



INTEGRATION INSTRUCTIONS

A comprehensive guide to integrating Hubspot with AdvizorPro

What to Expect

The HubSpot + AdvizorPro integration simplifies data syncing and updates from your saved searches, ensuring seamless system integration and better alignment between marketing and sales teams, while expanding data distribution capabilities.

Our integration team will guide you through each step, regardless of your HubSpot experience, to ensure a smooth setup.

Prerequisites

Before starting the Hubspot integration process, verify you have a Super Admin seat

Process & Timeline

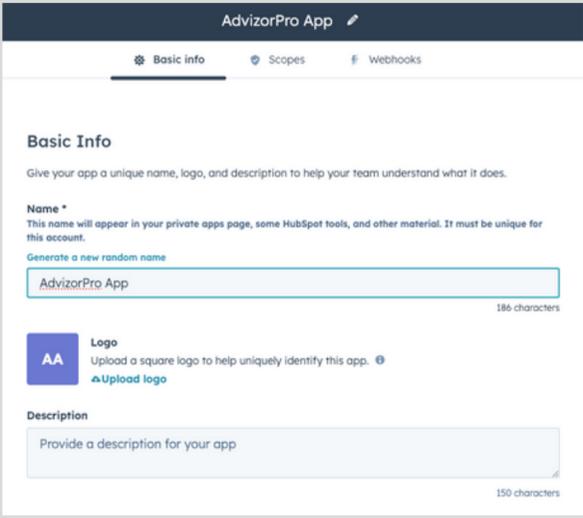
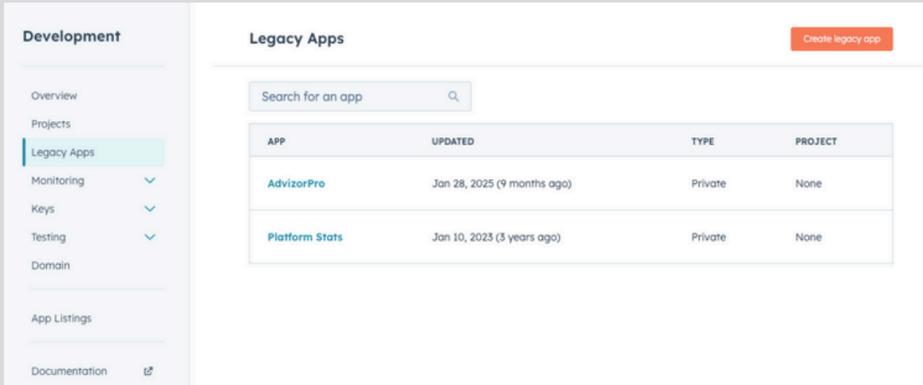
- Initial Setup: Expect a 30-minute setup call to kick things off, followed by ongoing communication to complete the integration.
- Timeline: The full integration, including custom field configurations from HubSpot to AdvizorPro, takes approximately 1-2 weeks.

Preview & Steps

- Connect HubSpot to AdvizorPro
- Select & Create Custom Properties
- Map Fields in AdvizorPro CRM UI and Confirm Field Import Preferences
- Build Your ICP Saved Searches
- Set Integration Preferences

You will first need to add AdvizorPro as a legacy app in your instance

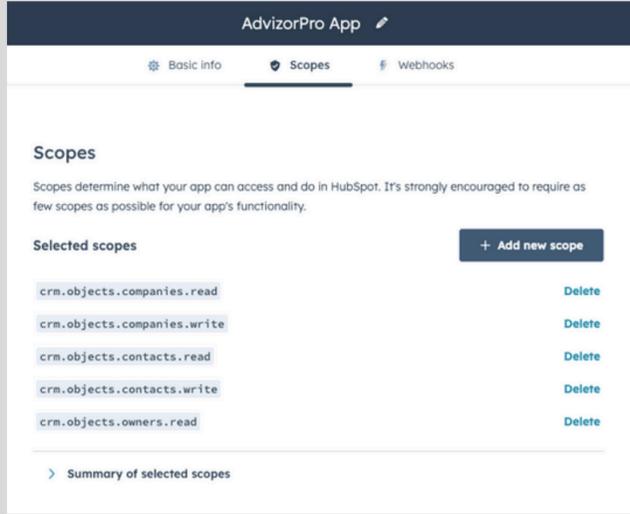
- Log into your Hubspot
- Click the Settings gear icon in the top right corner.
- Under "Account Management" click on "Integrations" then "Legacy Apps."



- Click "Create legacy app" in the top right corner, and select "Private app" when prompted.
- Name the app "AdvizorPro"

Next select "Scopes"

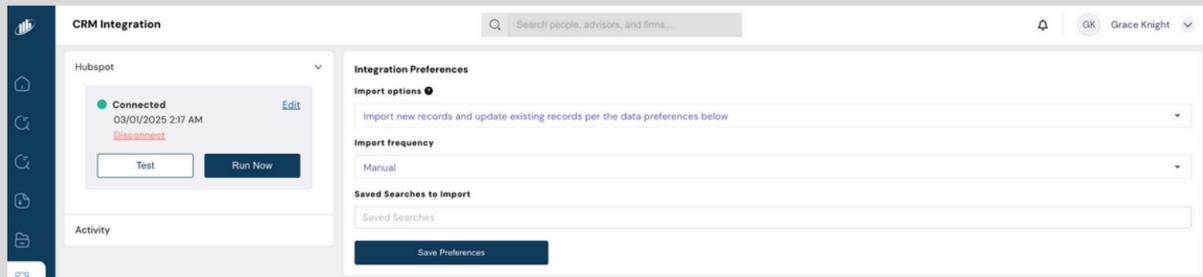
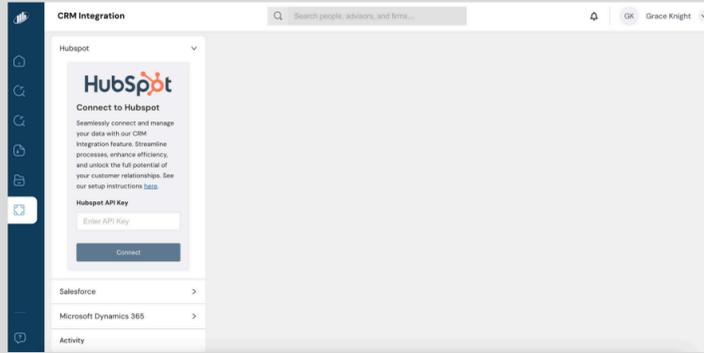
- crm.objects.owners.read
- crm.objects.contacts.read
- crm.objects.contacts.write
- crm.objects.companies.read
- crm.objects.companies.write



- Go to the "Auth" tab for the app
- Click "Copy" for the Access token to copy
- At this point, open a new tab and go to:

<https://app.advizorpro.com/crm/integrations>

Go back to your Salesforce tab and copy and paste the Key and Secret and click "Connect"



Next Step: Select & Create Custom Properties

Our integrations team has sent you a copy of our mapping template via email.

The next step is to schedule a call with an AdvizorPro integrations specialist to discuss your current CRM and workflows in place to ensure a smooth transition. Please email: grace@advizorpro.com if you do not have a scheduled meeting.