

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 field is left blank.
- Use the **Add another mapping** link to add more field pairs as needed.

The screenshot shows the configuration for a HubSpot Push Action. Under the 'Method' section, 'Push Data to HubSpot' is selected. The 'Push data via' dropdown is set to 'Insert'. The 'Map Fields' section contains a table with three columns: 'SurveyGizmo', 'HubSpot', and 'Default Value'. There are four rows of mappings:

SurveyGizmo	HubSpot	Default Value
Q 1. Email	Email	
Q 2. Job Title	Job Title	
Q 3. First Name	First Name	
Q 4. Last Name	Last Name	

Red 'x' marks are present next to the 'Default Value' fields for Job Title, First Name, and Last Name. A '+ Add another mapping' link is at the bottom left.

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 your 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.

Webhook	(Previously HTTP Connect) Communicate with external webpages via an HTTP POST or HTTP GET standard, send data via these methods and receive data through a special display method, all behind the scenes!	+ Add
LMS/LRS Connect	Send an automated HTTP POST to an LRS (Advanced)	+ Add
SF Marketing Cloud - Pull	Pull records from Salesforce Marketing Cloud into your survey <i>This Action cannot be added to the last page of the survey</i>	+ Add
SF Marketing Cloud - Push	Push records to Salesforce Marketing Cloud	+ Add
Salesforce	Retrieve, update, or add records in Salesforce Learn more	Add
Social Media	Allow respondents to share your survey on Twitter or Facebook	+ Add
HubSpot	Push and Pull Contact data to and from HubSpot	+ Add

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.

Edit Action

Primary Setup
Logic

Integration Title

Select a HubSpot Integration

✓
-- Select an Integration --

HubSpot Integration

New

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.

Select a HubSpot Integration

HubSpot Integration

contact

Method

Pull Data from HubSpot

Push Data to HubSpot

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:

Question containing the HubSpot Contact Email

Static Value (Merge Codes, etc.)

[url("email")]

[Select a Merge Code](#)

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.

Method

Pull Data from HubSpot

Push Data to HubSpot

Question containing the HubSpot Contact Email

capture email

Map Fields

SurveyGizmo	HubSpot	Default Value
Q 1. Email Address	Email	
Q 2. First Name	First Name	
Q 3. Last Name	Last Name	
Q 4. Job Title	Job Title	
Q 5. Based on your recent purcha	NPS	

[+ Add another mapping](#)

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:

The screenshot shows the configuration for a 'Radio Buttons' question titled 'Lead Status'. The 'Multiple Choice Options' section is divided into two columns: 'OPTION' and 'REPORTING VALUE'. The 'OPTION' column lists: New, Open, In Progress, Open Deal, and Unqualified. The 'REPORTING VALUE' column lists: NEW, OPEN, IN_PROGRESS, OPEN_DEAL, and UNQUALIFIED. A red box highlights the 'REPORTING VALUE' column. Below the options, there are links for 'Common Answer Library', 'Advanced Option Settings', '+ Click to Add Option', 'Add "Other"/"N/A", etc', and 'Paste in Options'.

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:

The screenshot shows the configuration for a 'Radio select' field in HubSpot. The 'Radio select options' table is shown with columns: LABEL, INTERNAL VALUE, CONTACTS WITH THIS..., and SHOW IN FORMS. The 'INTERNAL VALUE' column is highlighted with a red box. The table contains the following data:

LABEL	INTERNAL VALUE	CONTACTS WITH THIS...	SHOW IN FORMS
<input type="checkbox"/> New	NEW	0	<input checked="" type="checkbox"/>
<input type="checkbox"/> Open	OPEN	0	<input checked="" type="checkbox"/>
<input type="checkbox"/> In Progress	IN_PROGRESS	0	<input checked="" type="checkbox"/>
<input type="checkbox"/> Open Deal	OPEN_DEAL	0	<input checked="" type="checkbox"/>
<input type="checkbox"/> Unqualified	UNQUALIFIED	0	<input checked="" type="checkbox"/>

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

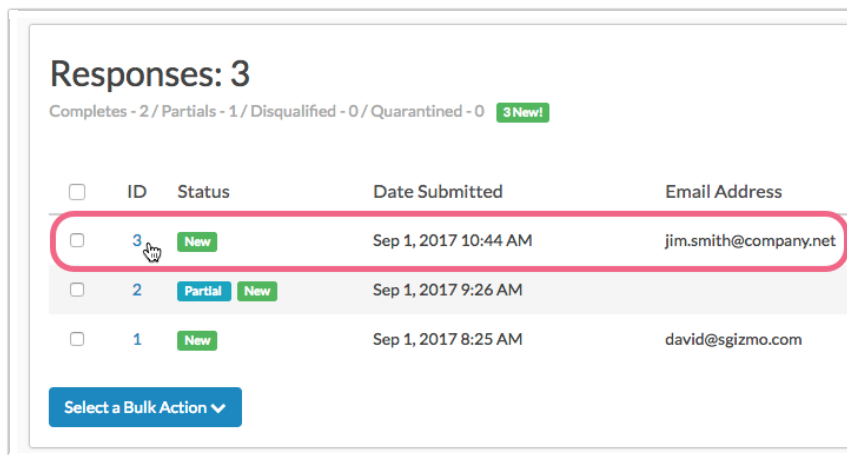
I'm using the Insert Push Method and a contact was not created.

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.



Responses: 3
Completes - 2 / Partial - 1 / Disqualified - 0 / Quarantined - 0 **3 New!**

<input type="checkbox"/>	ID	Status	Date Submitted	Email Address
<input type="checkbox"/>	3	New	Sep 1, 2017 10:44 AM	jim.smith@company.net
<input type="checkbox"/>	2	Partial New	Sep 1, 2017 9:26 AM	
<input type="checkbox"/>	1	New	Sep 1, 2017 8:25 AM	david@sgizmo.com

Select a Bulk 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:

Response #3 Customize

Data Details **Action Log** Data Quality Need Help?

2. Contact Details

Pull Contact Information from HubSpot

HubSpot

Submitted: 2017-09-01 12:44:16

Input: Array ([email] => [firstname] => [lastname] => [jobtitle] => [nps] =>)

Output:

```
Array
(
  [0] => Array
  (
    [datetime] => 2017-09-01 12:43:50
    [output] => Client error: GET https://api.hubapi.com/contacts/v1/contact/email/tes
    {"status":"error","message":"contact does not exist","correlationId":"..."}
  )
  [1] => Array
  (
    [datetime] => 2017-09-01 12:44:16
    [input] => Array
    (
      [email] =>
      [firstname] =>
      [lastname] =>
      [jobtitle] =>
      [nps] =>
    )
    [output] =>
  )
)
```

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 property is not supported with the Hubspot integration Pull and Push actions.

Related Articles