HubSpot Integration

Connect your SurveyGizmo and HubSpot accounts to take your data collection to the next level! SurveyGizmo's HubSpot integration allows you to automate the contact creation/lead generation process within HubSpot and also provides you with the ability to use your HubSpot Contact Record Properties to populate data into your SurveyGizmo surveys (a great way to keep your contact records up to date).

The SurveyGizmo HubSpot Action allows you to:

1. Create or Update contacts in HubSpot from SurveyGizmo survey submissions using the HubSpot **Push** Action. The push allows for:

- **Upsert -** If you have an existing contact, the contact email will be used to update an existing contact record during an upsert. If an email does not exist, a new contact record will be created. An upsert is a conditional action: *update* if it exists, *insert* if it doesn't.
- **Insert** - Insert is the term used for creating a new contact record. An identifier is not mapped in this case as it doesn't exist.
- **Update** - An update is an update of an existing contact record. An email address (unique identifier) is required.

2. Pull contact information (HubSpot Contact Record Properties) into questions/fields within your SurveyGizmo survey using a **Pull** Action.

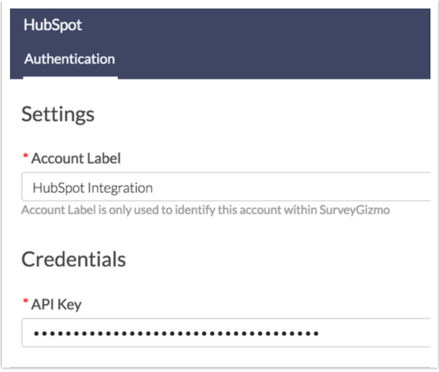
Integration Setup

The HubSpot Integration is available for purchase by Account Administrators via Account > Integrations. Once you've purchased this integration, you can connect SurveyGizmo and HubSpot.

> Before you get started, note that you will need your HubSpot **API Key** to setup the integration within SurveyGizmo. Visit the HubSpot API Key documentation for instructions on obtaining your key.

1. Navigate to **Account > Integrations > 3rd Party Integrations** and locate the HubSpot integration. Click the **Configure** button to get started.

2. On the **Authentication** tab, provide an **Account Label** (this is just a name for the account that is internal to you and your SurveyGizmo users) and the HubSpot **API Key** (both fields are required). If you don't have your API Key readily available, visit the HubSpot API Key documentation for instructions.



3. Once you are finished setting up your integration click **Save**. You can now add the **HubSpot Action** to your surveys to push/pull contact data.

HubSpot (Push) Action

SurveyGizmo's HubSpot Action (push method) allows you to automate the contact creation/lead generation process. Use your SurveyGizmo survey to collect contact details, which can then be synced with your HubSpot account Contact Record Properties. You can also use the push method to update existing records.

HubSpot Push Setup

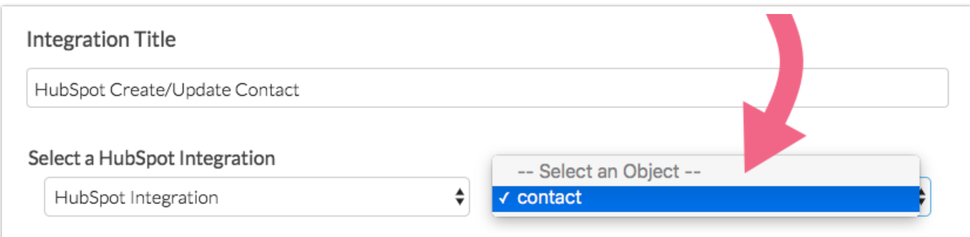
Your push action must be on a page follows any survey questions that you will be sending to HubSpot. We recommend placing the push action on your survey's Thank You page.

1. Click the **Action** link on the page where you wish to place your action and locate the **HubSpot** action within the **Integrations** section. Click the **+Add** button.

2. Provide an **Integration Title** for your action (This is a title that is internal to you and your fellow SurveyGizmo users; it should represent the purpose of the action.)

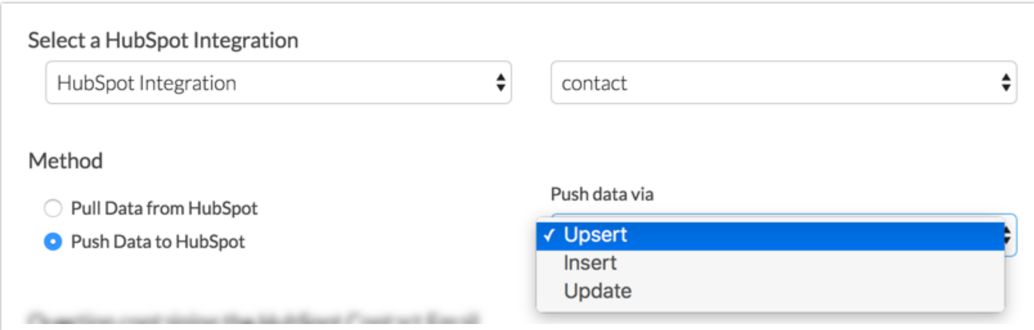
3. **Select a HubSpot Integration** using the provided dropdown menu. Your integration will be identified by the account label that you provided on the **Integrations** page when connecting your accounts.

4. Using the **Select an Object** dropdown menu, choose the object-type that you will be *pushing* to. Currently, the **contact** object is the only available object-type.



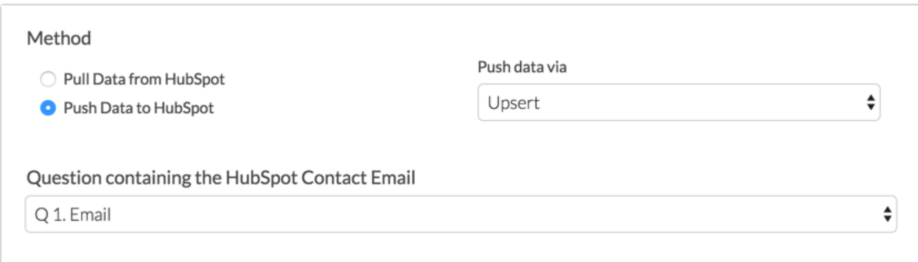
5. For the purpose of the *push* action, select **Push Data to HubSpot** under the **Method** section. Select the type of *push* that you want to execute:

- **Upsert -** If the provided email address exists in HubSpot, the survey response will be used to update an existing contact record with that email during an upsert. If an email address doesn't exist, a new contact record will be created with the provided email address.
- **Insert -** Insert is the term used for creating a new contact record. *An email address is required to insert/create a new contact in HubSpot.*
- **Update -** An update is just that, an update of an existing contact record. As such, an email address (unique identifier) is required to reference the contact record that should be updated.



6. The next step requires identifying the survey question/field where the respondent's email address will be stored:

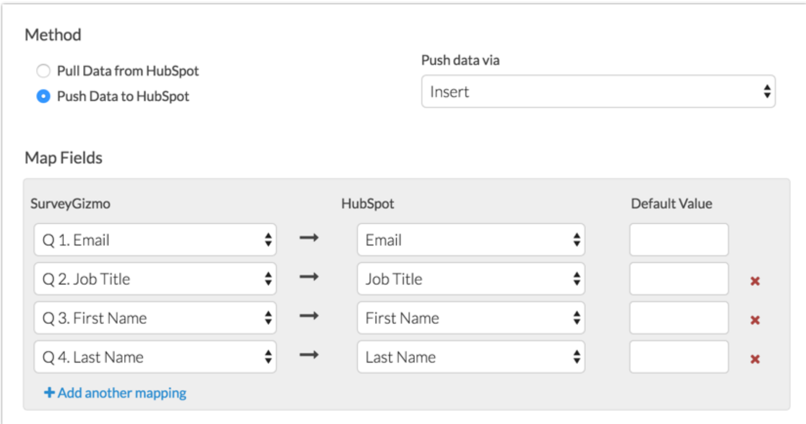
    - An *email address is required* to create or update an existing contact record in HubSpot. This email address must be passed into or collected on the survey and stored in either a question or Hidden Value Action.
    - Use the dropdown under **Question containing the HubSpot Contact Email** to select the survey question/field that captures the respondent's email.



    - In the event that you need to pass in the email address as a url variable or reference it via a merge code, select the **Static Value (Merge Codes, etc.)** option. You will see an additional field and can input a static value or use the merge code helper to reference the email address:

7. Once you have determined the type of Push that you want to execute, it's time to **Map Fields**. Within the Map Fields section (click here for an important note about field-mapping):

   - In the *left-hand column,* select the SurveyGizmo question/field from which you want to send data.
   - In the *right-hand column,* select the corresponding HubSpot Contact Record Property, that you want to send the question data to.
   - Use the **Default Value** field to pass information to HubSpot in the event that the SurveyGizmo filed is left blank.
   - Use the **Add another mapping** link to add more field pairs as needed.



8. Once you have finished your field-mapping, navigate to the Logic tab if you need to apply any conditions for triggering your HubSpot Push. Make sure to **Save Action** when finished.

Example - Create a New Lead

HubSpot (Pull) Action

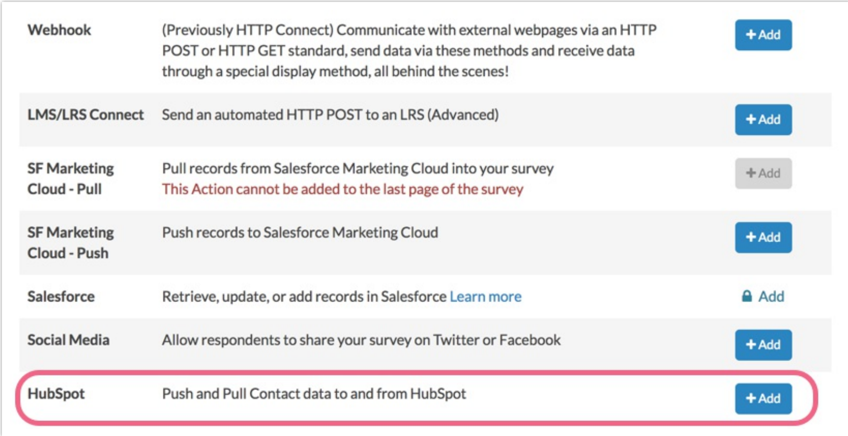
SurveyGizmo's HubSpot Pull Action provides you with the ability to use your Contact Record Properties within your SurveyGizmo surveys. This can be combined with a *push* action to help you keep you contact information up to date.

HubSpot Pull Setup

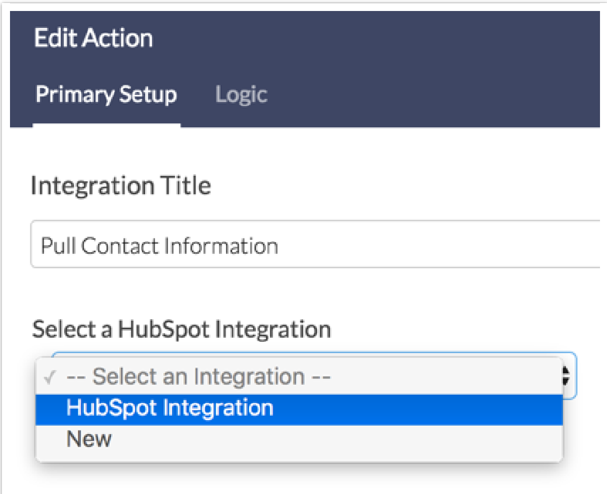
When pulling contact data from HubSpot into SurveyGizmo, the survey will need to be able to *identify* the contact whose information should be pulled in. This is done by referencing the contact's email address.

The *pull* action should be added before any fields that it will be populating. Keep in mind that the respondent's email address will need to be referenced in order to pull in any associated information. Refer to our example workflow below for one potential scenario.

1. On the page where you want to place your action, click the **Action** link and locate the **HubSpot** action within the **Integrations** section. Click the **+Add** button.

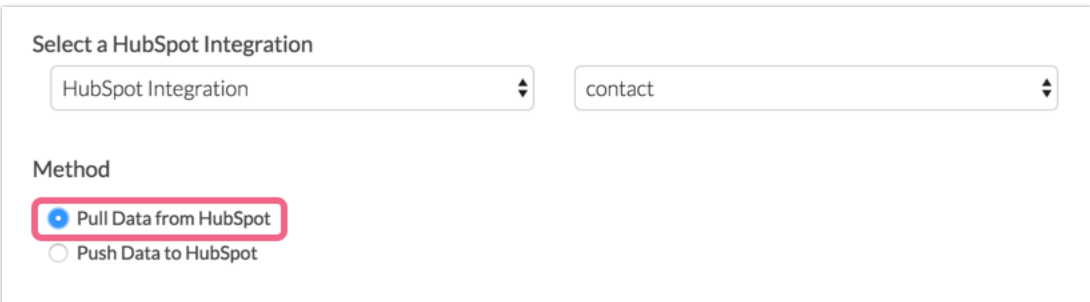


2. Provide a **Integration Title** for your action (this is an internal title) and **Select a HubSpot Integration** using the provided dropdown menu. Your integration will be identified by the account label that you provided on the **Integrations** page.



3. Using the **Select an Object** dropdown menu, choose the object-type that you will be *pulling* from. Currently, the **contact** object is the only available object-type.

4. For the purpose of the *pull* action, select **Pull Data from HubSpot** under the **Method** section.

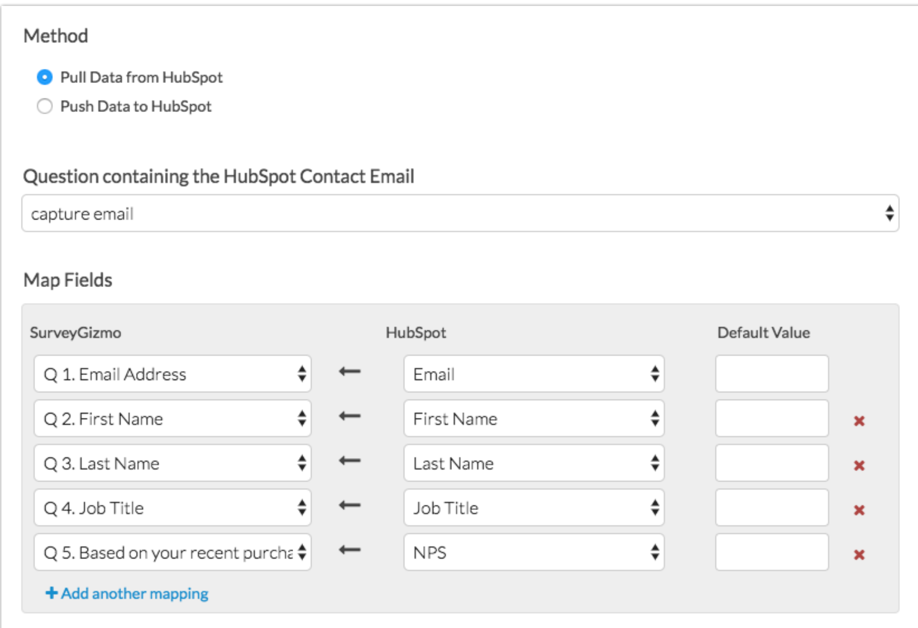


5. An *email address is required* to reference an existing contact record in HubSpot.

- This email address must be passed into or collected on the survey and stored in either a question or Hidden Value Action.
- Use the dropdown under **Question containing the HubSpot Contact Email** to select the survey question/field that captures the respondent's email. *This field must be on a page that precedes the pull action you are setting up.*
- In the event that you need to pass in the email address as a url variable or reference it via a merge code, select the **Static Value (Merge Codes, etc.)** option. You will see an additional field and can input a static value or use the merge code helper to reference the email address:

6. Once you have identified the question/field that collect the respondent email, it's time to **Map Fields**. Within the Map Fields section (click here for an important note about field-mapping):

   - In the *left-hand column,* select the SurveyGizmo question/field that you want to feed data into.
   - In the *right-hand column,* select the corresponding HubSpot Contact Record Property, from which you want to pass data.
   - Use the **Default Value** field to pass a default value into SurveyGizmo in the event that the field is blank for that record in HubSpot.
   - Use the **Add another mapping** link to add more field pairs as needed.



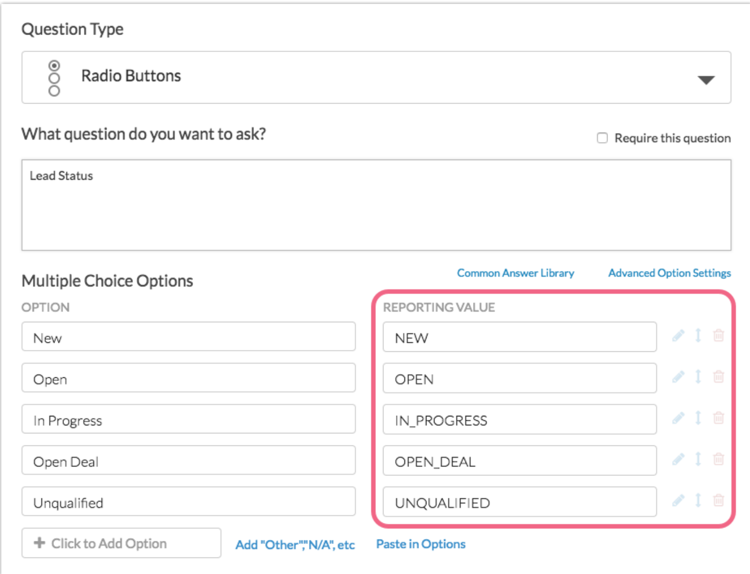
7. Once you have finished your field-mapping, navigate to the Logic tab if you need to apply any conditions for triggering your HubSpot Pull. Make sure to **Save Action** when finished.

Example - Pull Data From HubSpot into SurveyGizmo

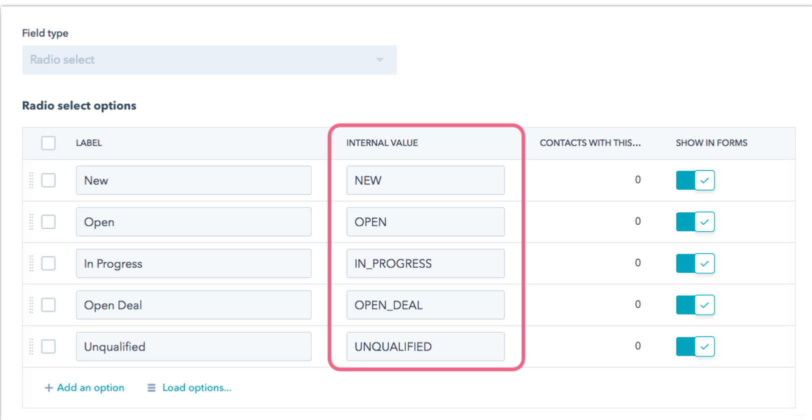
Mapping Fields

When mapping SurveyGizmo Questions to HubSpot Properties, it is critical that the SurveyGizmo Reporting Values are identical to the HubSpot Property Internal Values.

For the sake of example, in our SurveyGizmo survey we have a Radio Button question titled *Lead Status*. Our answers options and reporting values are configured as follows:



Note that our Reporting Values are all capitalized with underscores separating multiple words. These reporting values have been customized to match identically with the Internal Values of the HubSpot Lead Status Property:



Important! You can certainly customize both SurveyGizmo Reporting Values as well as HubSpot's Internal Values. Just make sure that if you customize one, you update the other (if you intend to pass data from question to property or vice-versa).

FAQ & Troubleshooting

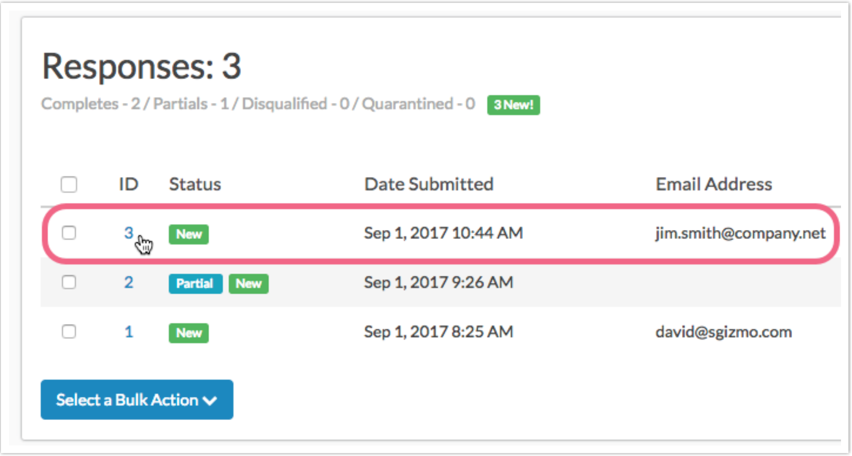
I'm using the Insert Push Method and a contact was not created.

Make sure that an email address was provided in your survey and that the email address was mapped to the Email HubSpot Property within your action. An email address is required to create a new contact record in HubSpot.

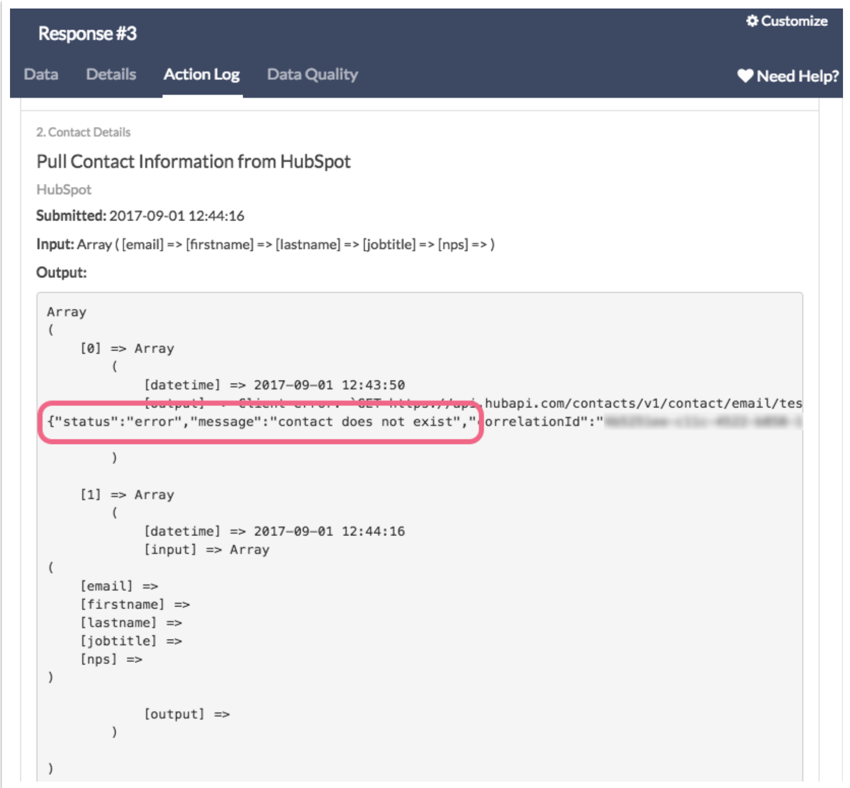
My HubSpot Action did not pull/push data .

If your HubSpot Action is failing to push or pull data, check the **Action Log** for any associated survey response.

1. Navigate to **Results > Individual Responses**, and click on one of the responses associated with a failed action.



2. Access the **Action Log** tab and locate your HubSpot Action (identified by title). Here, you can view the action input/output and refer to any errors that might be presented. The error should provide clues as to why the action failed:



One of my fields did not pass data correctly.

This is likely due to a mismatch of field types, i.e. sending data from a SurveyGizmo textbox question to a HubSpot Radio select property type.

I do not see the multiple checkboxes property in the integration dropdown menu.

At this time, the multiple checkboxes propery is not supported with the Hubspot integration Pull and Push actions.

Related Articles