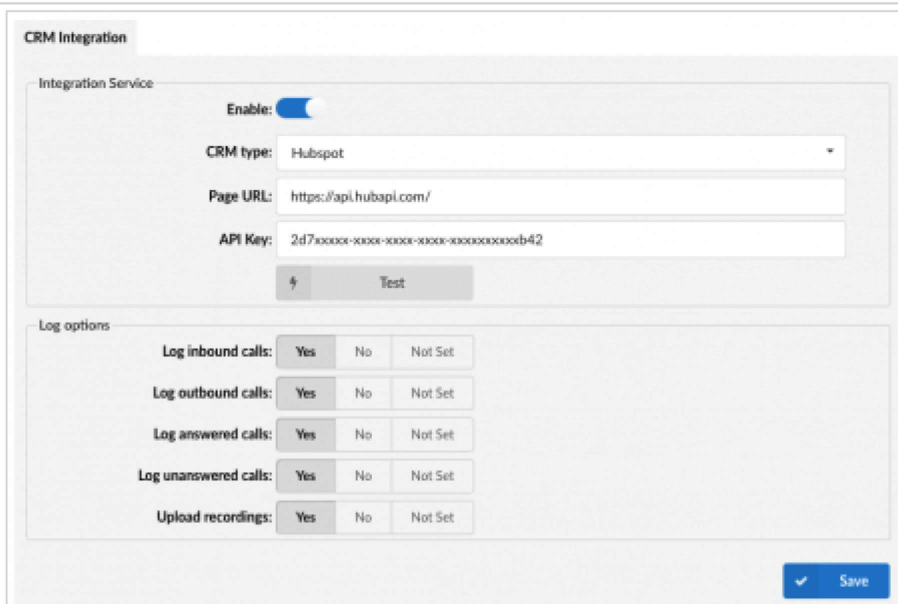
PBXware 6.0 Settings CRM Integration Hubspot

Contents

Hubspot Configuration

Hubspot doesn’t require any special configuration.

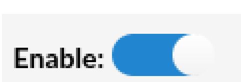


Hubspot Integration Example

CRM Integration Service

Configure the CRM Integration Service with the following options:

- **Enable**



Pressing the toggle button will enable or disable the service.
(E.g. On/Off)
(Toggle button)

- **CRM Type**

Select one of the CRM services supported by PBXware.
(E.g. Hubspot)

(Select box)

- **Page URL**

  (E.g. https://api.hubapi.com/)
  ([a-z][0-9])

- **API key**

  Hubspot API key
  ([a-z][0-9])

To obtain the 'Hubspot API Key', users should do the following:

- Navigate to their Hubspot account settings (in Hubspot) -> 'Integrations' -> 'API key'

  NOTE: Only super admin accounts can see the API key.

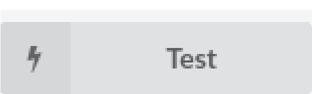
- Click the ‘Show key’ option and copy the given key.

  NOTE: In case there is no key displayed, users should create a new one.

Additionally, the 'Save to enable' button will appear which indicates that a user has to populate *all fields* on the page and 'Save' settings.

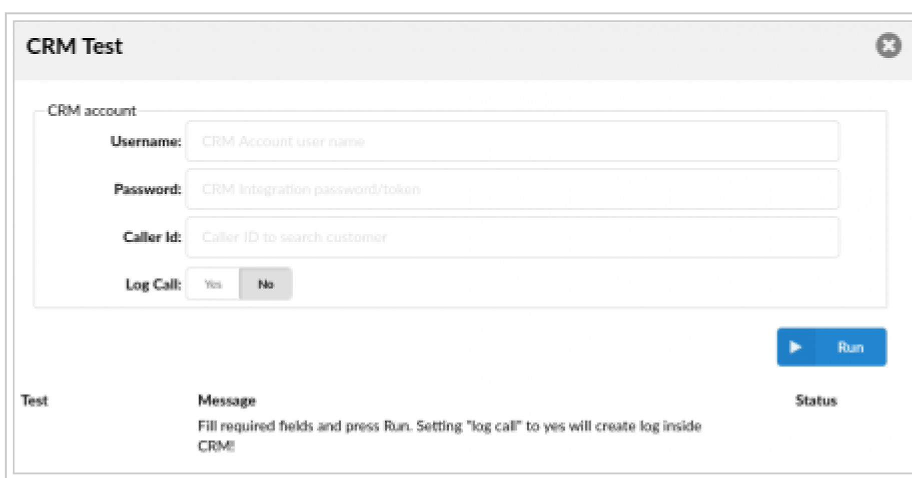
(Button)

After populating all fields and saving the settings, the 'Test' button will appear.



(Button)

Upon clicking the button, users will be prompted to a different pop-up window where they can enter the CRM account information in order to test the configuration.



- **Username:**

  Provide the CRM account's username.
  ([a-z][0-9])

- **Password:**

  Provide the CRM account's password.
  ([a-z][0-9])

- **Caller ID:**

  Caller ID to search for a customer (optional).
  ([a-z][0-9])

- **Log Call:**

  Setting 'Log call' to 'Yes' will create a log inside CRM.
  (E.g. Yes/No)
  (Options button)

After providing all the necessary information, press 'Run' and the CRM Integration test will be started.

Log Options

Users can enable the CRM default log options that each COMMUNICATOR instance is going to use. In addition, eachCOMMUNICATOR instance can set its own log options if needed.

The default log options are:

- **Log inbound calls**

  (E.g. Yes/No/Not Set)
  (Options button)

- **Log outbound calls**

  (E.g. Yes/No/Not Set)
  (Options button)

- **Log answered calls**

  (E.g. Yes/No/Not Set)
  (Options button)

- **Log unanswered calls**

  (E.g. Yes/No/Not Set)
  (Options button)

- **Upload recordings**

  (E.g. Yes/No/Not Set)
  (Options button)

COMMUNICATOR Configuration

For the COMMUNICATOR setup, the username should be the e-mail address of the Hubspot account. A password fieldcan be left empty.