Installation guide

1.Extract the file
Additional Packages Required:
    Try to install via pip.
- pyrecord
- voluptuous
- functools
- builtins
- copy
- requests
- future
- six

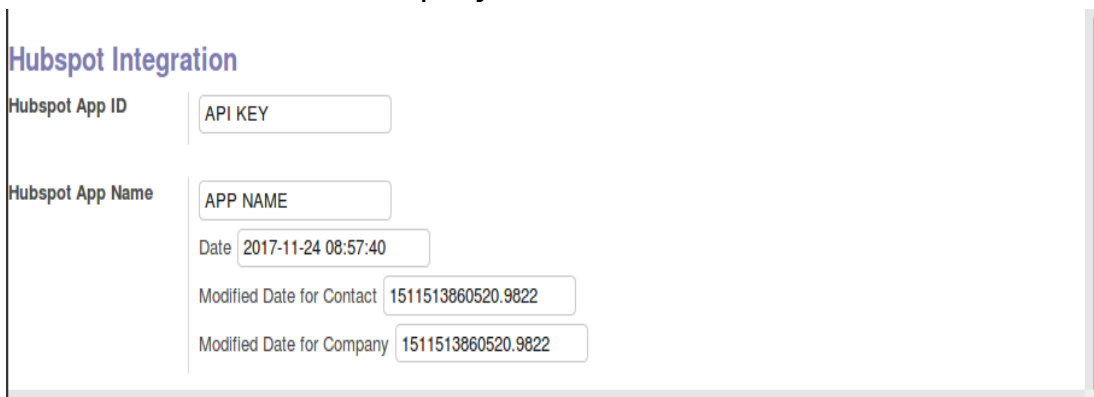3) Install following setup files of given python modules

- 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.

Hubspot Integration

Hubspot App ID	API KEY
Hubspot App Name	APP NAME
	Date 2017-11-24 08:57:40
	Modified Date for Contact 1511513860520.9822
	Modified Date for Company 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.

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.

<u>Contact Creation from Odoo to Hubspot:</u>

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

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

Contact Creation from Hubspot to Odoo:

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

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

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

Assign Company to a contact in Odoo:

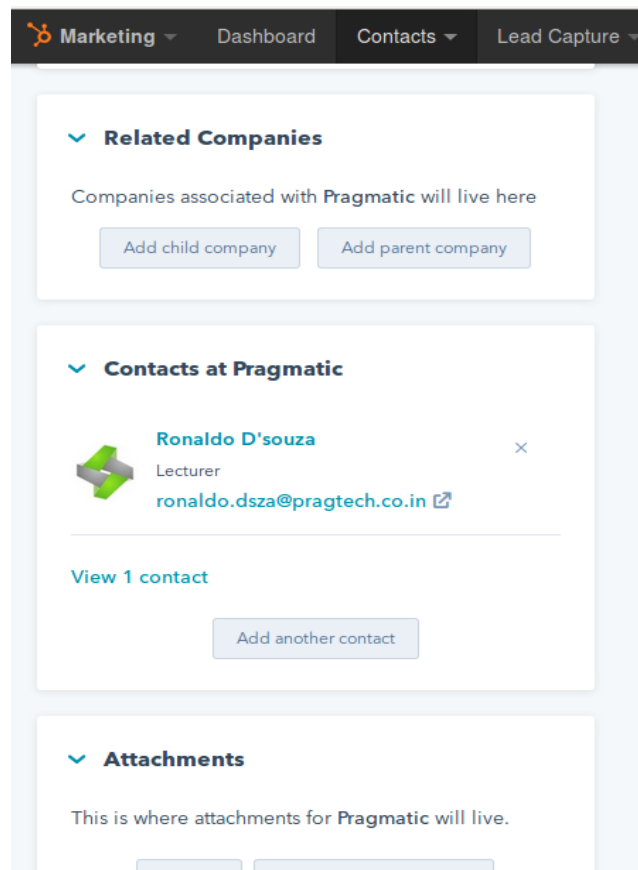- Assigning a company to a contact from odoo will add the corresponding contact to that company in hubspot.

- 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.

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

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