

Process to generate Hubspot Credentials

1: Create a hubspot account.

https://app.hubspot.com/signup-hubspot/crm?uuid=dc7141dd-d586-463f-9779-aba8895a7ab6&step=landing_page

2: Now Search For Hubspot Developer Account

<https://developers.hubspot.com/get-started>

3: Select App Developer Account

4: Continue with the user you have created

5: Create a new developer account

6: After step5 you will render to home page of developer account

7: Go to apps

8: Click on create app

9: Provide app information like Public App Name , logo and description.

10: Provide auth like redirect url for server

<https://pro1.hirisetech.com/app/connectors>

11 : Set the redirect url for local

<http://localhost:3000/app/connectors>

12 : Select the required scopes.

"content",

"ecommerce",

"tickets",

"crm.objects.goals.read",

"media_bridge.read",

"crm.objects.custom.read",

"Crm.objects.custom.write"

"crm.objects.contacts"

13 : After all the above steps we get

HUBSPOT_CLIENT_ID

HUBSPOT_API_ID

HUBSPOT_CLIENT_SECRET

14 : To access HUBSPOT_API_KEY go to the Get Hubspot Api Key button which is beside the create app button.

Steps to Generate salesforce credentials

1: SignUp on salesforce

<https://developer.salesforce.com/signup>

2: Login to the salesforce account

<https://login.salesforce.com/>

3: Go to My Personal Information → Reset My Security Token

4 : Go to Home → Apps → Apps manager → New Connected App
(fill the required fields and save)

5: Go to connected app → Manage Connected App → There we get
Consumer key and consumer secret key

Some Settings To Update

Apps → App Manager

Select your connected app

CallBackUrl :- <https://pro1.hirisetech.com/app/connectors>

O auth scopes to select

Access Analytics REST API Charts Geodata resources (eclair_api)

Access Analytics REST API resources (wave_api)

Access Connect REST API resources (chatter_api)

Access Headless Forgot Password API (forgot_password)

Access Lightning applications (lightning)

Access Visualforce applications (visualforce)

Access chatbot services (chatbot_api)

Access content resources (content)

Access custom permissions (custom_permissions)

Access the identity URL service (id, profile, email, address, phone)

Access unique user identifiers (openid)

Full access (full)

Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)

Manage Data Cloud Identity Resolution (cdp_identityresolution_api)

Manage Data Cloud Ingestion API data (cdp_ingest_api)

Manage Data Cloud profile data (cdp_profile_api)
Manage Pardot services (pardot_api)
Manage user data via APIs (api)
Manage user data via Web browsers (web)
Perform ANSI SQL queries on Data Cloud data (cdp_query_api)
Perform requests at any time (refresh_token, offline_access)
Perform segmentation on Data Cloud data (cdp_segment_api)

Fields to Be Checked

Enable OAuth Settings

Require Secret for Web Server Flow

Require Secret for Refresh Token Flow