ECHOBOT CRM-CONNECTOR: INSTALL & CONFIGURE DOCUMENT

HubSpot × mechobot



INTRODUCTION

This document provides a step-by-step approach to install the application to connect it with Echobot and HubSpot. Follow the steps described in this document to install and configure the application properly.



INSTALLATION AND CONFIGURATION

Installation of the application is really simple. There are some prerequisites which are required. Let's take a look and then we can proceed to install.

PREREQUISITES

- 1. You must have a valid HubSpot Account.
- 2. You must have a valid Echobot Account.

INSTALLATION STEPS

STEP 1: OPEN APPLICATION URL

Visit application URL: https://appconnect.cbsrv.net/hubspot

HubSpot	
Log in with Hubspot	
You will be taken to Hubspot to authenticate and install the Application.	
Log in with Hubspot	

STEP 2: READ AND ACCEPT PRIVACY POLICY

Click on button Login with Hubspot. A popup will appear displaying the Privacy policy. Read and accept the privacy policy to continue:

Privacy policy	×
Before we get started Our extension provides you with enriched B2B profile information In order to provide you with this service and match the relevant information from your CRM with applicable profiles you view on supported sites, we need to read certain words (such as full name, e-mail and company name) from such sites you view when you u our service.	ise
We store the data in our servers temporarily and delete it after providing you with the service. This data is not added to our database.	
We also keep track of your usage of our extension, for billing your Lusha credits properly. In order to do this, we may store information regarding profile information have previously received from the extension.	ı you
Cancel Accept privacy poli	су



STEP 3: LOGIN WITH HUBSPOT

When you click on Accepting Privacy Policy, you will be redirected to Hubspot. If you're not logged in you will see the login screen, else you will see the app installation page:

	··· >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Connect	ing EB2HS to HubSpot
FROME	
ER5H2	
Choose an account	Find an account by name, domain, or ID
NAME	DETAILS
• Stoerkens	
0	
\bigcirc	

You will be asked to choose the account if your login has access to multiple accounts, if not you will be redirected directly to the access page.

This installation page will display what kind of access is required on your HubSpot account in order to use the app.



After a successful installation, you will be redirected back to the application success page, where further instructions are defined.

Echobot Media

Basically, there are three forms for the configuration you need to complete in order to be able to use the application:

nstallat stallation is	ion Done! s now done! you can access echobot panel from company details view in Hubspot.
	Add Echobot Credential
0	Add Company Field Mapping
0	Add Contact Field Mapping

lext Steps:		
Add Echobot Cre	edential	
Echobot Configura	ation	
Account Email		
Account Secret		
Language		en-US ~
	Save	Cancel
Webhook URLs		
Organization Webhook:		https://appconnect.cbsrv.net/echo/webhook/org 🖪
Employee Webhook:		https://appconnect.cbsrv.net/echo/webhook/emp 🖪

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ext Steps:	
Add Ech	obot Credential
Add Cor	npany Field Mapping
Company Fie	ld Mapping
Name:	companyName ×
Address:	street × , location × , zip × , country ×
EBID:	
Employee Size:	
Test Field:	
EchobotID:	ld x
Add to Note:	
Ƴ Sho	w available fields
	Save Cancel

Add Ech	obot Credential
Add Con	npany Field Mapping
Add Con	ttact Field Mapping
ontact Field	I Mapping
Name:	lastName × , firstName ×
First name:	firstName ×
Last name:	lastName ×
Phone:	phone ×
Email:	email ×
Salutation:	
EchobotID:	id x
Add to Note: 😡	

In case there is some issue during the installation, an error message will be displayed.

STEP 4: VERIFY THE INSTALLATION

- To verify installation log in into your HubSpot account.
- Open any company.
- On the bottom right you should see a new panel now:

✓ Echobot Connet	ct (0)	
	Open Echobot Connect	
Powered by EB2HS		Chat Help

- Click on "Open Echobot CONNECT" button on the panel. •
- A new popupwill appear:

mechobot		Connect Pending Sync Settings 👻 User 🔻	,
e Stoerkens GmbH · Employees (2) · Signals ↓ Stoerkens G	• • News articles • HR • Finanzen Stoerkens Gm	nbH Q & Nosmo King 🏚	Â
explain.de () explain.de () we explain	 ☑ info@stoerkens.de 7, 85521 Ottobrunn ● Active company Key figures: ○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○○	Map: 20 Navigate to this address	
Twitter Facebook Ads Inbound Marketing Linkedin Content Marketing Facebook E-Mail Google AdWords (more)	Founding year Motion picture, video and television programme production activities Industry (WZ Codes) 59 . 11 . 0 E291416323	n Support × Hey there 🁏 Any questions? I'd be happy to help 👍	
	T ID Register ID		

This will show the Echobot search result of the company you are currently viewing in HubSpot. Before this can appear, you need to configure the application.

If the application is not yet configured, you will instead see the installation success page which you get at the time of app installation:

Installat	ion Donel
Installation is	now done! you can access echobot panel from company details view in Hubspot.
Next Ste	ps:
	Add Eskahat Perdanial
	Add Echippot Gredeniuar
	Add Company Eidd Manning

Please check out next steps for the configuration. The image above shows the state after the successful configuration. However, when you first encounter the image, the icons will be red in color meaning that the values do not exist yet.

CONFIGURATION STEPS

Once the application is installed, you should be able to verify the installation using Step 4 from the previous section. Before you can start using the application, you will need to configure the application.

Please make sure prerequisite 2 is given for configuration. That means, you will need a valid Echobot account with Echobot CONNECT enabled.

STEP 1: LOGIN TO ECHOBOT CONNECT

First, log in into your Echobot account:

Username:	
Your email address	
Password:	
	FORGOT YOUR PASSWORD
	Login

mechobot

STEP 2: CREATE NEW WEBHOOK

Go to Echobot CONNECT: •

iiiechobot ~			1	⊗ ° ~
Welcome, Andreas Stoll	•	C	Ð	
Dashboard	Echobot MONITORING	Echobot CONNECT	Echobot TARGET	Echobot DATACARE
② User settings	Try now	Start >	Try now >	Try now
_				

Navigate to Settings and Data Integration:

ఫి		\bowtie	Search for companies		0 d [®]	2
col	NNECT	Dashl	oard	⇔	View customisation	
		4- F-I		పి	Browser plugins	×
Ech	obot CONN	ECT provi	IODOL CONNECT	ø	Integrations	
Get	Get information on more than 51 million employees, 16 billion news and over 142 million financial figures as well as financial statements.		<u></u>	Data interfaces		
				2	Invite new user	·

- Create a new webhook.
- Fill in details. .
- Copy webhook URL from success page which you get after installing the app and filling in given fields:

stallation Done! tallation is now done! you can acce ext Steps:	ess echobot panel from organization view in pipedrive.
Add Echobot Credenti	iel
Echobot Configuration	n
Account Email	
Account Secret	
Language	en-US ~
Sa	Cancel
Webhook URLs	
Organization Webhook:	https://appconnect.cbsrv.net/echo/webhook/org 🖪

Click Create

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శ్రి Data interfaces	XING-Connect	tor
	Create new we	phook +
lanual	Edit webhook	
	Name	Company HDA
	Data type	Companies ~
	Url	ppconnect.cbsrv.net/echo/webhook/org
	For	All Users (account-wide push) ~
)0 additional services with I	Ech Create	

Similarly create another webhook for employees as well:

Webho	oks / Data Push				
Send selected using webhool	company and employee data to <s.< td=""><td>third-party services</td><td>D Manual</td><td>Create new webhook +</td><td></td></s.<>	third-party services	D Manual	Create new webhook +	
	Data type	Name		Uri	Actions
C	Companies	Company HDA		Inttps://appconnect.cbsrv.net/echo/web	oho 🥜 🔒
	Employees	Contacts HDA		https://appconnect.cbsrv.net/echo/web	bho 🕜 📋

STEP 3: CONFIGURE INTEGRATION TOKEN

- Go to the Integrations tab.
- You will find an integration token. Copy it: •

🔗 📰 🖂 Search for companies 🔍 🔹	?
😂 Company view customisation 🛛 🖏 Browser plugins 🖉 Integrations 🖧 Data interfaces	XING-Connector
IFrame integration	
Integrate Echobot CONNECT directly as an IFrame into your own systems. Afterwards, you will be able to look up relevant additional information.	Your secret account key for the IFrame integration:

- Back on the application page, the first form gives you the option to enter the details for the configuration of Echobot and the token.
- Go to the first section on the success page or click on the settings icon and navigate to Configuration:

nstallation Done! stallation is now done! you car	access echobot panel from organization view in pipedrive.				
lext Steps:					
Add Echobot Cre	dential				
Echobot Configura	tion				
Account Email					
Account Secret	1				
Language	en-US ~				
	Save Cancel				
Webhook URLs					
Organization Webhook:	https://appconnect.cbsrv.net/echo/webhook/org 🖪				
Employee Webhook:	https://appconnect.cbsrv.net/echo/webhook/emp				

Or



- Complete the information in the form.
 - Fill in the email address which is used in the Echobot account. •
 - Fill in a token copied from Echobot CONNECT Integrations tab. •
 - Choose which type of widget you want to see on the main page of Echobot • CONNECT.
 - Choose preferred language. •
 - Save details.

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Echobot Configuratio	'n	
Account Email	Echobot ac	count email
Account Secret	4a7b10726d368	10
Language	en-US	Echobot token
webhook URLs	Interface languag	e
Organization Webhook:	https://appconnect.cbsrv.net/echo/webhook/org	
Employee Webbook:	https://appconnect.chsrv.pet/echo/webbook/emp	

STEP 4: CREATE FIELD MAPPING

Before you can start using the App, there is one more step required to complete the confirmation.

• You can access the mapping form on the default success page or from the top menu:

xt Steps:	
Add Ech	obot Credential
Add Con	npany Field Mapping
company Fie	ld Mapping
Name:	companyName ×
Address:	street × , location × , zip × , country ×
EBID:	
Employee Size:	
Test Field:	
EchobotID:	idx
Add to Note: 🛛	
Ƴ Sho	w available fields
	Save Cancel

- You will see the default fields are populated. However, these are not yet saved, you need to adjust them as per your requirement or save them if you want to proceed with default.
- From the settings menu you can access the company field mapping as well:

Pending Sync	\$
	Configuration
	Company Field Mapping
	Contact Field Mapping

- You will find mltiple fields representing the fields in your HubSpot account.
- In any field start typing with @ to see available options, filter by typing in more characters and click to select:

mechobo	Pending Sync 🚾 - 🗠 -
Company Field M	apping
Name: com	panyName x type @ to show available options
Address:	NAme x streetNumber x 2in x location x county x
Tel Zentrole:	Create combination of tags as required
phore phore	
Info-E-Mail: ema	a x
Homepage: url >	
last change: last	JpdateDate ×
Quelle:	
Messe-do not	
use:	
Patt:	
Latest visit:	
Trade Fair:	
LinkedIn:	
Branche:	
Anzahl	Anna Stra v
Mitarbeiter:	
Adresse-Neu:	
Besuche:	
Punkte:	
LinkedIn URL:	
Website:	
Mautic ID:	
Echobot Id:	
id ×	
Add to Note: Score	All Availbale options tag from echobot are displayed here
Available Fields:	it complementative legition lastipatedus companyture (seet stretture stretture) za locato county ut enal phore far registribute registribute registribute
✓ hide available	fields
Sav	

- Once you are done with adding tags, click Save.
- Repeat the same process for employee field mapping under the settings menu.

This mapping will come handy when you try to sync data from Echobot to HubSpot.

Note: Third-party cookies must be enabled in the browser for the app to work.