

 HubSpot

Installation & Administrator Guide



**“We integrate technologies to
accelerate business success”**

- Tarun Kumar, Founder & CEO - DataGardener

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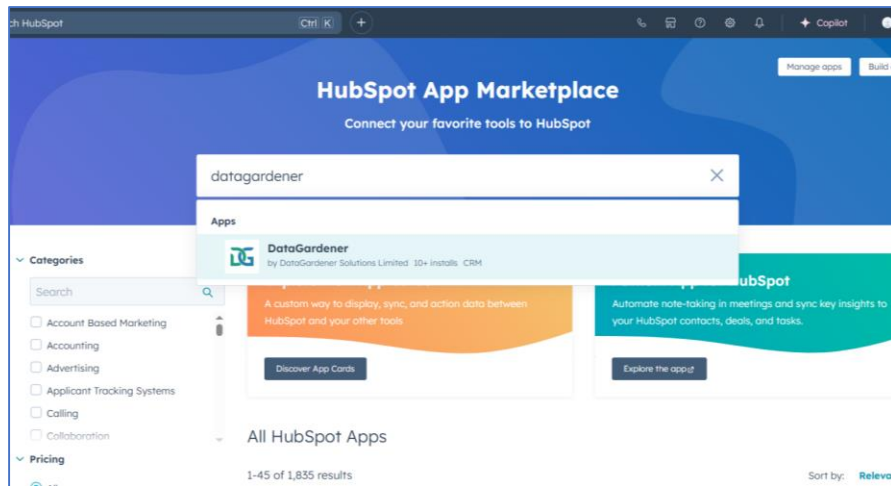
Installation and Administrator Guide

Description

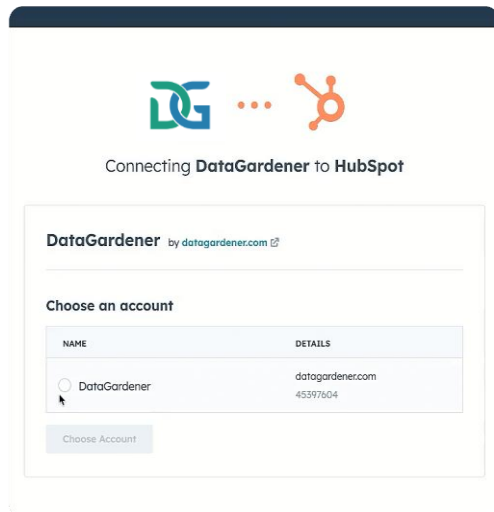
The DataGardener HubSpot App is a lead generation tool. It enables you to fetch data from DataGardener directly into your HubSpot app, which will enrich your CRM data and help you accelerate prospecting and increase conversions by having access to the latest updates and company information.

Installation

1. Install the application by searching for DataGardener in the Marketplace.



2. Click on Install to start the installation.



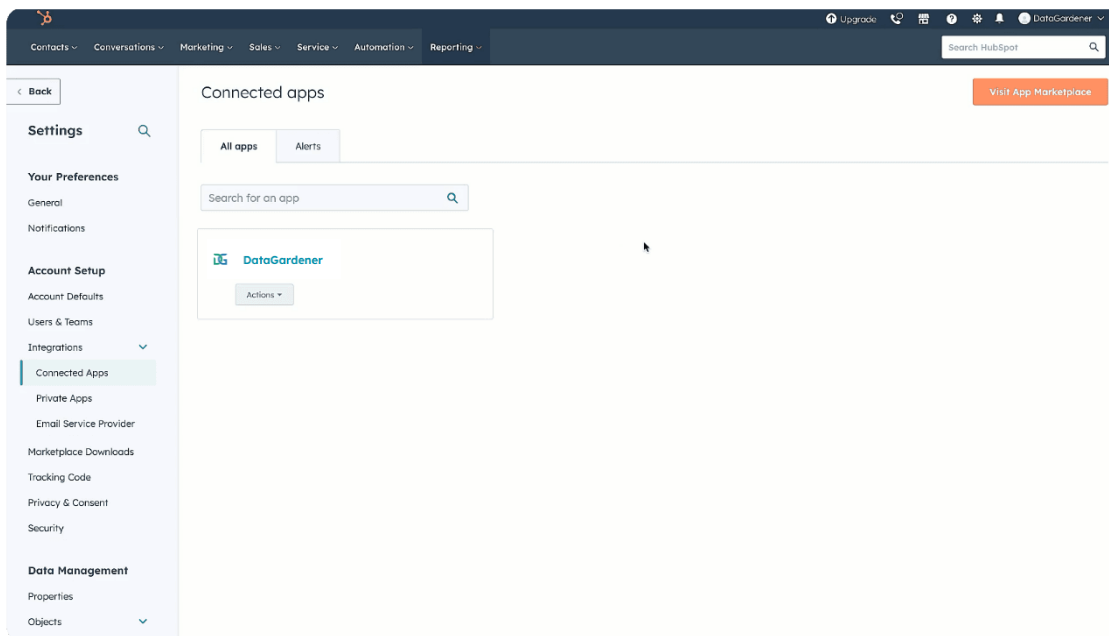
3. Choose the account in which you want to install the App. It will redirect you to a page to confirm that the installation has been done.

Verify Installation

Check if the application has been successfully installed by navigating to your HubSpot account.

Go to Account -> Settings -> Integrations -> Connected Apps -> All apps.

Refer to the images below:

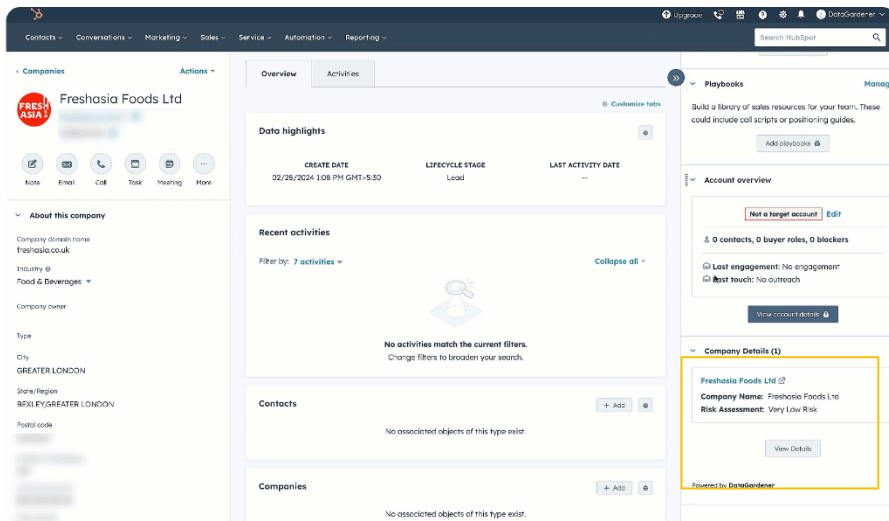


View Company Information in HubSpot

After the installation is complete, you will see the app functionality inside your company overview page:

1. View Company Details in HubSpot

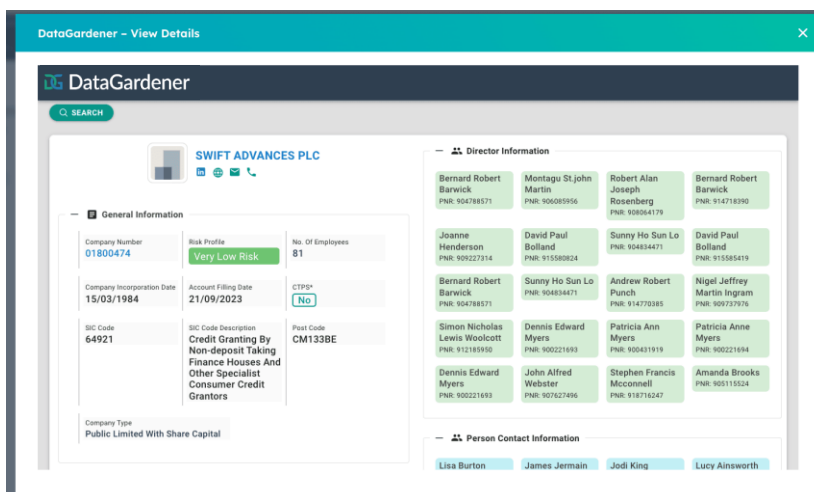
Select a company from your list of companies and navigate to the company details page. On the right navigation bar of the details page, find the company details section. You will find the details of the company, if available, otherwise, you will see a sample company.



To access the DataGardener application, click on the [View Details](#) button in this section.

2. Sync Data in HubSpot

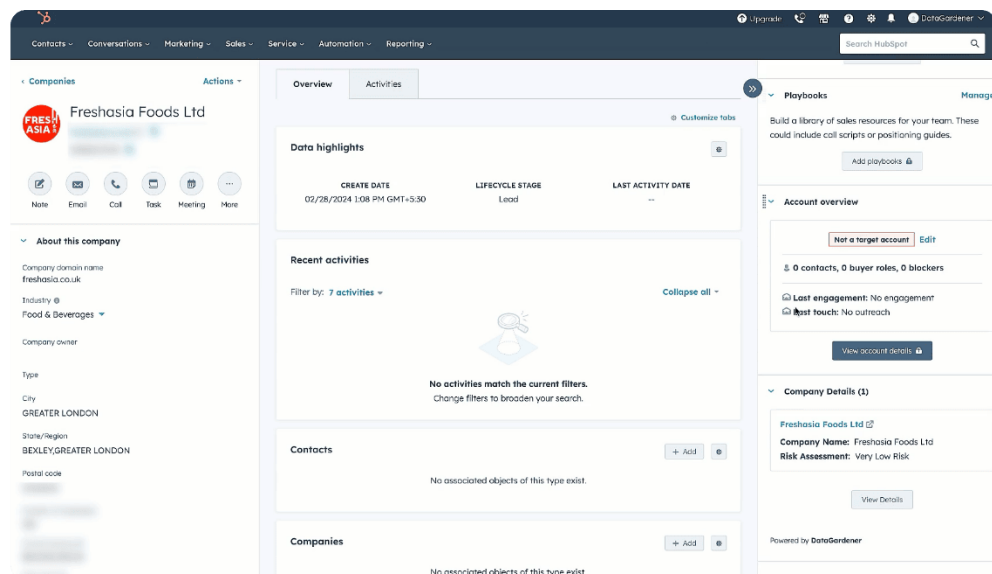
To sync, click on the [View Details](#) button. If any matching details are found, they will be displayed, otherwise, you will see the search/filter criteria for finding other companies you want to import.



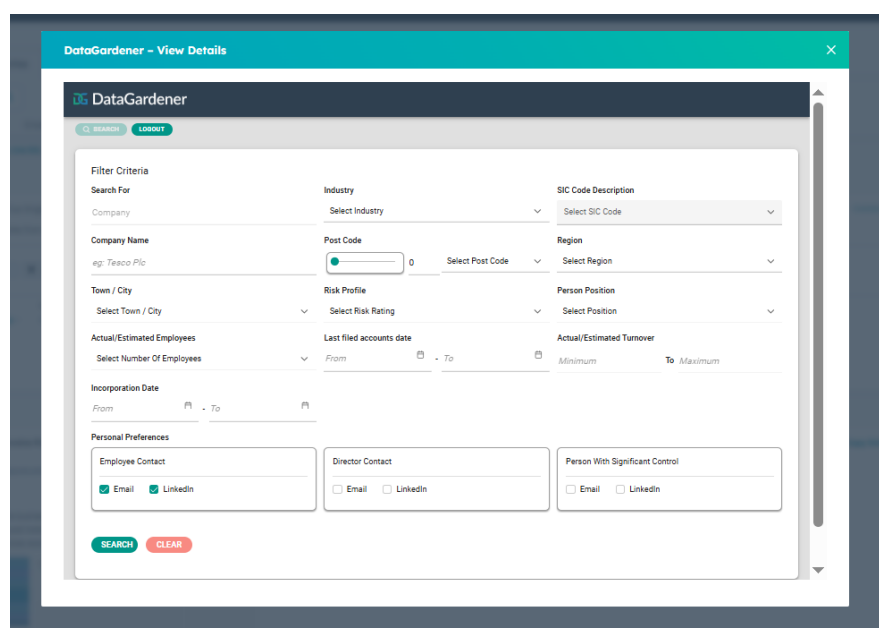
3. Import Data from DataGardener into HubSpot within HubSpot

To access the data you need a DataGardener premium account.

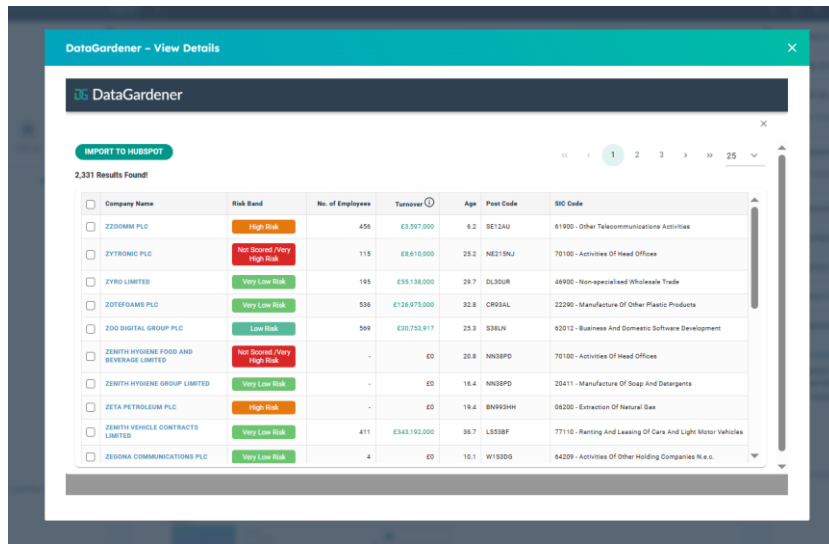
- i. Click on the [View Details](#) button. You will see the search/filter criteria for finding other companies you want to import.



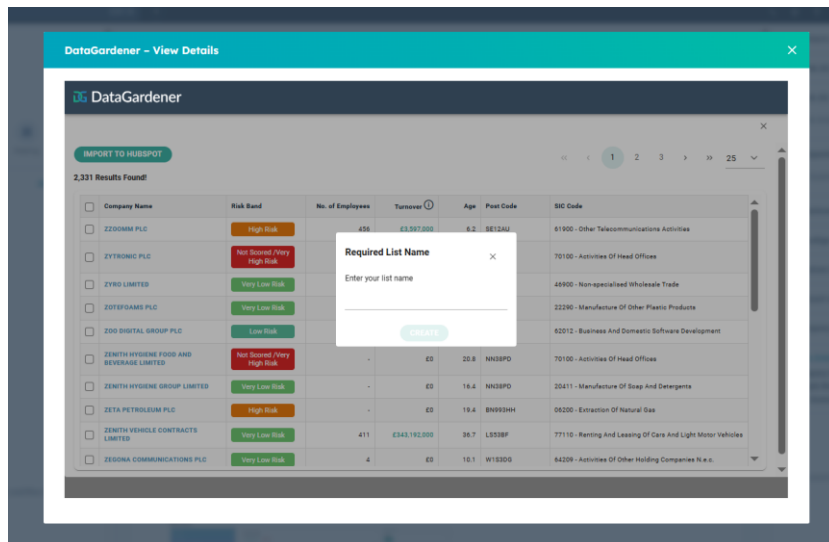
- ii. Log in to DataGardener. Upon successful login, you will proceed to the next screen for further processing.
- iii. Use the search functionality to apply some filters. You will see companies related to your query.



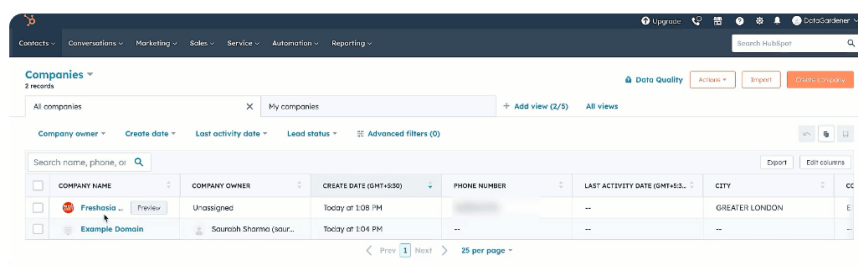
- iv. Select the company/companies you want to import into your HubSpot account and click on the Import To HubSpot button to execute the request.



- v. After clicking the import button, you will be prompted to name the import.



- vi. Upon successful import, you will see the imported company in your HubSpot companies list.



4. Add or Update properties

To change or add more properties from the DataGardener app, click on the view all properties button as shown below.

The screenshot shows the 'Manage properties' page for 'Oilfield Consultants International Ltd'. The page is divided into three main sections:

- Left Sidebar:** Contains company details such as 'Company owner', 'Type', 'City', 'State/Region', 'Postal code', 'Number of employees', 'Annual revenue', 'Time zone', and 'Description'. It also includes a 'See more' link and a 'LinkedIn company page' link.
- Center Panel:** Titled 'About', it explains that properties will appear when viewing company information. It includes a 'Reset to account defaults' button and a list of properties to be managed: 'Company domain name', 'Industry', 'Company owner', 'Type', 'City', 'State/Region', 'Postal code', 'Number of employees', and 'Annual revenue'. Each property has a dropdown menu and a close button.
- Right Panel:** Titled 'All properties', it features a search bar and a 'Manage properties' button. Below this, it lists categories of properties: 'Sales properties' (4), 'Company activity' (13), 'Deal information' (4), and 'Company information' (44). The 'Company information' section is expanded, showing details like 'About us', 'Annual revenue', 'City', 'Close date', 'Company domain name', and 'Company name'.

Select DataGardener in properties and choose which properties you want to display in your view and click on [Add to your view](#) button.

Push Company Information from DataGardener to HubSpot

After the connection has been established between HubSpot and DataGardener, you can push a single record as well as a complete list from DataGardener to HubSpot.

Log in to your DataGardener account and follow the steps:

a. Push an Individual company

If you want to push an individual company, then search the company using filters or directly using company number/name in the search bar. Go to the company's detail page and under **MORE** option, select the 'Push to HubSpot' option.

The screenshot shows the DataGardener interface for TESCO PLC. The 'MORE' dropdown menu is open, showing options: Monitor Plus, Monitor, Notes, Push To Salesforce, Push To HubSpot, and Compare. The 'Push To HubSpot' option is highlighted. The page also displays financial data such as Turnover (£65.76 B), Total Assets (£46.14 B), Total Liabilities (£33.90 B), and Net Worth (£6.87 B).

b. Push Companies in Bulk

1. Push Results Based on a Search

Create a search using the DataGardener filters. Click on 'Apply Filters'. Based on the search, a result list will be created. Select the records you want to push. Click on the Push to CRM button and select Push to HubSpot option to push the selected records to HubSpot.

If you do not select the records, then all the records in displayed list will be pushed to HubSpot.

The screenshot shows a search results page with 4,458 results found. The table lists companies with columns: Company Name, Company Status, Risk Band, SIC Code, and Industry. The 'Push to CRM' button is visible, and the 'Push to HubSpot' option is selected in the dropdown menu.

Company Name	Company Status	Risk Band	SIC Code	Industry
HERMES PACIFIC INVESTMENTS PLC	LIVE	Very Low Risk	70100 - Activities Of Head Offices	Finance, Impact Investing, Hea
V.SHIPS PLC	LIVE	Low Risk	50200 - Sea And Coastal Freight Water Transport	Maritime, Visa Sponsors, Trans
MINDAN GROUP PLC	LIVE	Low Risk	41100 - Development Of Building Projects	Leisure, Tourism, Travel, Const
HEAVYTREE BREWERY PLC	LIVE	Very Low Risk	56302 - Public Houses And Bars	Restaurants, Travel, Food & Be
EARS PLC	LIVE	Very Low Risk	61900 - Other Telecommunications Activities	Female Owned, Telecommunic
GLOBAL PORTS HOLDING PLC	LIVE	High Risk	70100 - Activities Of Head Offices	Maritime, Visa Sponsors, Po Fi
IMPACT HEALTHCARE REIT PLC	LIVE	Very Low Risk	64306 - Activities Of Real Estate Investment Trusts	Health Care, Real Estate, Finan
KROPZ PLC	LIVE	High Risk	08910 - Mining Of Chemical And Fertilizer Minerals	Agriculture, Chemical, Farming
PROPERTY CAPITAL PLC	LIVE	Very Low Risk	68100 - Buying And Selling Of Own Real Estate	Real Estate

2. Push a Saved List

- i. Create a search using the DataGardener filters. Click on 'Apply Filters'.
- ii. Based on the search a result list will be generated.
- iii. Select the companies you want to add to a list.
- iv. Click on **+ LIST** then select the list or create a new one to add the companies to.
- v. Go to the 'Saved Lists' section on the left side menu and click on the Push to CRM button and select Push to HubSpot option to push the records to HubSpot.

The screenshot shows the DataGardener web application interface. At the top, there's a header with 'Welcome, Datagardener!' and a search bar containing 'Company' and 'eg: Tesco Plc'. Below the header, a breadcrumb trail shows 'Dashboard > Company Search'. A status bar indicates '51 Results Found in the List Of 51 from Company Search.' and a 'FILTER' button. A toolbar contains buttons for 'columns selected', 'RESET TABLE', 'PUSH TO CRM' (which is active), 'EXPORT', 'EXPORT TEMPLATE', and 'CRM EXPORT ALL'. Below the toolbar, there are buttons for 'DELETE FROM LIST', '+ LIST', and '+ ADD'. A dropdown menu is open under 'PUSH TO CRM', showing options for 'Push To Salesforce' and 'Push To HubSpot'. The main table displays a list of companies with columns for Company Name, Company Status, Risk Band, No. of Employees, Property Owned Count, and Latest Financial Year. The table is paginated, showing results 1 through 3.

Company Name TL	Company Status	Risk Band	No. of Employees	Property Owned Count	Latest Financial Year
Search Keyword	Choose Status	Search Keyword	Search Keyword		
☐ SCOTVALVE SERVICES LIMITED	LIVE	Not Scored / Very High Risk	-	-	2021
☐ OLDBAUM SERVICES LIMITED	LIVE	Low Risk	7	-	2023
☐ ENERGY AND CARBON MANAGEMENT LIMITED	LIVE	Low Risk	-	-	2022
☐ SMART GREENTECH SOLUTIONS LIMITED	LIVE	Very Low Risk	1	-	2023
☐ SURESENSE TECHNOLOGIES LIMITED	LIVE	Moderate Risk	6	-	2023
☐ NEWENCO LIMITED	LIVE	Low Risk	4	-	2022
☐ KENDRA ENERGY SOLUTIONS LIMITED	LIVE	Very Low Risk	138	-	2023

Once you click on button, the application will display the success message.

Application Behavior

For importing any company to HubSpot a Company must have Contact with these mandatory fields: Email, Website, First Name and Last Name.

- Website/Domain of a Company is a mandatory field as it is used to control importing duplicate data.
- Company Registration Number is also a mandatory field as it helps DataGardener to search the details of the requested company from the platform and provide the details back to HubSpot.
- While syncing the company details with our system we update all company details with these field values:
 - Name
 - Website
 - City
 - State
 - Phone
 - CTPS
 - Country
 - Postal Code
 - Industry
 - Number of Employees
 - Turnover
 - CCJ
 - Company Number
 - Company Email
 - Estimated Turnover
 - Incorporation Date
 - Net Worth
 - Number of CCJs
 - SIC Code
 - SIC Description
 - Trading Address
 - Company Status
 - Credit Score
 - Total Assets
 - Total Current Liabilities
- Once the import process is initiated, the user won't be able to stop it.
- The process completion takes time depending upon data size.

Need Additional Support?

For any questions or issues regarding your installation process or any content featured in this manual, please don't hesitate to contact us at support@datagardener.com.



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