

HubSpot and Dynamics 365 Integration

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Overview

Alima - HubSpot Integration solution automatically imports HubSpot contacts to Dynamics 365 as Leads. Using the HubSpot APIs, it retrieves Company, Contact and Owner data into Dynamics 365.

Requirements

Parameters	Description	Current Value
API Key	Authorization key (apikey) that the flow uses to pull data from HubSpot	
Trigger Time	Time and frequency on when the flow will run	 Recurrence Runs at 4:30 every day Edit
Contact Records Filename ¹	Filename for all contact records that will be exported from HubSpot	 AllContacts.csv
Company Records Filename ¹	Filename for all company records that will be exported from HubSpot	 AllCompanies.csv
Leads to Import Filename ¹	Filename for all contact records that will be created as Leads in D65	 Created Leads - 2021-03-16.csv
Path where Files will Upload ¹	OneDrive or SharePoint path on where the files will be uploaded	
OneDrive or SharePoint Account ¹	Account that will be used by the flow to save and upload files in OneDrive or SharePoint	
Outlook Account ²	Account that will be used by the flow to send email notification	

¹ These parameters are required if the user wants to save and upload a copy of all the contacts and company that were extracted from HubSpot.

² This parameter is required if the user wants to send email notification every time the flow runs.

Data Mapping

This is how the HubSpot fields are mapped to Dynamics 365 fields.

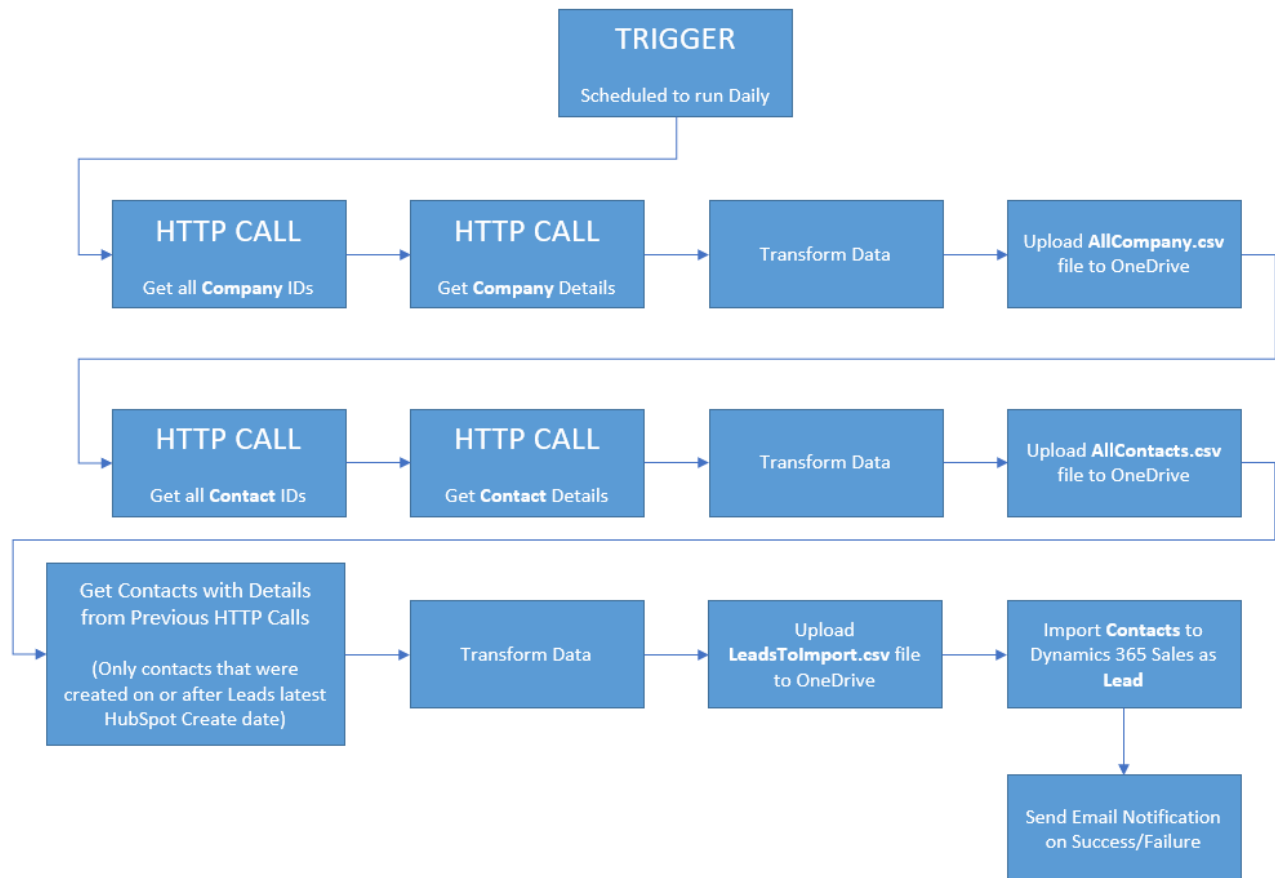
Dynamics Fields (Leads)	HubSpot Fields
Last Name	Contact: Last Name
Topic	SET TO: "Topic NEEDED: Lead imported from CallBox HubSpot"
Company Name	Contact: Company Name
Description	Contact: Callbox Notes
Email	Contact: Email
First Name	Contact: First Name
Job Title	Contact: Job title
Annual Revenue	Company: Annual Revenue
City	Contact: City
No of Employees	Company: Number of employees
SIC Code	Company: SIC Code
Source Campaign	SET TO: "CallBox Direct Sales"
State/Province	Contact: State/Region
Status Reason	SET TO: "New"
Street 1	Contact: Street Address
Website	Contact: Website URL
ZIP/Postal Code	Contact: Postal Code
HubSpot Contact ID ³	Contact: ID
HubSpot Create Date ³	Contact: Create Date

³ Hidden custom fields.

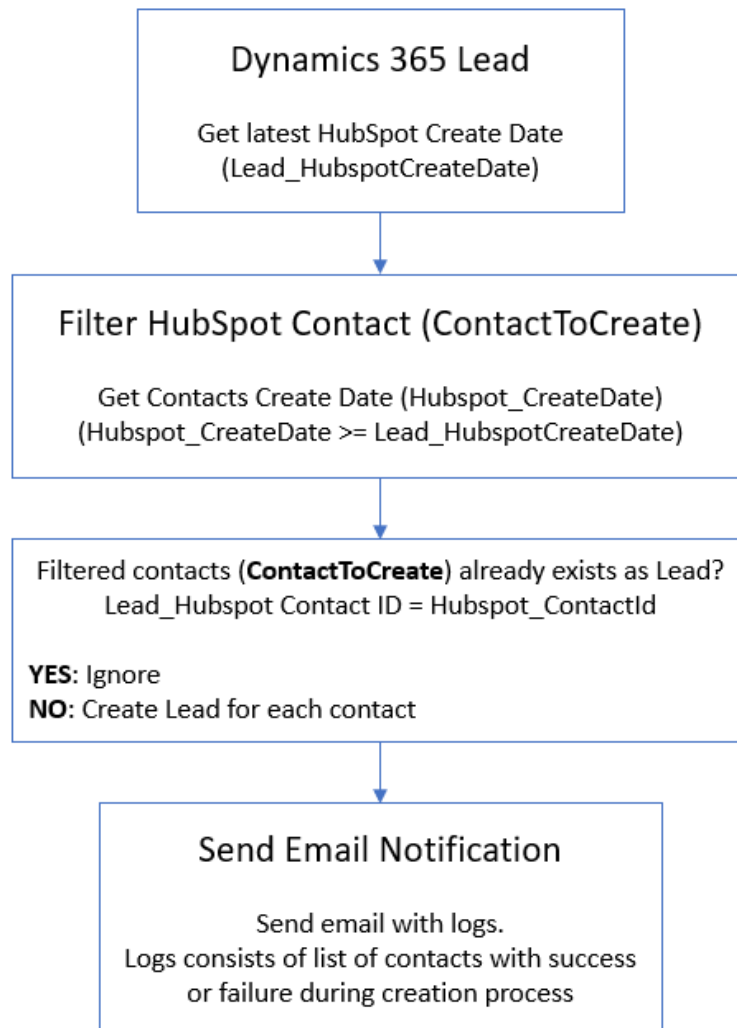
HubSpot Integration Flows

There are two flows called **HubSpot Integration – Scheduled** and **HubSpot Integration – Manual Triggered**. HubSpot Integration – Scheduled flow runs automatically on a specific time (currently set to run daily at 4:30 AM SGT). HubSpot Integration – Manual Triggered is designed to create a lead from a specific HubSpot contact. Users need to enter the HubSpot **ContactID** as an input for a successful import.

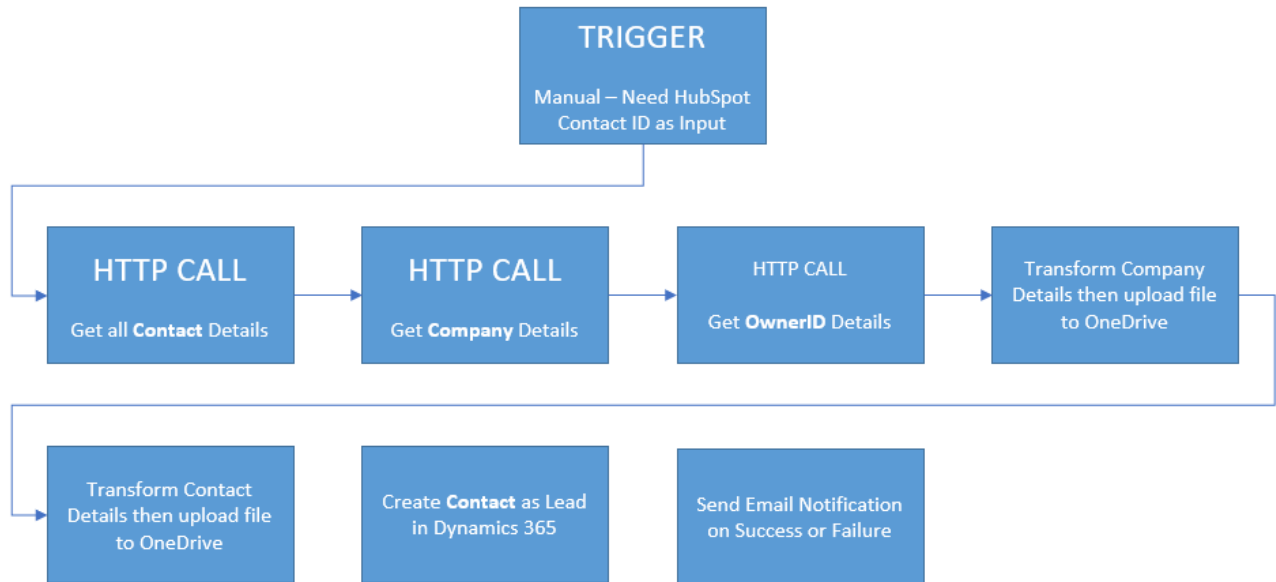
Scheduled Flow



The process of filtering contacts will be created in Dynamics 365.



Manual Trigger Flow



Email Notifications

When the flows finish processing, they will send out notifications for whether it succeeds or fails. Each type of notification will provide important details.

Success

Hubspot Contact Integration - Successful



To

Reply

Reply All

Forward

...

Sat 13/03/2021 4:36 am

Currently, there are **49** lead record(s) in D365 . **46** of which were created from Hubspot contacts.

58 company record(s) from Hubspot have been exported to OneDrive. You can view the uploaded file through this [link](#).

48 contact record(s) from Hubspot have been exported to OneDrive. You can view the uploaded file through this [link](#).

2 contact(s) have been imported in D365 Sales as Lead. You can also view the uploaded files in [OneDrive for Business](#).

List of Contacts that were created as Lead in D365:

Hubspot Contact ID	First Name	Last Name	Company Name	Hubspot Create Date
2301	Frank	Chiaramonte	Phillips Law Group	2021-03-11 16:53:43
2351	Josh	Brown	Luckinbill Inc Mechanical	2021-03-12 12:06:43

List of Contacts that failed:

Hubspot Contact ID	First Name	Last Name	Company Name	Hubspot Create Date
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Failure

Hubspot Contact Integration - Failed



To

Reply

Reply All

Forward



Tue 16/03/2021 8:01 am

There was an issue with action Apply_to_each_Contacts_Imported_to_Dynamics

Status: Failed

Code: ActionFailed

Click the link below to access the run history for the Flow.

<https://flow.microsoft.com/manage/environments/2d02dddf-820f-44ea-a6ad-a5c3a459f4c7/flows/76fc2329-9c03-435b-bf0d-31086aad9475/runs/08585857541386965454439402840CU79>

List of Contacts that were created as Lead in D365:

Hubspot Contact ID	First Name	Last Name	Company Name	Hubspot Create Date
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List of Contacts that failed:

Hubspot Contact ID	First Name	Last Name	Company Name	Hubspot Create Date
2751	Paula	Bowie	Dyp Consulting	2021-03-15 10:19:28
2801	Boris	Blum	MY CEO	2021-03-15 15:10:24

Contact Us

We look forward to connecting with you so please use the details below and reach out.

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Glossary

Details	
Company	Alima Technologies Corporation
Author(s)	Irene Merle, Vikram Chand
Version	2.0
Created	March 16, 2021
Updated	March 28, 2021
Revision Lifecycle	As needed
Summary	This document contains the information about how the flow works, data mapping of HubSpot and D365 contacts and parameters needed from customers when setting up the solution.

Revision History			
Version	Date	Details	Author
1.0	03/16/2021	Initial version	Irene Merle
2.0	03/28/2021	Updated document styling using standardized template. Updated flow charts, screenshots, and verbiage.	Vikram Chand