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ECHOBOT CRM-CONNECTOR: INSTALL & CONFIGURE DOCUMENT

HubSpot ✕ ‖‖‖echobot

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.

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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.
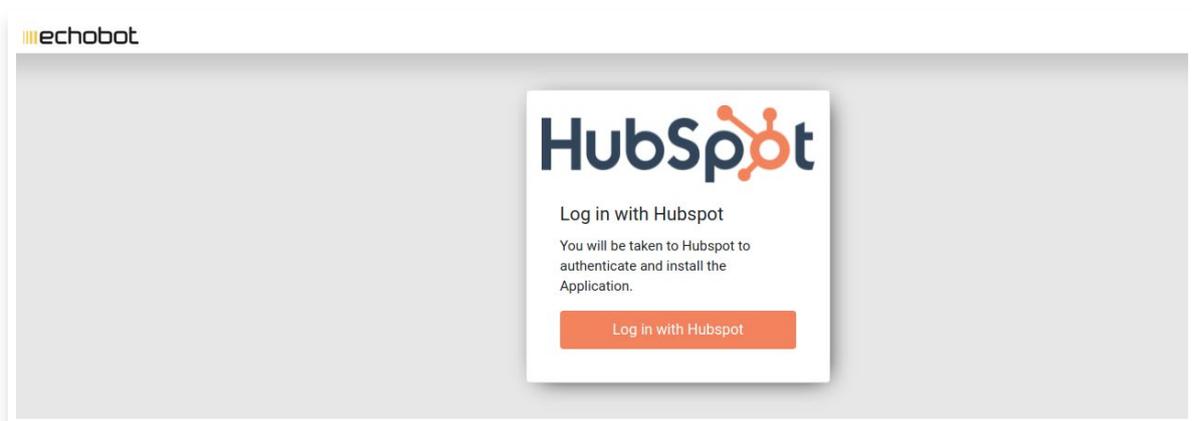
PREREQUISITES

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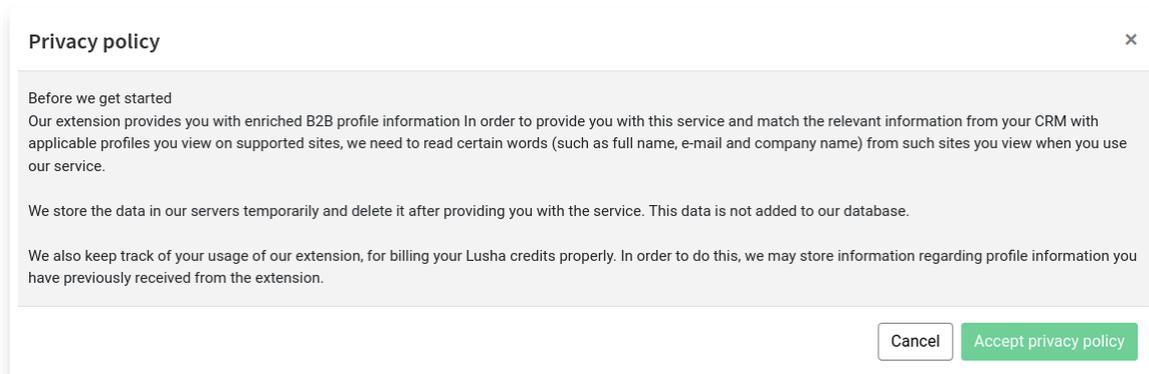2. You must have a valid Echobot Account.

INSTALLATION STEPS

STEP 1: OPEN APPLICATION URL

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


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:

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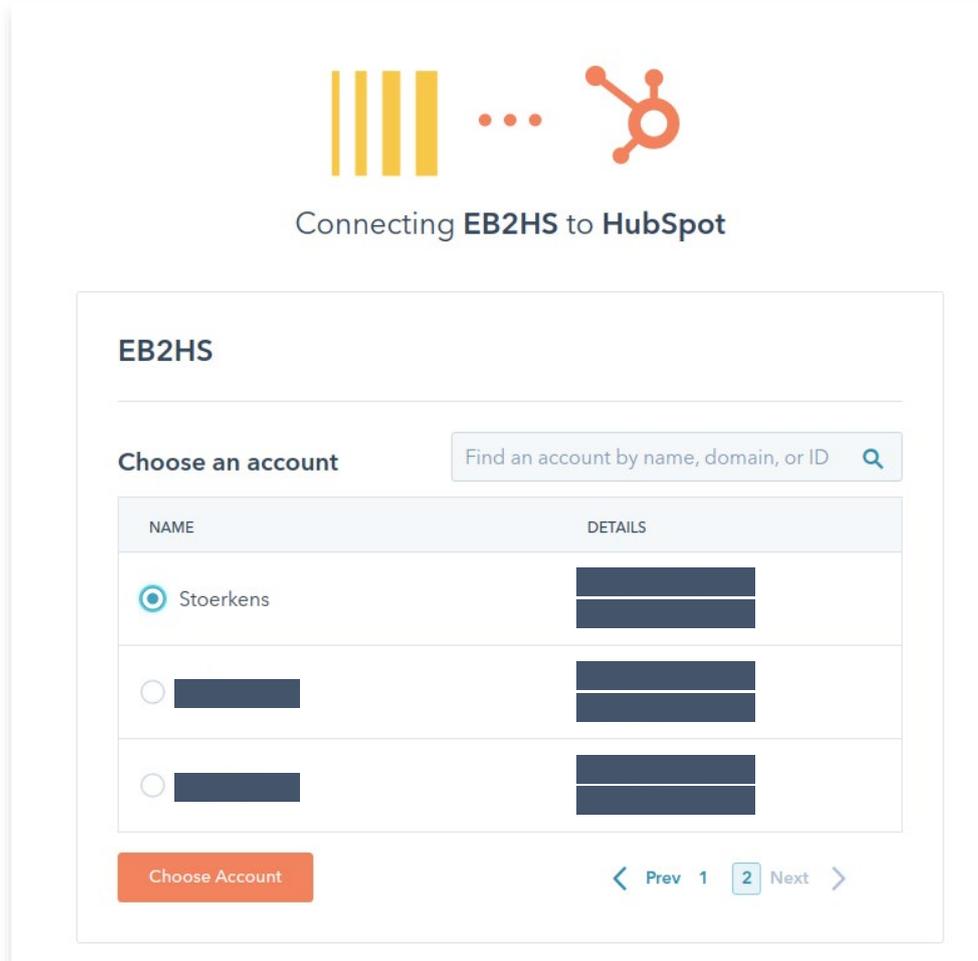
You will be asked to choose the account if your login has access to multiple accounts, if not you will be redirected directly to the access page.

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

⚠ **Please note that the app can be installed for each user differently!**

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

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

Installation Done!

Installation is now done! you can access echobot panel from company details view in Hubspot.

Next Steps:

✅ Add Echobot Credential

✅ Add Company Field Mapping

✅ Add Contact Field Mapping

Next Steps:

✅ Add Echobot Credential

Echobot Configuration

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

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

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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:
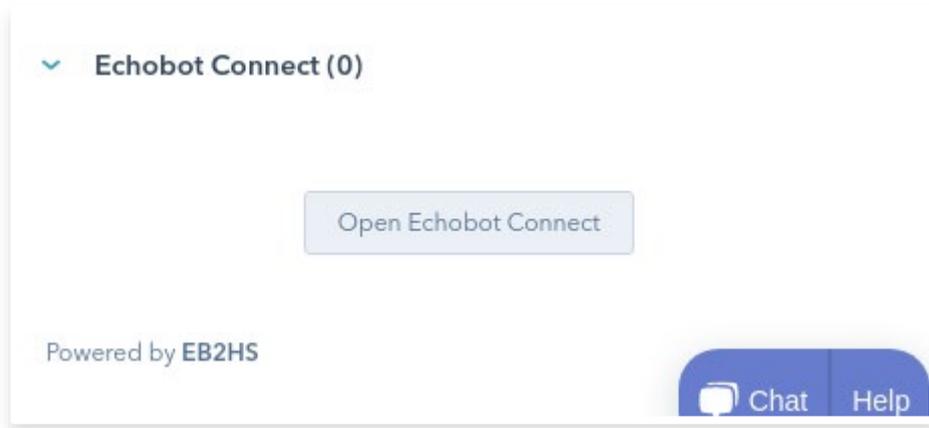
- Click on "Open Echobot CONNECT" button on the panel.
- A new popupwill appear:
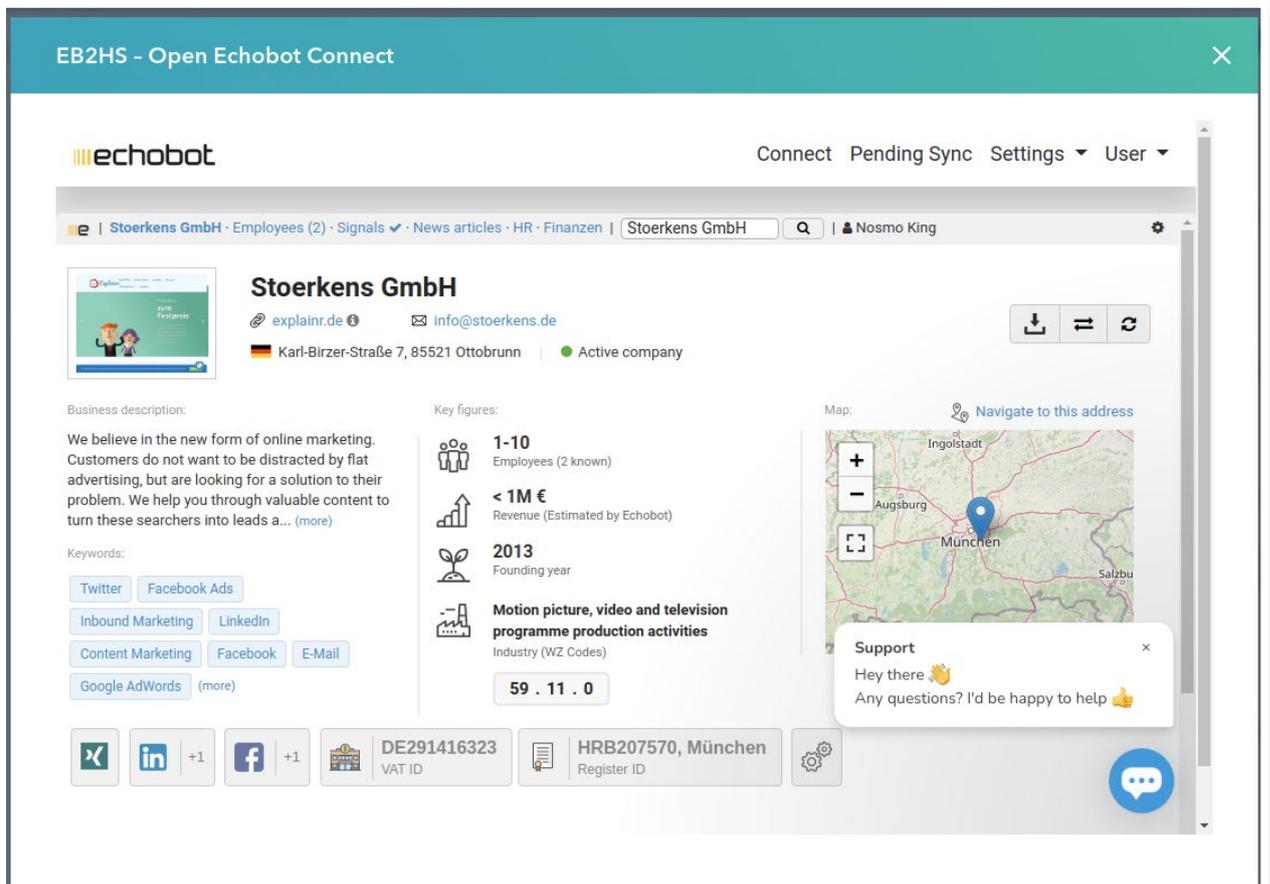
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This will show the Echobot search result of the company you are currently viewing in HubSpot. Before this can appear, you need to configure the application.

If the application is not yet configured, you will instead see the installation success page which you get at the time of app installation:
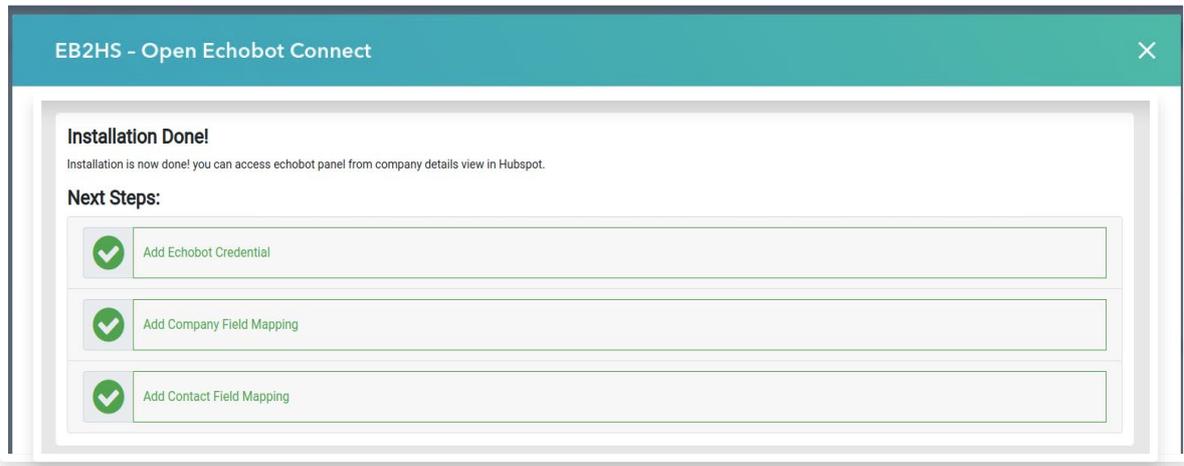
Please check out next steps for the configuration. The image above shows the state after the successful configuration. However, when you first encounter the image, the icons will be red in color meaning that the values do not exist yet.

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.
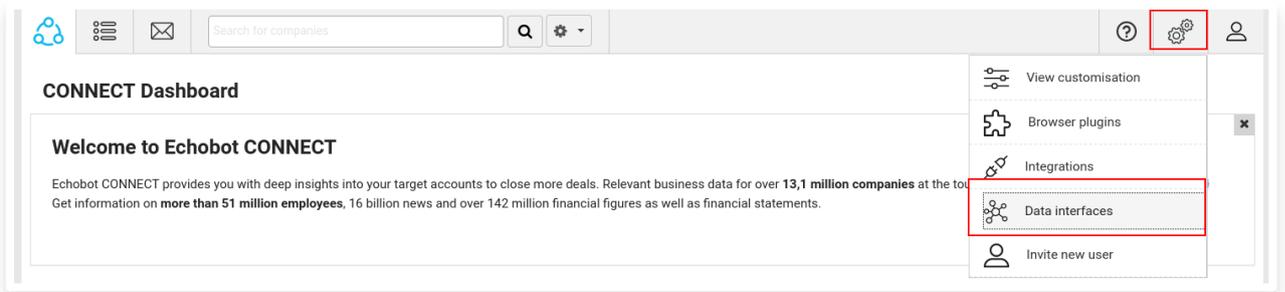
STEP 1: LOGIN TO ECHOBOT CONNECT

- First, log in into your Echobot account:
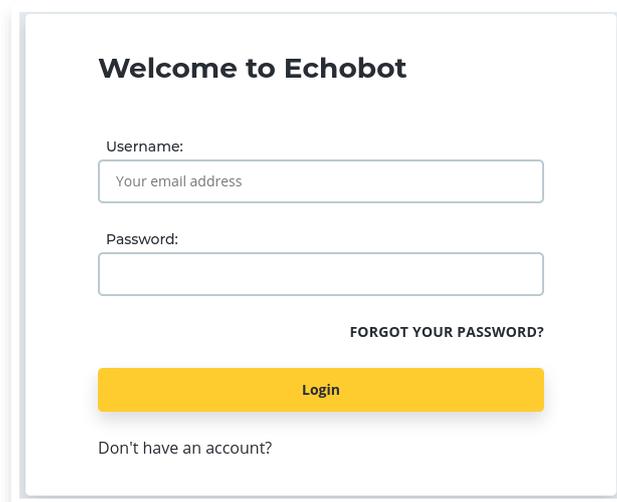
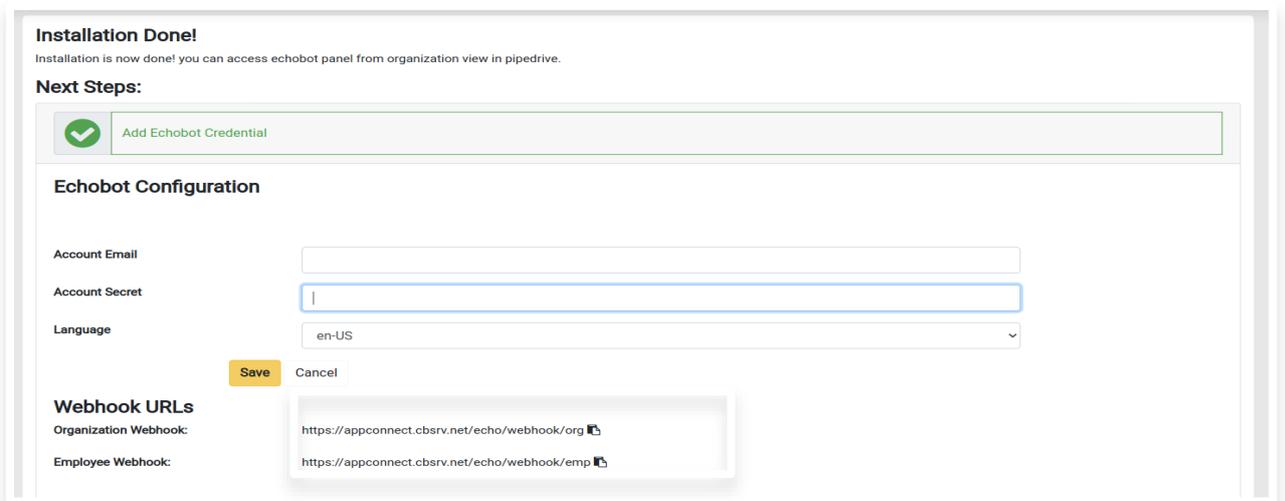## STEP 2: CREATE NEW WEBHOOK

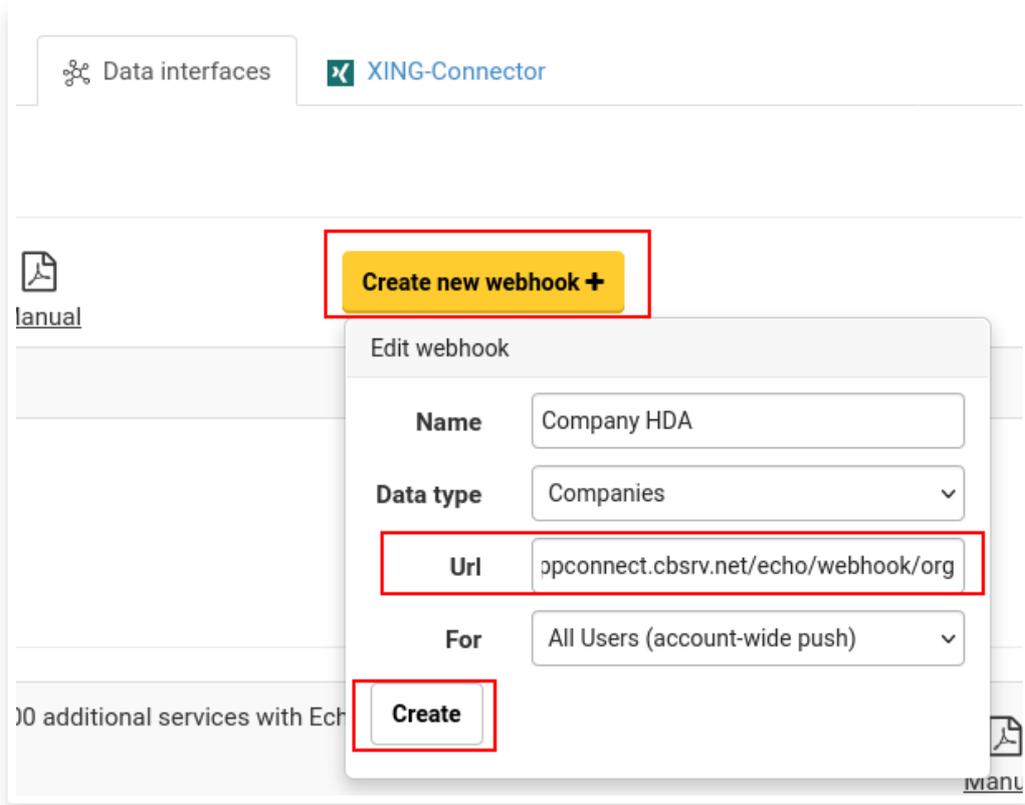- Go to Echobot CONNECT:
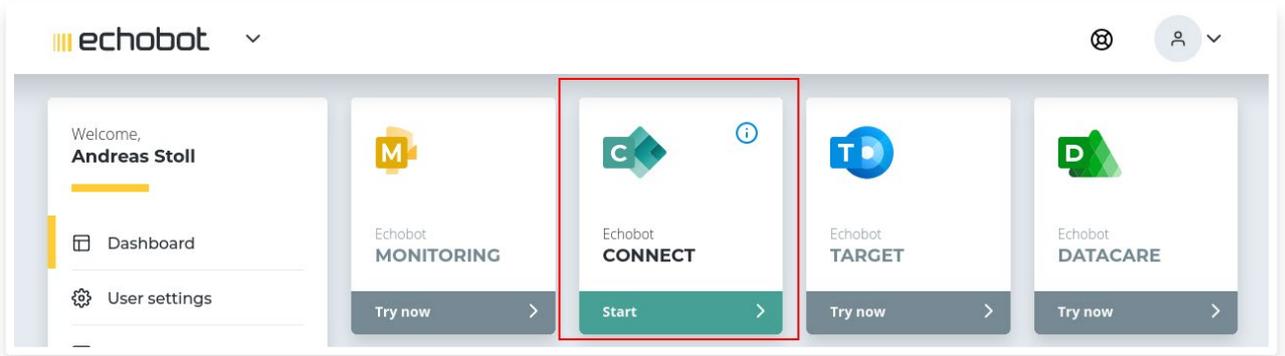
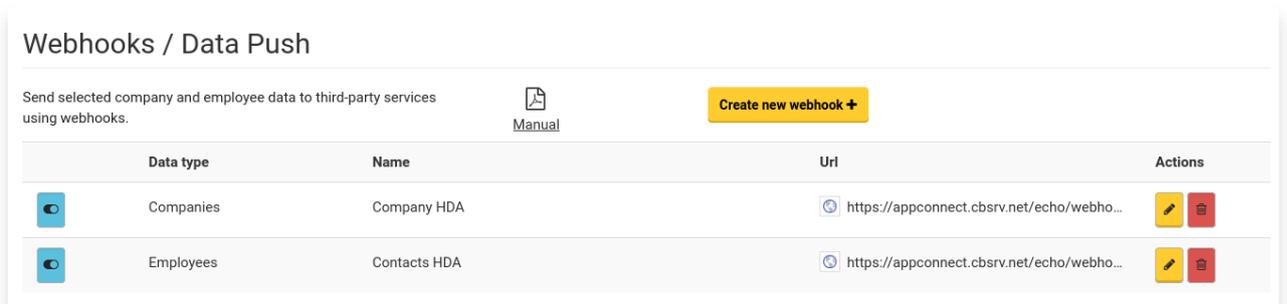- Navigate to *Settings and Data Integration*:

- 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:
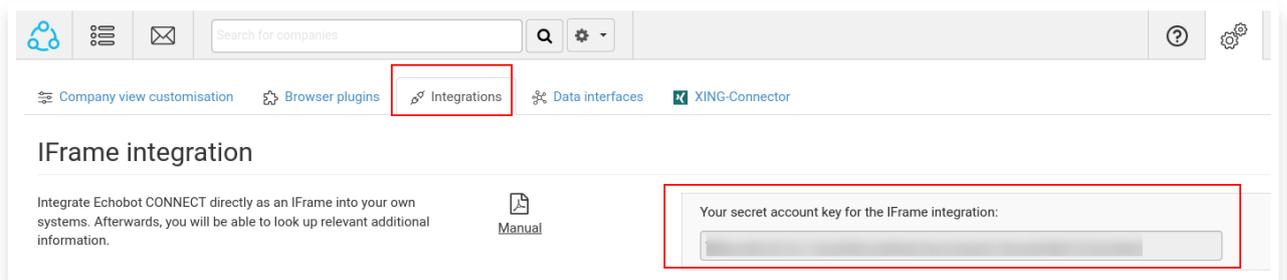

- Click *Create*

- Similarly create another webhook for employees as well:

STEP 3: CONFIGURE INTEGRATION TOKEN

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

▪ 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:

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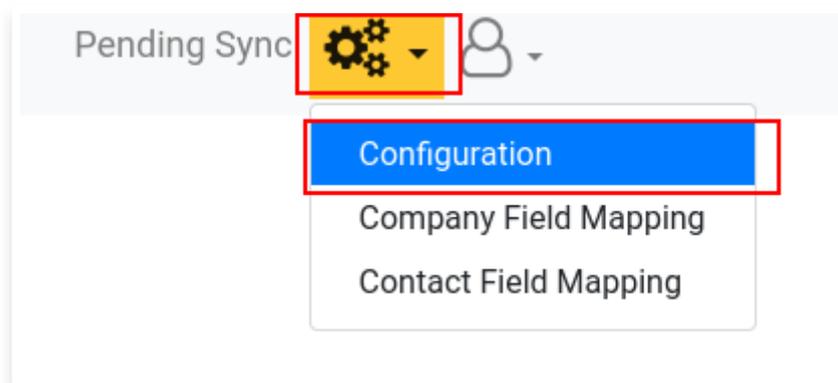
▪ Complete the information in the form.
  • Fill in the email address which is used in the Echobot account.
  • Fill in a token copied from Echobot CONNECT Integrations tab.
  • Choose which type of widget you want to see on the main page of Echobot CONNECT.
  • Choose preferred language.
  • Save details.

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:

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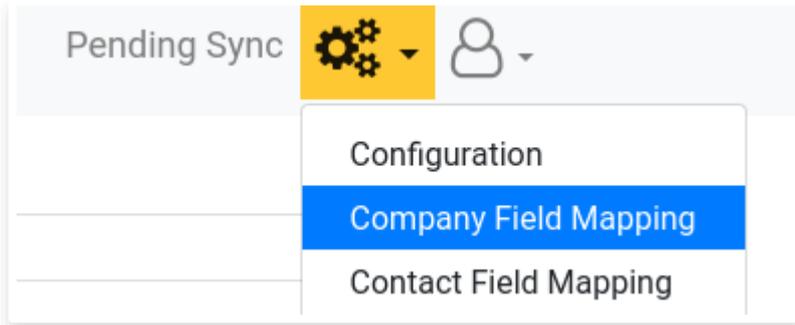
- You will find mltiple fields representing the fields in your HubSpot account.
- In any field start typing with @ to see available options, filter by typing in more characters and click to select:

- 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.