SCOTT'S FOR HUBSPOT APP INSTALLATION

1.1 Overview
Objective: Successful installation and configuration of data provider's HubSpot integration
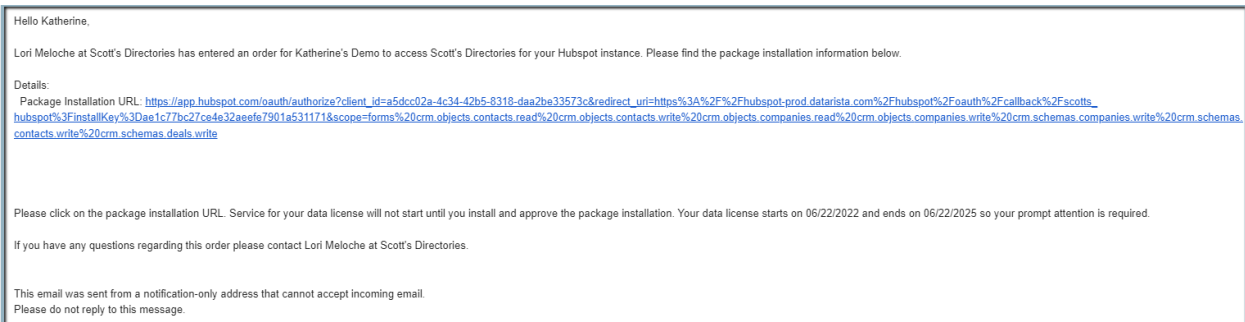
What you'll need:
- HubSpot user with Admin permissions
- Invitation email that includes link
Estimated time to complete: 5 minutes

1.2 Install the Application

▶   Click the Package Installation URL found in the new order email

Hello Katherine,

Lori Meloche at Scott's Directories has entered an order for Katherine's Demo to access Scott's Directories for your Hubspot instance. Please find the package installation information below.

Details:
 Package Installation URL: https://app.hubspot.com/oauth/authorize?client_id=a5dcc02a-4c34-42b5-8318-daa2be33573c&redirect_uri=https%3A%2F%2Fhubspot-prod.datarista.com%2Fhubspot%2Foauth%2Fcallback%2Fscotts_hubspot%3FinstallKey%3Dae1c77bc27ce4e32aeefe7901a531171&scope=forms%20crm.objects.contacts.read%20crm.objects.contacts.write%20crm.objects.companies.read%20crm.objects.companies.write%20crm.schemas.companies.write%20crm.schemas.contacts.write%20crm.schemas.deals.write

Please click on the package installation URL. Service for your data license will not start until you install and approve the package installation. Your data license starts on 06/22/2022 and ends on 06/22/2025 so your prompt attention is required.

If you have any questions regarding this order please contact Lori Meloche at Scott's Directories.

This email was sent from a notification-only address that cannot accept incoming email.
Please do not reply to this message.

▶   Log in to your HubSpot account as an Admin. (You may already be logged in.)

► Select your HubSpot account. You may not see this option if you only have a single account associated with your login.

Choose an Account

NAME ⇅	DOMAIN ⇅	PRODUCTS
hubspot-developers-130sld5.com	hubspot-developers-... 5111668	
test-install1-dev-5257996.com	test-install1-dev-5257... 5257996	Sales Enterprise Service Enterprise Marketing Enterprise

Connecting **Scotts Directories for Hubspot** to **HubSpot**

Scotts Directories for Hubspot

Choose an account

NAME	DETAILS
⦿ Scott's Directories	www.scottsdirectories.com 22201548

Choose Account
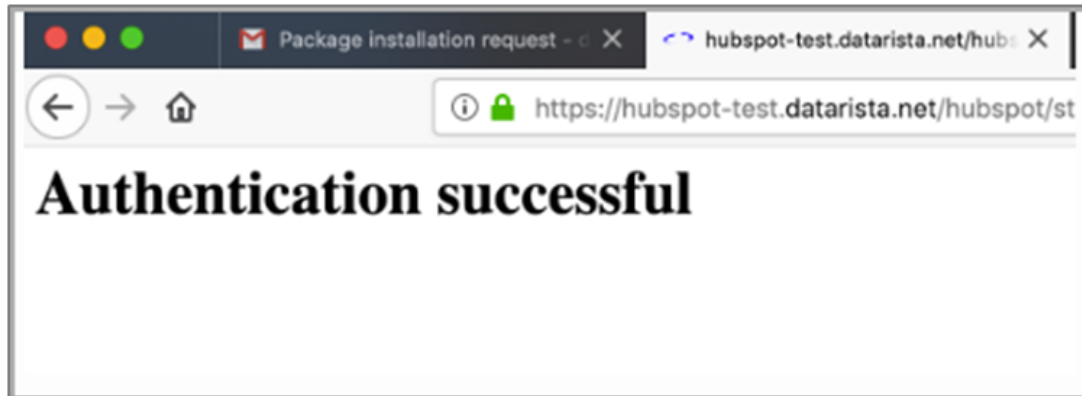
► Grant permissions to the application.

Request for Integration Permissions

Test Package wants access to:

⚙ **User and Account Information**
This includes access to read information about the user and account

👤 **Read from and write to my Contacts**
This includes prospects and lists

▭ **Read from and write to my Forms**
This includes access to the Forms API

Grant access

► You will see an "Authentication successful" message. You can close that tab/window.

► The application/integration will automatically install.

1.3 Property/Field Configuration (Optional)

► The HubSpot Admin may wish to make configuration changes:

1. Configure properties shown when viewing contact and company records.

   See HubSpot documentation

   https://knowledge.hubspot.com/contacts/select-properties-to-show-under-the-about-section-in-a-record#account-wide-default-properties

   The Admin may wish to expose properties from the integration.

2. Configure properties shown when creating contact and company records.

   See HubSpot documentation

   https://knowledge.hubspot.com/crm-setup/set-up-fields-seen-when-manually-creating-records

   Properties added by the integration should not be shown for record creation. These properties are managed by the integration and will be overwritten if the user makes modifications. Note: HubSpot does not allow properties to be marked "read only."