

MYOB Advanced Business HubSpot Integration

Last Updated: 07 June 2016

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MYOB Advanced ^{Live}

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HubSpot Integration

This document describes how to integrate the HubSpot marketing automation system with MYOB Advanced 2016.1 or later. The process should only take you a few minutes.

Scenario Overview

Business Problem

MYOB Advanced's Customer Relationship Management (CRM) module allows your salespeople to more effectively manage and close sales opportunities. A CRM system is designed to help sales efficiently manage prospects and existing customers.

Salespeople do not have time to manage a large list of unqualified leads. The activities associated with moving unqualified leads through the sales funnel are usually performed by marketing. The activities associated with doing this are much different from activities performed by sales.

Sales Activities	Marketing Activities
MYOB Advanced CRM	HubSpot marketing automation system
Send personal email	Send mass email to large list
Qualify sales opportunities Pain points, timeframe, budget, authority	Qualify leads <ul style="list-style-type: none">Validate contact, level of interest
Appointments with detailed notes	Telemarketing with appointment setting
Review sales history, define product needs	Capture interests and general needs
Provide sales proposal	Provide drip marketing

Marketing activities occur at the top of the sales funnel, while sales activities occur further down.



Integration Points

The hand off between marketing and sales is the ideal place to integrate the two systems. The MYOB Advanced interface to HubSpot provides a simple way to configure the information that you need to share when the handoff occurs.

In this example, leads that are qualified in HubSpot are automatically imported into the MYOB Advanced lead screen. These leads can then be automatically assigned for follow up by a sales person.

You may also encounter a situation where leads in MYOB Advanced need to be exported to HubSpot. This would occur if a lead is disqualified (not ready to buy for 1-2 years) or if leads are entered into MYOB Advanced CRM and not in HubSpot.

Demonstration Scenario

This document describes how to quickly configure MYOB Advanced to accept marketing qualified leads from HubSpot. Then if the lead is disqualified, the lead can be updated in HubSpot for nurturing.

MYOB Advanced Implementation

In MYOB Advanced 5.3, HubSpot integration is implemented as a data provider in integration services. This means that you can map HubSpot fields to MYOB Advanced and schedule the import to occur automatically at a predefined interval.

This has mostly been setup for you, so the process we describe in this article is simple configuration. The following steps are discussed.

1. Configure the provider using information from your HubSpot account
2. Verify the Import Scenario in MYOB Advanced
3. Process the Import Scenario to verify functionality
4. Schedule the Import Scenario to automate the process
5. Verify the Export Scenario in MYOB Advanced
6. Process the Export Scenario in MYOB Advanced

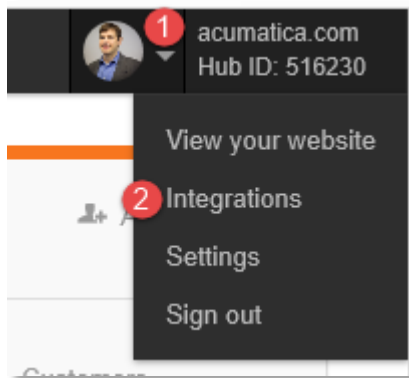
Step 1: Configure the HubSpot provider in MYOB Advanced

Navigate to System > Integration > Manage > Data Providers and select the HubSpot provider (as illustrated below). The Provider Type has already been selected, so you only need to add your HubSpot specific information.

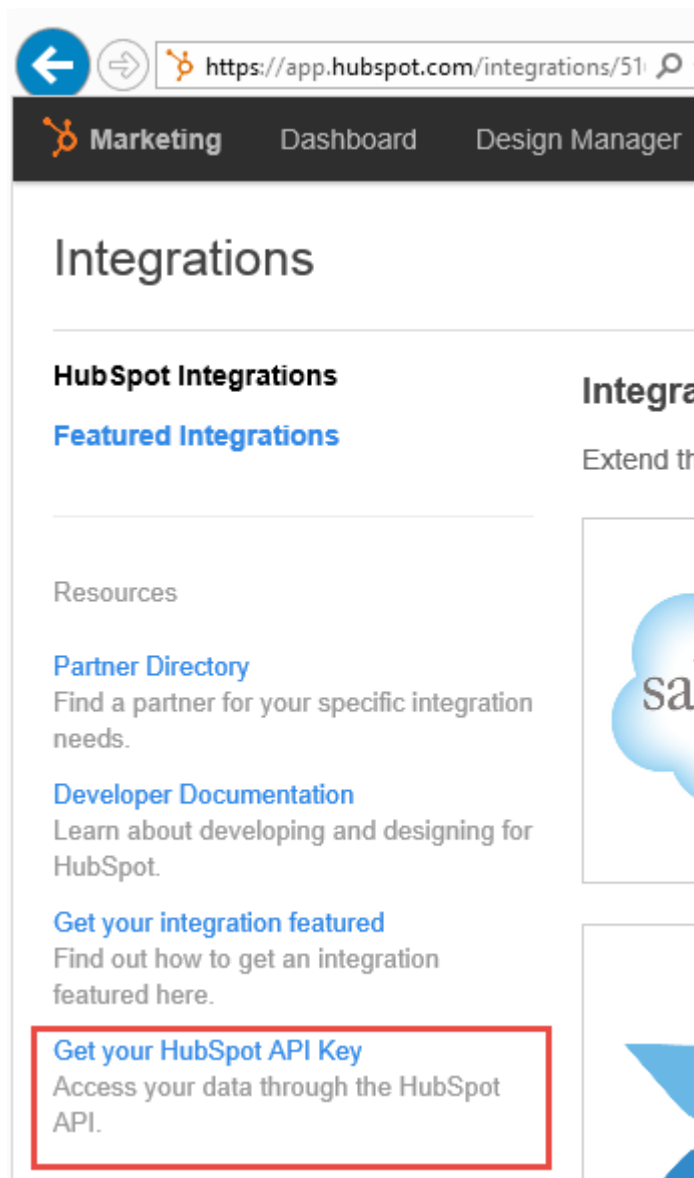
The screenshot shows the MYOB Advanced interface. The top navigation bar includes the MYOB Advanced logo, tabs for Organisation, People, Finance, and System, and a user profile for Andrews@AU2016. The main content area is titled 'Melbourne - Data Providers' and contains a form for configuring the HubSpot provider. The form includes fields for Name (HubSpot), Provider Type (HubSpot Provider), and an Active checkbox. Below the form is a table with columns for Name, Description, and Value. The table contains several rows, with the first row highlighted in green. The first three rows have yellow circles with numbers 1, 2, and 3 next to their values.

Name	Description	Value
URL	Url	https://api.hubapi.com
Hapikey	Hapikey	1
HubSpotList	List Name in HubSpot	2
PortallID	PortallID	3
ClearHubL...	Clear HubList After Imp...	True
HubSpotD...	HubSpot Delay, c	1

1. The Hapikey (HubSpot API Key), can be found by expanding the menu in the top right of your screen when you login to HubSpot and selecting the Integrations option.

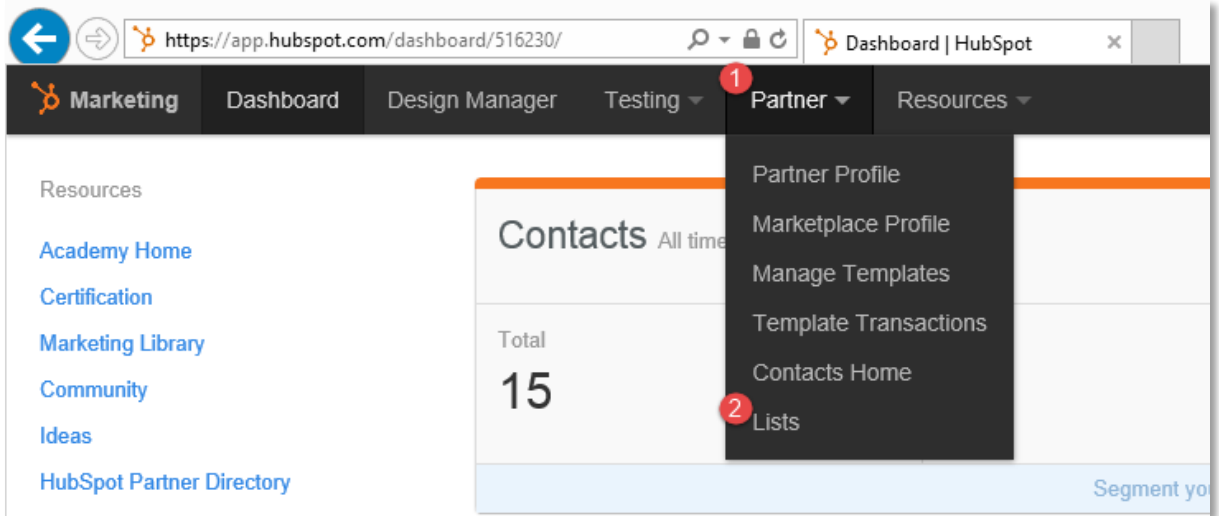


Expand the menu, then select Integrations.

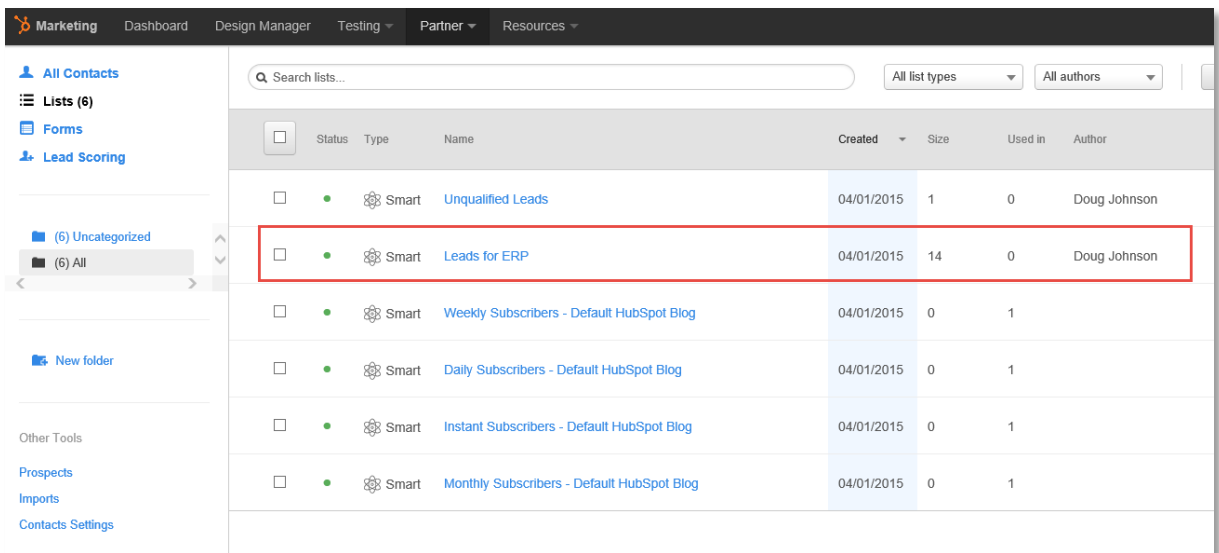


From the integrations screen, click the option to 'Get your HubSpot API Key' and follow the instructions on the API key page.

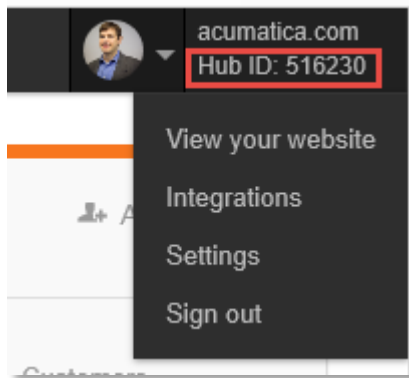
- The List Name in HubSpot is the name of the list that you will monitor in order to bring leads into MYOB Advanced. Within HubSpot navigate to Partner > Lists as illustrated below.



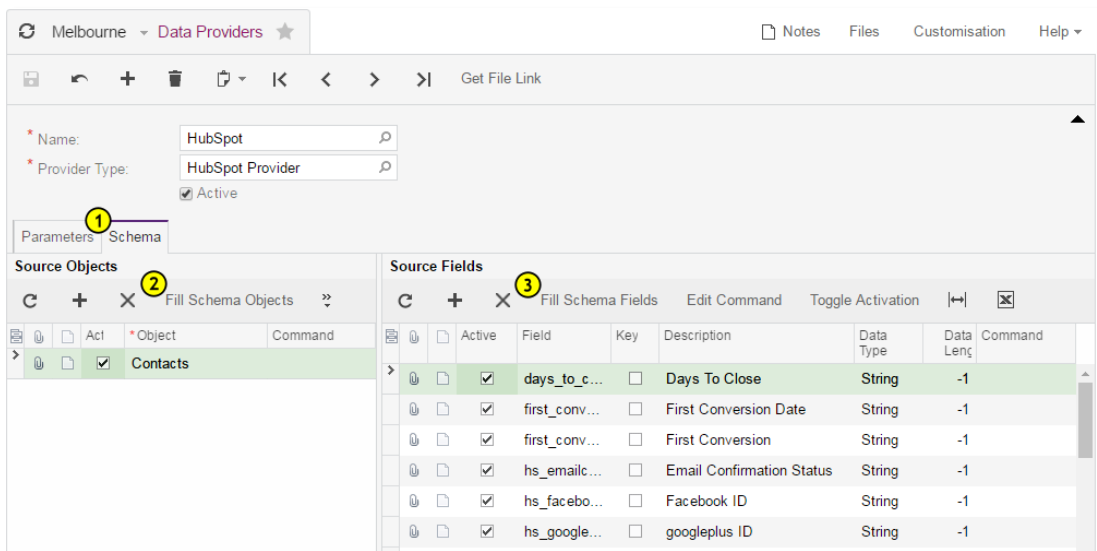
I created a Smart list called Leads for ERP. After leads score enough points (from visiting web pages, entering data, responding to forms, opening emails, etc.), HubSpot automatically moves them to this list.



3. The PortalID is listed on the top right of your screen when you login to HubSpot as illustrated below.



To verify that you have entered the information correctly, click the 'Schema' tab, the select Fill Schema Objects, and then select Fill Schema Fields. In most cases the screen will not change, and the absence of an error means that you have entered your account data correctly.



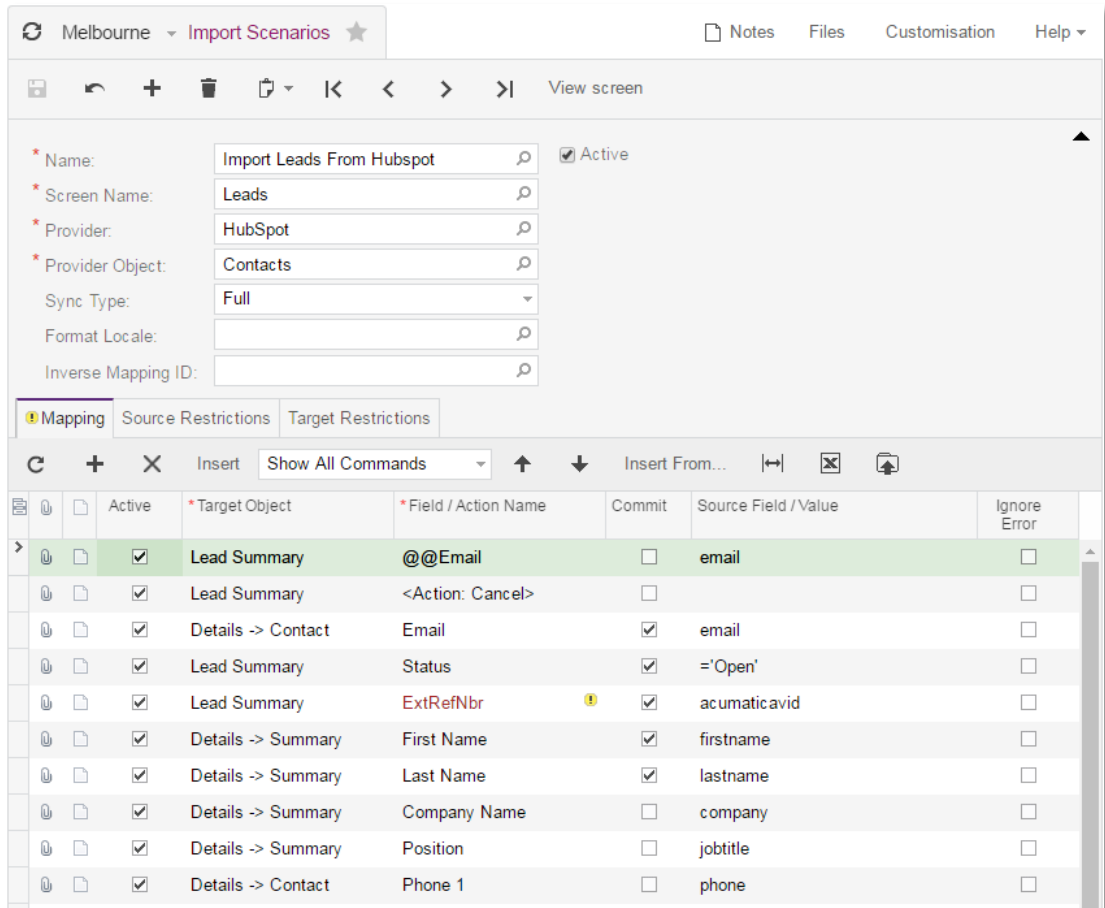
Re-building the schema does two things in addition to testing.

1. If you have any custom contact properties in MYOB Advanced, this action adds them to the default data provider that ships with the system
2. It adds MYOB Advanced service fields to the HubSpot as contact properties. This is required before running the integration.

Step 2: Verify the Import Scenario in MYOB Advanced

After establishing the data connection to HubSpot, the next step is to map the HubSpot fields to the fields on the MYOB Advanced lead screen.

To do this navigate to System > Integration > Manage > Import Scenarios. An import scenario called "Import Leads from HubSpot" has already been created for you. So all you have to do is verify the fields or add more if you want to capture more information.



The screenshot shows the 'Import Scenarios' configuration interface in MYOB Advanced. The scenario is named 'Import Leads From Hubspot' and is active. It is mapped to the 'Leads' screen, using the 'HubSpot' provider and 'Contacts' provider object. The sync type is set to 'Full'. Below the configuration fields, the 'Mapping' tab is selected, showing a table of field mappings.

Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Lead Summary	@@Email	<input type="checkbox"/>	email	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Contact	Email	<input checked="" type="checkbox"/>	email	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	Status	<input checked="" type="checkbox"/>	= 'Open'	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	ExtRefNbr	<input checked="" type="checkbox"/>	acumaticavid	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	First Name	<input checked="" type="checkbox"/>	firstname	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	Last Name	<input checked="" type="checkbox"/>	lastname	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	Company Name	<input type="checkbox"/>	company	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	Position	<input type="checkbox"/>	jobtitle	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Contact	Phone 1	<input type="checkbox"/>	phone	<input type="checkbox"/>

MYOB Advanced allows you to map attributes (see the Appendix 1) and custom fields as well. In this case, I deactivated the Ext Ref Nbr because it was preventing successful import of the email address.

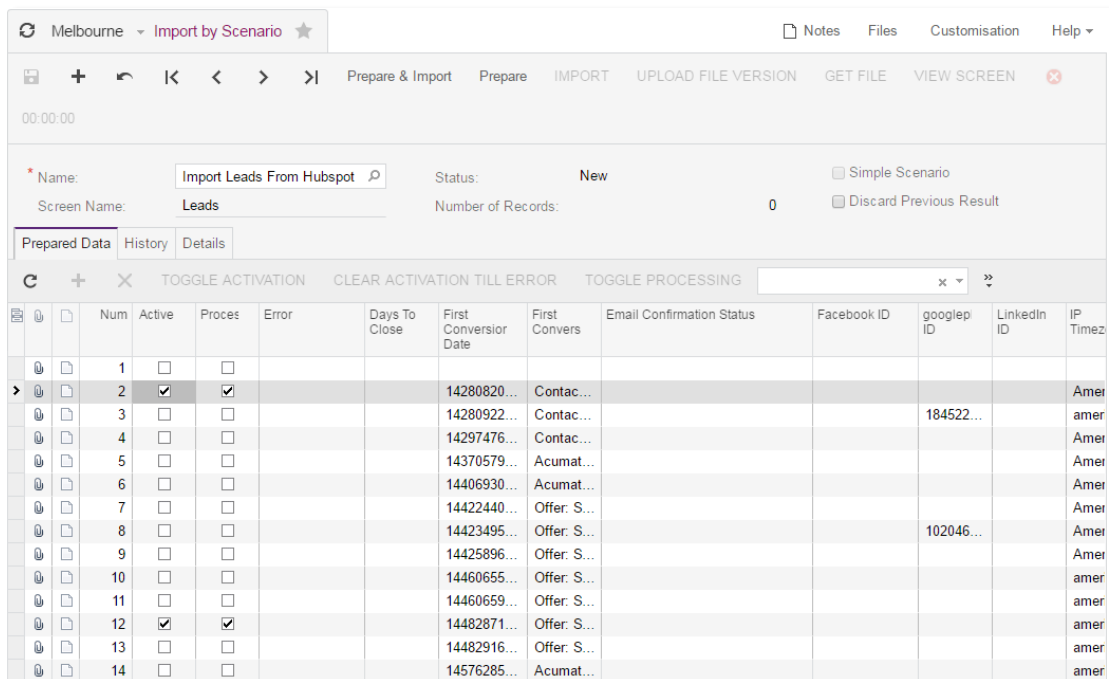
Step 3: Process the Import Scenario

Navigate to System > Integration > Process > import by Scenario and select the *Import Leads from HubSpot* scenario.

Click 'Prepare' and any leads that you have in HubSpot will be gathered into the screen.

Click import and the leads will be loaded into MYOB Advanced. Missing required fields, invalid values, etc. will be flagged and not imported in order to ensure data consistency. In the screen below I successfully imported two records.

When performing the import, MYOB Advanced checks to see if there are existing leads with the same email address. If the system finds a match, then the record is updated. If the system does not find a match, then a new lead is created. If the email address does not exist, then duplicates will be created.



The screenshot shows the 'Import by Scenario' interface in MYOB Advanced. The scenario is named 'Import Leads From Hubspot' and is in 'New' status. The screen name is 'Leads' and the number of records is 0. The interface includes tabs for 'Prepared Data', 'History', and 'Details'. Below the tabs is a table with 14 rows of prepared data. The table columns are: Num, Active, Proces, Error, Days To Close, First Converstion Date, First Converstion Date, Email Confirmation Status, Facebook ID, googlep ID, LinkedIn ID, and IP Timez. Rows 2 and 12 are highlighted in grey and have checkmarks in the 'Active' and 'Proces' columns.

Num	Active	Proces	Error	Days To Close	First Converstion Date	First Converstion Date	Email Confirmation Status	Facebook ID	googlep ID	LinkedIn ID	IP Timez
1	<input type="checkbox"/>	<input type="checkbox"/>									
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			14280820...	Contac...					Amer
3	<input type="checkbox"/>	<input type="checkbox"/>			14280922...	Contac...			184522...		amer
4	<input type="checkbox"/>	<input type="checkbox"/>			14297476...	Contac...					Amer
5	<input type="checkbox"/>	<input type="checkbox"/>			14370579...	Acumat...					Amer
6	<input type="checkbox"/>	<input type="checkbox"/>			14406930...	Acumat...					Amer
7	<input type="checkbox"/>	<input type="checkbox"/>			14422440...	Offer. S...					Amer
8	<input type="checkbox"/>	<input type="checkbox"/>			14423495...	Offer. S...			102046...		Amer
9	<input type="checkbox"/>	<input type="checkbox"/>			14425896...	Offer. S...					Amer
10	<input type="checkbox"/>	<input type="checkbox"/>			14460655...	Offer. S...					amer
11	<input type="checkbox"/>	<input type="checkbox"/>			14460659...	Offer. S...					amer
12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			14482871...	Offer. S...					amer
13	<input type="checkbox"/>	<input type="checkbox"/>			14482916...	Offer. S...					amer
14	<input type="checkbox"/>	<input type="checkbox"/>			14576285...	Acumat...					amer

You can do a Universal Search on the name that you just imported and click the lead to see the results.

Melbourne ▾ Leads

SAVE & CLOSE [Icons] Actions ▾

Lead ID: Overman, Kristen [Search] Workgroup: [Search]
* Status: Open [Dropdown] Owner: [Search]
Reason: In Process [Dropdown]

Details | Attributes | Activities | Relations | Campaigns | Marketing Lists

Summary

First Name: [Dropdown] Kristen
* Last Name: Overman
Position: Purchasing Manager
Business Account: [Search] [Edit]
Company Name: Try Harder
Parent Business Ac...: [Search] [Edit]

Contact

Email: koverman@tryharder123.com [Envelope]
Web: [Search]
Phone 1: Business 1 [Dropdown] 425-321-4321
Phone 2: Business 2 [Dropdown] 425-909-0323
Phone 3: Home [Dropdown]
Fax: Business Fa [Dropdown]

CRM

Lead Class: LEADBUS - Sales Lead - Business [Search] [Edit]
Source: [Dropdown]
Campaign ID: [Search]
Contact Method: Any [Dropdown]
 Do Not Call Do Not Fax
 Do Not Email Do Not Mail
 No Mass Mail No Marketing

Last Incoming Activ...
Last Outgoing Activ...

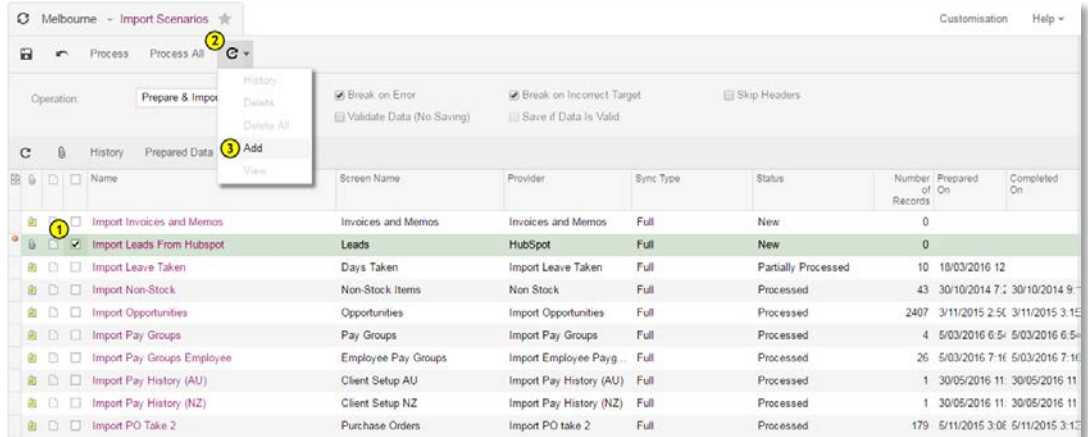
Address

Same As In Account
Address Line 1: 414 8th Ave S
Address Line 2:
City: Seattle
* Country: US - UNITED STATES [Search] [Edit]
State: WA - WASHINGTON [Search]
Postal Code: 98104 [View on Map]

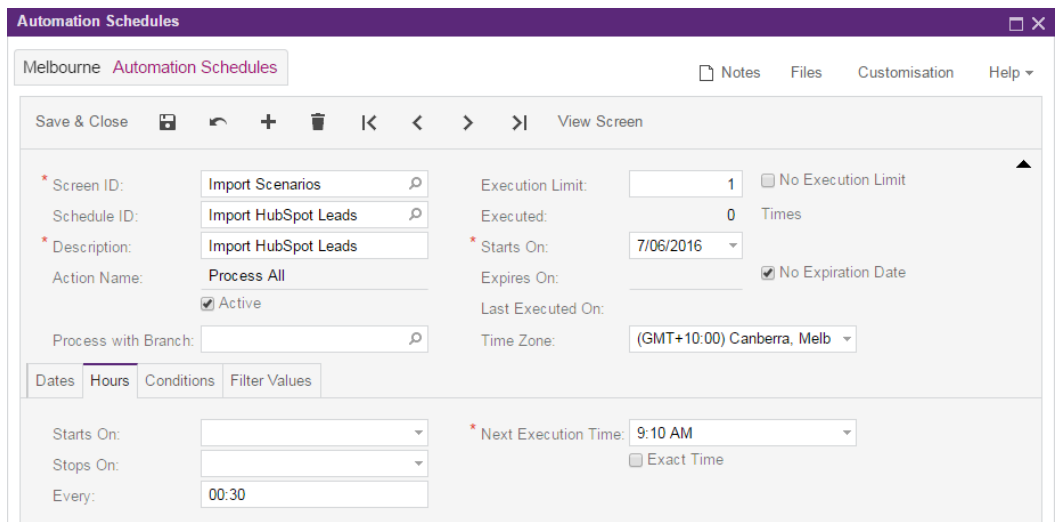
Step 4: Schedule the Import Scenario

To schedule the import scenario to happen on a recurring basis, do the following:

1. Navigate to System > Integration > Schedule > Import Scenarios.
2. Click the scheduler button.
3. Select **Add**.



4. Complete the automation schedule form

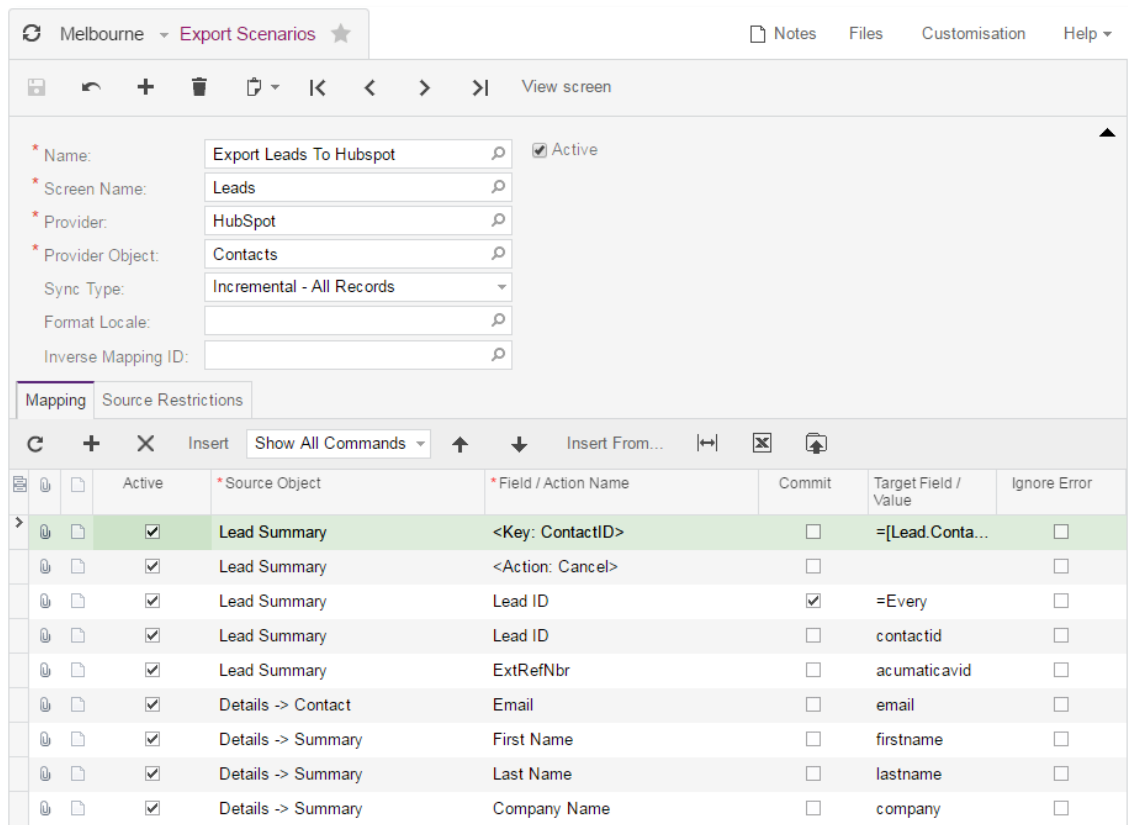


In this case, the import is scheduled to occur every 30 minutes. In the 'Conditions' tab, the system automatically set the condition that Name Equals Import Leads From HubSpot so not all automation schedules are processed every 30 minutes. The information in the Filter Values tab is also automatically set.

Step 5: Verify (and Modify) the Export Scenario in MYOB Advanced

The MYOB Advanced integration also includes a process to export data to HubSpot.

To review the scenario navigate to System > Integration > Manage > Export Scenarios. An export scenario called “Export Leads to HubSpot” has already been created for you. So all you have to do is verify the fields or add more if you want to push more information.

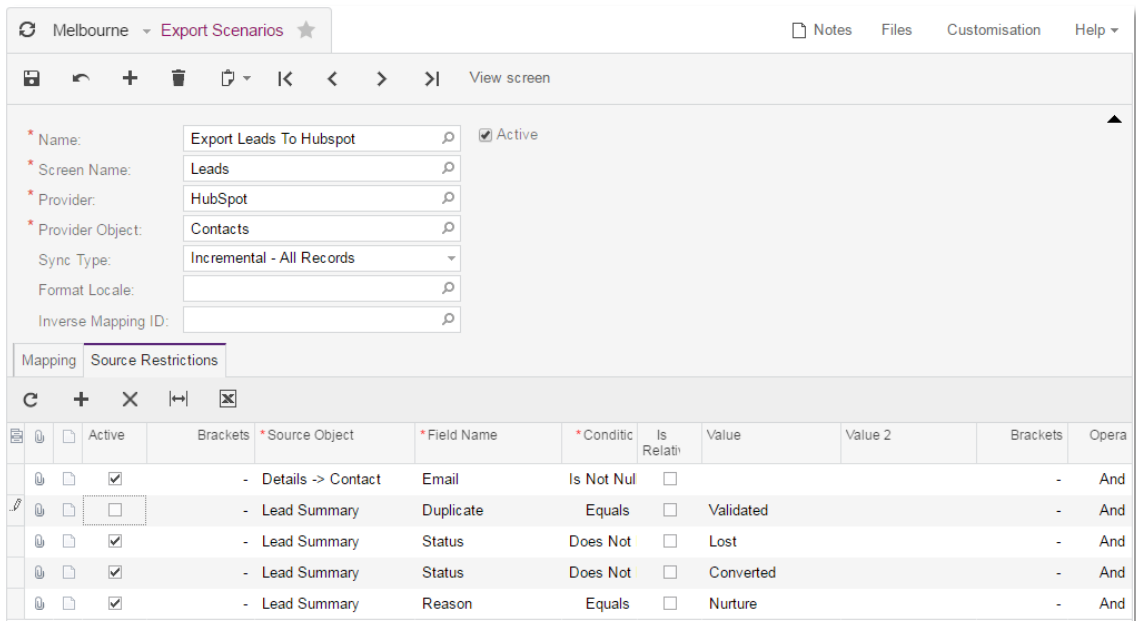


Active	*Source Object	*Field / Action Name	Commit	Target Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Lead Summary	<Key: ContactID>	<input type="checkbox"/>	=[Lead.Conta...	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	<Action: Cancel>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	Lead ID	<input checked="" type="checkbox"/>	=Every	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	Lead ID	<input type="checkbox"/>	contactid	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Lead Summary	ExtRefNbr	<input type="checkbox"/>	acumaticavid	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Contact	Email	<input type="checkbox"/>	email	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	First Name	<input type="checkbox"/>	firstname	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	Last Name	<input type="checkbox"/>	lastname	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Details -> Summary	Company Name	<input type="checkbox"/>	company	<input type="checkbox"/>

Notes about the export process:

- Export selects leads that have been modified since last export
- Export adds leads to a specific list in HubSpot or updates existing records if it finds the email address already exists in that list

In the Source Restrictions Tab of the Export Scenario, the records are limited to those that are selected for export. In addition to the built in restrictions, I added one to limit data pushed back to HubSpot to include only records Sales has marked for nurturing.

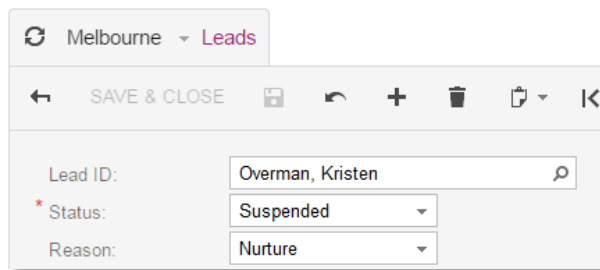


The screen shot above shows the source restrictions and highlights two changes:

- Duplicate checking is turned off by default in the SalesDemo data, so this validation is unchecked.
- A new condition is added to check for records that Sales has marked for nurturing.

Step 6: Process the Export Scenario in MYOB Advanced

In order to test the export process, navigate to one of the records that you imported and set the Status to suspended and the Reason to nurture.



Melbourne ▾ Leads

← SAVE & CLOSE [Icons]

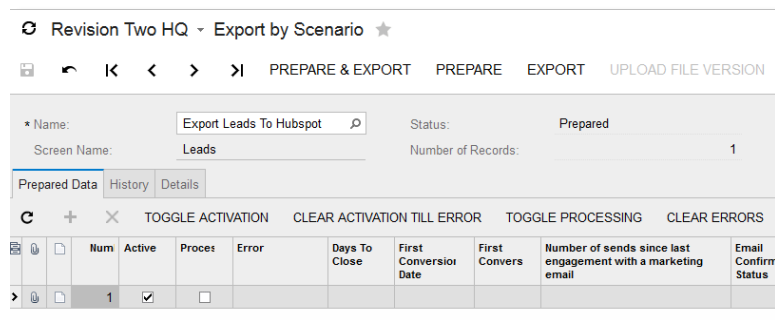
Lead ID: Overman, Kristen

* Status: Suspended

Reason: Nurture

This change will cause the record to satisfy the source restrictions in the export scenario. You can also change some of the other information that you have mapped in the export scenario.

1. Navigate to System > Integration > Process > Export by Scenario.
2. Select the “Export Leads to HubSpot” scenario.
3. Click **Prepare**.



Revision Two HQ ▾ Export by Scenario ★

PREPARE & EXPORT PREPARE EXPORT UPLOAD FILE VERSION

* Name: Export Leads To Hubspot Status: Prepared

Screen Name: Leads Number of Records: 1

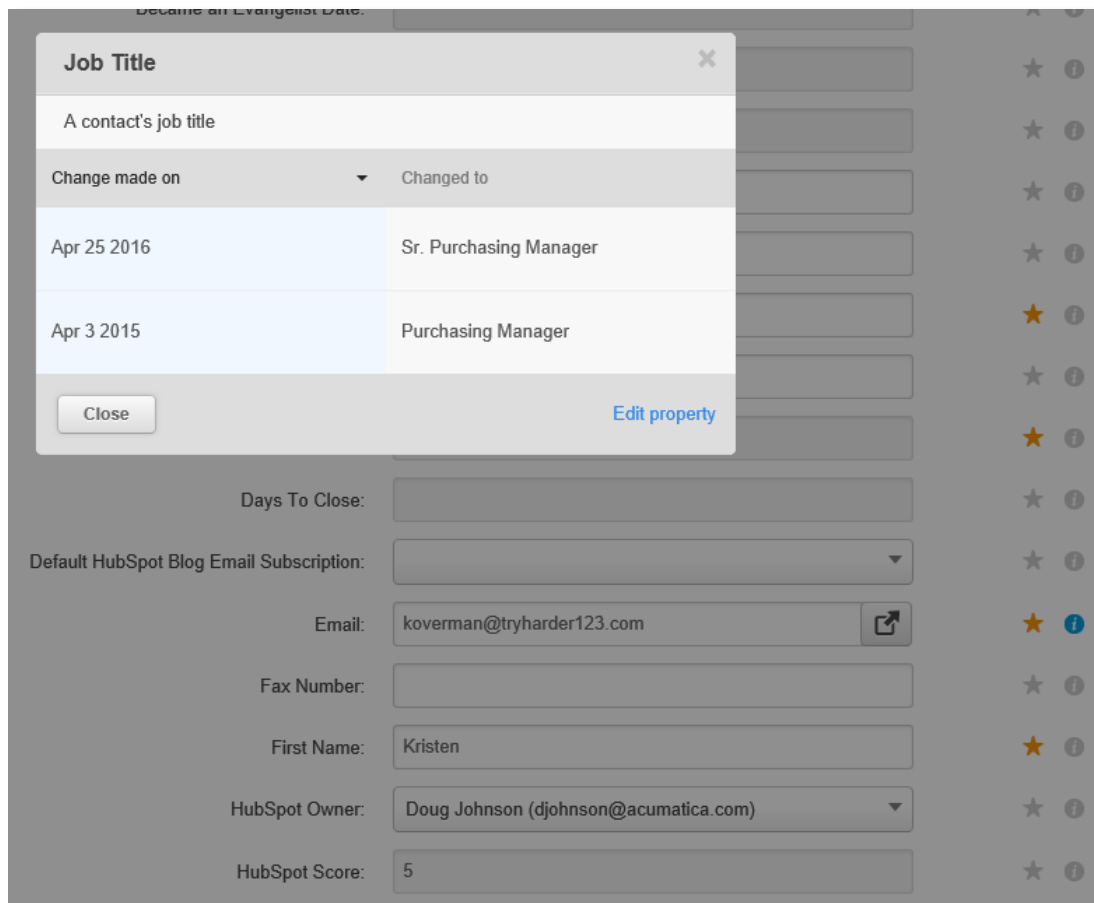
Prepared Data History Details

TOGGLE ACTIVATION CLEAR ACTIVATION TILL ERROR TOGGLE PROCESSING CLEAR ERRORS

Num	Active	Proce:	Error	Days To Close	First Conversion Date	First Convers	Number of sends since last engagement with a marketing email	Email Confirm Status
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

The result of clicking prepare is that only a single record (the one you selected for nurturing) should appear in the export.

4. Click **Export**.



When the contact is viewed in HubSpot, the changes that have been made to the record are visible. In this case, the title has been changed in addition to changing the status of the record.

As with the import scenario, you can schedule the export scenario to run automatically. This is done at System > Integration > Schedule > Export Scenarios.

Other Notes

- Developer notes:
<https://www.youtube.com/watch?v=CIQvXwDXfN4&feature=youtu.be>
- Recommended: Create separate lists for import and export processes in HubSpot. This will help you see which records have been imported/exported and take action. In order to do this, you will need to create a new provider because the provider is specific to a HubSpot list.

Conclusion

MYOB Advanced's built-in integration with HubSpot allows your marketing and sales organizations to completely manage the entire sales funnel.

The bi-directional integration ensures:

- A clean hand-off between sales and marketing activities
- Marketing has the right tools to build, nurture, and manage the top of the funnel
- Sales has the right tools to manage an opportunity pipeline and close deals
- Information maintained in HubSpot and MYOB Advanced is shared and up-to-date

By separating tasks into best of breed systems, sales and marketing can operate at full efficiency. Marketing can use HubSpot to create drip marketing campaigns with automatic opt-out, lead scoring, easy email creation, and a plethora of reports detailing key metrics such as open and click rates. Sales can use MYOB Advanced to create proposals that include customer specific pricing, up-to-date inventory, and track all pipeline activities. Real-time information sharing among sales teams closes deals faster and ensures everybody is on the same page.

Appendix 1: Adding Attributes to your HubSpot Sync

Attributes are user-defined fields that you can add to objects in MYOB Advanced. In this example we want to store the Twitter username in MYOB Advanced for our leads.

To do this we:

1. Create an attribute for storing this Twitter ID
2. Assign our attribute from step one to the appropriate business object
3. Modify the HubSpot import scenario to bring over the Twitter name from HubSpot

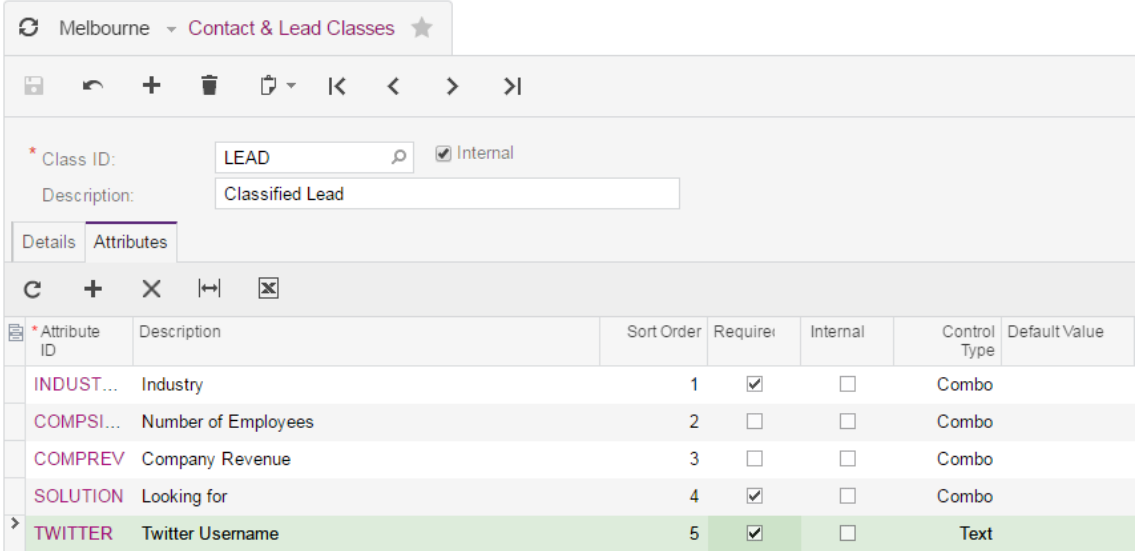
Step 1: Create an attribute in MYOB Advanced

Navigate to Configuration > Common Settings > Attributes and create a text field as shown below.

*Value ID	Description	Sort Order	Disablec
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Step 2: Associate the attribute with the Lead object

Navigate to Organization > Customer Management > Configuration > Setup > Contact & Lead Classes and link the Twitter attribute as shown below. In MYOB Advanced, each lead class can have different attributes, so you may need to link your new attribute to several different contact & lead classes.



The screenshot shows the 'Contact & Lead Classes' configuration window. The 'Class ID' is 'LEAD' and the 'Description' is 'Classified Lead'. The 'Attributes' tab is active, showing a table of attributes. The 'TWITTER' attribute is highlighted in green, indicating it is selected for association.

*Attribute ID	Description	Sort Order	Required	Internal	Control Type	Default Value
INDUST...	Industry	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Combo	
COMPSI...	Number of Employees	2	<input type="checkbox"/>	<input type="checkbox"/>	Combo	
COMPREV	Company Revenue	3	<input type="checkbox"/>	<input type="checkbox"/>	Combo	
SOLUTION	Looking for	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Combo	
> TWITTER	Twitter Username	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Text	

Step 3: Modify the HubSpot import scenario

Navigate to System > Integration > Manage > Import Scenarios and enter the syntax in the screen shot below.

The screenshot shows the 'Import Scenarios' configuration page for 'Import Leads From Hubspot'. The 'Mapping' tab is selected, displaying a table of field mappings. The table has columns for 'Active', 'Target Object', 'Field / Action Name', 'Commit', 'Source Field / Value', and 'Ignore Error'. Two rows are highlighted with a red box:

Active	Target Object	Field / Action Name	Commit	Source Field / Value	Ignore Error
<input checked="" type="checkbox"/>	Attributes	<Key: AttributeID>	<input type="checkbox"/>	=[Answers.AttributeID]	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Attributes	Attribute -> Attribute ID	<input type="checkbox"/>	= 'TWITTER'	<input type="checkbox"/>

Line 1: Select the Attribute target object, select the attribute ID, then type the name of the attribute you want to reference in the Source Field / Value field as shown above. MYOB Advanced automatically adds the line <key: AttributeID> =[Answers.AttributeID] above this line.

Line 2: Select the Attribute target object, select the value field, then select 'Twitter Username' from the fields available from HubSpot. When you save the screen, the value changes from the HubSpot label "Twitter Username" to the internal API name "twitterhandle".