

Installation guide

1.Extract the file

Additional Packages Required:

Try to install via pip.

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

3) Install following setup files of given python modules

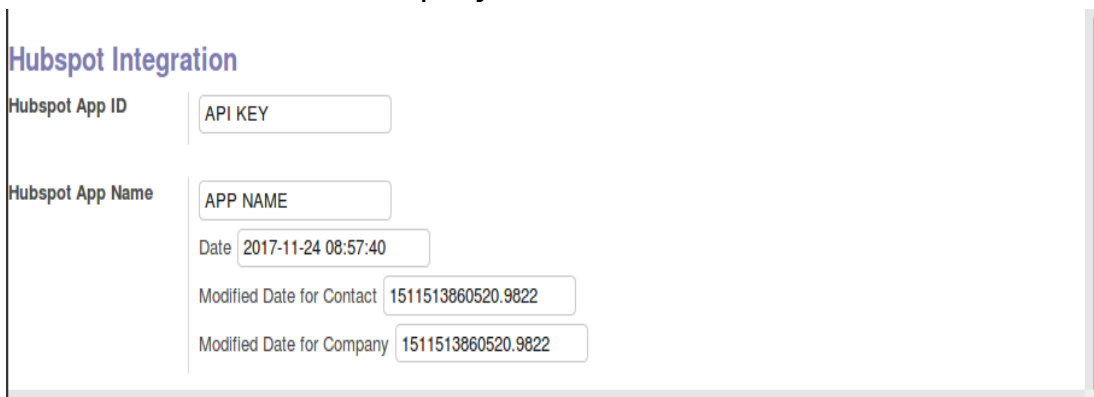
- HEQAI5~Q - **python setup.py install**
- hubspot-contacts-1.0rc1

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

5)Configuration:

First configure hubspot account. Go to Settings -> General Settings ->Hubspot Integration

- Following configurations are required to integrate with hubspot:
 - The timestamp for Modified date for Contact and Company are set to current timestamp by default.



The screenshot shows the 'Hubspot Integration' configuration form. It includes the following fields:

- Hubspot App ID:** A text input field containing 'API KEY'.
- Hubspot App Name:** A text input field containing 'APP NAME'.
- Date:** A date and time field showing '2017-11-24 08:57:40'.
- Modified Date for Contact:** A text input field containing the timestamp '1511513860520.9822'.
- Modified Date for Company:** A text input field containing the timestamp '1511513860520.9822'.

- To get API Key Go to Hubspot Integrations. You can see Integration option under the Profile menu. Once you open it you will see the the “HubSpot API Key” option. Click on that

and select 'View key' button, down there you will see your API key.

The screenshot shows the HubSpot Integrations page. The sidebar on the left has 'Integrations' selected. The top navigation bar shows 'Profile & Preferences'. The main content area is titled 'Your integrations' and 'All integrations'. Under 'Your integrations', there is a section for 'Your HubSpot API key'. It includes a 'View key' button and an 'API key history' table. The table has columns for DATE, NAME, KEY, and ACTION. A 'Help' button is visible in the bottom right corner.

Integrations

Your integrations All integrations

Installed

HubSpot API key

Your HubSpot API key

Welcome to the HubSpot API. HAPIkeys allow your applications and integrations to use the APIs that power HubSpot.

Your HubSpot API key provides access to your HubSpot portal, so do not freely distribute it. Each key is specific to a one key at a time. If needed, you may deactivate your HubSpot API key and generate a new one.

To get started using the HubSpot APIs, please visit <https://developers.hubspot.com>.

View key

API key history

DATE	NAME	KEY	ACTION
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Help

Profile & Preferences

pragtech.hu

Account & Billing

Integrations

Settings

Privacy policy

Sign out

Products & add-ons

YOUR ACCOUNTS

pragtech.hu

hubspot-developers-1whlfk3.com

See all accounts

6) After filling all required details save your details.

The contacts and the companies created in hubspot, get created in odoo system as well and vice versa.

Contact Creation from Odoo to Hubspot:

- Once, you create a contact in Odoo, it will be automatically synced in hubspot.

Individual

Company

Christopher Clarke

Company

0 Opportunities

0 Meetings

0 Sales

0 Analytic Acc...

Active

0.00 Invoiced

Address

M.G.Road

Camp

Pune

Maharas

411001

India

Job Position

Process Executive

GSTIN

e.g. BE0477472701

Phone

+91 8986565633

Tags

trainee ✕

customer_support ✕

Tags...

Mobile

Email

christopher.charke@pragtech.co.in

Website

e.g. www.odoo.com

Hubspot Vid

0

Title

Mister

Language

English

Contacts & Addresses

Internal Notes

Sales & Purchases

Invoicing

Create

- Any change in the contact fields are also updated to the contact in hubspot.

Marketing

Dashboard

Contacts

Lead Capture

Settings

Search

pragtech.hu

Hub ID: 4025292

Contacts

Search for a contact

Customize

Import

Add contact

All contacts

All saved filters >

All contacts

5 contacts

Options

+Add filter

	NAME	EMAIL	PHONE NUMBER	LEAD STATUS	CREATE DATE
<input type="checkbox"/>	Christopher Clarke	christopher.charke@pragtec...	+91 8986565633	-	Today at 3:21
<input type="checkbox"/>	Ketlin Smith	ketlon67@gmail.com	+91 9665888554	-	Today at 3:03
<input type="checkbox"/>	Savio Pereira	savio.pereira@gmail.com	+91 9020000032	-	Today at 2:56
<input type="checkbox"/>	Brian Halligan (Sample Contact)	bh@hubspot.com	-	-	Nov 2, 2017

Contact Creation from Hubspot to Odoo:

- When a contact is created in hubspot, it gets synced in Odoo.

Add a contact

Email

ronaldo.dsza@pragtech.co.in

First name

Ronaldo

Last name

D'souza

HubSpot owner

Search

Job title

Lecturer

You can [customize the properties](#) your team sees here.

Create contact

Create and add another

Cancel

- A scheduler is triggered once a day(configurable), after which the contact gets created.

Individual

Company

Ronaldo D'souza

Company

1 Opportunities

0 Meetings

0 Sales

0 Analytic Acc...

Active

0.00 ₹ Invoiced

Address

Street...

Street 2...

City

State

ZIP

Country

GSTIN

e.g. BE0477472701

Tags

Tags...

Job Position

Lecturer

Phone

+91 (20) 41322895

Mobile

Email

ronaldo.dsza@pragtech.co.in

Website

e.g. www.odoo.com

Hubspot Vid

14,601

Title

Language

English

Contacts & Addresses

Internal Notes

Sales & Purchases

Invoicing

Create

- Any change in the contact is updated to the corresponding contact in Odoo.

Assign Company to a contact in Odoo:

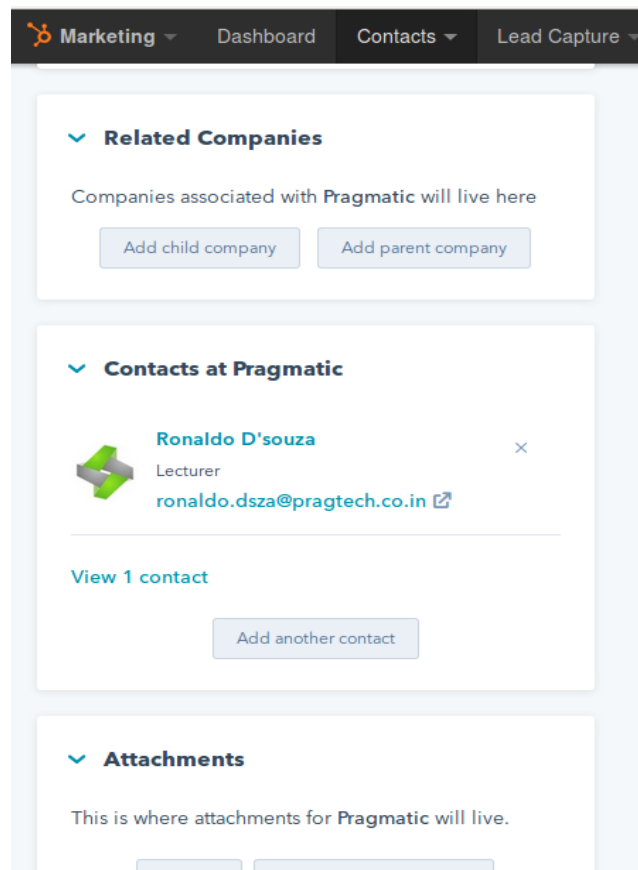
- Assigning a company to a contact from odoo will add the corresponding contact to that company in hubspot.

The screenshot displays the Odoo contact form for 'Ronaldo D'souza'. At the top, there are 'Save' and 'Discard' buttons, and a page indicator '5 / 6'. The form is divided into several sections:

- Header:** Includes a profile picture placeholder, a radio button to switch between 'Individual' (selected) and 'Company', and a dropdown menu set to 'Pragmatic'.
- Summary:** A grid of statistics: 1 Opportunity, 0 Meetings, 0 Sales, 0 Analytic Acc..., Active status, and 0.00 ₹ Invoiced.
- Address:** Fields for (edit), Sun shree Woods Commercial Premises, Office No 14, 15, Pune Maharashtra 411048, India, GSTIN (PRG9895600P89I0), and Tags.
- Job Position:** A text field containing 'Lecturer'.
- Phone:** A text field with '+91 (20) 41322895' and a checkmark icon.
- Mobile:** An empty text field.
- Email:** A text field with 'ronaldo.dsza@pragtech.co.in'.
- Website:** A text field with 'http://www.pragtech.co.in/'.
- Hubspot Vid:** A text field with '14,601'.
- Title:** A dropdown menu with 'Mister' selected.
- Language:** A dropdown menu with 'English' selected.

At the bottom, there are tabs for 'Contacts & Addresses', 'Internal Notes', 'Sales & Purchases', and 'Invoicing'. A 'Create' button is located at the bottom left.

- Similarly, when a company is assigned from hubspot to a contact, it gets reflected in the contact in Odoo after the scheduler is triggered.



Lead Creation from Hubspot to Odoo:

- Assigning a Lifecycle Stage to a contact from hubspot and it will add the corresponding opportunity lead in odoo.

The image shows a screenshot of a CRM application interface. At the top, there is a dark navigation bar with the following items: 'Sales' (with a dropdown arrow), 'Dashboard', 'Contacts', 'Companies', and 'Deals'. Below this, a light blue sidebar contains a section titled 'About William Mark' with a dropdown arrow. The main content area is a form for editing contact information. The form fields are as follows:

- First name: William
- Last name: Mark
- Email: william.mark@pragtech.co.in
- Phone number: 9966336699
- HubSpot owner: (empty)
- Last contacted: (empty)
- Lifecycle stage: Sales qualified lead (with a dropdown arrow)
- Lead status: (empty)

Below the form fields, there are two buttons: 'View' (with a dropdown arrow) and 'Customize Properties'. At the bottom of the form, there are two buttons: 'Save' (in an orange box) and 'Cancel' (in a white box with an orange border). To the right of the 'Cancel' button, there is a message: 'You've changed 2 contact pr'.

Note: The lead will be created only if the lifecycle stage is in Lead or Sales qualified Lead

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