Objective 7 – Create Deals API (feed) that picks up Quotes and Booking deltas and passes to Hubspot for use by the Deals feature in Sales view.

Business problem:

Business needs to be able to communicate with clients from Hubspot using data from the res systems. Currently, Sales users must enter in their booking and quote data into the res system and again into Hubspot. This adds significant workload for Sales users to enter transactional data twice, into two systems.

The Deals function is a separate entity from Contacts within the Sales view in Hubspot. Quote and booking details are currently going to the Contact database within Hubspot, and there is no visibility between the two areas within Hubspot.

Objective:

Create a new Deals API that picks up quote and booking deltas and passes to Hubspot Deals portal on an hourly (if not more frequent) basis, so that branded, seamless, professional communications can be sent out automatically without Sales users having to enter it twice.

Benefit:

* Bringing over quote data will enable Sales users to send out branded, seamless, professional communications via Hubspot in a more timely fashion after a transaction is recorded in the res system
* Sales users will no longer be required to enter a transaction into both res system and Hubspot
* Providing sales with additional data will enable them to better convert sales opportunities and provide a better customer journey

Note:

* Work on this objective shall precede work on Objective #5; if testing proves successful, requirement to load historical data for Objective #5 may be de-scoped.
* This is a parallel feed to the Hubspot API contacts feed, covered under Objective #5.
* Requirements for how to enter currencies from this feed data TBD after developers are more familiar with complexities
* Time/Resources should be made available to make adjustments after going live; adjustments are foreseen, as this is uncharted territory

Out of scope

* SalesPro licensing to satisfy this objective.
* Dependency on the implementation of Outlook 365 to satisfy this objective. Outlook 365 could permit manual emails sent from Outlook to be plugged into Hubspot w/o requiring additional integration; however the implementation of Outlook 365 globally is not running smoothly and cannot be added as a dependency for this project as there is no confirmed completion date (was to be end of summer, 2017).
* The use of batched data to satisfy this objective. Batched data doesn’t de-dupe in Hubspot, so this will not be an acceptable solution for the business.

The following list of requirements must be met in order to successfully implement the CRM Phase III project. Requirements will be prioritized according to the following scale:

**Priority assignment –**

**Must Have (M)** – a critical requirement without which the product is not acceptable to the stakeholders

**Should Have (S)** – a necessary but deferrable requirement without which makes the product less usable but still functional

**Nice to Have (N)** – a nice feature to have if there are resources but the product functions well without it

REQUIREMENTS:

1. Scope to include delta quotes and bookings data from both res systems, Neptune and Triton. **(M)**
2. Data feed for delta quotes and bookings shall be provided to a new Hubspot API (Deals API) as frequently as possible **(M)**
   1. Delays of an hour or 30 minutes will require manual tracking, which will not benefit the sales teams (expected beneficiaries).
3. Quotes that become bookings should be re-categorized in the correct pipeline stage.  **(M)**
   1. Quotes that become bookings should NOT be duplicated as bookings.
4. Data feed API should not bring though any duplicate quotes/bookings to Deals API **(M)**
5. Quotes in interim pipeline stages should be reclassified/moved to the “lost lead” category after x amount of time. **(M)**
   1. Amount of time is TBD by sales feedback
   2. Amount of time must be changeable.
6. Solution team shall provide updated documentation of the feed so that business has reference materials to work with for future needs. Feed documentation may include items such as: **(M)**
   1. Field mappings (Triton/Boxi/Hubspot/Feed parameters)
   2. Diagrams
   3. Timings
   4. Specifications
7. Deals portal shall be connected to the Contact record within Hubspot. **(M)**

Res system data to be included in the feed for both Neptune and Triton is specified in the document:

Document: **Objective 7 Deals API fields 20170811.xlsx (M)**

****