



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.”

Development

Overview

Projects

Legacy Apps

Monitoring

Keys

Testing

Domain

App Listings

Documentation

Legacy Apps

Create legacy app

Search for an app

APP	UPDATED	TYPE	PROJECT
AdvizorPro	Jan 28, 2025 (9 months ago)	Private	None
Platform Stats	Jan 10, 2023 (3 years ago)	Private	None

AdvizorPro App

Basic info

Scopes

Webhooks

Basic Info

Give your app a unique name, logo, and description to help your team understand what it does.

Name *

This name will appear in your private apps page, some HubSpot tools, and other material. It must be unique for this account.

Generate a new random name

AdvizorPro App

186 characters

Logo

Upload a square logo to help uniquely identify this app.

Upload logo

Description

Provide a description for your app

150 characters

Next select “Scopes”

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

AdvizorPro App

Basic info

Scopes

Webhooks

Scopes

Scopes determine what your app can access and do in HubSpot. It's strongly encouraged to require as few scopes as possible for your app's functionality.

Selected scopes

+ Add new scope

crm.objects.companies.read

Delete

crm.objects.companies.write

Delete

crm.objects.contacts.read

Delete

crm.objects.contacts.write

Delete

crm.objects.owners.read

Delete

> Summary of selected scopes

Back to all apps

AdvizorPro

Edit app

App description...

Last changed a few seconds ago

Overview

Auth

Logs

Webhooks

These credentials provide API access to your HubSpot account. Keep them safe and secure.

Access token

Used to make API calls. See an example

pat-na1-2db45+-----

Show token

Copy

Rotate

Client secret

Used for signature validation. Learn more

Show secret

Copy

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

CRM Integration

Search people, advisors, and firms...

Hubspot

HubSpot

Connect to HubSpot

Seamlessly connect and manage your data with our CRM Integration feature. Streamline processes, enhance efficiency, and unlock the full potential of your customer relationships. See our setup instructions

HubSpot API Key

Enter API Key

Connect

Salesforce

>

Microsoft Dynamics 365

>

Activity

CRM Integration

Search people, advisors, and firms...

Hubspot

Connected

03/01/2025 2:17 AM

Disconnect

Test

Run Now

Integration Preferences

Import options

Import new records and update existing records per the data preferences below

Import frequency

Manual

Saved Searches to Import

Saved Searches

Save Preferences

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.