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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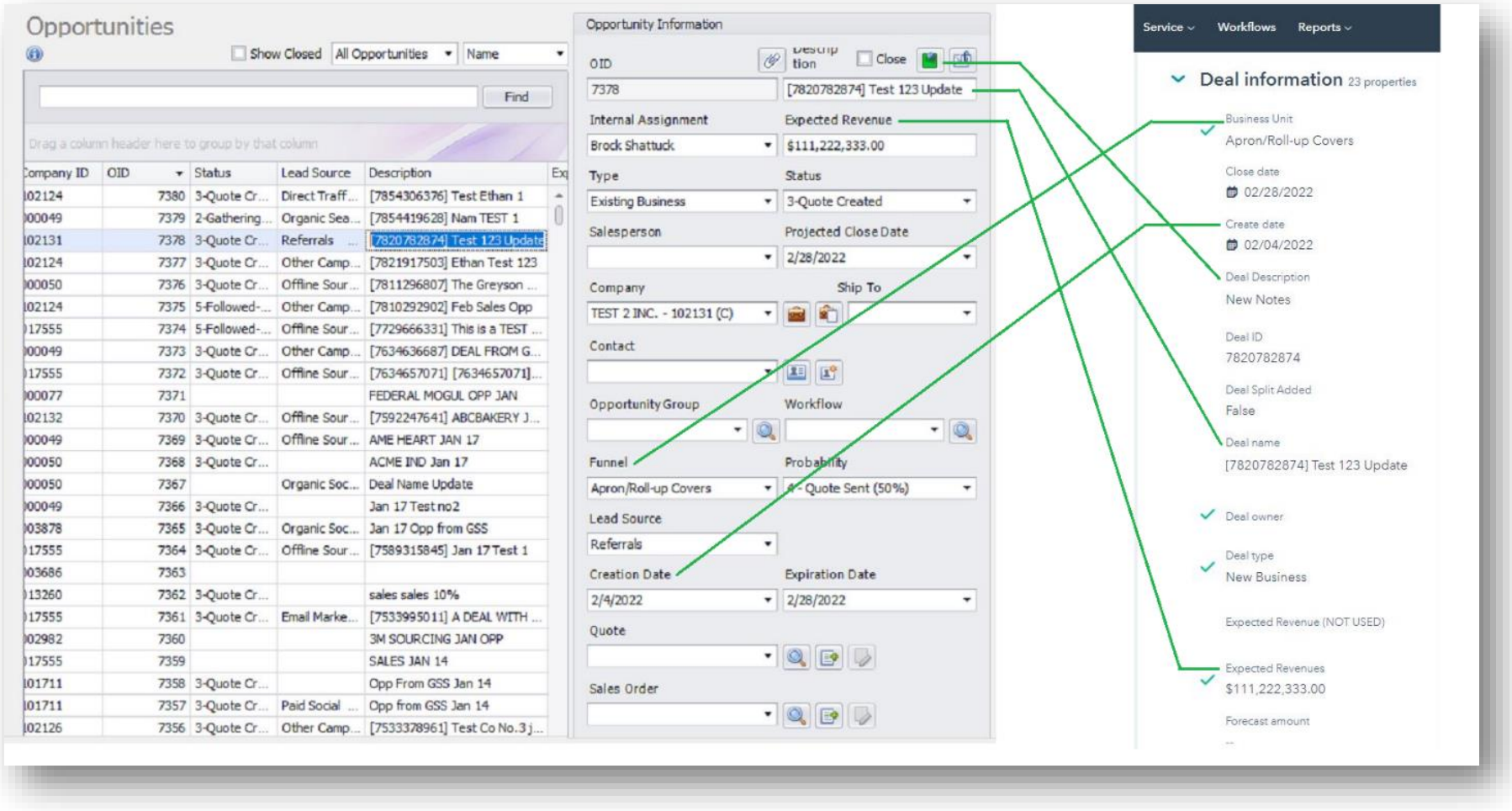
I. FIELD MAPPINGS

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


Opportunities
Show Closed
All Opportunities
Name
Find
Drag a column header here to group by that column
Company ID
OID
Status
Lead Source
Description
Opportunity Information
OID
Close
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
Service
Workflows
Reports
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	Wed 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)

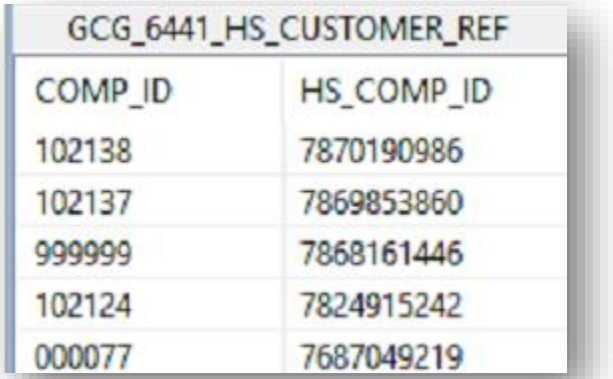
In table GCG_6441_HS_QT_HRD_XREF. [HS_DEALID] to [QUOTE_NO]

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 = Workholding	then Internal Assignment = Colleen Tryggestad
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 Shervey
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 Sarabia
If BU/Funnel = Bellow Covers	then Internal Assignment = Enoch Sarabia
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 Sarabia
If BU/Funnel = Wiper Systems (TSC)	then Internal Assignment = Enoch Sarabia
If BU/Funnel = Wiper Systems (Other)	then Internal Assignment = Enoch Sarabia
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 Sarabia
If BU/Funnel = Platforms/Stairs/Guarding/Fencing	then Internal Assignment = Ken Davis Jr.
If BU/Funnel = Service & Repair	then Internal Assignment = Enoch Sarabia

FLOWS DETAIL

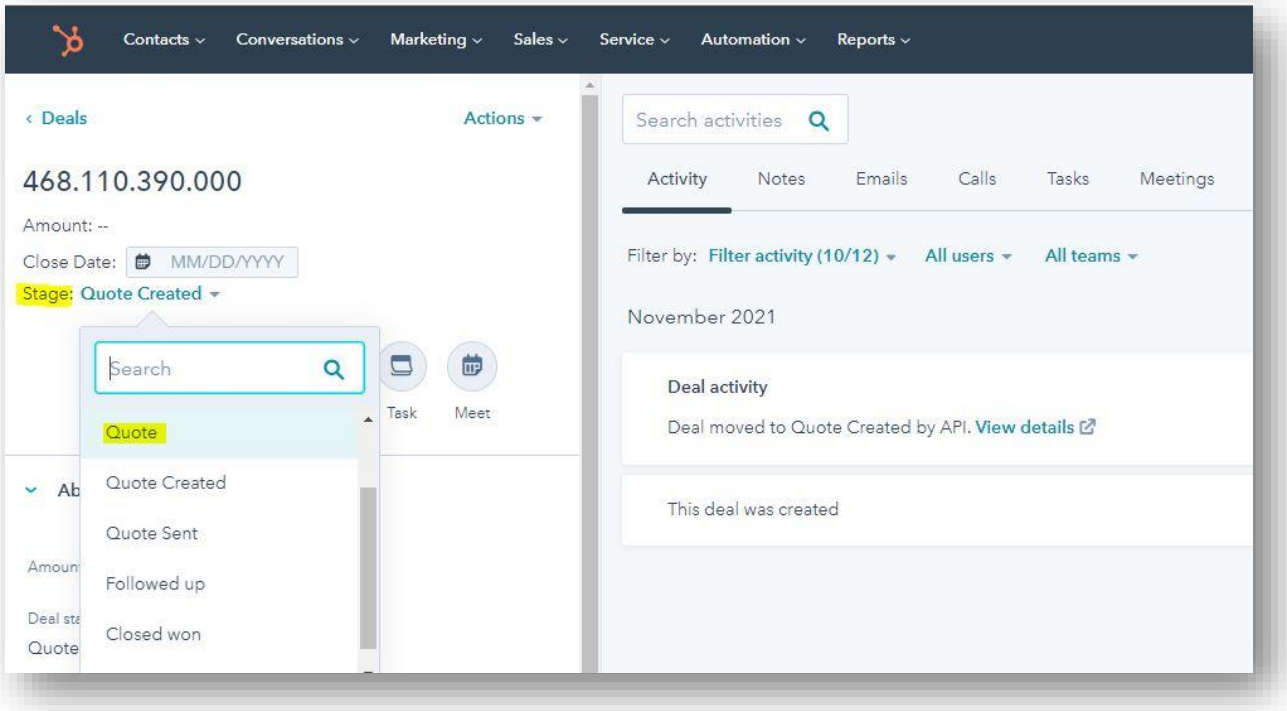
1. HubSpot Deals to Global Shop Quote

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

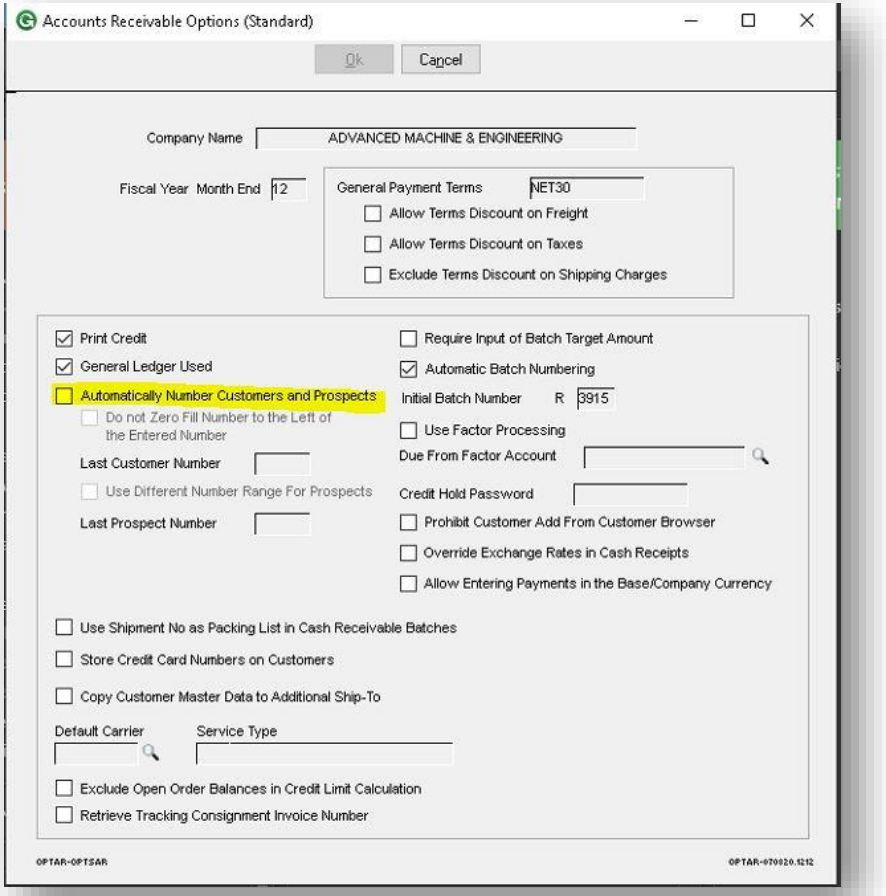
The program will look for any newly-created and recently-edited Opportunities in CRM to sync to HubSpot. No further action is required from Global Shop users.

- 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

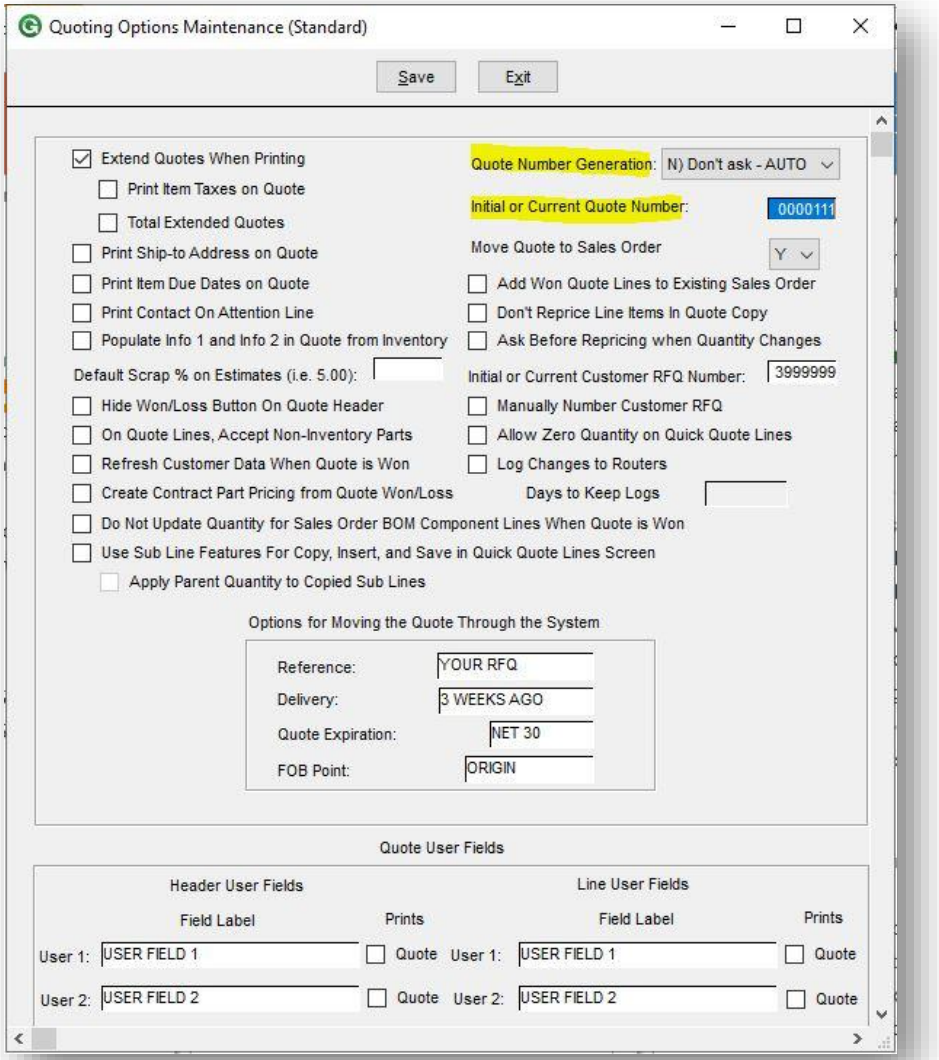
1. System Support > Administration > Company Options (Standard) > Accounts Receivable Options

Option for “Automatically Number Customers and Prospect” need to be turned on

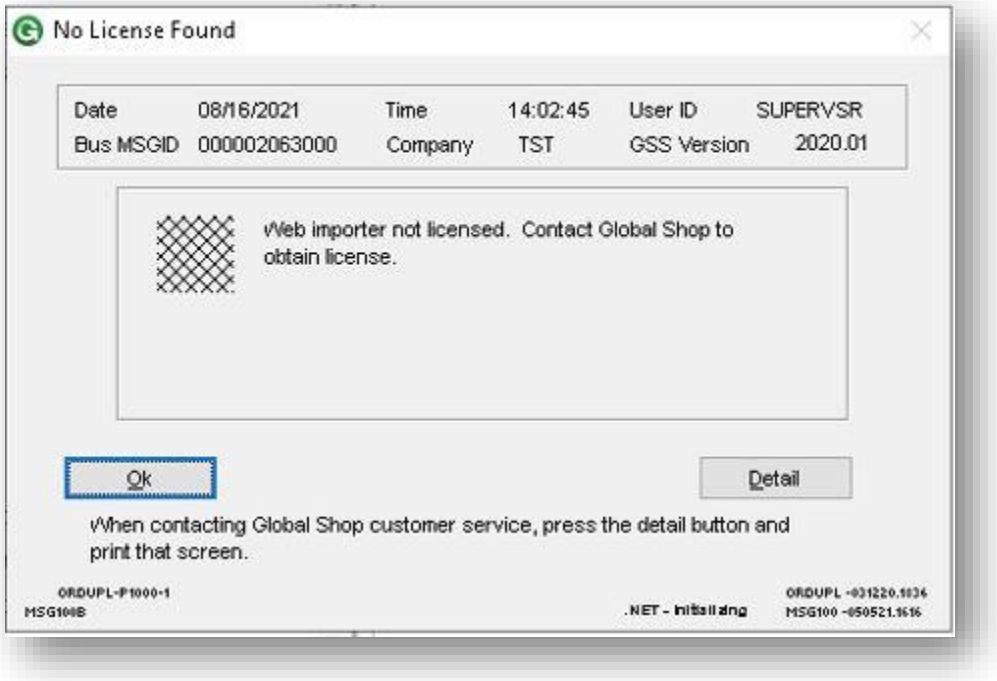


2. System Support > Administration > Company Options (Standard) > Quoting Options Maintenance

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



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.

	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

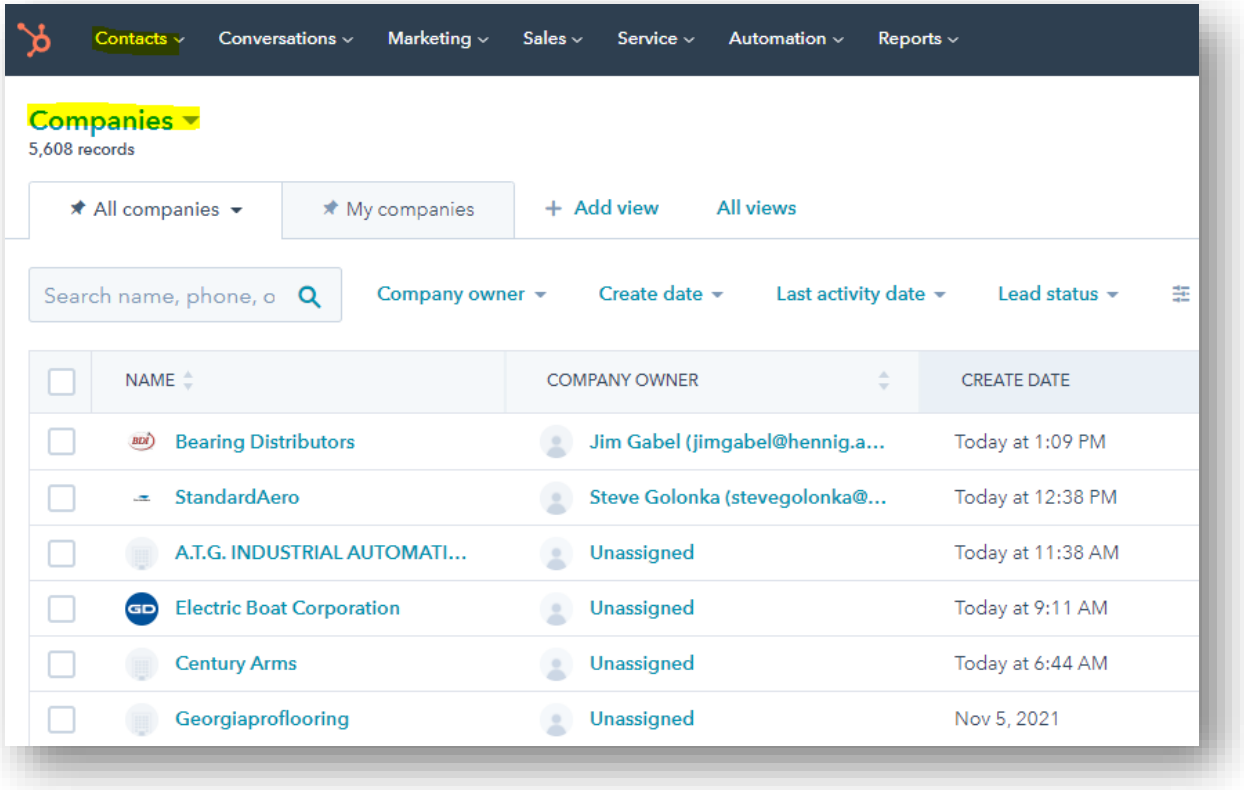
V. GSS-HS CROSS-REFERENCES FOR EXISTING ENTITIES

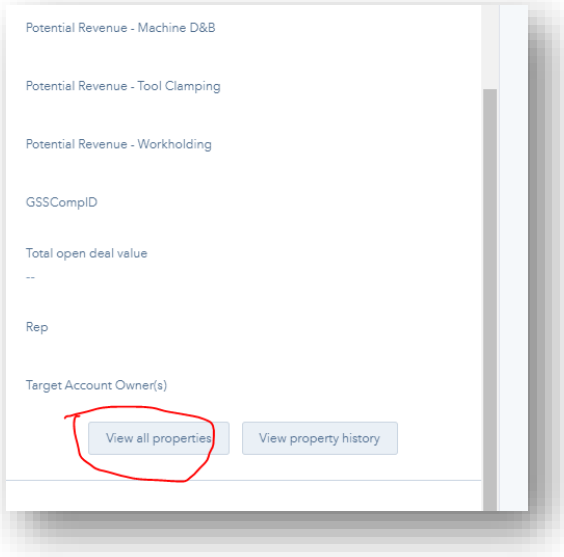
1. Cross-Reference for Existing GSS Customers-HS Companies

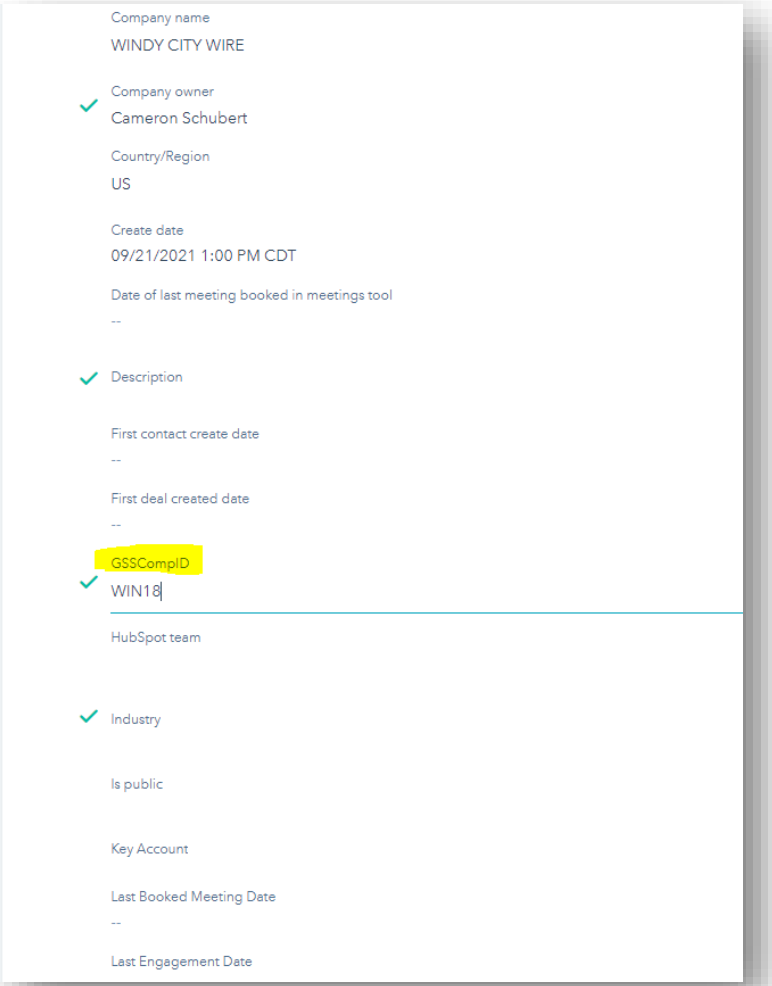
GSS Customers and HS Companies are linked by a Custom Field called “GSSCompID” in HS. This field carries the Customer Code in GSS toward HS.

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.



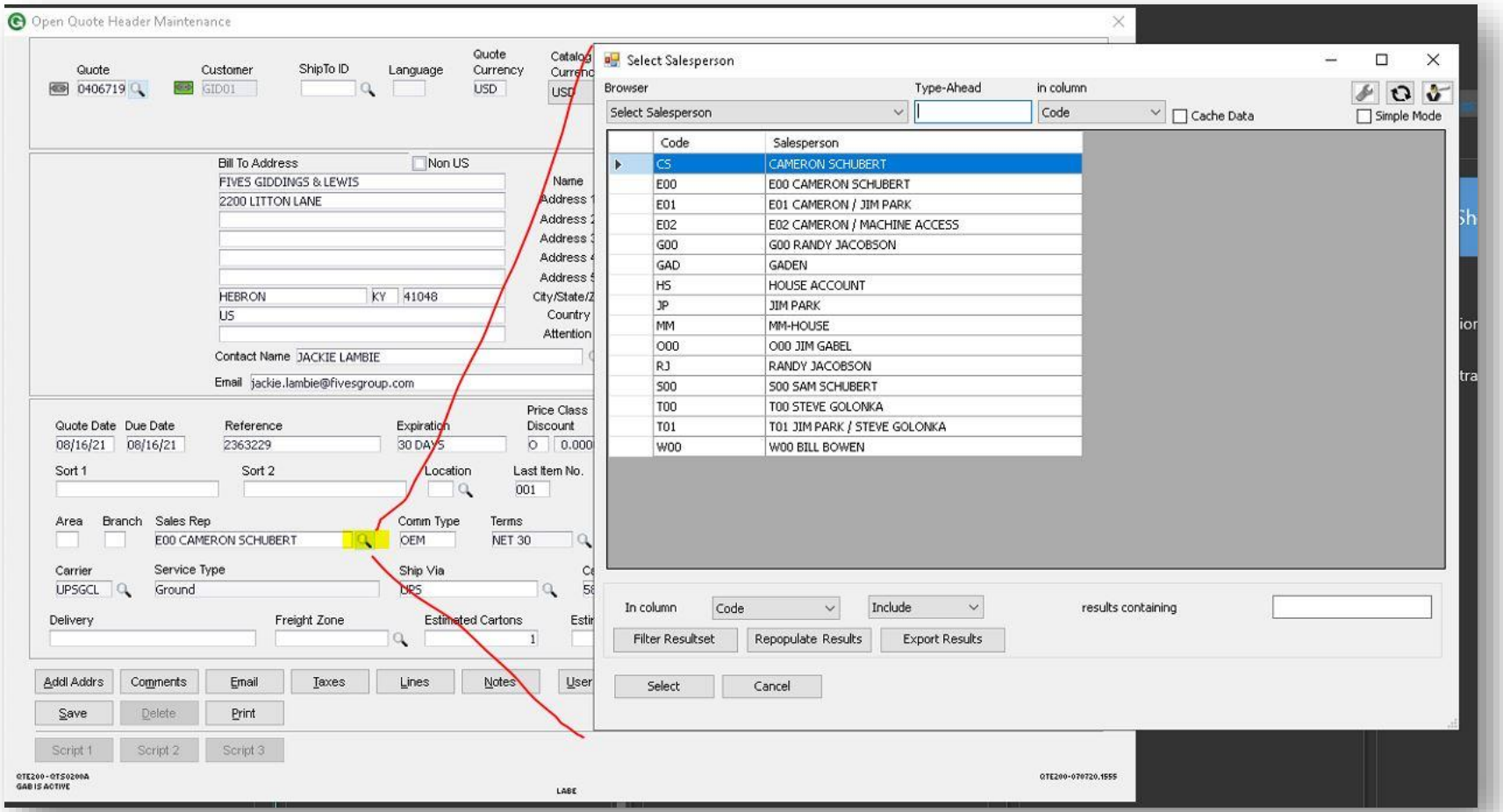
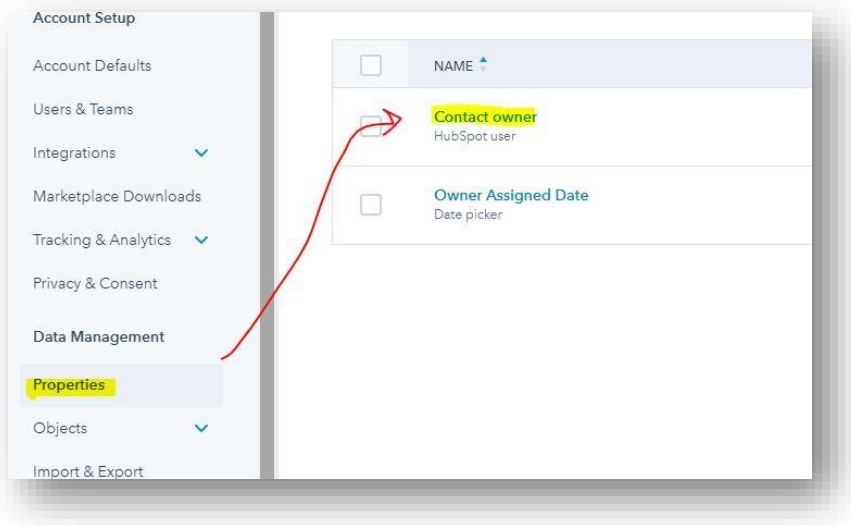
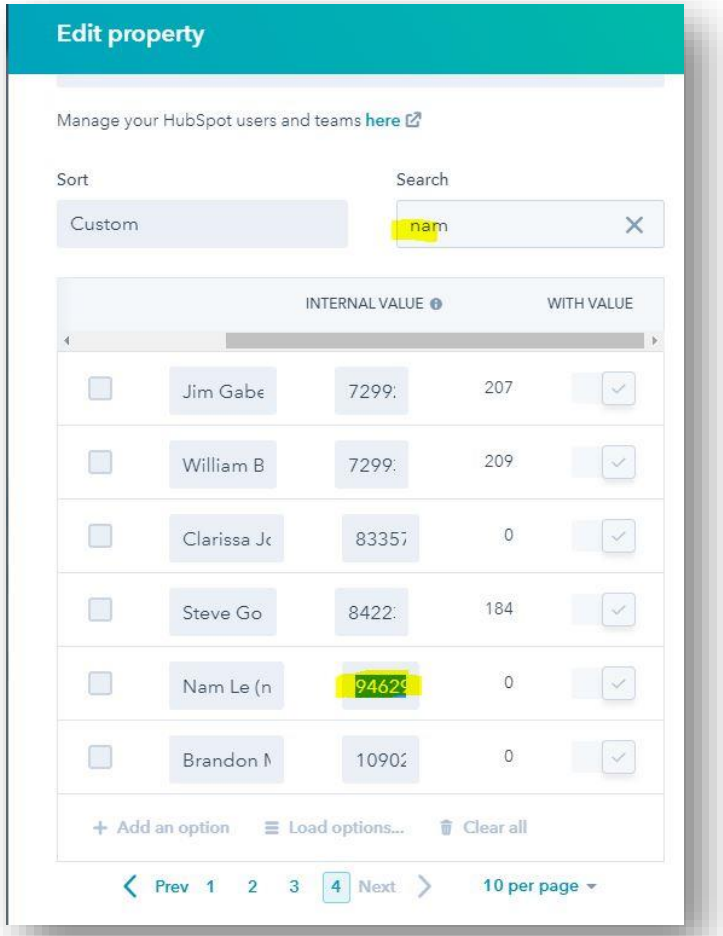

Potential Revenue - Machine D&B
Potential Revenue - Tool Clamping
Potential Revenue - Workholding
GSSCompID
Total open deal value
--
Rep
Target Account Owner(s)
View all properties
View property history


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
--
GSSCompID
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
Quote Currency
USD
Bill To Address
Non US
FIVES GIDDINGS & LEWIS
2200 LITTON LANE
HEBRON
KY
41048
US
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
Discount
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
UPS
Delivery
Freight Zone
Estimated Cartons
1
Addl Addrs
Comments
Email
Taxes
Lines
Notes
Save
Delete
Print
Script 1
Script 2
Script 3
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***