES GIDDINGS & LEWIS
 2200 LITTON LANE
 Address 1:
 Address 2:
 Address 3:
 Address 4:
 Address 5:
 HEBRON KY 41048
 City/State/Zip
 US
 Country
 Attention:
 Contact Name: JACKIE LAMBIE
 Email: jackie.lambie@fivesgroup.com

Quote Date: 08/16/21 Due Date: 08/16/21 Reference: 2363229 Expiration: 30 DAYS Price Class: 0 Discount: 0.000

Sort 1: Sort 2: Location: Last Item No.: 001

Area: Branch: Sales Rep: E00 CAMERON SCHUBERT Comm Type: OEM Terms: NET 30

Carrier: UPSGCL Service Type: Ground Ship Via: DR5

Delivery: Freight Zone: Estimated Cartons: 1

Add Addr Comments Email Taxes Lines Notes User

Save Delete Print

Script 1 Script 2 Script 3

07E200-0750200A GAB IS ACTIVE

07E200-070720.1555

Select Salesperson

Browser: Select Salesperson Type-Ahead in column: Code Cache Data Simple Mode

Code	Salesperson
CS	CAMERON SCHUBERT
E00	E00 CAMERON SCHUBERT
E01	E01 CAMERON / JIM PARK
E02	E02 CAMERON / MACHINE ACCESS
G00	G00 RANDY JACOBSON
GAD	GADEN
HS	HOUSE ACCOUNT
JP	JIM PARK
MM	MM-HOUSE
O00	O00 JIM GABEL
RJ	RANDY JACOBSON
S00	S00 SAM SCHUBERT
T00	T00 STEVE GOLONKA
T01	T01 JIM PARK / STEVE GOLONKA
W00	W00 BILL BOWEN

In column: Code Include: results containing:

Filter Resultset Repopulate Results Export Results

Select Cancel

The Hubspot Contact Owner's Internal ID can be found in HS > **Settings** > **Properties** > search for "Contact Owner" > search by User > **Internal Value**

