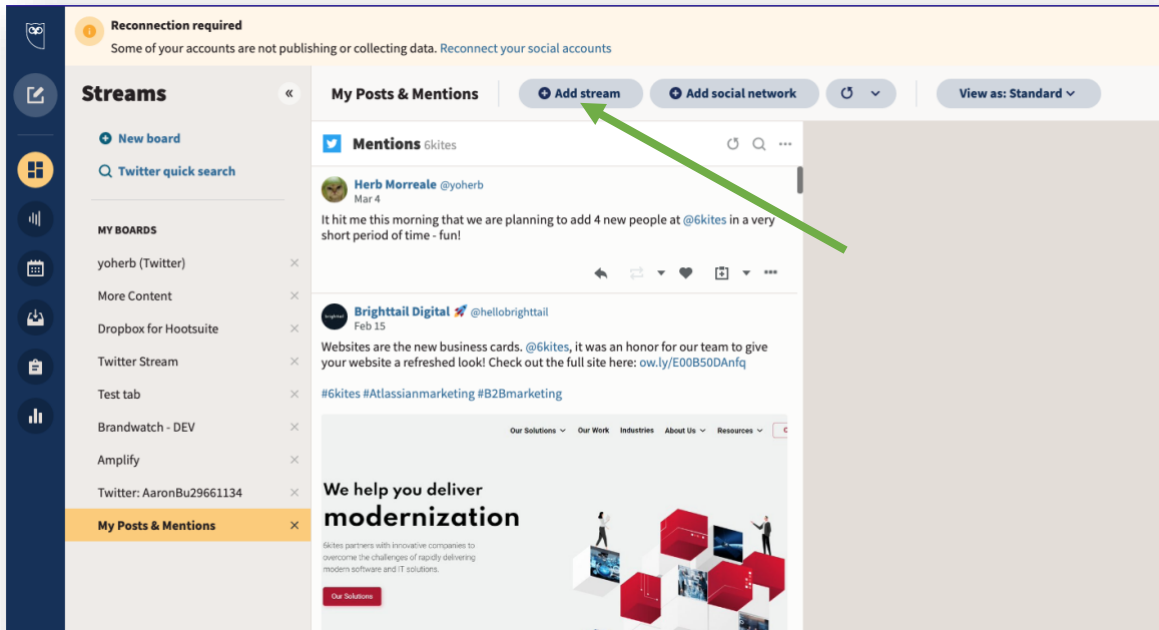


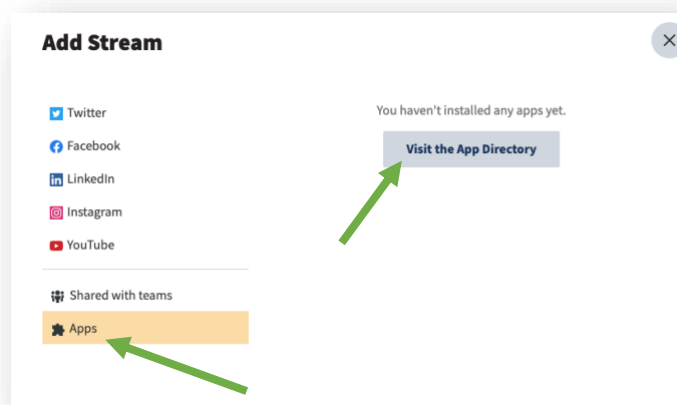
Welcome to the HubSpot App for Hootsuite! Please follow these instructions in order to use the app.

Installing the HubSpot App in Hootsuite

1. Log into your **Hootsuite Dashboard** at <https://hootsuite.com>
2. Click the **Add Stream** button.

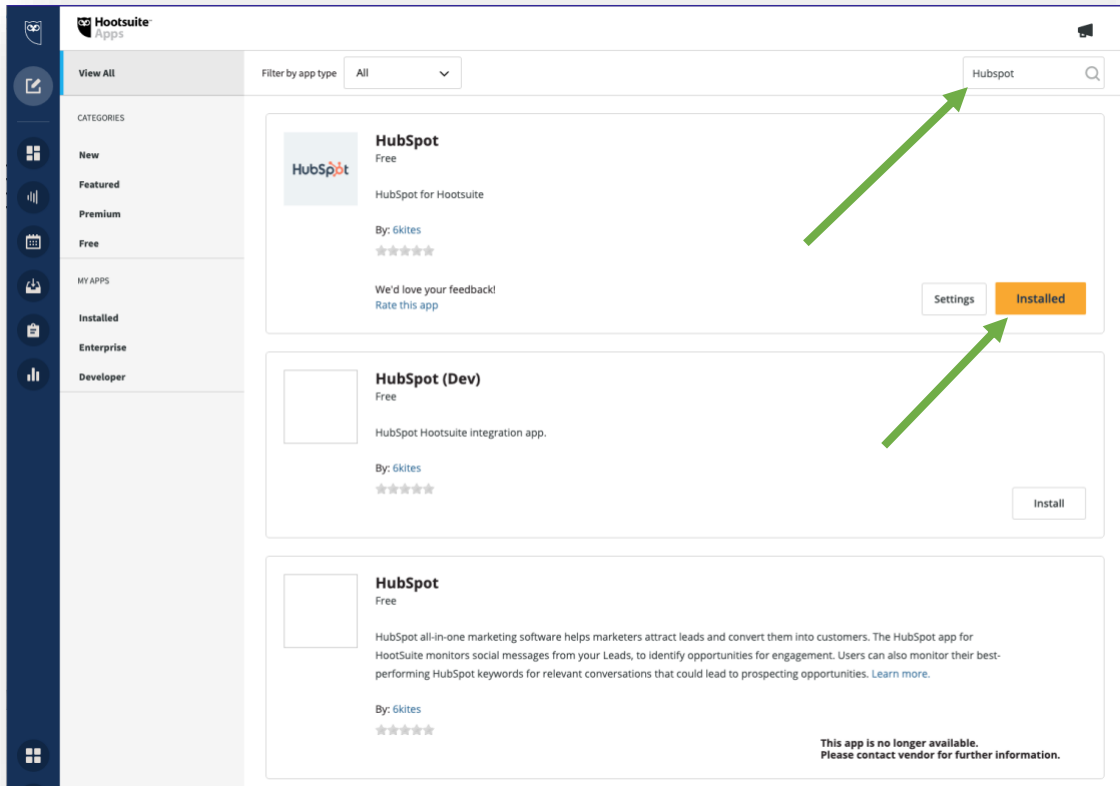


3. Click on **Apps** on the **Add Stream** window that appears.
4. Click **Visit the App Directory**



5. Enter **HubSpot** in the **Search Box**

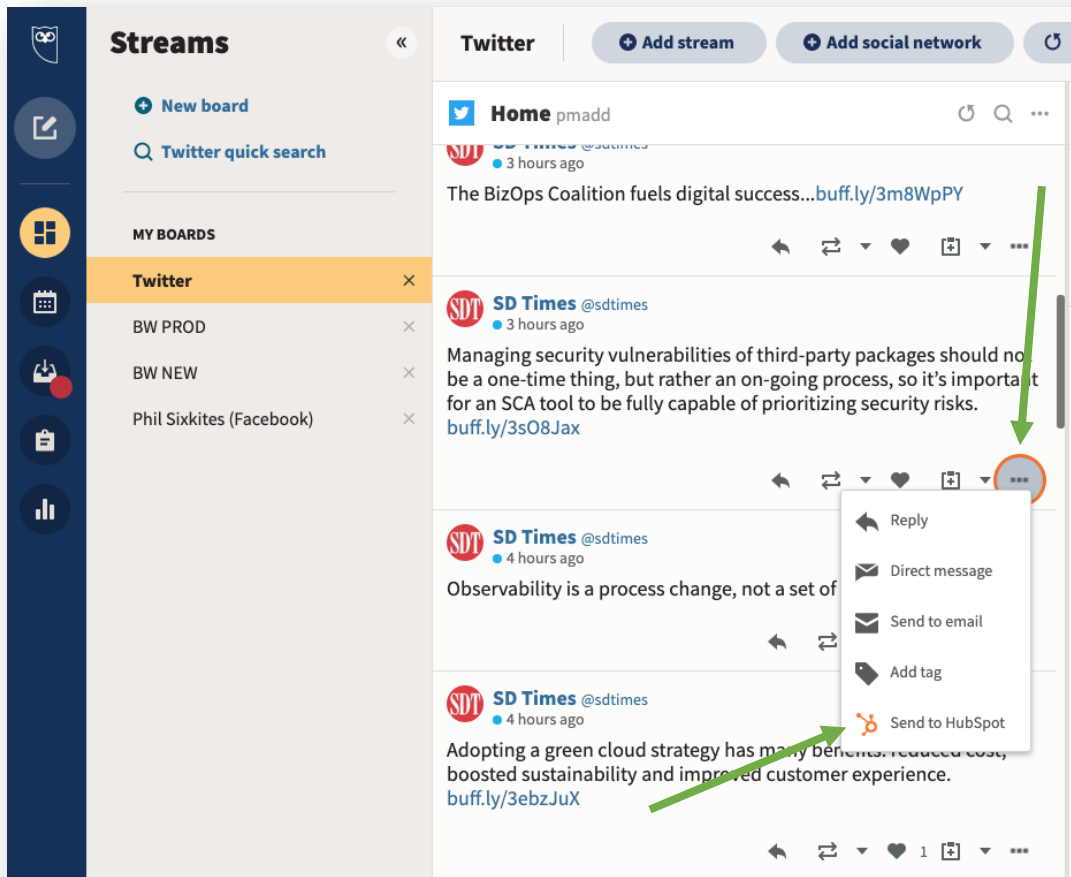
6. Click on **Install** next to the **HubSpot App Listing**



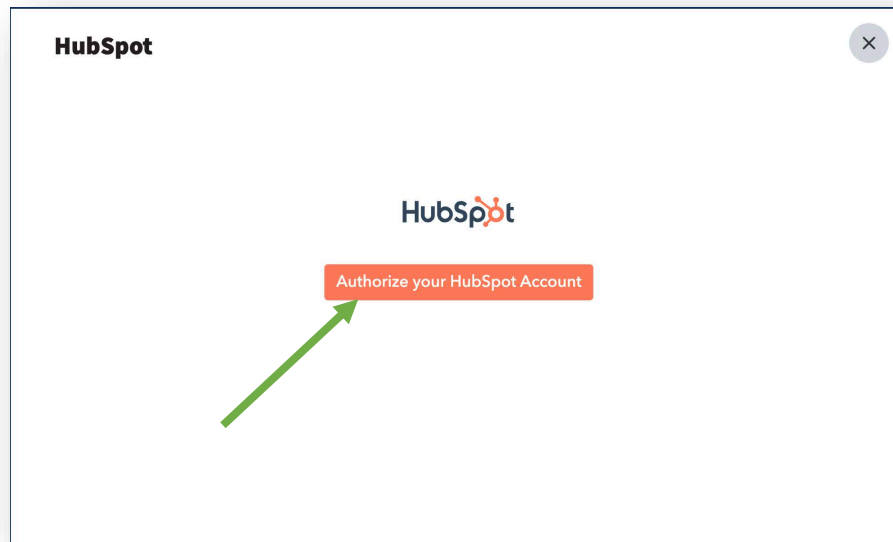
Connecting Your HubSpot Account

Now that you have installed the app, you can connect your HubSpot account by following these steps.

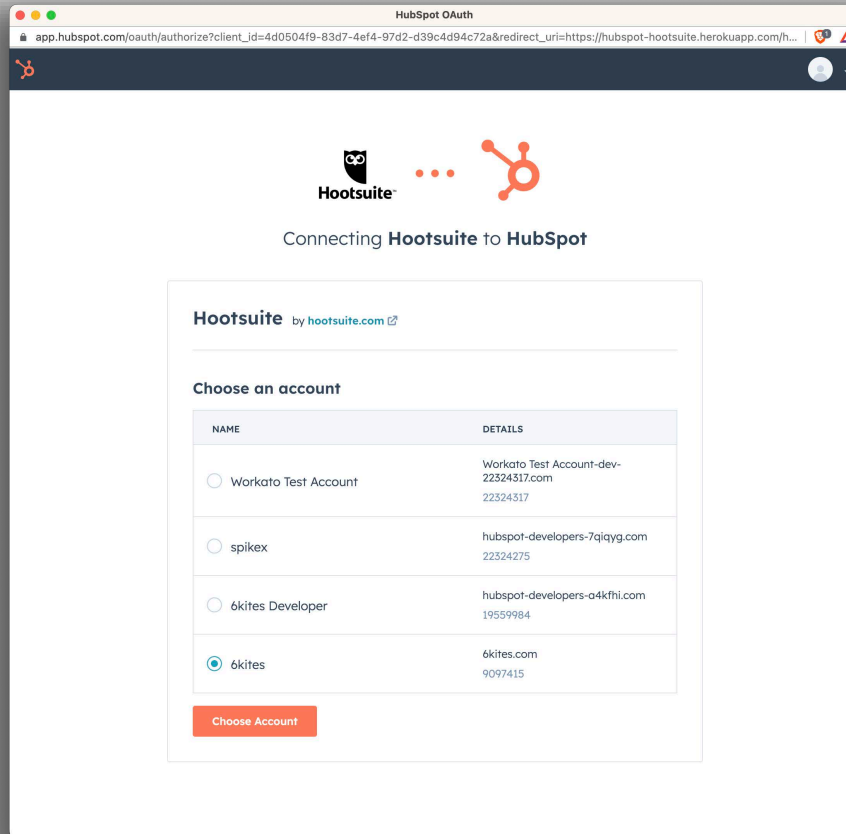
1. Return to your **Hootsuite Dashboard** and find or create a Twitter or Facebook Social Network stream.
2. Select a Tweet or Facebook Post in your stream, click the context menu (three dots) and select "Send to HubSpot"



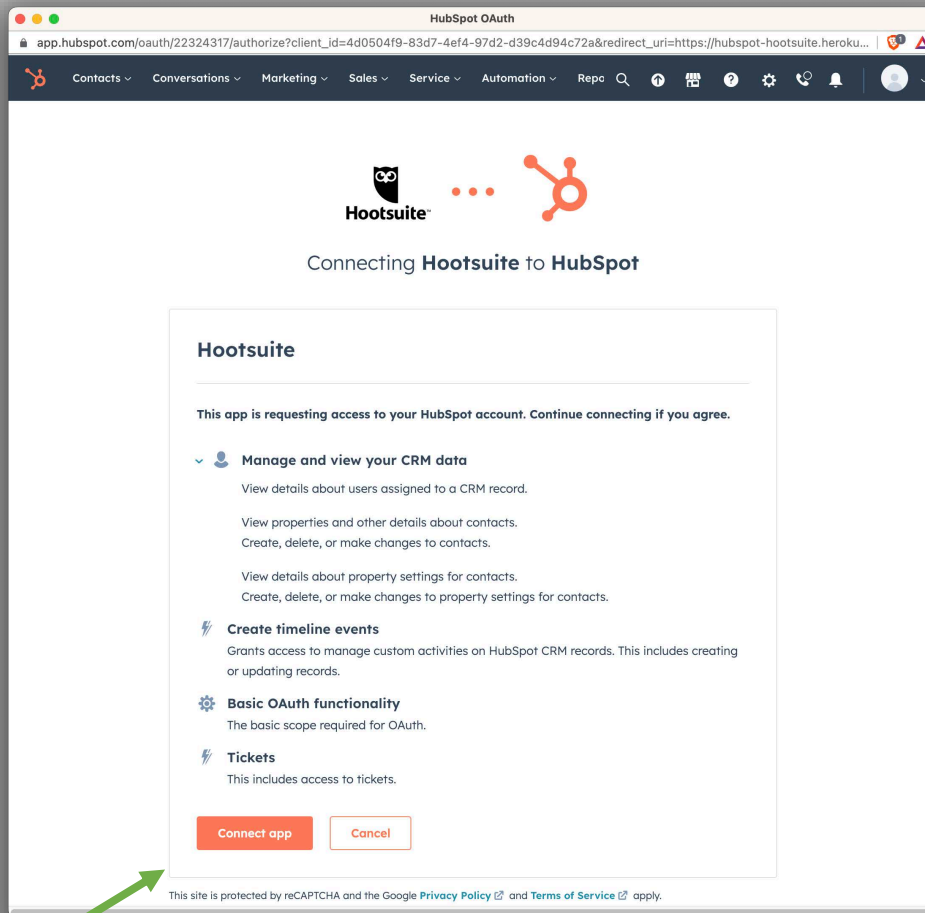
3. You will see a dialog asking you to Authorize your HubSpot account, click on the **Authorize HubSpot Account** button to start



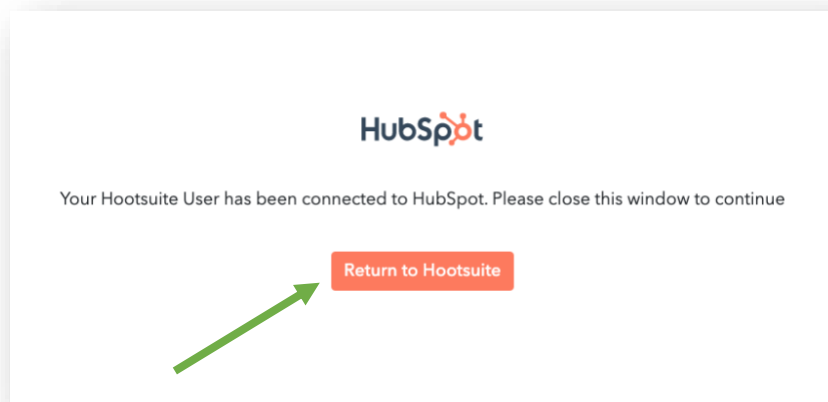
4. Next, another window will appear. You may be asked to log into your HubSpot account. If so, log in. This will take you to the next step.
5. Next, you may be asked to select a HubSpot Account (organization) if your login is part of more than one HubSpot Account. If so, select the one you want to connect to Hootsuite. If you are only part of one HubSpot Account, you will not see this screen.



- Next, you will be asked to authorize the HubSpot for Hootsuite app to access your HubSpot account (as shown below).

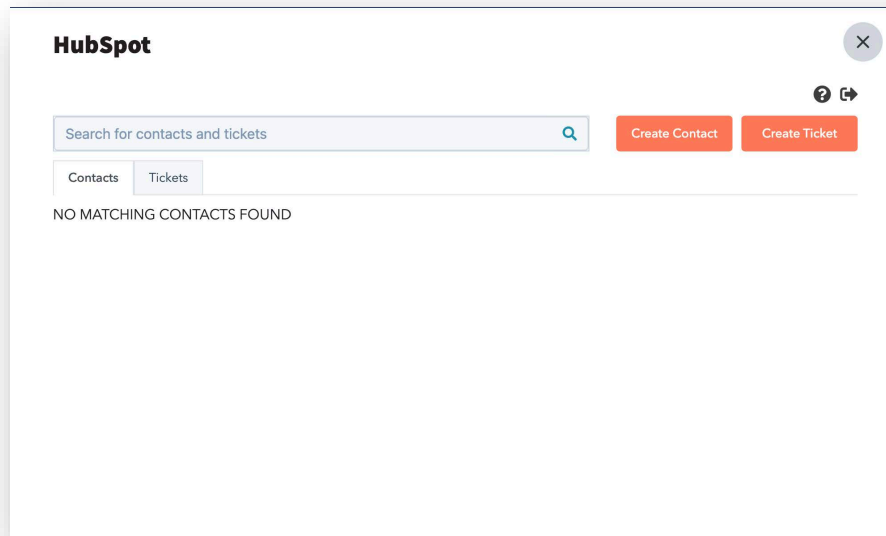


7. Once you click Connect App, you will see the following screen. Click on Return to Hootsuite and you will be taken back to the Hootsuite Dashboard with the initial screen of the HubSpot for Hootsuite App displayed.



Using the HubSpot for Hootsuite App

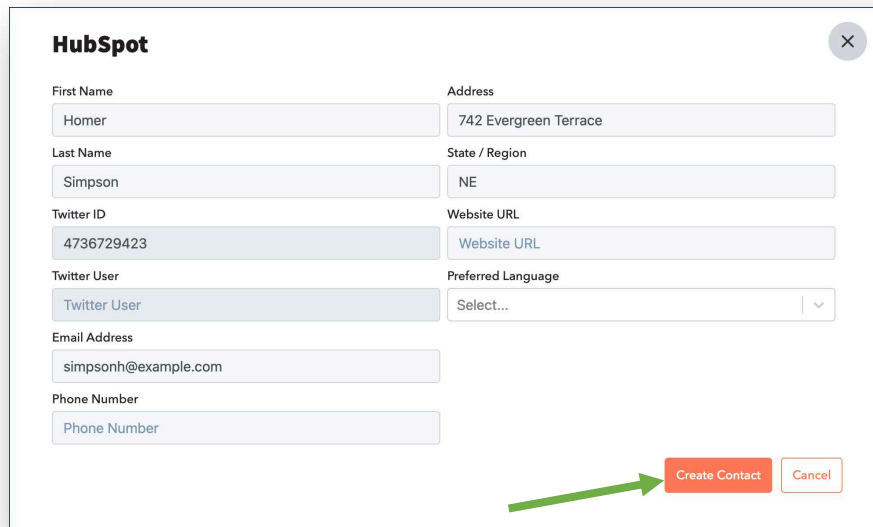
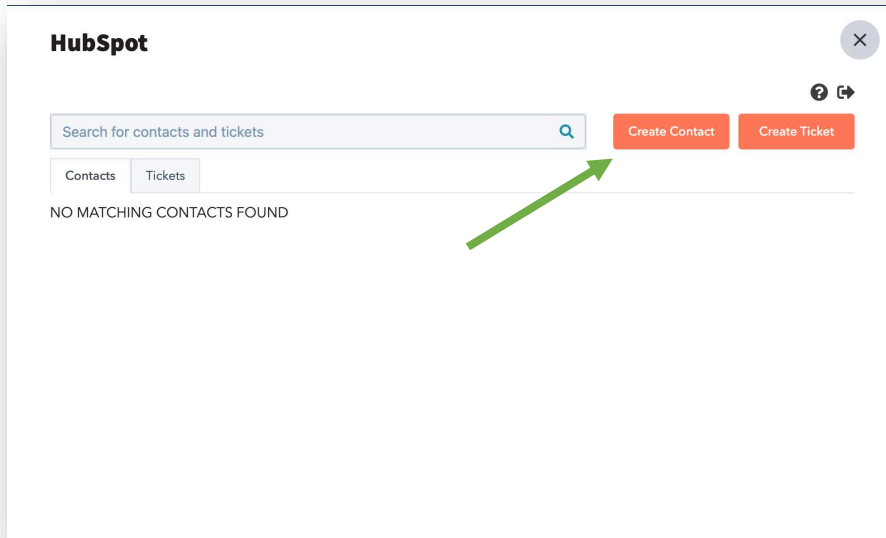
When you have finished authorizing your HubSpot account, you will initially see the following screen.



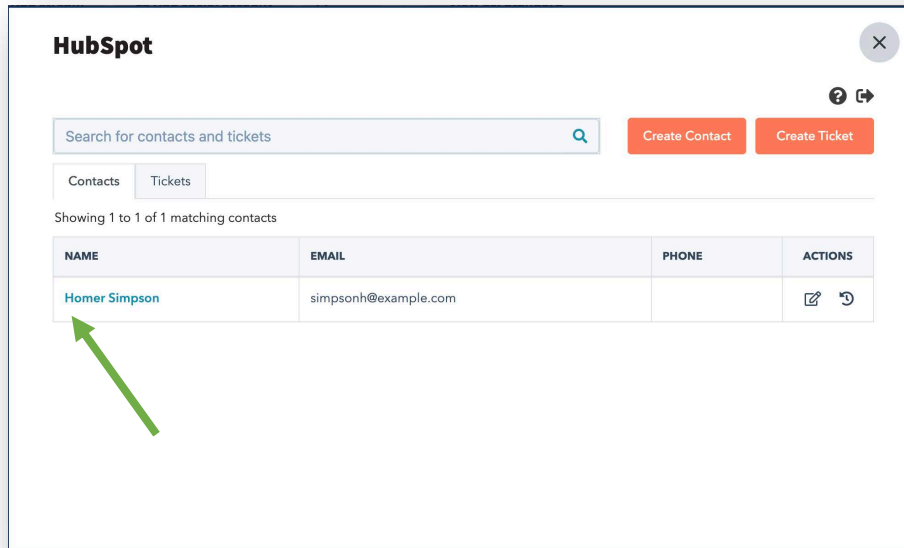
From here, you can either Create a new HubSpot account, Create a new HubSpot Ticket, or Search for Contacts and Tickets in your HubSpot account.

Create a New HubSpot Contact

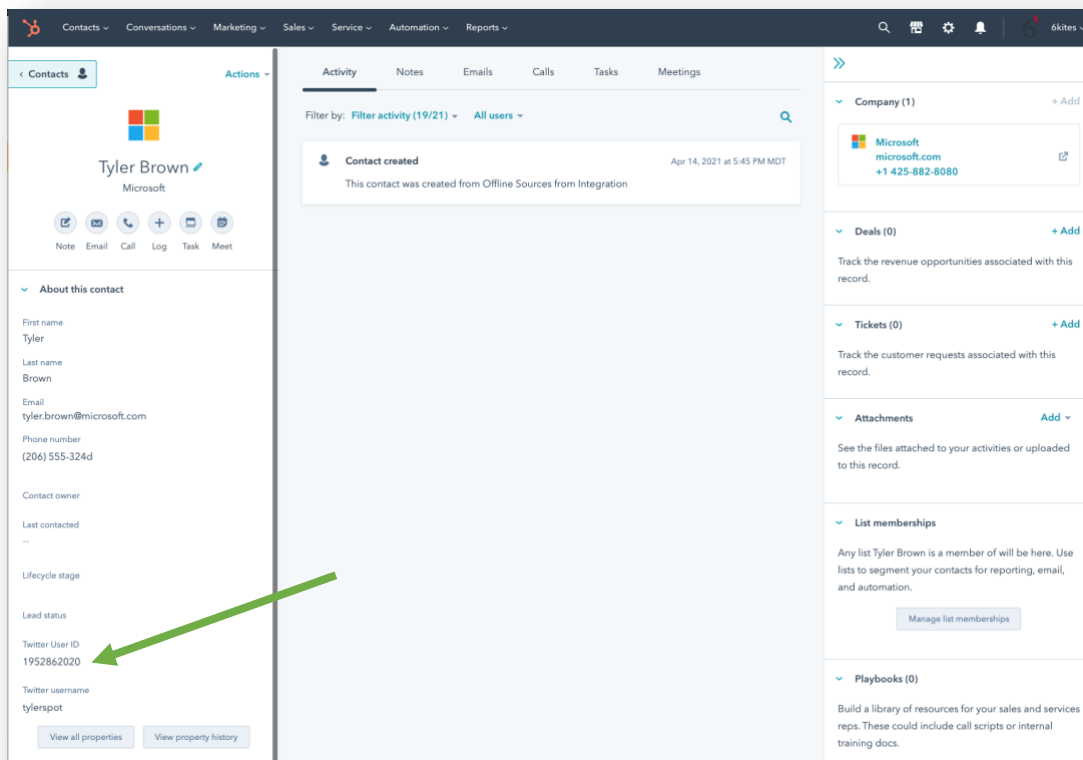
To create a new HubSpot contact, click on the Create Contact button. You will then be presented with a contact form. Enter the details for this contact and click the Create Contact button. The contact will be created in your HubSpot account and associated with the Twitter or Facebook contact that you originally selected when clicking on **Send to HubSpot**.



You will be taken back to the main screen showing the newly created contact.



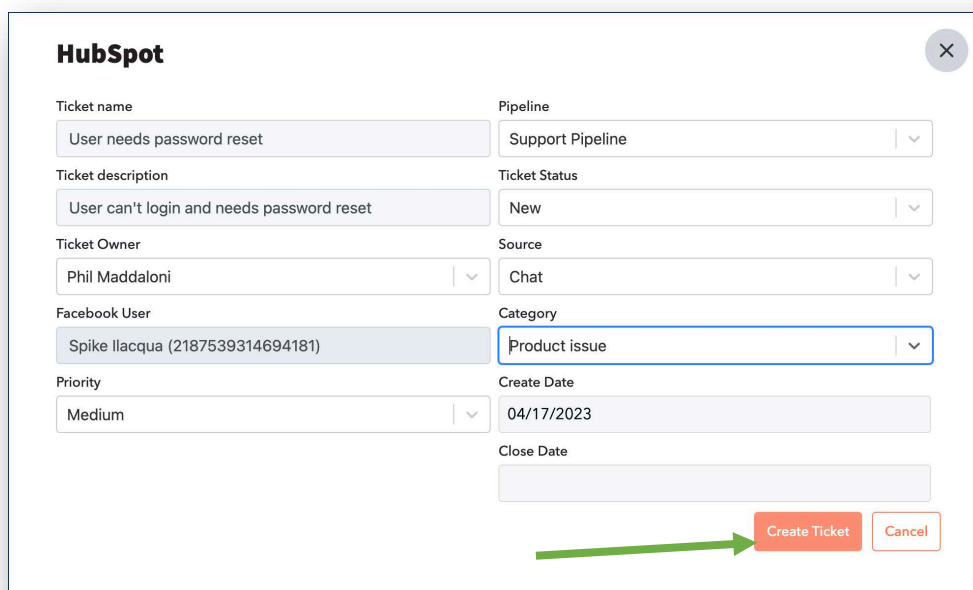
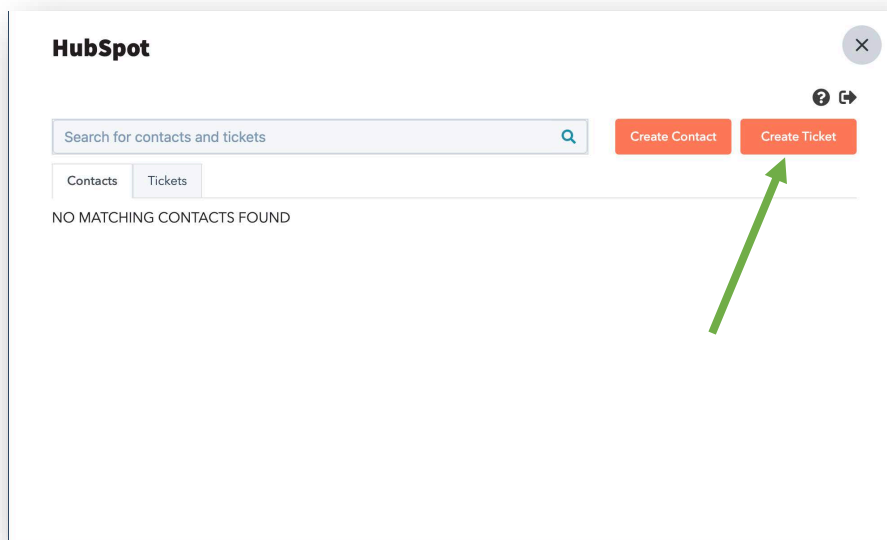
Clicking on the name of the contact will bring up the HubSpot app in a new tab open to the details for this contact. The social details from the Hootsuite mention that triggered the popup will be added to custom fields as shown below. These fields will be automatically added to your HubSpot instance if they did not previously exist.

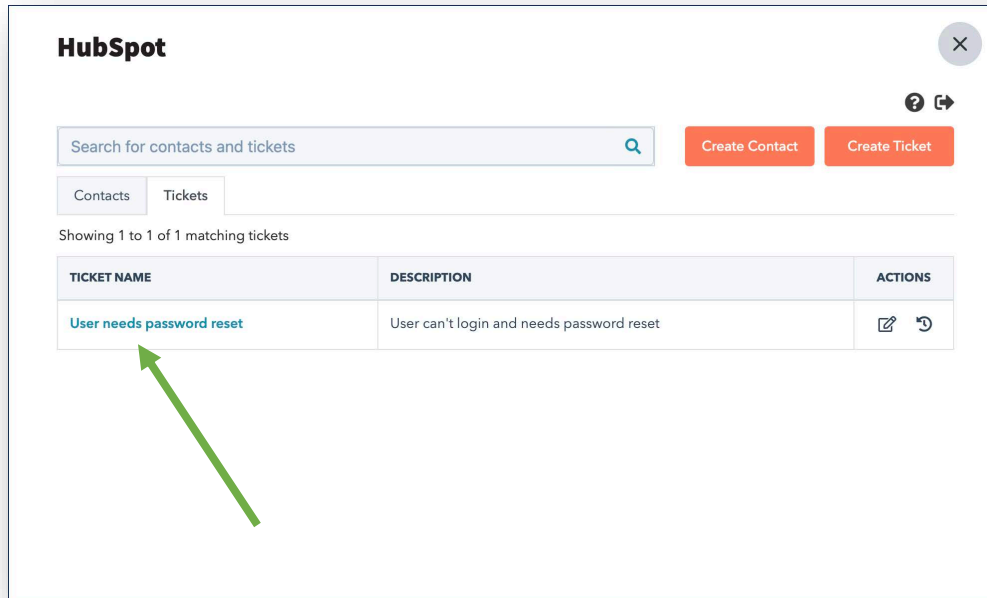


The next time you select a Tweet or Facebook Post from the same user (same social id), the HubSpot for Hootsuite app will be automatically populated with the details of the matching Contact.

Create a New HubSpot Ticket

To create a new HubSpot ticket, click on the Create Ticket button. You will then be presented with a new ticket form. Enter the details for this ticket and click the Create Ticket button. The ticket will be created in your HubSpot account and associated with the Twitter or Facebook user that you originally selected when clicking on **Send to HubSpot**.





Clicking on the name of the ticket will bring up the HubSpot app in a new tab open to the details for this ticket. The social details from the Hootsuite mention that triggered the popup will be added to custom fields as shown below. These fields will be automatically added to your HubSpot instance if they did not previously exist.

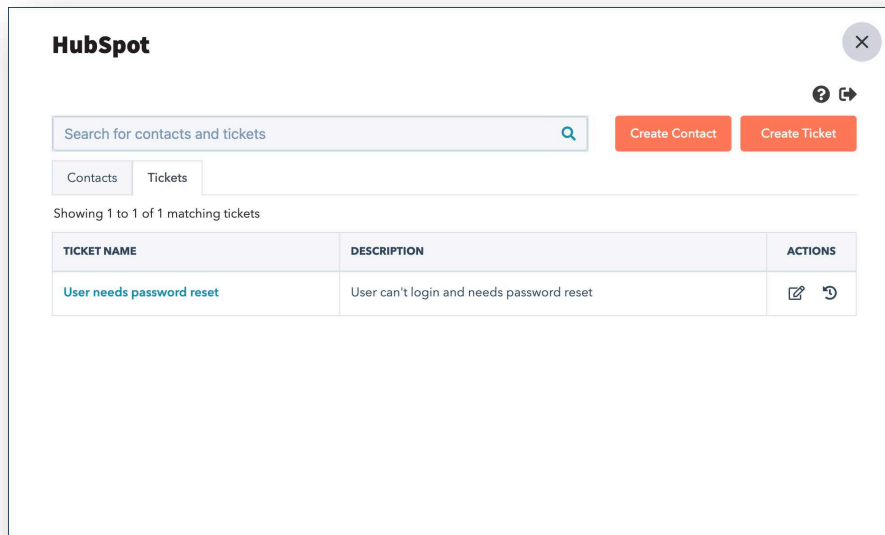
The screenshot displays the HubSpot CRM interface for a ticket titled "User needs account reset". The interface is divided into three main sections: a left sidebar, a central activity feed, and a right-hand navigation pane.

- Left Sidebar:** Contains ticket details such as "User needs account reset", "Open 2 minutes", "Status: New", and "About this ticket" section with fields for Ticket name, description, owner (Phil Maddaloni), create date (04/14/2021), priority (High), and social media identifiers (Twitter User ID: 1952862020, Twitter Username: tylerspot).
- Central Activity Feed:** Shows a "Ticket activity" log with entries like "Ticket moved to New by API" and "Ticket created" on April 14, 2021.
- Right-hand Navigation Pane:** Lists various entities associated with the record, including Company (0), Contacts (0), Deals (0), Attachments, and Conversations (0).

A green arrow points to the "Twitter User ID" field in the "About this ticket" section, which contains the value "1952862020".

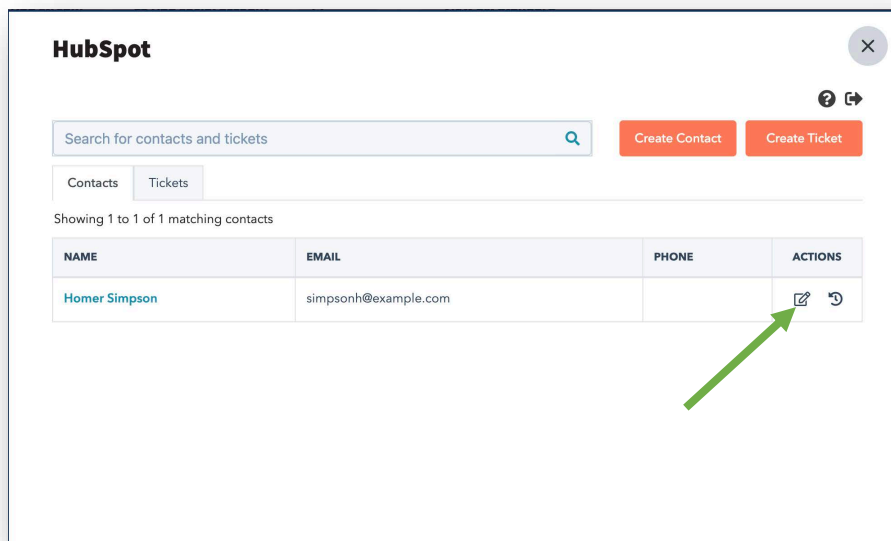
Viewing Matching Contacts and Tickets

If you initiate the HubSpot app with a **Twitter Tweet** or **Facebook Post** of a user whose social account is already associated with a HubSpot contact ticket, they will appear when you open the dialog. You can toggle between viewing matching Contacts and Tickets by clicking on the respective Tabs.



Editing a HubSpot Contact

You can edit an existing HubSpot contact by clicking on the Edit Icon to the right of the contact's details.



This will bring up a dialog similar to the Create Contact dialog with the details for this contact pre-populated. You can edit the details of the contact as you wish here and then click the Update Contact button to update the details in HubSpot.

HubSpot ✕

First Name	Address
<input type="text" value="Homer"/>	<input type="text" value="742 Evergreen Terrace"/>
Last Name	State / Region
<input type="text" value="Simpson"/>	<input type="text" value="NA"/>
Twitter ID	Website URL
<input type="text" value="174372602"/>	<input type="text" value="Website URL"/>
Twitter User	Preferred Language
<input type="text" value="Twitter User"/>	<input type="text" value="Select..."/>
Email Address	Last Activity
<input type="text" value="simpsonh@example.com"/>	<input type="text" value="Last Activity"/>
Phone Number	Last Contacted
<input type="text" value="Phone Number"/>	<input type="text" value="Last Contacted"/>

Editing a HubSpot Ticket

You can also edit an existing HubSpot ticket by clicking on the Edit Icon to the right of the ticket's details. You may need to click the Tickets tab first to see the tickets.

HubSpot ✕

Showing 1 to 1 of 1 matching tickets

TICKET NAME	DESCRIPTION	ACTIONS
User needs password reset	User can't login and needs password reset	<input type="button" value="Edit"/> <input type="button" value="Refresh"/>

HubSpot

Ticket name: User needs password reset | Pipeline: Support Pipeline

Ticket description: User can't login and needs password reset | Ticket Status: New

Ticket Owner: Phil Maddaloni | Source: Chat

Facebook User: Spike Ilacqua (2187539314694181) | Category: Product issue

Priority: Medium | Create Date: 04/17/2023

Close Date: [Empty]

[Update Ticket](#) [Cancel](#)

Attaching Social Context to HubSpot Timeline

You can optionally attach the details of the Tweet or Facebook Post that triggered the HubSpot dialog as a Timeline event to the HubSpot app. To do this, you can click on the Clock icon next to the Contact or Ticket in the list. When you click this icon, it will spin while the timeline event is being added and then change to a small green checkmark.

Timeline events can be added to both Contacts and Tickets in the same way.

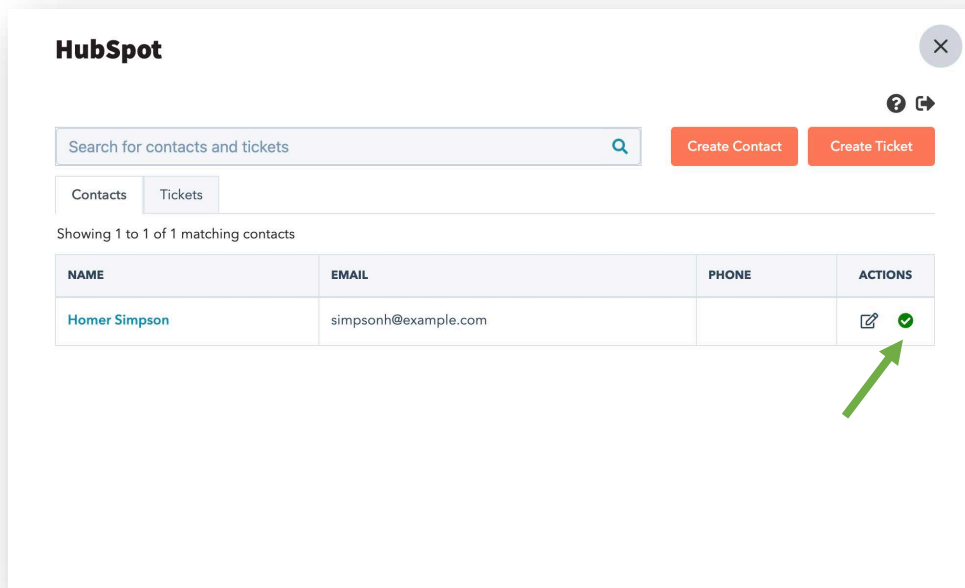
HubSpot

Search for contacts and tickets [Search] [Create Contact](#) [Create Ticket](#)

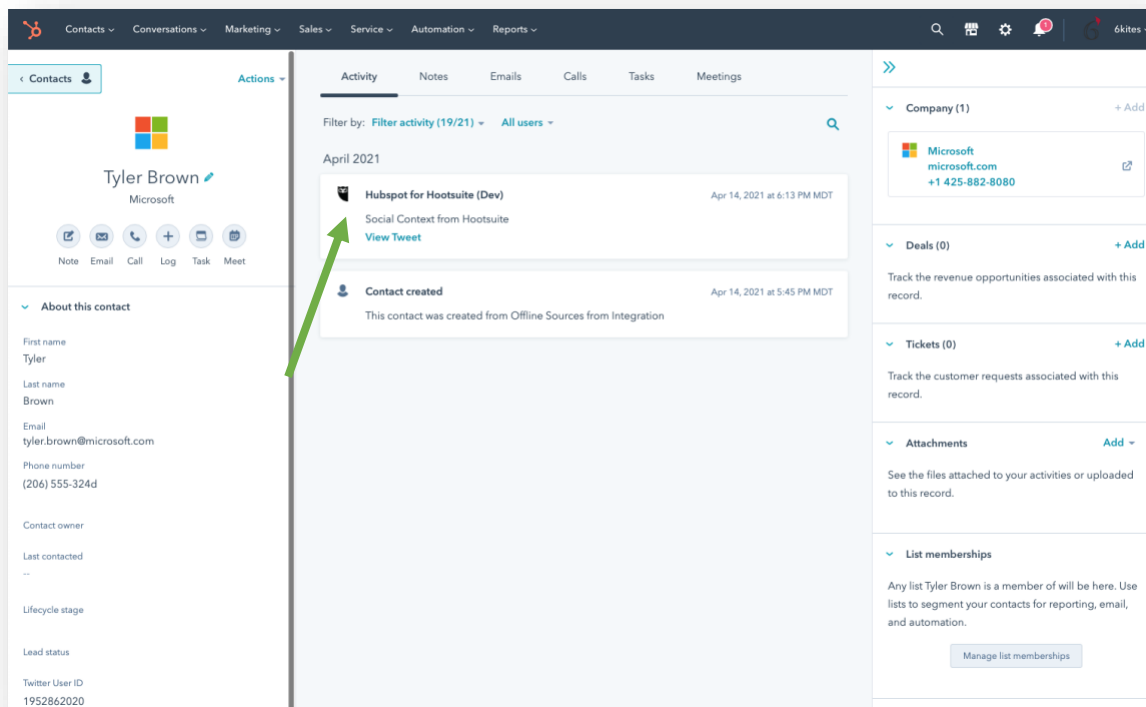
Contacts | Tickets

Showing 1 to 1 of 1 matching contacts

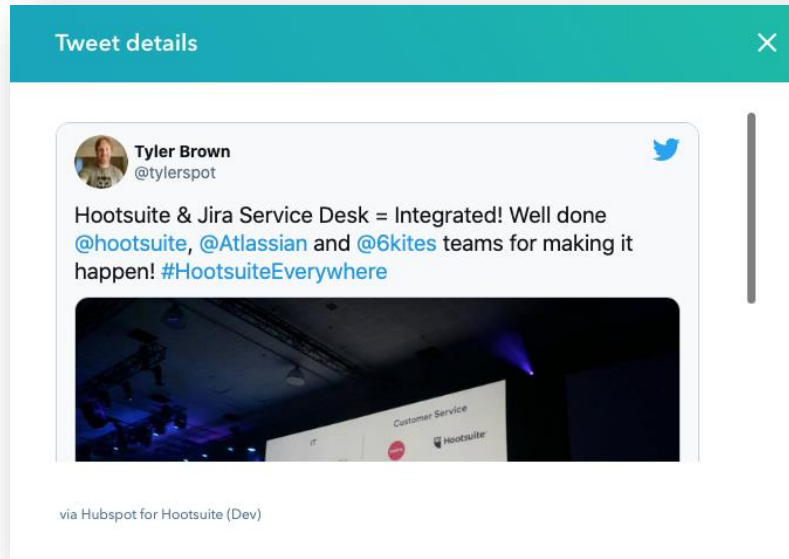
NAME	EMAIL	PHONE	ACTIONS
Homer Simpson	simpsonh@example.com		



Once the green checkmark appears you can click on the name of the Contact and view the Timeline event within HubSpot.

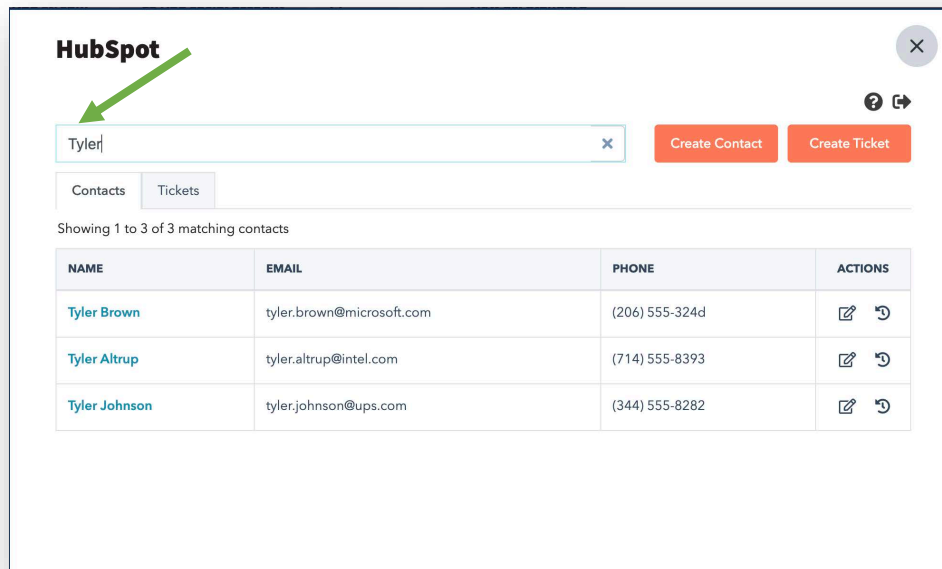


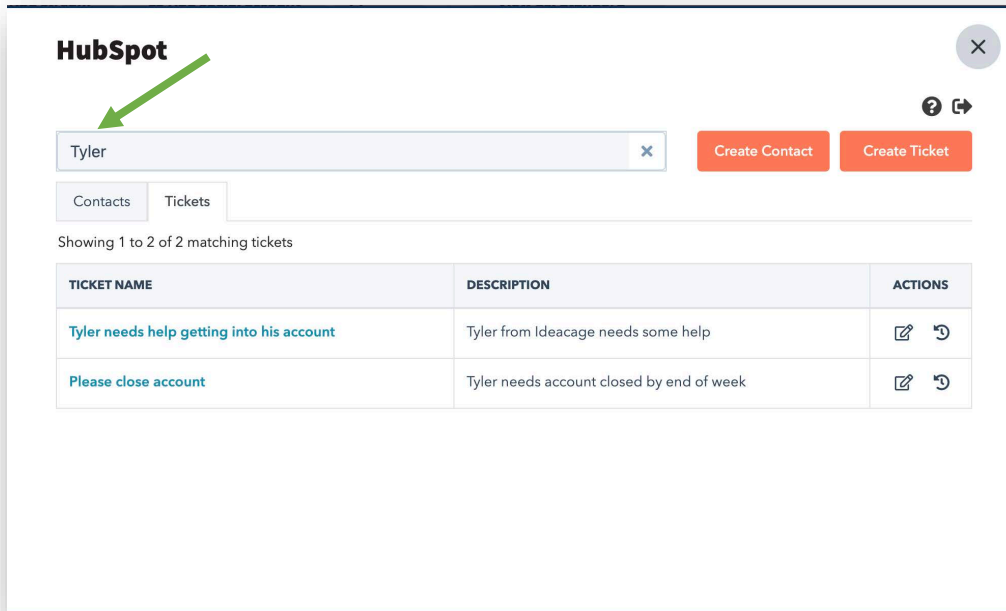
Clicking on **View Tweet** (or **View Post** for a Facebook Post) will display the details of the post in a dialog.



Searching for Contacts and Tickets

You can also search for contacts and tickets within HubSpot. Entering a search term into the search box and pressing enter will return all contacts and tickets that match that search term based on contact name, phone, email, address, or company or ticket id, name or subject.

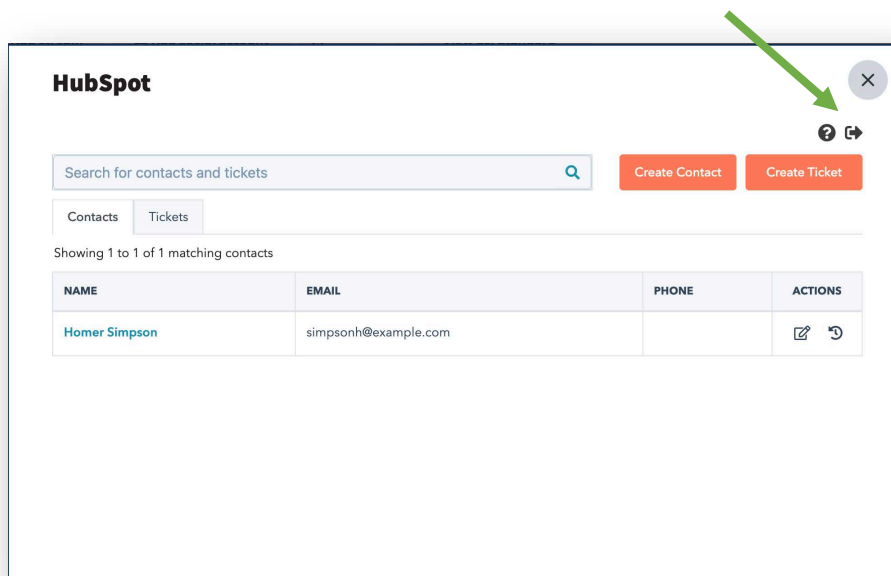




Once you have searched for contacts or tickets, you can perform any of the actions on the contacts and tickets that were found such as editing or attaching social context.

Logging out and Viewing Help

If you wish to **log out of your HubSpot** account (possibly to attach a different HubSpot account) for the app, you click on the **Sign Out** icon on the top right. To view this **Help** document, you can click on the **Question Mark** icon.



If you need further assistance or have questions about the app, please contact dev.support@hootsuite.com