

Hubspot Magento 2 Extension Guide

by CedCommerce Products Documentation

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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 the 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 Magento 2 Extension. 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 Magento 2 admin panel to HubSpot**. Result? you can manage your business well by in-depth details of products.

A glance at its Features-

Product Sync – Sync the product along with its details such as Name, Image, Price, and Description to HubSpot 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, and Contact Stage.

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 clientèle.

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' behaviour 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 case 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.

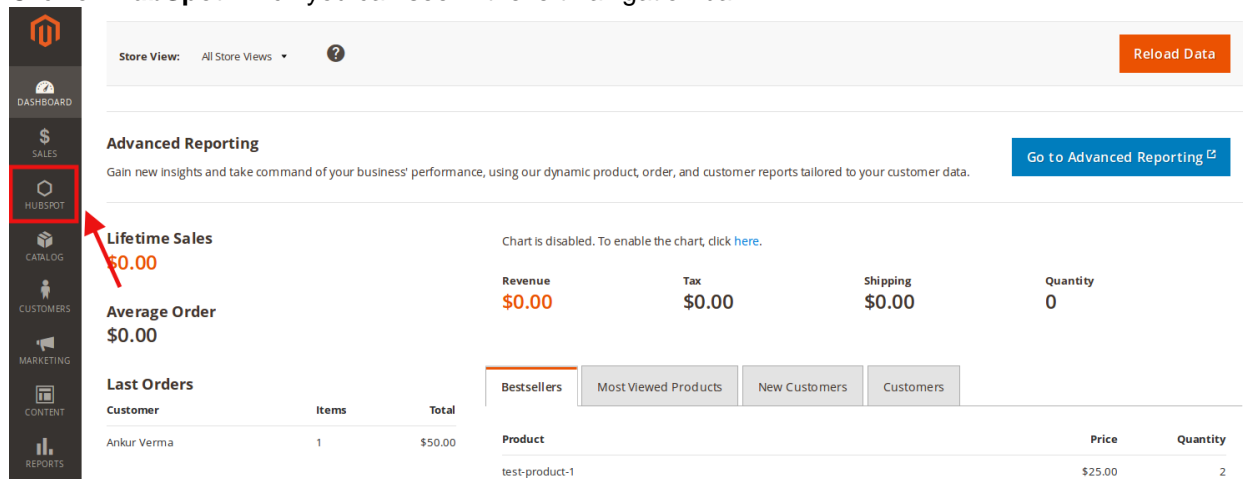
Customer Re-engagement – With the HubSpot E-Commerce Integration, re-engage with your customers and draw their attention towards your brand once again. The HubSpot E-Commerce Integration authorizes you to send emails to communicate with your users who haven't made a purchase with you lately.

2. Configuration Settings

The first step in the process of integrating your Magento 2 store with HubSpot is the Configuration.

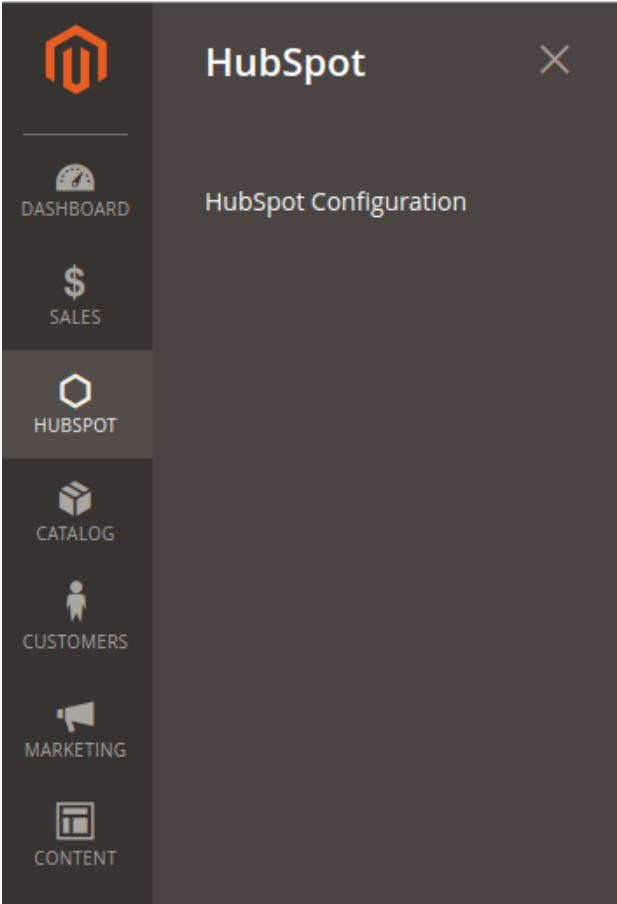
To do the Configuration,

- Go to your Magento Admin Panel.
- Click on **HubSpot** which you can see in the left navigation bar.

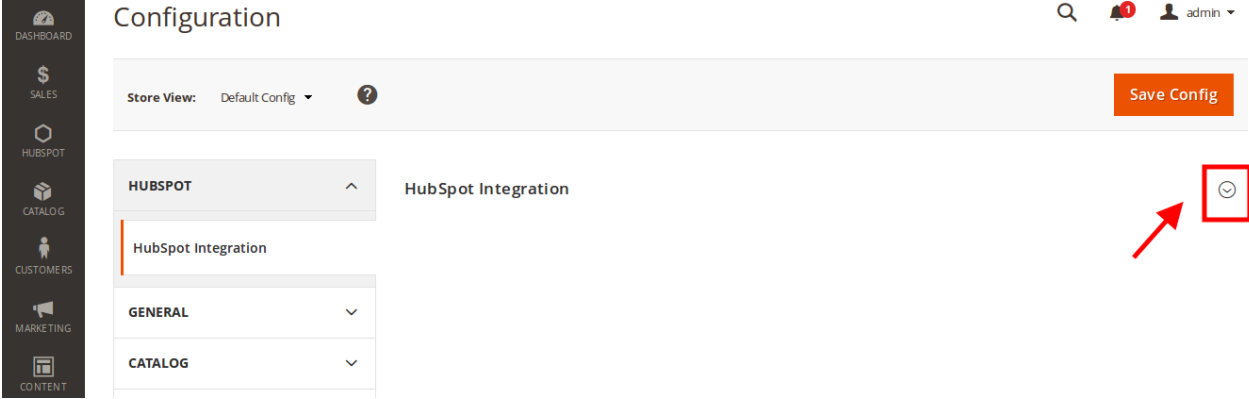


The screenshot displays the Magento Admin Panel interface. On the left, the navigation bar includes icons for Dashboard, Sales, HubSpot (highlighted with a red box and an arrow), Catalog, Customers, Marketing, Content, and Reports. The main content area features a 'Store View' dropdown set to 'All Store Views' and a 'Reload Data' button. Below this is the 'Advanced Reporting' section, which includes a 'Go to Advanced Reporting' button. The 'Lifetime Sales' section shows a total of \$0.00. The 'Average Order' section shows a total of \$0.00. The 'Last Orders' section includes a table with columns for Customer, Items, and Total, showing one order for Ankur Verma with 1 item and a total of \$50.00. Below this, there are tabs for 'Bestsellers', 'Most Viewed Products', 'New Customers', and 'Customers'. The 'Bestsellers' tab is active, showing a table with columns for Product, Price, and Quantity, listing 'test-product-1' with a price of \$25.00 and a quantity of 2.

- On clicking it, the bar will get expanded as shown below:



- Now click on **HubSpot Configuration** as shown in the above image.
- On clicking, you will be navigated to the page as shown below:



- Click on HubSpot Integration and the section will get expanded as shown below:

HubSpot Configuration



Enable HubSpot Integration

[global]

Yes

▼

Abandoned Cart

[global]

3

After how minute of inactive cart we should treat it as Abandoned

Authorize

Authenticate

Export Settings



Select Cron Time

[global]

Every Hour

▼

Export Old Data



Want to Export Old Data?

[global]

Yes

▼

Export Old Data

RFM Settings

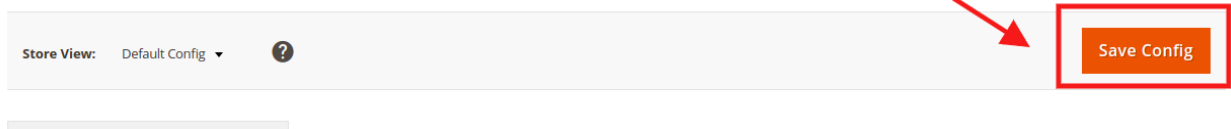


Rfm Settings

Rating	Recency (days since last order)	Frequency (total orders placed)	Monetary (total money spent)
5	Less Than: 30	More Than: 20	More Than: 1000
4	From: 31 To: 90	From: 10 To: 20	From: 750 To: 1000
3	From: 91 To: 180	From: 5 To: 10	From: 500 To: 750
2	From: 181 To: 365	From: 2 To: 5	From: 250 To: 500
1	More Than: 365	Less Than: 2	Less Than: 250

- In **Enable HubSpot Integration**, select **Yes** to enable the extension. (*Yes is the default state which is already selected.*)
- In **Abandoned Cart**, enter the time in minutes after which you want the inactive shopping cart to be treated as abandoned.
- **Select Cron Time** – You can decide in what frequency data get sync, it can be once in a day, twice in a day, four times a day or every hour.
- **Want to Export old Data**– If a user selects yes and click on the **Export Old Data** then old data (products, customers, orders and line items) will get export to HubSpot.
- In **RFM Settings**, you may categorize your customers on the basis of the Recency (How frequently they are ordering your product?), Frequency (How many orders they are placing?), and Monetary (How much your customers are spending on your product?), and then rate them on the scale of 1 to 5, where 5 indicates the customers who are most inclined towards your product and 1 indicates those who are least inclined.
 1. In **Recency** column, you need to enter the numbers as a parameter for days and decide on its basis which type of customers are visiting your store most frequently. You may rate them accordingly.
 2. In **Frequency** column, you need to enter the numbers for the total orders placed by a customer, and on the basis of that, you can decide about the customers who are placing most orders and who are placing the least number of orders.
 3. In **Monetary** column, enter the numbers as a parameter and decide on its basis that who are the customers who are spending the most on your product and who are spending the least.
- Once you've selected and entered the information mentioned above, click on the **Save Config** button on the top right side of the page.

Configuration



Store View: Default Config ?

Save Config

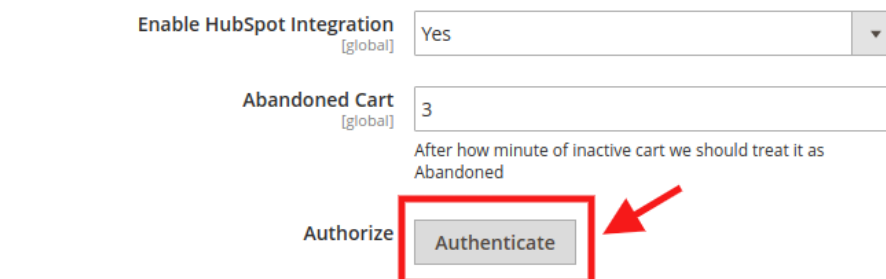
- The configuration will be **saved**.

3. Installation

After the Configuration is done successfully, you may move a step further and take the necessary steps for installation.

- Click on the **Authenticate** button to authorize and connect to HubSpot.

HubSpot Configuration



Enable HubSpot Integration [global] Yes

Abandoned Cart [global] 3

After how minute of inactive cart we should treat it as Abandoned

Authorize Authenticate

- On clicking it, a new tab of **HubSpot** will be opened,
 - **Login** to your Hubspot account
 - On Logging, in the HubSpot account page will appear as-

Request for Integration Permissions

HubSpot Magento Ecomm Bridge API Integration wants access to:



User and Account Information

This includes access to read information about the user and account



Read from and write to my Files

This includes access to File Manager



Create timeline events

Provides the ability to add events to contact timelines



Access to integrations sync features

Exposes the sync (and ecomm) api for integrators to build apps with Sync enabled, which allows syncing of most Crm objects



Read from and write to my Contacts

This includes prospects and lists



Read from and write to my Workflows

This includes workflows

Grant access

- Click on **Grant Access** which is mentioned in the above image and authentication process will get complete.