

HubSpot-iPipeline integration - Usage Guide

HubSpot (opens new window) is a leading growth platform that provides a complete suite of marketing, sales, customer service, and CRM software, along with additional services. It helps businesses optimize content, nurture leads, and track contacts as they move through the customer journey. HubSpot also integrates with a growing range of customer success, productivity, and finance apps, making it easier for businesses to scale and succeed.

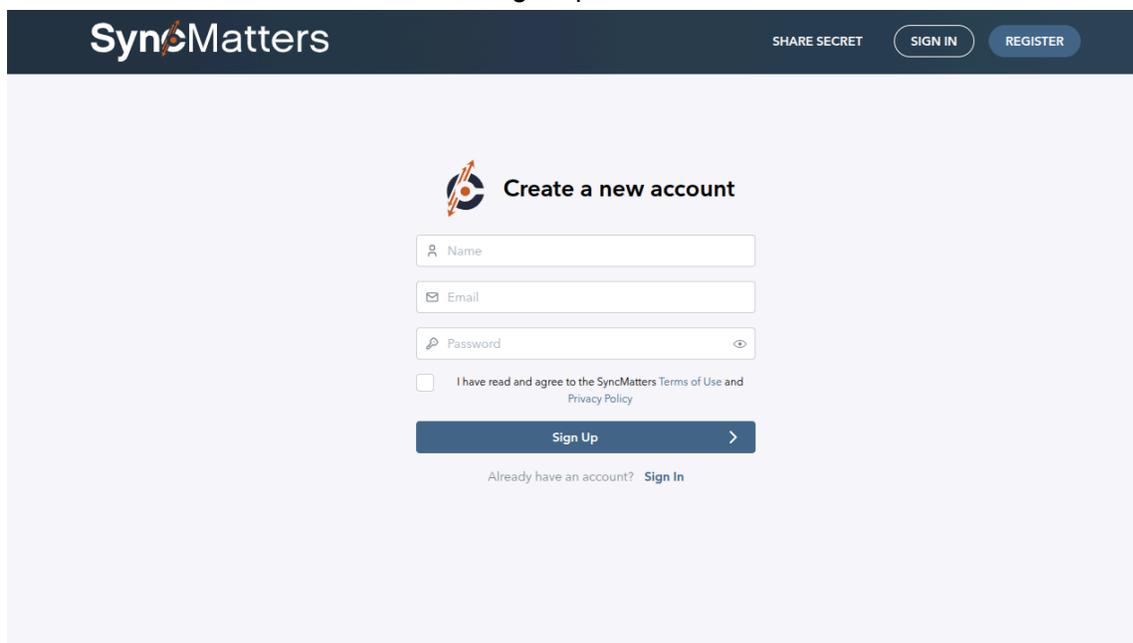
iPipeline is a leading provider of cloud-based solutions for the insurance and financial services industries. Its platform streamlines sales, underwriting, and policy administration by offering a comprehensive suite of digital tools for agents, advisors, and carriers. iPipeline enables businesses to automate workflows, enhance customer engagement, and accelerate the application process. It also integrates with a growing ecosystem of financial, compliance, and CRM applications, helping organizations improve efficiency and drive growth.

Install:

Please note that since we offer a white-glove service, this guide provides a high-level overview. More details will be discussed during personalized communication as we configure the integration process for your business. Our team will ensure a seamless setup tailored to your specific needs.

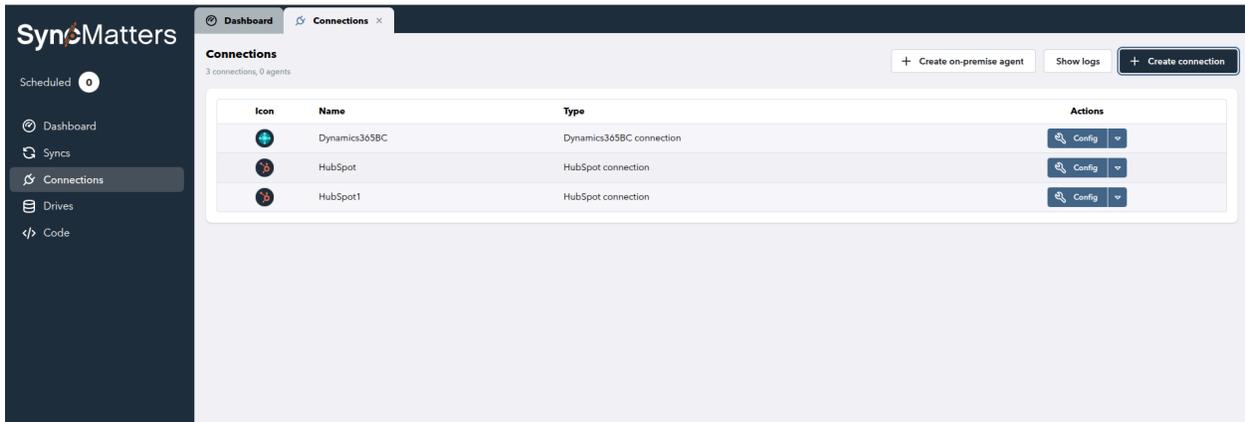
! We strongly suggest filling out the Contact Us form on this page: [ipipeline HubSpot Integration](#), and we assist with everything.

General flow could look like the following steps: **Account Creation.**

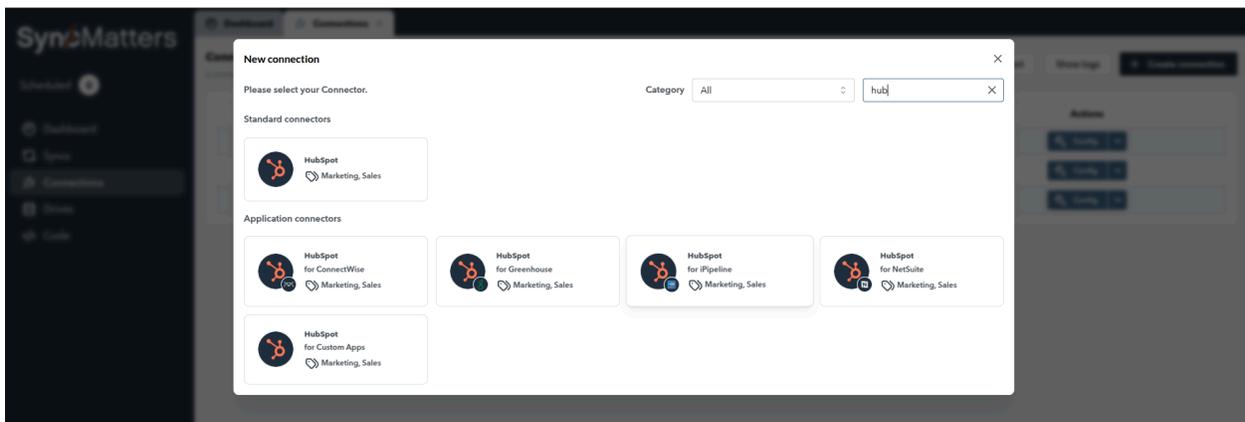


The screenshot shows the SyncMatters website's account creation page. At the top, the SyncMatters logo is on the left, and navigation links for 'SHARE SECRET', 'SIGN IN', and 'REGISTER' are on the right. The main heading is 'Create a new account' with a logo icon. Below this are three input fields: 'Name', 'Email', and 'Password'. The 'Password' field has an eye icon to toggle visibility. Below the fields is a checkbox labeled 'I have read and agree to the SyncMatters Terms of Use and Privacy Policy'. A dark blue 'Sign Up' button with a right-pointing arrow is positioned below the checkbox. At the bottom, there is a link: 'Already have an account? Sign In'.

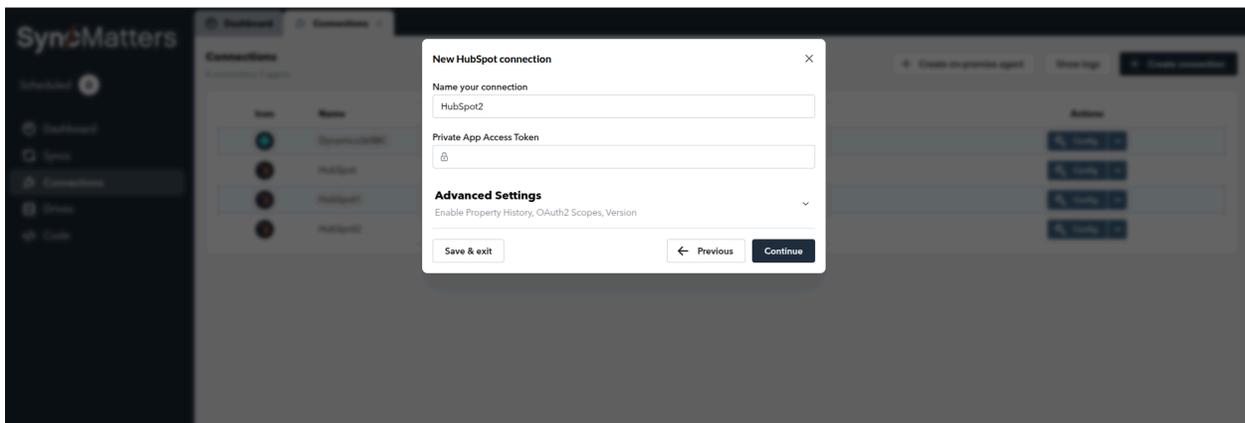
So then connect the system/connector; go to “Connections” and click the **Create Connection** button in the top right corner.



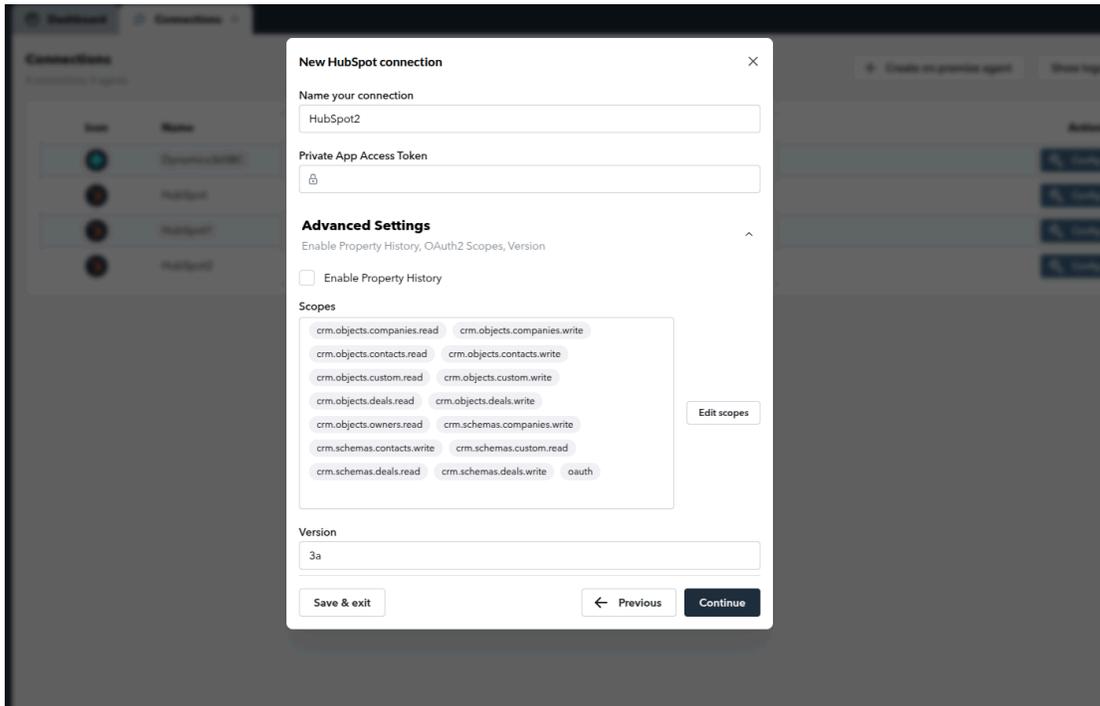
In our case, that would be the **HubSpot for Ipipeline**



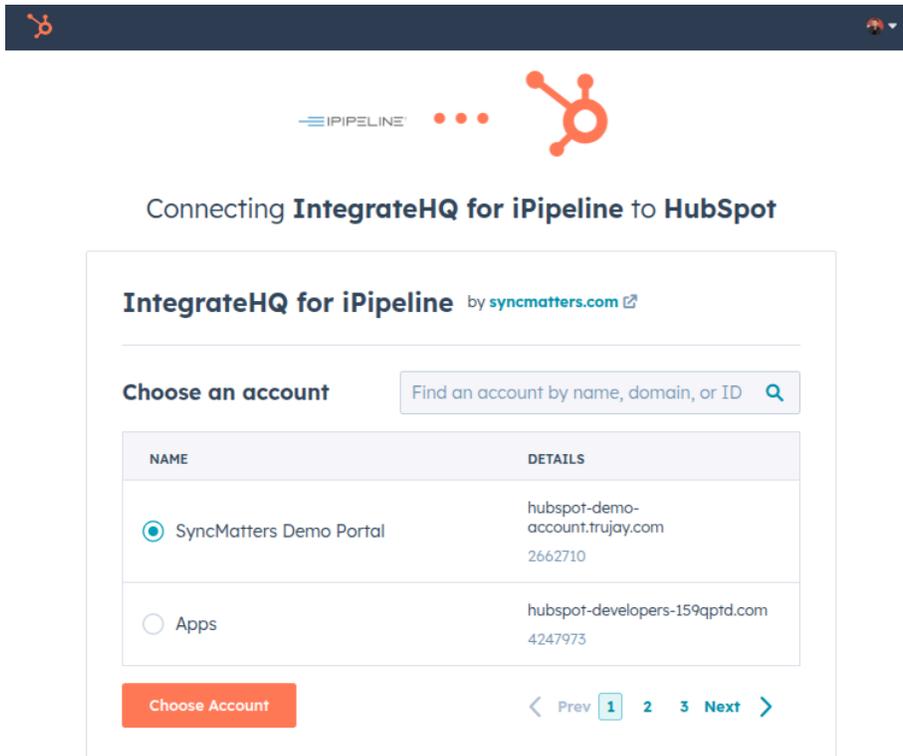
Since **we offer a white-glove setup**, we take care of the rest of the configurations. **Please contact us** for the next steps.



Here are a few next steps on how we connect to HubSpot. In the Scopes section, we configure what our app can access.



Pick the HubSpot portal to connect to our app and click **the Connect App**.





Connecting **IntegrateHQ for iPipeline** to **HubSpot**

IntegrateHQ for iPipeline

by syncmatters.com

This app is requesting access to your HubSpot account. Continue connecting if you agree.

Manage and view your CRM data

View properties and other details about companies.
Create, delete, or make changes to companies.

View properties and other details about contacts.
Create, delete, or make changes to contacts.

View details about custom objects in the CRM.
Create, delete, or make changes to custom objects in the CRM.

View properties and other details about deals.
Create, delete, or make changes to deals.

View details about users assigned to a CRM record.

Create, delete, or make changes to property settings for companies.

Create, delete, or make changes to property settings for contacts.

View details about custom object definitions in the CRM.

View details about deals.
Create, delete, or make changes to property settings for deals.

Basic HubSpot account information

This includes the account's primary domain and email addresses of HubSpot users interacting with features of this app, including app cards.

Connect app

Cancel

Configure:

Our iPaaS solution offers customizable integration options. You can configure mappings and set up specific business rules to align with your unique operational requirements. Our dedicated team will be in touch with you regarding your business use cases and coordinate all of the configurations.

Use:

Our dedicated team will reach out to discuss your business use cases and coordinate all necessary configurations.

Disconnect & Uninstall

To disconnect an app from your HubSpot account, follow these steps:

1. In your HubSpot account, click the **settings**  icon in the top navigation bar.
2. In the left sidebar menu, navigate to **Integrations > Connected Apps**.
3. Find the app you want to disconnect, click **Actions**, then select **Uninstall**.
4. Type "**uninstall**" in the text field in the confirmation dialog box and click **Uninstall**.