

# HubSpot Integration for monday.com

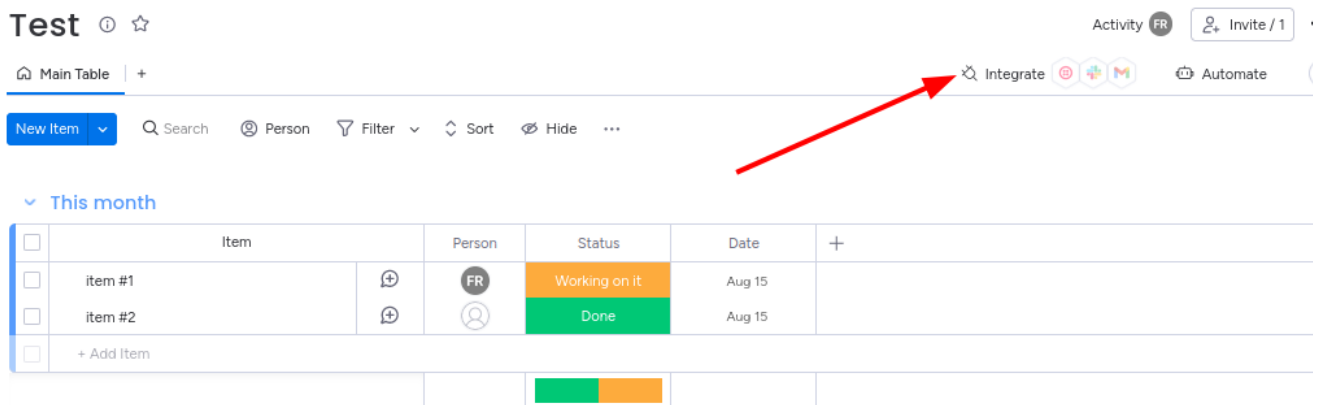
## HubSpot Integration for monday.com

This app has two purposes: to automatically add HubSpot contacts to your monday tables and to integrate HubSpot forms into your monday dashboard, board or item views. Let's see how you can get started with using the app.

### Add HubSpot contacts to monday

To add HubSpot contacts automatically to your monday tables first, you need to set up the integration. To do this, follow the steps below.

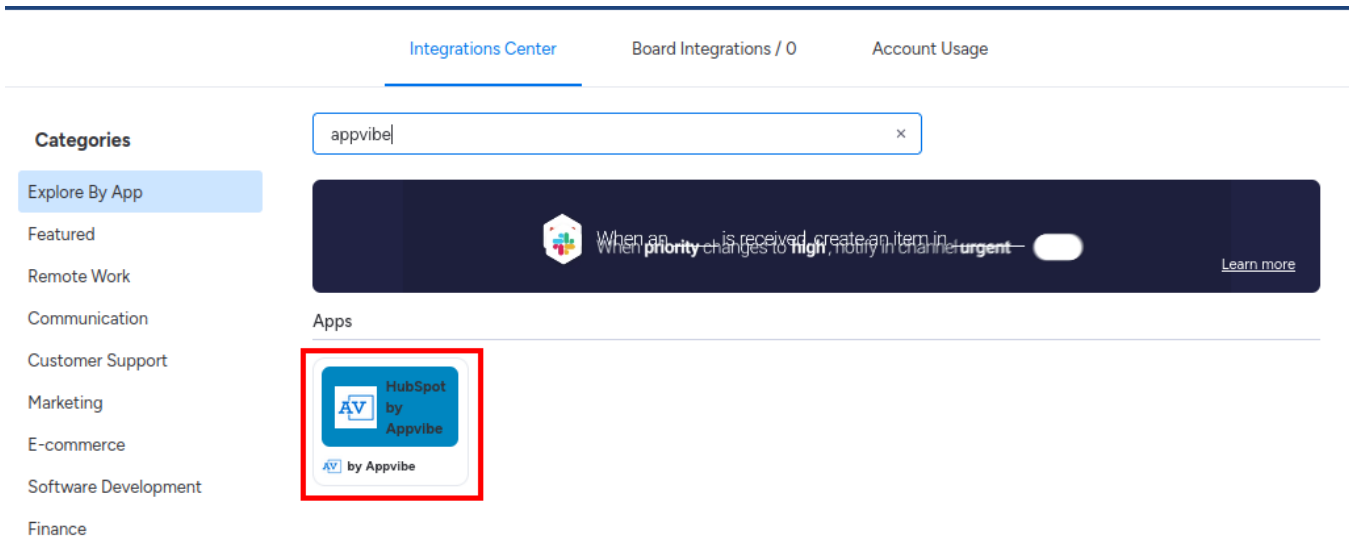
1. Navigate to the monday table you wish to use for this.
2. Click on the "Integrate" button.



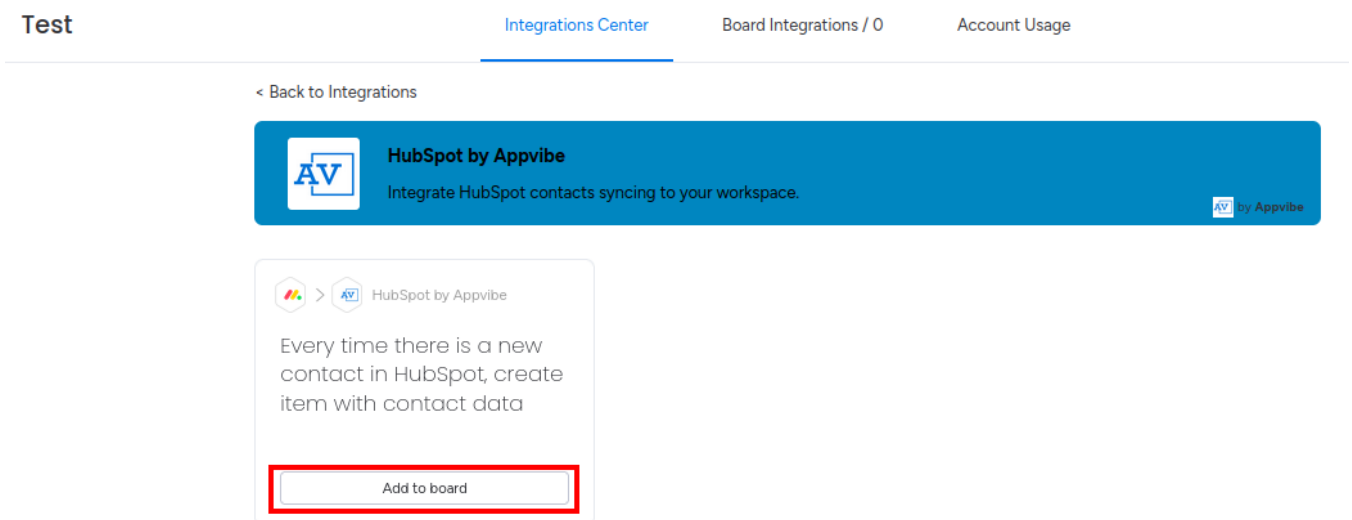
The screenshot shows the monday.com interface for a table named 'Test'. The table has columns for Item, Person, Status, and Date. A red arrow points to the 'Integrate' button in the top right corner of the table view. The table contains two items: 'item #1' with status 'Working on it' and 'item #2' with status 'Done'. The 'Integrate' button is located in the top right corner of the table view, next to the 'Automate' button.

Item	Person	Status	Date
item #1	FR	Working on it	Aug 15
item #2		Done	Aug 15
+ Add Item			

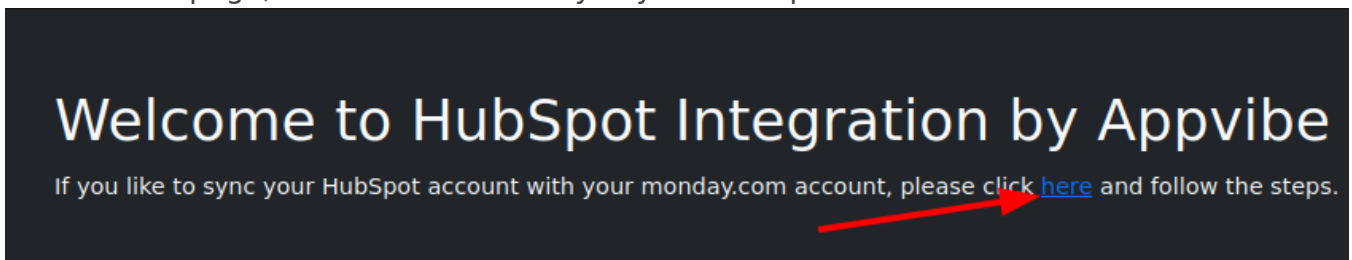
3. Find the HubSpot integration by Appvibe and click on it.



4. Currently, there is one available recipe: “Every time there is a new contact in HubSpot, create item with contact data”. Select “Add to board”



5. On the next page, click on the link to sync your HubSpot account.



6. If you previously used the app, you can click “Use this Hub” to make the set up faster.

7.

Follow the directions on screen: log into your HubSpot account, choose your account, and click on the “Connect App” button.



## Connecting **HubSpot Integration by Appvibe** to **HubSpot**

**⚠ You're connecting an unverified app**

This app's details haven't been reviewed or verified by HubSpot. Make sure you trust the developer before connecting it to your account.

### HubSpot Integration by Appvibe

This app is requesting access to your HubSpot account. Continue connecting if you agree.

✓  **Manage and view your CRM data**

View properties and other details about contacts.

⚙ **Basic HubSpot account information**

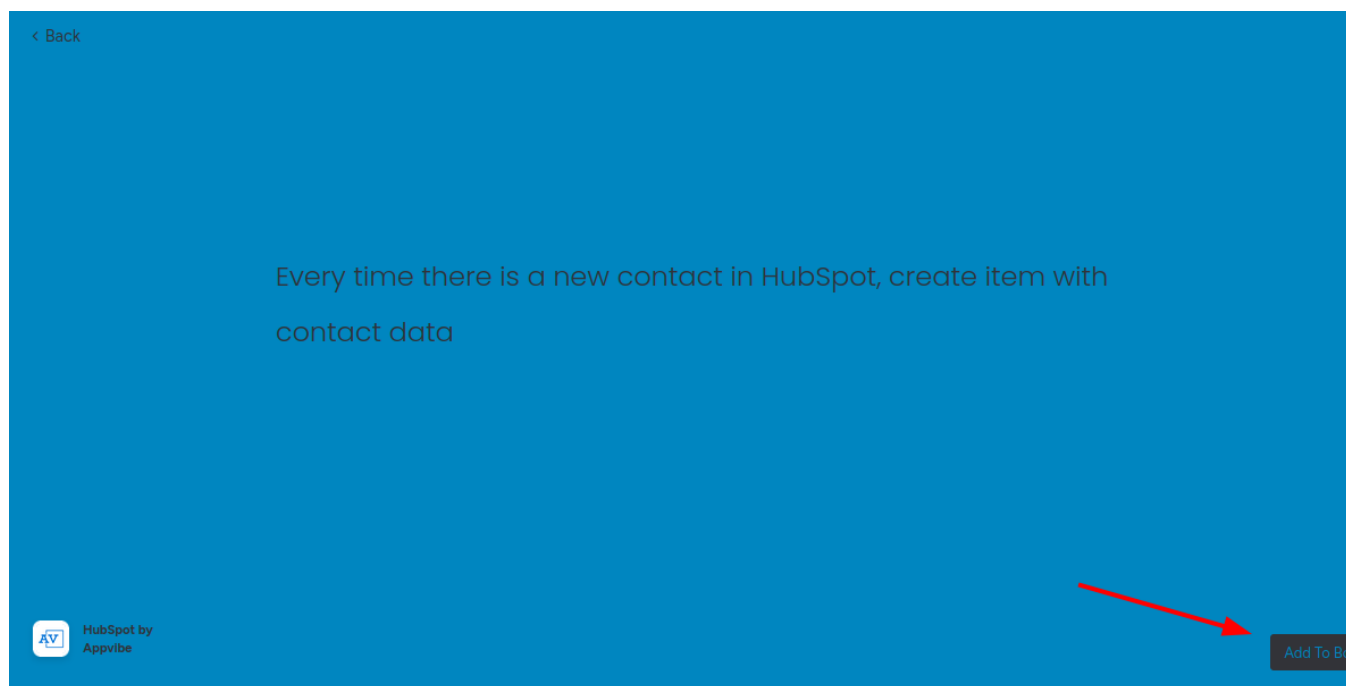
This includes your user email address and the account's primary domain.

**Connect app**

Cancel

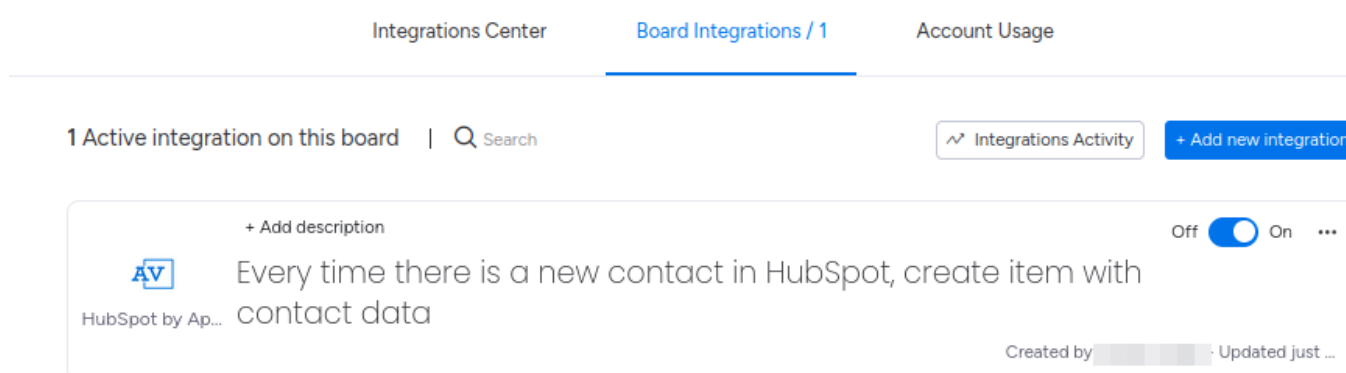
8.

Finally, click on the “Add to board” button again.

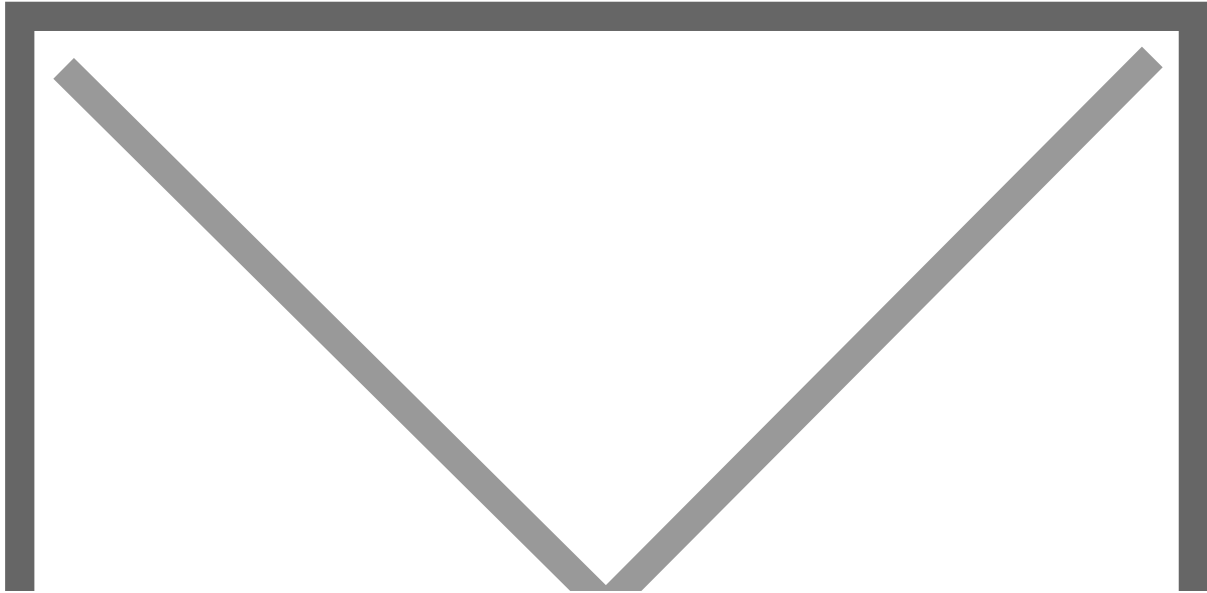


9.

With this, you have successfully installed the integration.

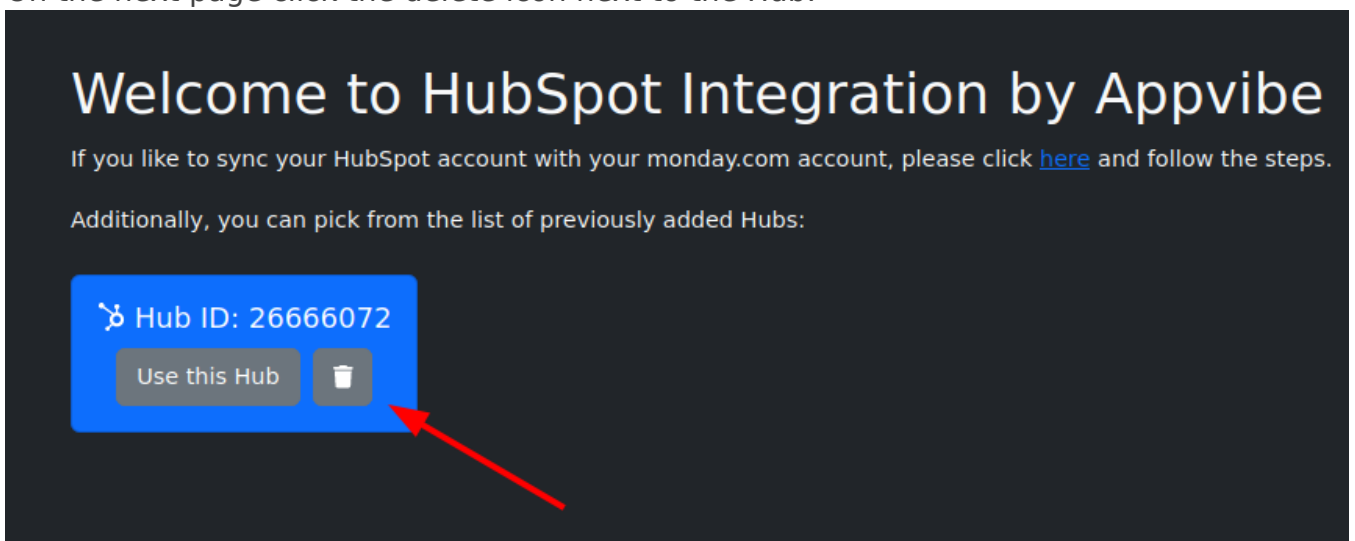


You will see four new columns on your table: HubSpot Contact, Contact Name, Contact Email and Contact Phone. Whenever you create a new HubSpot contact, this information will be automatically added to your monday table.



## Remove the previously integrated HubSpot account

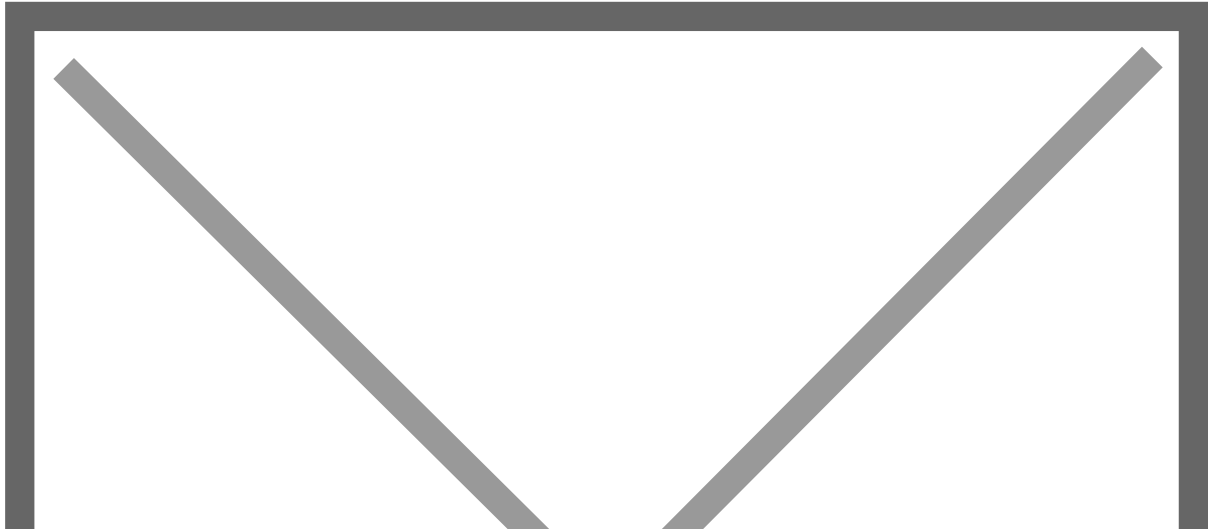
1. Navigate to “Integrate” on the board.
2. Search for the HubSpot Integration by Appvibe in the Intergration Center.
3. Click “Add to Board”.
4. On the next page click the delete icon next to the Hub:



## Add HubSpot forms to monday

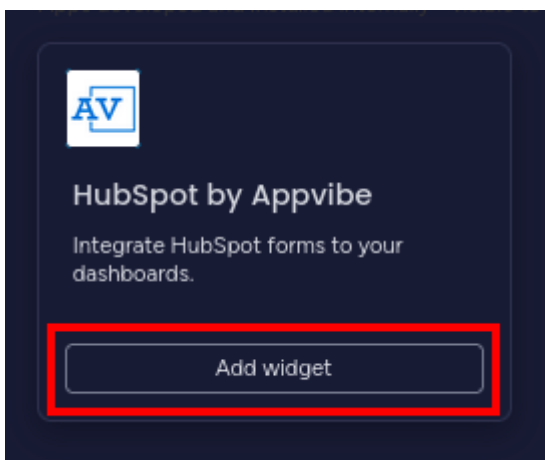
1.

Navigate to the dashboard where you wish to add the HubSpot form, then click “Add widget”.



2.

Search for HubSpot by Appvibe and click on “Add widget”.



3.

On the configuration page of the app, review and follow the steps.

The screenshot shows the 'QA Testing' app interface. At the top, there's a header with the app name 'QA Testing' and icons for help and favorites. Below the header is a navigation bar with tabs for 'Main Tab...' and 'Dashboa...'. A toolbar contains buttons for 'New Item', 'Add widget', 'Search', 'Person', and 'Filter'. The main content area is titled 'HubSpot by Appvibe' and features three tabs: 'Form 1', 'Form 2' (selected), and 'Form 3'. The selected tab displays instructions for embedding a HubSpot form. It starts with a recommendation to set up the Integration component first, followed by a link to 'Open integrations'. Below this, it states 'You can embed HubSpot form by following these steps:' and lists five numbered steps: 1. Open HubSpot Dashboard, 2. Click on 'Marketing > Forms' from navigation menu, 3. Hover through the desired form from the list and click on 'Actions > Share', then click 'Copy', 4. Come back to this page. You can add copied URL from the input field below, also from the application settings, and 5. (Optional) You can change the title for tabs by filling the input below URL. There are two input fields: the first contains the URL 'https://share.hsforms.com/16V...' and the second is labeled 'Form Title (optional)'. A 'Save' button is located at the bottom right of the form area.

QA Testing ⓘ ☆

🏠 Main Tab... | Dashboa... | +

New Item ▾ + Add widget 🔍 Search 👤 Person ⚙️ Filter ▾

HubSpot by Appvibe ..

Form 1 Form 2 Form 3

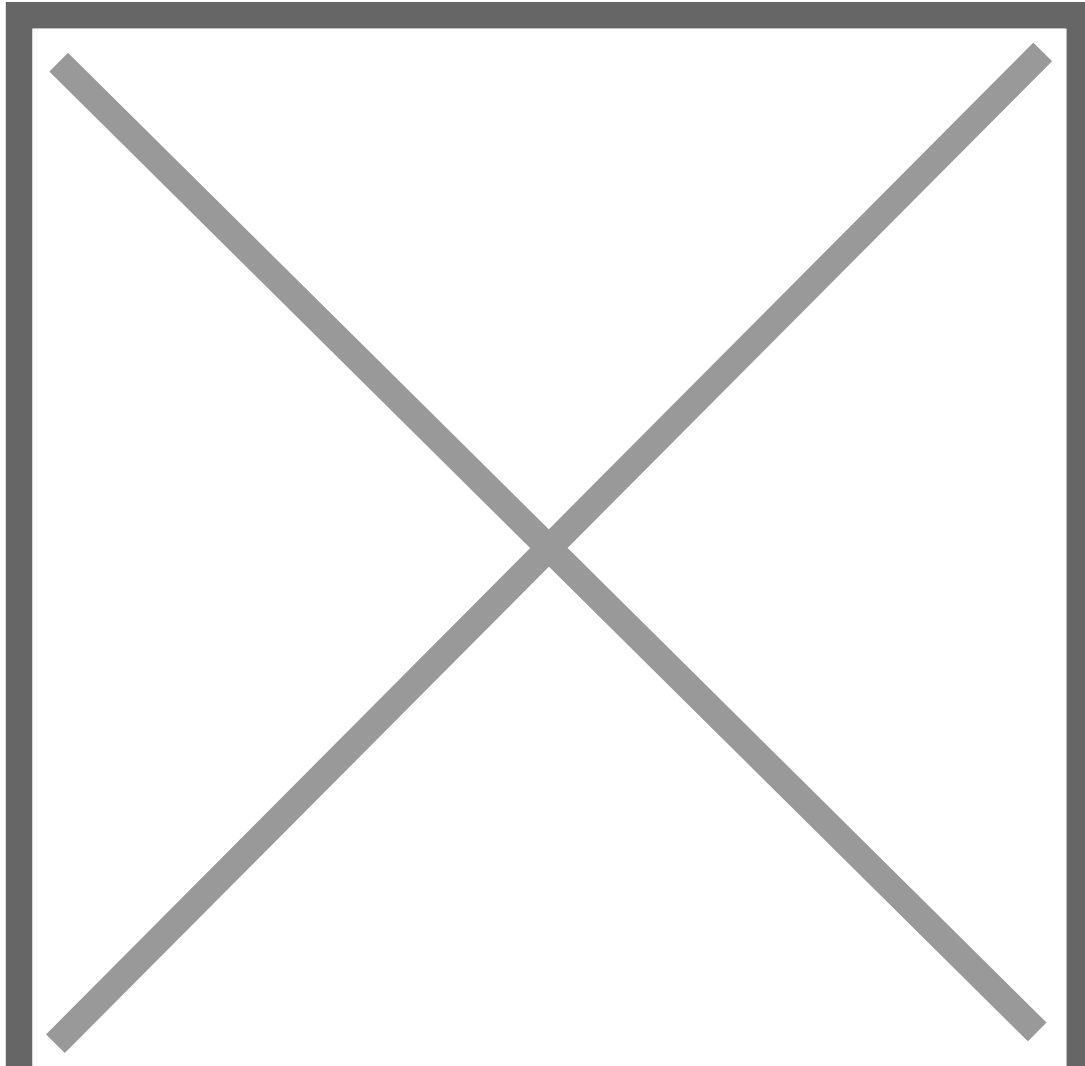
To have the best experience with this app, we recommend that you set up the Integration component first if you haven't already. This will ensure that contact information entered to the form is added to your board. [Open integrations](#)

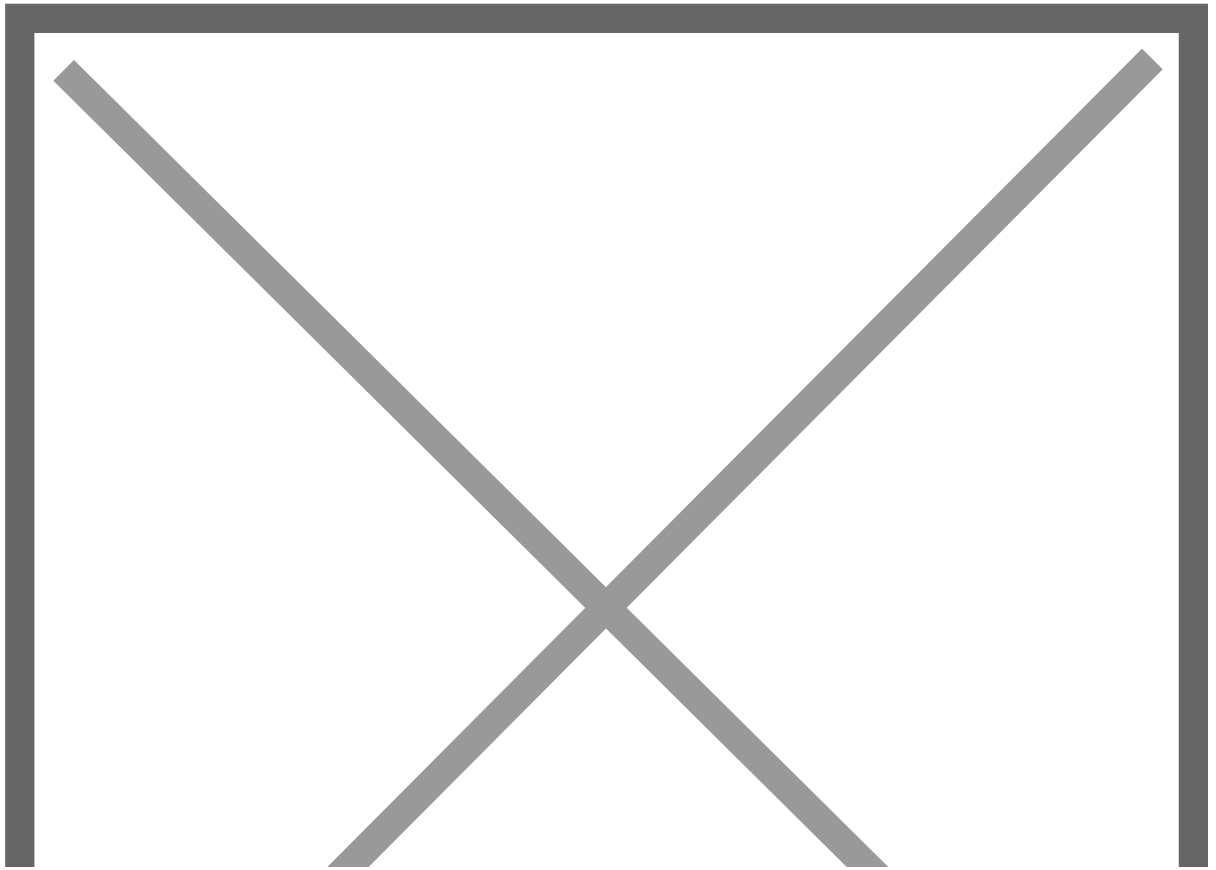
You can embed HubSpot form by following these steps:

1. Open [HubSpot Dashboard](#)
2. Click on `Marketing > Forms` from navigation menu
3. Hover through the desired form from the list and click on `Actions > Share`, then click `Copy`
4. Come back to this page. You can add copied URL from the input field below, also from the application settings
5. (Optional) You can change the title for tabs by filling the input below URL

Save

4.  
Open your HubSpot Dashboard.
5.  
Click on `Marketing > Forms` from the navigation menu.
6.  
Hover through the desired form from the list and click on `Actions > Share`, then click `Copy`





7.  
Add the copied URL into the first input field on the Configuration page.
8.  
You can change the Form Title with the second input field or leave it as it is, and then click "Save".



You have now successfully added your form to monday. Anyone who fills out your form will be added to your HubSpot account as a contact.

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Revision #2

Created 26 June 2023 11:32:11 by Admin

Updated 14 August 2023 13:20:37 by Admin