

# **Bigcommerce Hubspot Integration App - User Manual**

by CedCommerce Products Documentation

<b>1. Overview .....</b>	<b>3</b>
<b>2. Hubspot Integration Installation App .....</b>	<b>3</b>
<b>3. Hubspot BigCommerce Features .....</b>	<b>8</b>
<b>4. Hubspot Configuration Settings .....</b>	<b>11</b>

## 1. Overview

Companies today spend a considerable amount of time on planning their marketing strategies but they quite often miss the inbound marketing factor that can help them reach their target customers using their own 'company created internet content – something that ends customers care about the most. That's where HubSpot takes the reins for all your worries.

**HubSpot** is an inbound marketing and sales platform. It is a marketer and developer of software products that help companies plan their inbound marketing strategies. HubSpot provides tools for social media marketing, content management, web analytics, search engine optimization, etc for customized content to attract the end-users.

Keeping these factors in mind to help the online sellers, CedCommerce presents the **HubSpot Integration for Bigcommerce**. Using this extension by CedCommerce, the sellers can not only create the customized content for their customer base but can also **sync the comprehensive product and details from their Bigcommerce dashboard panel to HubSpot**. Result? you can manage your business well by in-depth details of the products.

### Compelling: Features-

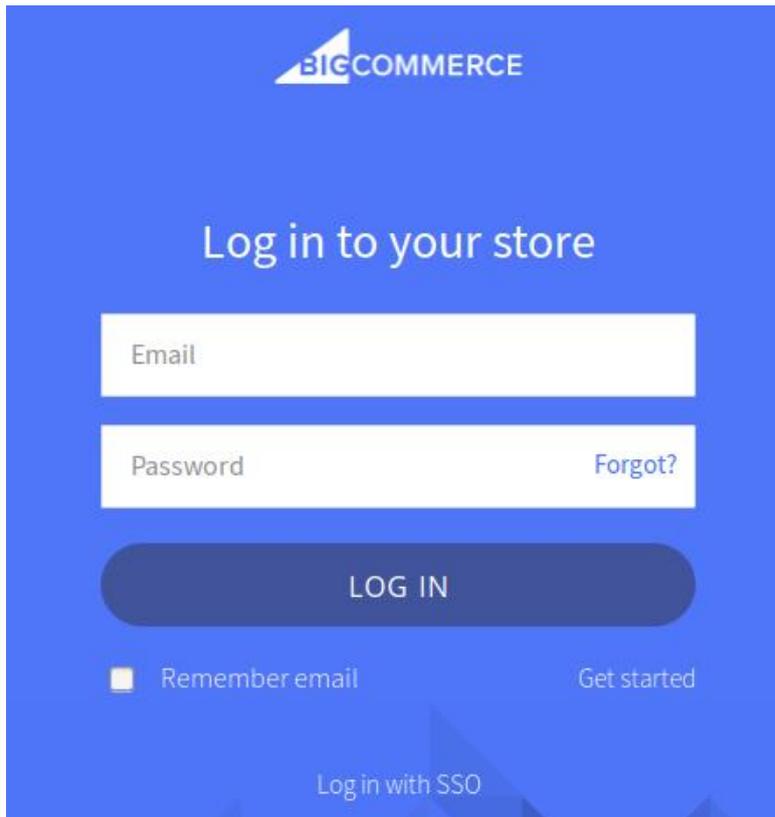
- **Product Sync** – Sync the product along with its details such as Name, Image, Price, and Description to HubSpot using the HubSpot Connector for your e-commerce store.
- **Customer Sync** – Sync all the customer details from your e-commerce store to HubSpot. The customer details that you may sync are – Email, First Name, Last Name, Company Name, Telephone Number, Street, City, Region, Country, Post Code, Contact Stage, etc.
- **Deal Sync** – Get all the orders from your e-commerce store synced with HubSpot. The order details that can be synced using HubSpot E-Commerce Integration are – Deal Stage, Deal Name, Closed Won Reason, Closed Lost Reason, Close Date, Amount, Pipeline, Abandoned Cart URL, Discount Amount, Increment ID, Shipment IDs, Tax Amount, and Contact Ids.
- **Line Item Sync** – Sync the Line Items to HubSpot and know in detail about products' performance – which is being ordered or is high in demand. The HubSpot E-Commerce Integration lets you sync the Product ID, Deal ID, Discount Amount, Quantity, Price, Name, and SKU.
- **E-Mail** – With the HubSpot E-Commerce Integration, you may create the e-mail pattern with personalized content from the HubSpot panel itself and make your presence more prominent amongst your target client.
- **Marketing Automation** – Forget the hassles of e-mail marketing. Operate and experience the automated e-mail marketing from HubSpot panel with the HubSpot E-Commerce Integration, and rely on the self-operating e-mail marketing.
- **Analytics** – Understand your customers' behavior and purchasing pattern by understanding the analytics from the HubSpot panel. Get the comprehensive details with HubSpot E-Commerce Integration, have deeper insights about your marketplace analytics, and turn it into your forte.
- **Abandoned Cart Recovery** – HubSpot E-Commerce Integration enables you to send emails to the customers from your HubSpot panel in the situation of Abandoned Shopping Cart, to procure the recovery. After a specific time period, communicate with the shoppers through an email to persuade them to take the desired action.
- **Customer Welcome** – On your customers' first purchase, send the welcome email to them within a specific time period. From your HubSpot panel, initiate the email communication with shoppers once they have completed the buying process, within a definite time period.
- **Customer Re-engagement** – With the HubSpot E-Commerce Integration, re-engage with your customers and draw their attention towards your brand once again. The HubSpot E-Commerce Integration authorizes you to send emails to communicate with your users who haven't made a purchase with you lately.

## 2. Hubspot Integration Installation App

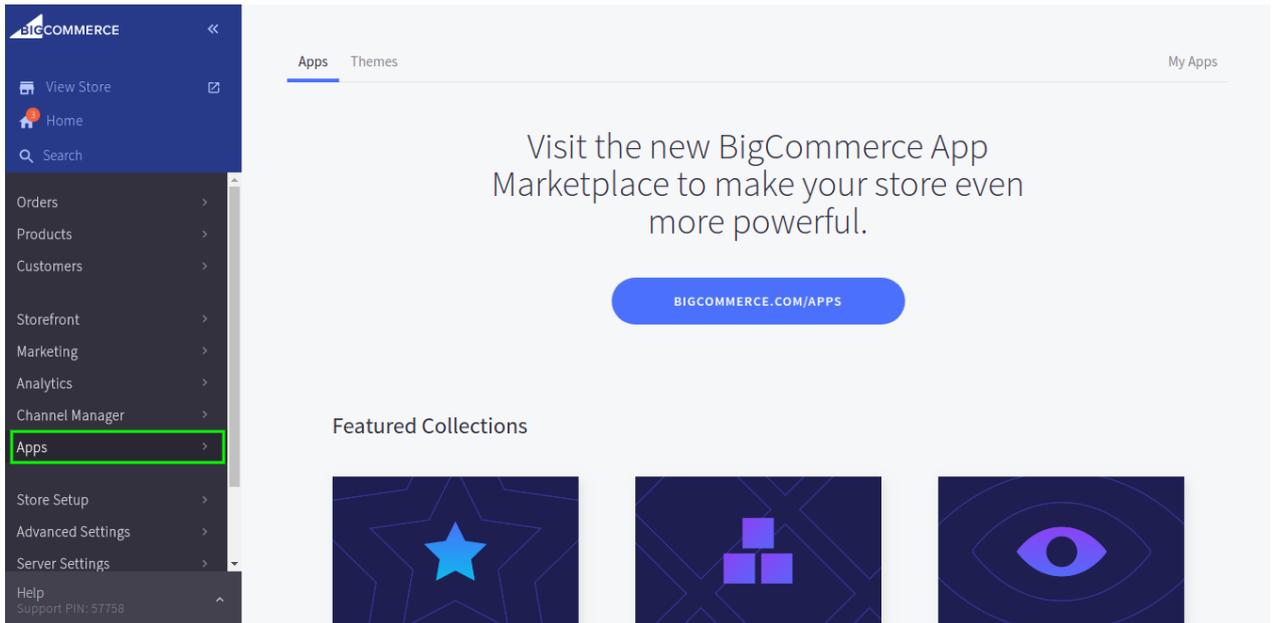
This section covers the process of Bigcommerce Hubspot App Installation from the App Store and then configuring it in the Bigcommerce store.

### To install the Hubspot Bigcommerce Integration app

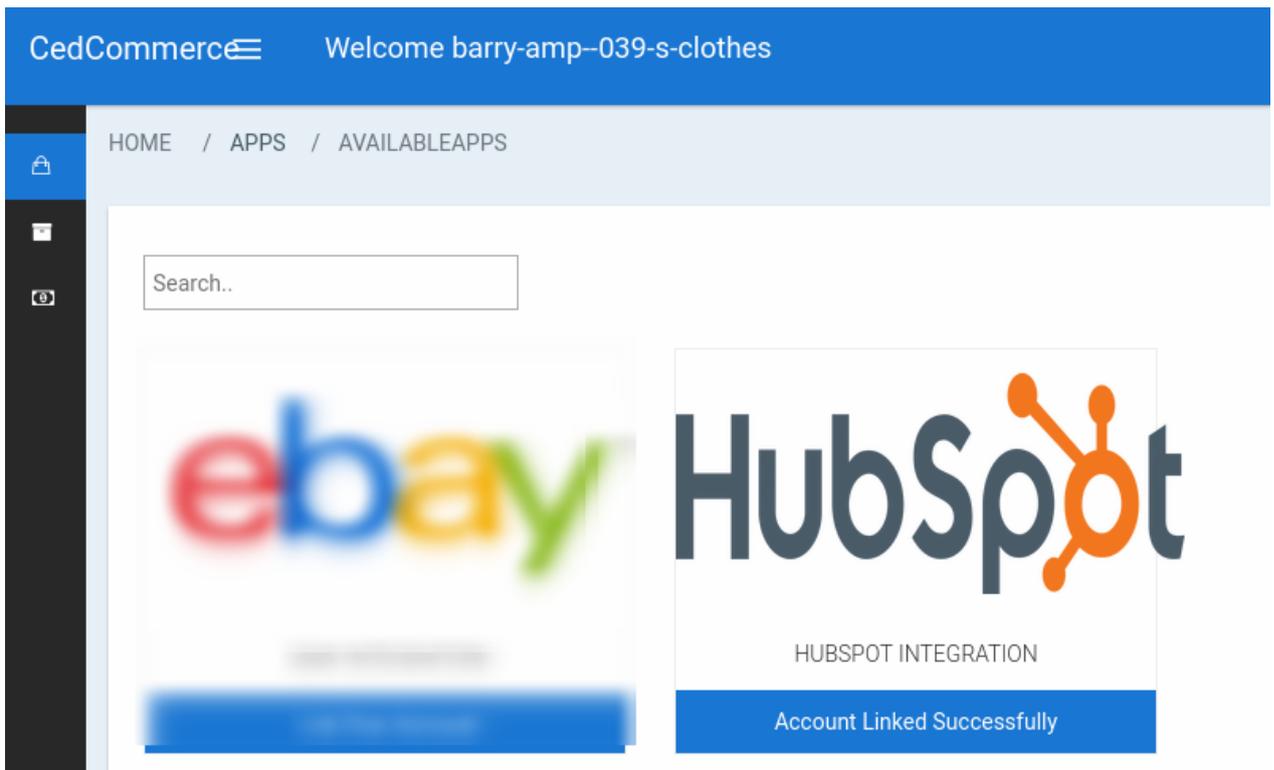
1. Go to the Hubspot Bigcommerce App link.
2. Click the **GET IT NOW** button.
3. Click the **Login** button.  
A dialog box appears as shown in the following figure:



Or, if you're already logged in, then you're redirected to the dashboard of the app. As shown in the figure below:



4. Now click on the Apps button on the left hand and browse through different apps and click on Hubspot integration. The page appears as shown in the following figure:



Here click on **Link Your Account** button. The account in the above picture is already linked.

5. As soon as you click on the Link Your Account Button, it redirects to Hubspot login page and if it's already logged in it redirects to the dashboard page:



## HubSpot Accounts

Search accounts

Compare sessions: **Month over month** ▾

NAME	DOMAIN	SESSIO...	LEADS	PRODUCTS
anjali-dev-4968999.com	anjali-dev-4968999.c... 4968999	--	--	<span>Sales Free</span> <span>Service Free</span> <span>Marketing Free</span>
ank-dev-4729... <span>Pin</span> <span>Open</span>	ank-dev-4729406.com 4729406	--	--	<span>Marketing Free</span>
demoM1-dev-5598808.com	demoM1-dev-55988... 5598808	--	--	<span>Sales Free</span> <span>Marketing Free</span>
demo-M2-dev-6086282.com	demo-M2-dev-60862... 6086282	--	17	<span>Sales Enterprise</span> <span>Service Enterprise</span> <span>Marketing Enterprise</span>
hubspot-developers-p3jaq8.com	hubspot-developers-... 4702448	--	--	
Sudeep	sudeep-dev-4831086... 4831086	--	--	<span>Service Free</span> <span>Marketing Free</span>
test	demo.cedcommerce.... 4661599	--	--	<span>Sales Free</span> <span>Marketing Free</span>
testing-aban-cart-dev-6113175.com	testing-aban-cart-dev... 6113175	--	2	<span>Sales Enterprise</span> <span>Service Enterprise</span> <span>Marketing Enterprise</span>
testing-ext-M1-dev-5906850.com	testing-ext-M1-dev-5... 5906850	--	--	<span>Sales Enterprise</span> <span>Service Enterprise</span> <span>Marketing Enterprise</span>
testing-ext-M2-dev-6086711.com	testing-ext-M2-dev-6... 6086711	--	2	<span>Sales Enterprise</span> <span>Service Enterprise</span> <span>Marketing Enterprise</span>
Testingtest-dev-5656610.com	Testingtest-dev-5656... 5656610	--	--	<span>Sales Free</span> <span>Marketing Free</span>
umakantecomsync	hubspot-developers-... 4904086	--	--	
vishal-dev-61... <span>Pin</span> <span>Open</span>	vishal-dev-6149717.c... 6149717	--	2	<span>Sales Enterprise</span> <span>Service Enterprise</span> <span>Marketing Enterprise</span>

6. Since, you can operate multiple accounts on Hubspot, choose the one with whom you want to sync your BigCommerce store details. Once you choose any of the accounts, the dashboard corresponding to the account appears:

You have 84 days left in your Developer Test Portal trial.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾

Marketing Dashboard ▾ Create dashboard Export Share ▾ Add report

Filter dashboard Visibility: Shared Actions ▾

### Marketing Performance ⓘ

Date range: In the last 30 days | Frequency: Daily



No items to show for this time frame.

### Landing Page Performance ⓘ

Date range: In the last 30 days



No landing pages to show for this time frame.

### Top Landing Pages ⓘ

Date range: In the last 30 days

LANDING PAGE	VIEWS ▾	SUI
Sample - Convert visitors with a HubSpot landing page	0	

### Blogging Performance ⓘ

Date range: In the last 30 days [Report settings](#) Actions ▾



No blog posts to show for this time frame.

### Top Blog Posts ⓘ

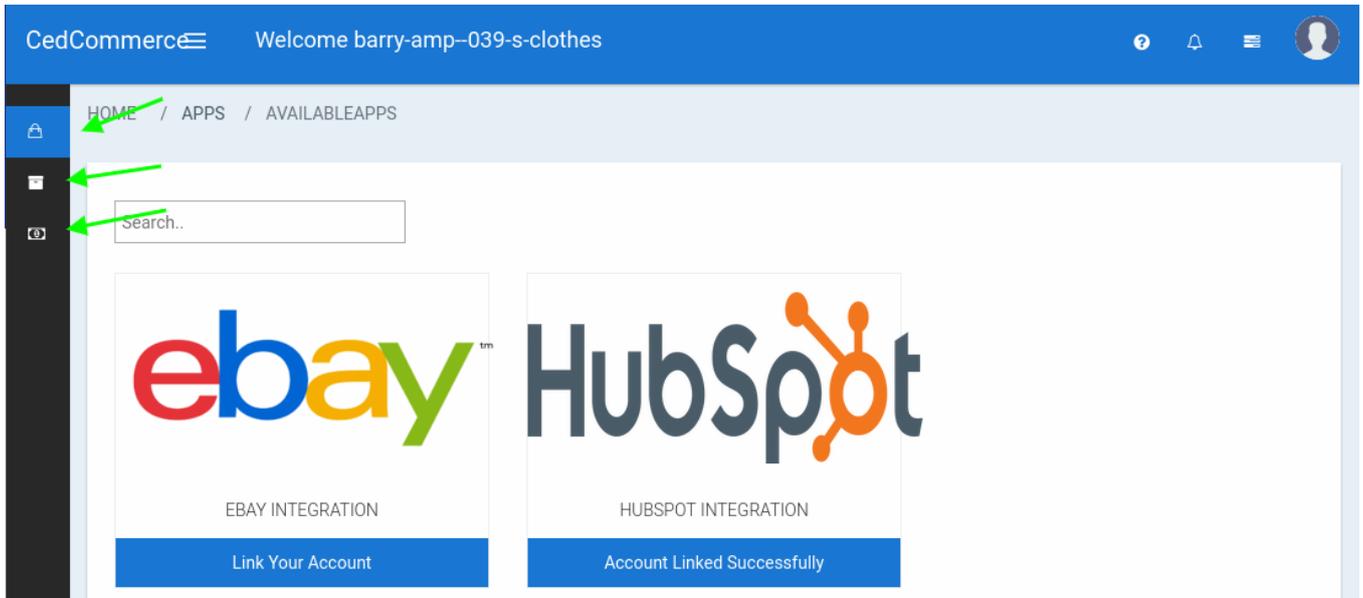
Date range: In the last 30 days

BLOG POST	VIEWS ▾
Sample - How To Post	0

Note: Meanwhile when you click the Link Your Account button, the installation process starts which connects the Hubspot with the BigCommerce and transfers properties such as Customers (Contact), Products, Orders, and Line Items).

### 3. Hubspot BigCommerce Features

Now that the app has been installed, let's start the process of understanding the app and its functions, as you would have seen this screenshot earlier let's get to the bottom of it and understand all such features:



In the above-mentioned picture, you can see 3 little logos marked against green arrows. All of them have their own significance. However first about the icons:

- ? Apps
- ? Hubspot
- ? Pricing

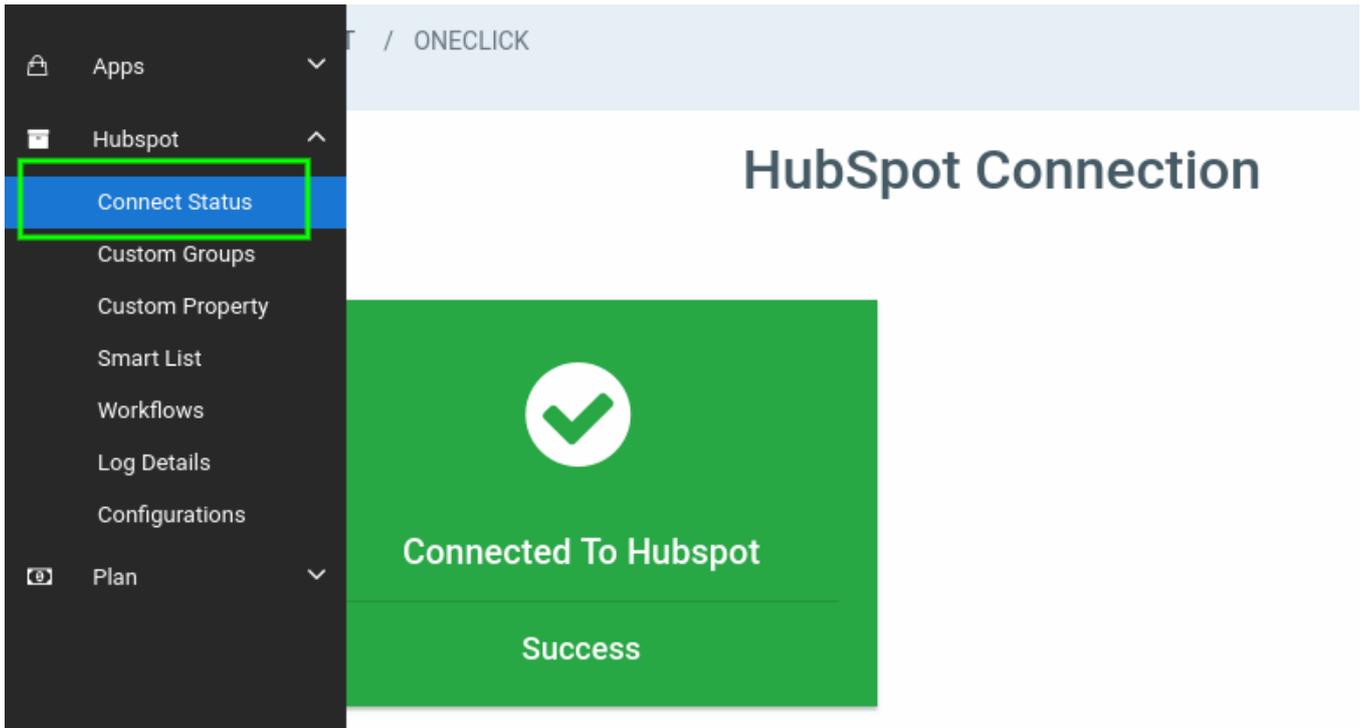
**Apps:** They have two sub-sections – Available Apps and Installed Apps.

**Hubspot:** It's the most crucial option among all the options. It has the following parts:

1. Connect Status
2. Customer Groups
3. Customer Property
4. Smart List
5. Workflows
6. Log Details
7. Configuration

**So let's understand each one, one-by-one:**

1. Connect Status: As visible from its name, connect status tells merchants if the Bigcommerce store is connected to Hubspot or not. If it's connected, this is how it gets displayed:



**2. Custom Groups:** These groups can be best understood as the set of information or set of activities performed by merchants which are used to create automated targeted campaigns.

### Hubspot Custom Group

Groups overview to see which are on your HubSpot account. Your group automatic created

Group Name	Action
Customer Group	✓
Shopping Cart Information	✓
Order	✓
Last Products Bought	✓
Categories Bought	✓
RFM Information	✓
SKUs Bought	✓
ROI Tracking	✓

**3. Custom Property:** It consists of sets of information which corresponds to different aspects of an order being placed. It ranges from customer details such as name, billing address, SKU bought, to the details of products and more. More or less it is a single unit or entity when coupled together creates custom groups.

Group Name	Action
Customer Group/ User role	✓
Accepts Marketing	✓
Shopping Cart Customer ID	✓
Shipping Address Line 1	✓
Shipping Address Line 2	✓
Shipping City	✓
Shipping State	✓
Shipping Postal Code	✓
Shipping Country	✓
Billing Address Line 1	✓
Billing Address Line 2	✓

4. **Smart List:** It contains the details of different buyer personas – those who purchase more or less, those about to quit, newsletter subscribers, different number of times purchase being made, etc.

HOME / HUBSPOT / SMARTLISTS

### HubSpot Smart Lists

Smart Lists overview to see which are on your HubSpot account. Smart List has been Automatic Created

Group Name	Action
Best Customers	✓
Big Spenders	✓
Loyal Customers	✓
Churning Customers	✓
Low Value Lost Customers	✓
New Customers	✓
Customers needing attention	✓
About to Sleep	✓
Mid Spenders	✓

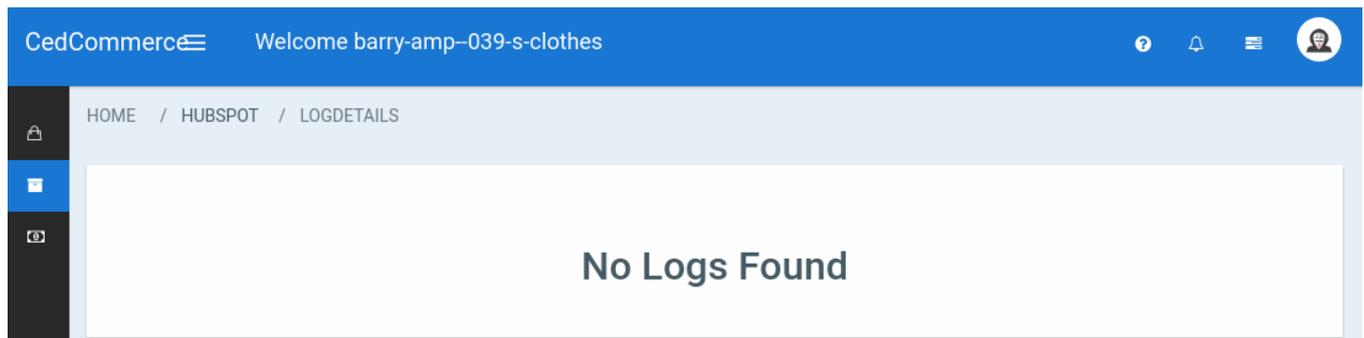
5. **Workflows:** Workflows are the planned actions triggered when some activity happens at the eCommerce stores like auto triggering of thank you email to customers who just made the purchase. Another example could be coupons being sent to customers who just came into the highest spenders club. Some of the examples of these are:

## HubSpot Workflows

workflows on HubSpot has been Automatic Created.

Group Name	Action
CedCommerce: MQL to Customer lifecycle stage Conversion	✓
CedCommerce: Welcome New Customer & Get a 2nd Order	✓
CedCommerce: 2nd Order Thank You & Get a 3rd Order	✓
CedCommerce: 3rd Order Thank You	✓
CedCommerce: ROI Calculation	✓
CedCommerce: Order Workflow	✓
CedCommerce: set Order Recency 1 Ratings	✓
CedCommerce: set Order Recency 2 Ratings	✓
CedCommerce: set Order Recency 3 Ratings	✓

**6. Log Details:** This option contains the details of all the actions (logs) occurred during the functioning of the Hubspot BigCommerce app.



### 7. Configurations:

Continue further to complete all the 6 steps of the Configuration

Settings(<https://docs.cedcommerce.com/bigcommerce/jet-bigcommerce-integration-guide?section=registration-and-jet-configuration-setup>)

## 4. Hubspot Configuration Settings

Under the Configuration tab, there are settings for defining a cart as abandoned or define RFM factors (Recency, Frequency, and Monetary). There are 5 combinations of RFM that can be used to define the different customer condition, then the data from your Bigcommerce has compared accordingly with these values and then transferred to Hubspot.

? Here you can define the maximum period of inactivity for a cart to be treated as abandoned

? You can also enable/disable Hubspot Bigcommerce integration

? You can choose to import data or not.

## ⚙️ Hubspot Configuration Details

### 🔒 Abandoned Cart

After how many minute(s) of inactive cart we should treat it as Abandoned.

### Enable hubspot Integration

### Do you want import old data?

### RFM settings

Rating	Recency	Frequency	Monetary
1	More than <input type="text" value="365"/>	Less than <input type="text" value="2"/>	Less than <input type="text" value="250"/>
2	From <input type="text" value="181"/>	From <input type="text" value="2"/>	From <input type="text" value="250"/>

→ Once you/merchant has defined all the parameters, simply save the configuration. To save the configuration click the Save Configurations.

Save Configurations

button