

# HUBSPOT DEVELOPER OPTIONS.



- ✓ The power of succinctness in marketing
- ✓ All in one platform for marketing, sales, and services

- Bringing a variety of marketing functionalities together
- Includes content creation, social media sharing, workflow automation, lead capture, customer relationship management, sales pipeline mapping, and performance tracking.
- Companies are better equipped to manage sales and marketing activities efficiently, and leads can be nurtured through the buyer's journey effortlessly.
- Siloed information and misaligned departments can be avoided

Cognitive Convergence

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# About Us

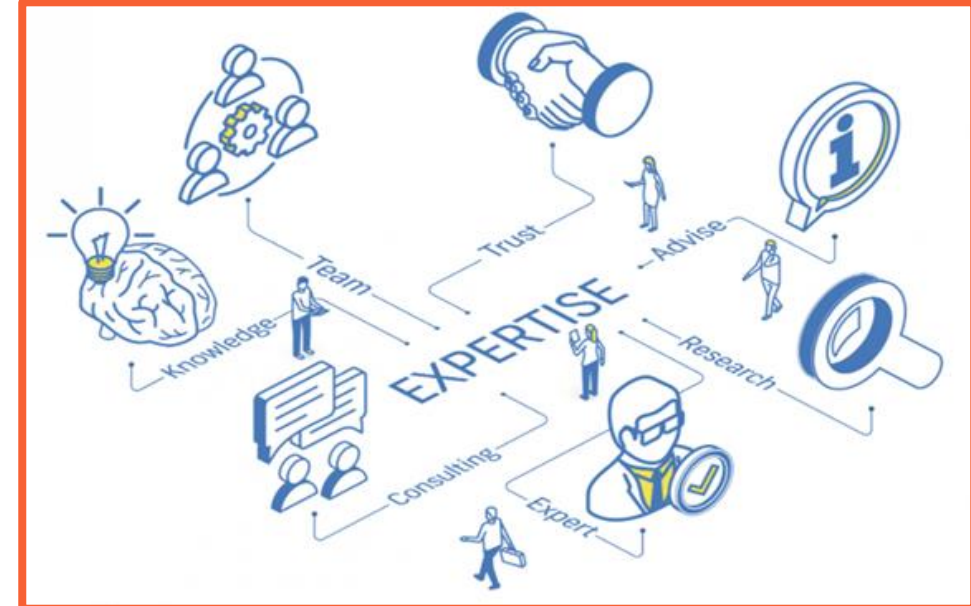
Cognitive Convergence is a subject matter expert in HubSpot development consulting. Our certified and experienced consultants will create custom, robust, and scalable apps for different business needs.

Our core HubSpot consulting are:

- ✓ Planning marketing campaigns
- ✓ Establishing efficient sales processes
- ✓ Building a customer-first services organization, as applicable.
- ✓ Best practices to set up HubSpot in a way that helps your team achieve optimal results
- ✓ Quantifying the impact of your marketing, sales, and services activities with reporting and KPI tracking

**Current Location:** Lahore, Pakistan

**Planned Front-end Office:** California/Washington States- USA



# HubSpot

HubSpot is an inbound marketing and sales, and service platform that helps companies to attract visitors, convert leads, and close & retain customers. It does this through a single source of truth, intuitive UX, and a unified codebase. HubSpot equips companies to better manage marketing, sales, service, and operations efforts.



- Market your products through HubSpot development
- Sales departments to manage all your activities in one place.
- Includes content creation, social media sharing, workflow automation, lead capture, customer relationship management, sales pipeline mapping, and performance tracking.
- Companies are better equipped to manage sales and marketing activities efficiently, and leads can be nurtured through the buyer's journey effortlessly.
- Siloed information and misaligned departments can be avoided

# Development on the HubSpot CMS

- ✓ Fast, Secure, Reliable
- ✓ Handles security, reliability, maintenance
- ✓ Powerful for developers, flexible for content creators
- ✓ Create pages and publish content
- ✓ Create flexible design systems for content creators to use.

## Efficient Development Workflow

- ✓ Help with the working process more effective when building websites on the HubSpot CMS.
- ✓ Customized and personalized workflows depending on the nature of the web development team, or the nature of a specific project
- ✓ Sets enrolment criteria to automatically enrol records and take action
- ✓ Take action on associated records, such as updating an enrolled contact's associated company.





# Building with portability in mind

HubSpot enables to grant any access/portability request by easily exporting contact record into a machine-readable format. Engagement data like tasks, notes, and calls that aren't provided in the contact record export can be accessed using the CRM engagements API.

- ✓ Important to recognize portability as a key concept in having an efficient developer workflow
- ✓ Project ensures it is easy to move between environments with little friction and explanation
- ✓ Makes it easy to test and stage changes before taking them live.

## HubSpot defined objects

HubSpot-defined objects use the same object framework as the standard CRM objects, which enables to segment or report on them. The following are some of the HubSpot-defined objects

### Products

Represent goods or services for sale. Products to deals, generate quotes, and report on product performance

### Line Items

Represent a subset of products sold in a deal

### Feedback Submissions

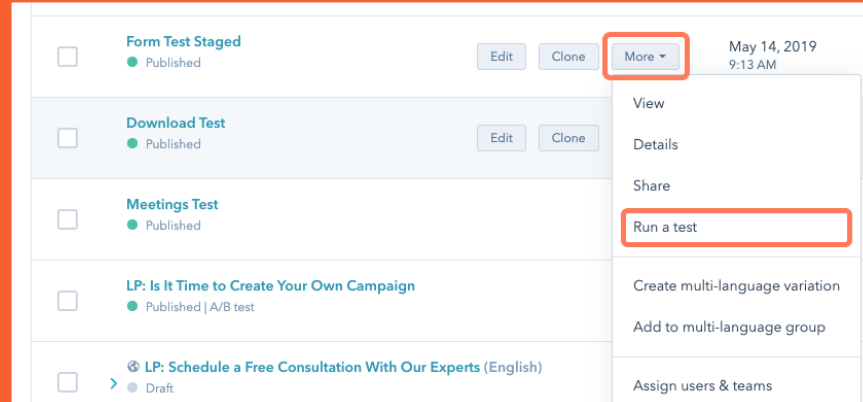
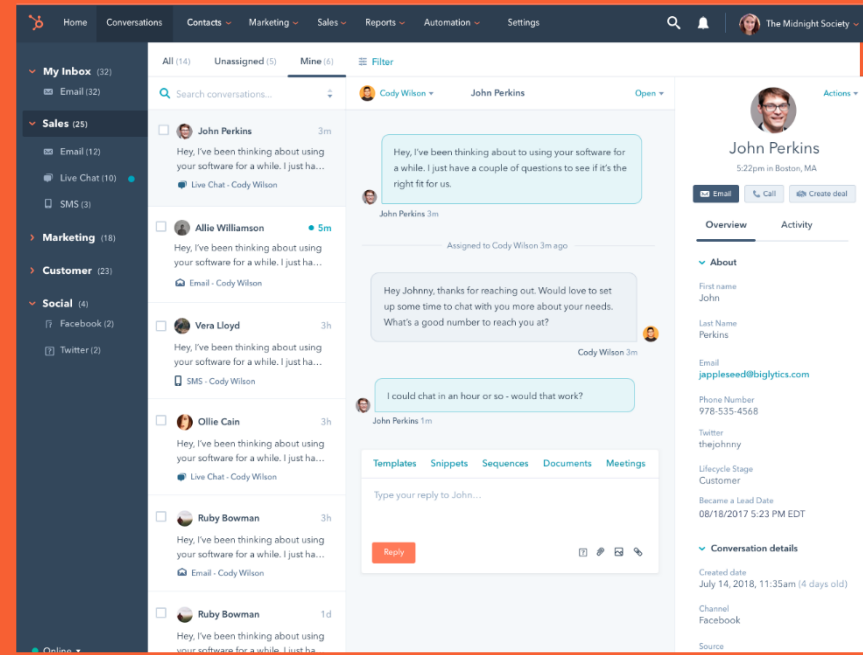
Stores information submitted to a feedback survey

### Marketing events

Represent events related to marketing efforts, including events from connected integrations

### Custom objects

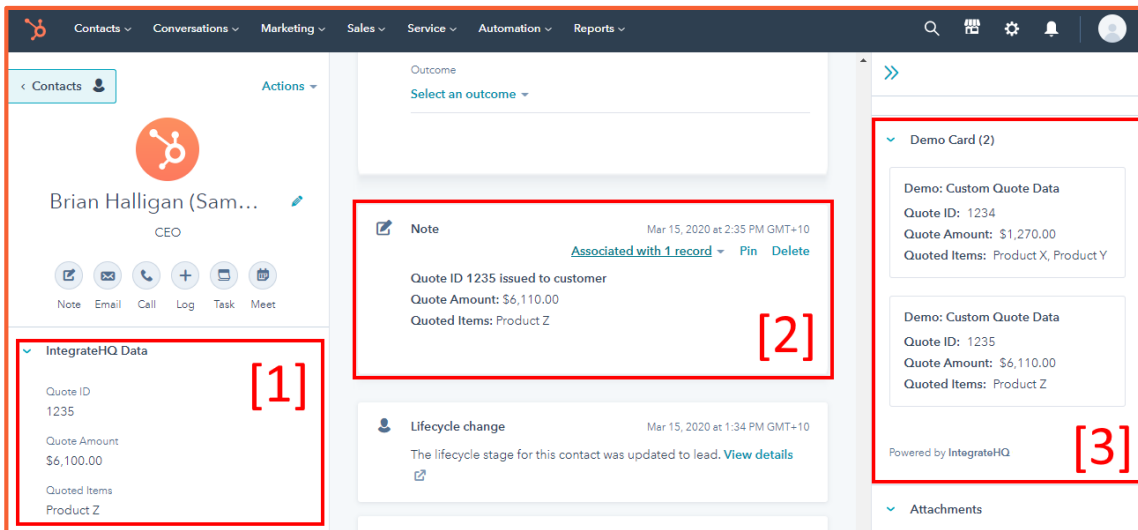
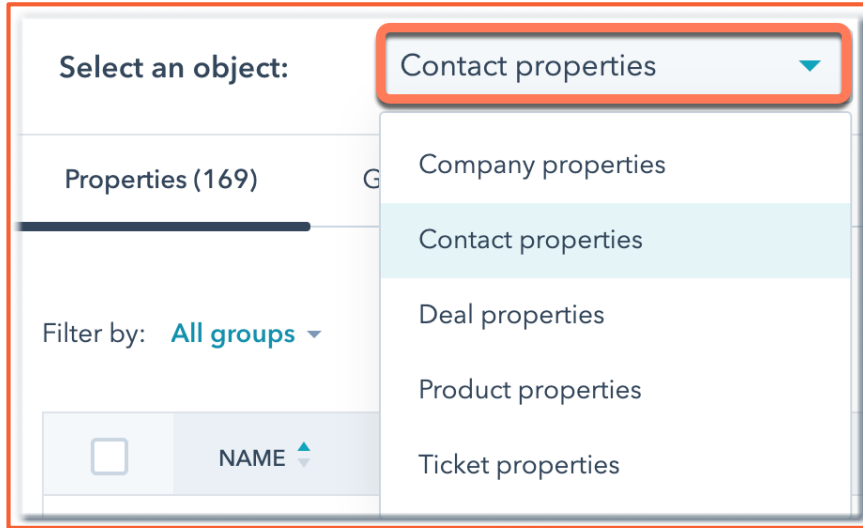
store any type of data in HubSpot—particularly data that doesn't fit the standard objects



# HubSpot Properties

Properties are fields that store information on HubSpot records.

- ✓ Detailed information (metadata) for HubSpot's CRM objects is stored
- ✓ Organized into groups



## Default Properties

- Defined by a primary type and a set of properties
- Has a unique set of standard properties
- Represented by a map of name-value pairs.

01

## Custom Properties

- Store specialized information for an object.
- Can be managed through the CRM object properties endpoints.

## Property Groups

- Group related properties.
- Integration creates custom object properties
- Organize in a custom property group

02

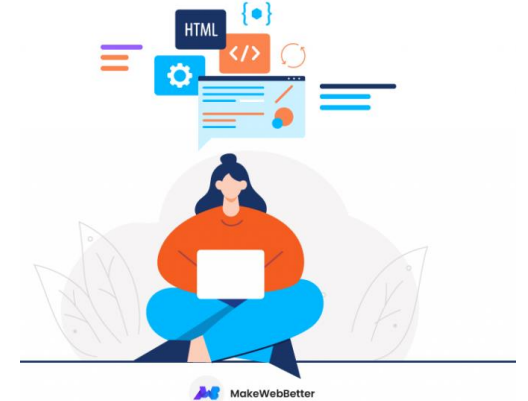
## Clearing Properties

- Review anything that was never used, is out of date, shouldn't be updated, and is overdue
- Can be cleared value via the API by setting
  - Property value to an empty string

## Record Owners

- Assigned to contacts, companies, deals, or ticket records.
- Multiple owners can be assigned to an object
- Get identifying details of owners, including IDs and email addresses.

03



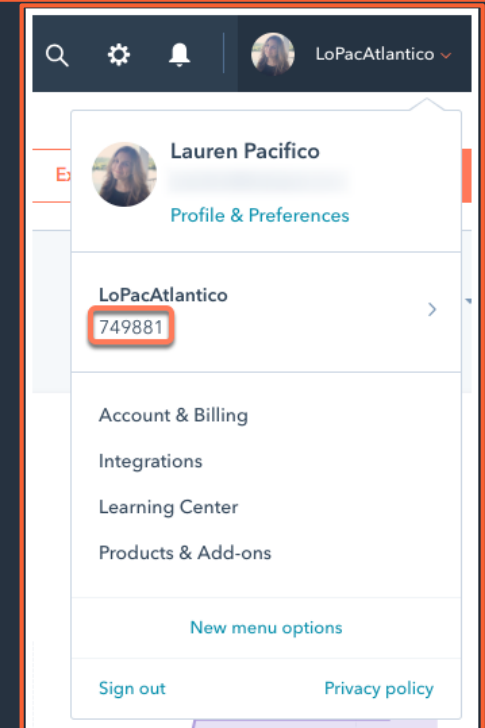
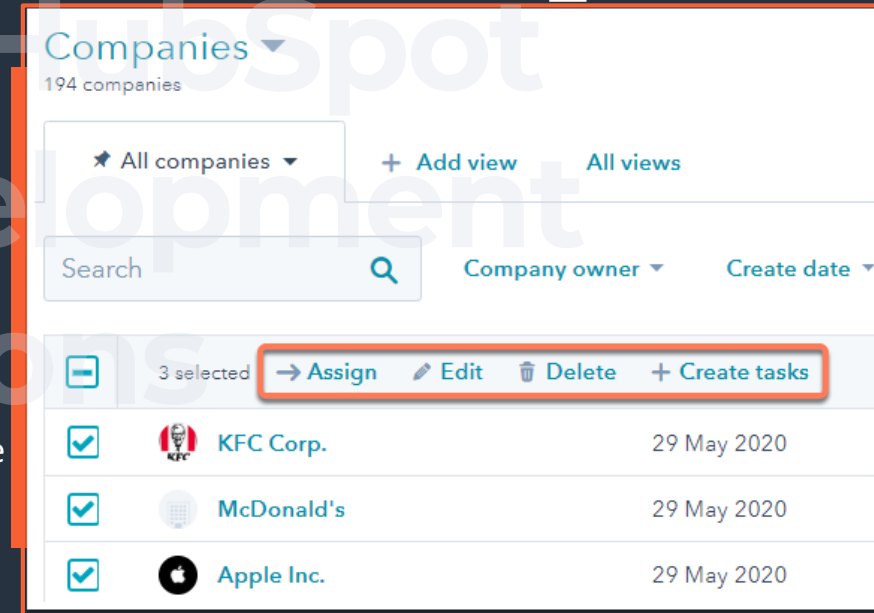
# HubSpot Development consultancy.

## Record engagements and attachments

- ✓ Engagement index based on how many HubSpot tools a client uses, the more tools in use, the higher their engagement score.
- ✓ Store data from interactions between records and the business, including notes, tasks, meetings, emails, and calls.
- ✓ Attach a file to a note, call, email, or meeting.

## Object and Record Associations:

- ✓ Represent the relationships between objects
- ✓ Use of association endpoints



## Data Syncing

- ✓ Data is not required to sync object data.
- ✓ Can be associated with numerous engagements
- ✓ Important to keep API limits in mind before syncing.
- ✓ Will ensure you have the data you need during the transition.

## Batch Actions

- ✓ Provides batch endpoints that let developers create, read, update
- ✓ Archive multiple object records in a single request.
- ✓ Have a limit of 100 records per call except for creating
- ✓ Updating contacts, which are limited to 10 records per call.

## Unique Identifiers and Record IDs

- ✓ A value that differentiates one record in a database from another
- ✓ Have otherwise identical information.
- ✓ Are used to send the data to the correct records
- ✓ Manage deduplication.

# HUBSPOT APIs.

API stands for application programming interface. In short, the API is a set of programming protocols and tools that specify how your CRM can interact with other software programs. HubSpot Developer platform empowers organizations to grow better through the API support. The APIs are designed to enable teams of any shape or size to build robust integrations that help them customize and get the most value out of HubSpot.

Client libraries are designed to interact with the HubSpot APIs with less friction, written in different languages.



## Analytics API

Export analytics and reporting data from HubSpot

## Events API

Dealing with different events occurring on HubSpot CRM

## Automation API

Automate marketing, sales, and service processes

## CRM API

Providing a set of standard CRM objects, as well as additional HubSpot-defined objects

## Marketing API

Providing automation for Marketing events and marketing emails

## Files API and

## Conversation APIs

Store files in HubSpot and manage and interact with inbox

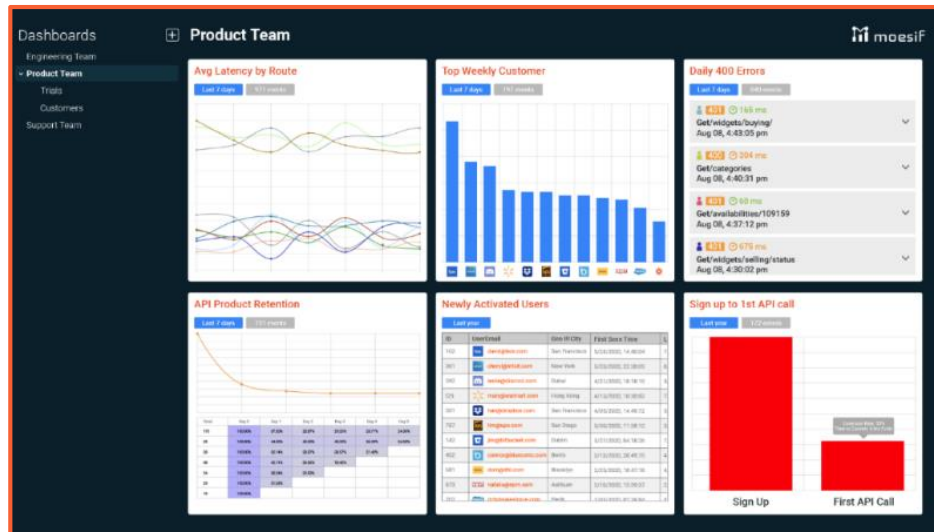
# HubSpot Developer APIs



# Analytics API.

The Analytics API allows to export analytics and reporting data from HubSpot. It's primarily used to connect metrics tracked in HubSpot to those stored in other business intelligence tools.

- ✓ Providing access to Analytics API
- ✓ Handling HubSpot account's permissions
- ✓ Creating analytics data breakdown by category
- ✓ Handling custom behavioral events – store event details in event properties
- ✓ Automatically populate data with clicked events and visited URL events
- ✓ Manually tracked business events, captured as per your business requirements, through HubSpot integration



# Automation API.

Workflows are used to automate marketing, sales, and service processes. A variety of Automation APIs are available to automate marketing tasks.

- ✓ Workflow API with full CRUD access
- ✓ Enrolling contacts in the workflow based on the triggers in the external application
- ✓ Webhooks used in workflows to trigger notifications to external applications
- ✓ Custom Workflow actions to integrate your service with HubSpot's workflows

The screenshot shows the HubSpot Automation API configuration interface. The main view displays a workflow diagram with a 'Contact enrollment trigger' and a custom action '1. My Extension'. A modal window titled '1. My Extension' is open, showing configuration options for static input, object property input, external options input, and properties always included with the action.

The modal window '1. My Extension' includes the following configuration options:

- Static Input \*:** Contact token
- Object Property Input \*:** Annual revenue
- External Options Input \*:** Big Widget
- Properties always included with the action:** Email

# CRM API

Settings  
Monitoring

Features

CRM cards

Timeline events

Webhooks

Back to all CRM cards

## Example CRM object type

Data request | Card properties | Custom actions

Data fetch URL  
https://

HubSpot will poll this URL to fetch details about your card.  
[Learn more about the expected data format for CRM cards](#)

### Target record types

This card can appear on one or more CRM record types. At least one type is required.

RECORD TYPE	APPEAR ON THIS TYPE?	PROPERTIES SENT FROM HUBSPOT
Contacts	<input checked="" type="checkbox"/>	<input type="text" value="firstname"/> <input type="text" value="apiprop2"/> <input type="text" value="lastname"/>
Companies	<input checked="" type="checkbox"/>	Select or enter properties
Deals	<input type="checkbox"/>	Select or enter properties
Tickets	<input type="checkbox"/>	Select or enter properties

Select an object you'd like to import

**Companies**  
The businesses you work with, which are commonly called accounts or organizations.

**Contacts**  
The people you work with, commonly called leads or customers.

**Deals**  
The revenue connected to a company, which is commonly called an opportunity.

**Tickets**  
The issues created from a customer's request for help.

- ✓ Foundation of HubSpot account
- ✓ A database of user business relationships and processes, called the CRM (Customer Relationship Management).
- ✓ Manages data
- ✓ Provides a set of standard CRM objects, as well as additional HubSpot-defined objects.
- ✓ Each object represents a different type of relationship or process.
- ✓ Create individual records.
- ✓ Associations can also be made between records to understand the relationships between them.
- ✓ Provides access to CRM objects and records.

The following are the standard CRM objects available in HubSpot:

## Contacts

- Store information about an individual person.

## Companies

- Store information about an individual business or organization.

## Deals

- Represent revenue opportunities with a contact or company.
- Tracked through pipeline stages
- Resulting in the deal being won or lost.

## Tickets

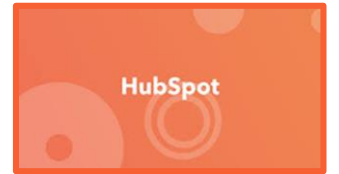
- Represent customer requests for help or support.
- Tracked through pipeline statuses
- Resulting in the ticket being closed.



# Custom Objects

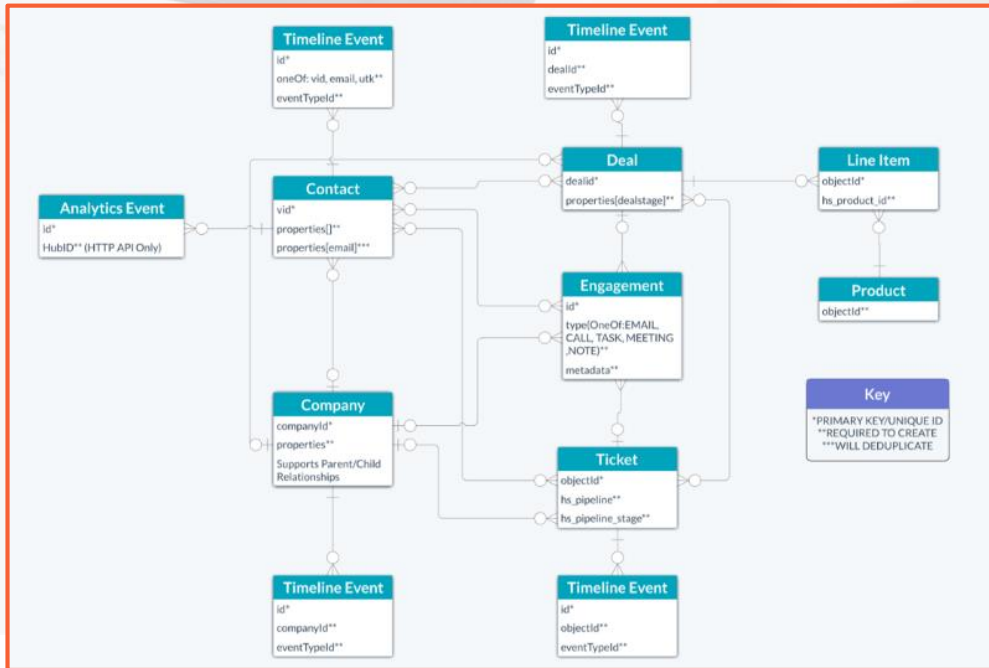
When a business requires a different object a custom object can be defined. Once defined, properties can be created and customized for the associations between custom objects and other objects.

- Creates a custom object to store any type of data
- Particularly data that doesn't fit the standard objects listed above.
- Custom objects created via the custom object endpoints
- Can be associated with standard objects.



# CRM Associations API

- Helps manage and define relationships between objects
- Create a more holistic picture of the customer interactions and improve the ability to market, sell, and serve.
- Common use cases: contact to the company, company to parent or child company, deal with company or contact, and a ticket to contact or company.
- Can also be created between engagements and other objects.
- Several deals open with a company
- Can use the to associate these deals with a contact who has decision-making power.
- Make it easier to analyze data and trends



# Events API.

Use API to trigger a custom behavioral event using an HTTP GET request. Event completions can be tracked in HubSpot and used to segment contacts, score leads, and more.

## Web Analytics

- ✓ Use to fetch events associated with CRM records of any type.
- ✓ Includes standard events, such as website page views and email opens,
- ✓ Custom behavioural events.
- ✓ Timeline can be used to build a dataset for custom analytics or present a contact timeline in an external application.

## Event types

- ✓ Queries for the events associated with CRM object.
- ✓ Response will include all event types, including custom behavioural events.
- ✓ During the beta, some standard event types are subject to change.
- ✓ Can be included to only return custom behavioural event completions.

## Tracking code API

- ✓ Allows to identify visitors, track events, and manually track page views without reloading the page.
- ✓ Allows to dynamically create events and track event data in HubSpot.
- ✓ Added to a visitor's browser with the cookie banner API.

### Create event

DETAILS **CONFIGURE** Step 2 of 2

Custom events can be set up using the [Javascript Events API](#) in your code or via the [Events HTTP API](#).

Once your event is saved you'll have an ID. For now you can use the placeholder `EVENT_ID` and it will update when saved.

Custom Javascript (optional)

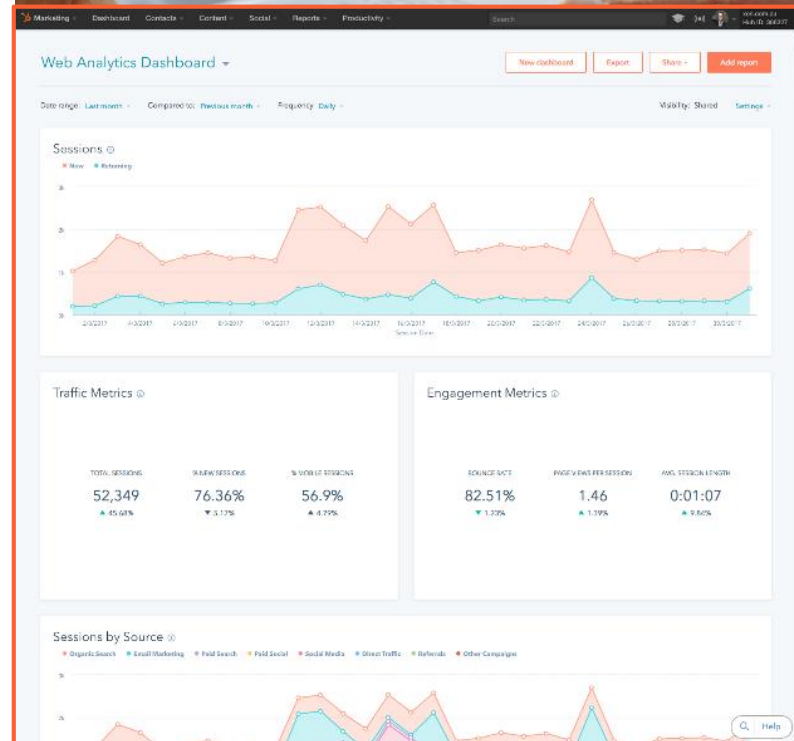
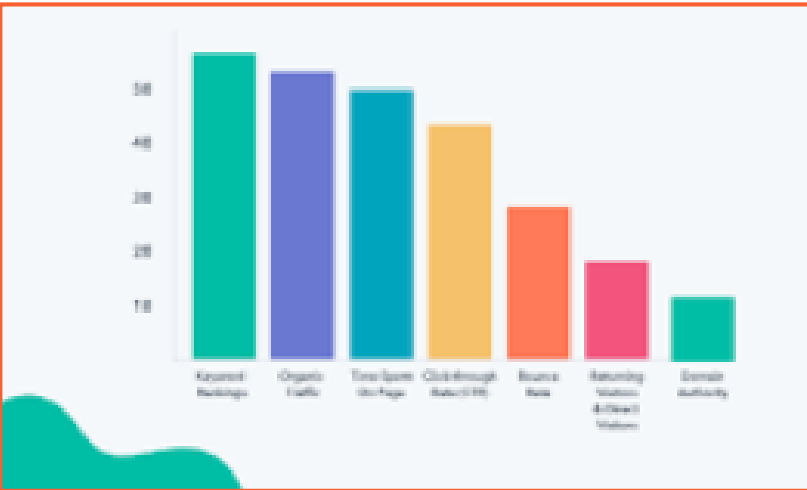
```
_hsq.push(['trackEvent', {  
  id: '000001371632',  
  value: 120.25  
}]);
```

Any code entered above will automatically be run as part of your HubSpot tracking code.

< Back

Cancel

Save



# Tracking custom behavioural events

The HubSpot tracking custom behavioral events are unique to each HubSpot account and allow HubSpot to monitor website traffic. The tracking code is automatically included on HubSpot blog posts, landing pages, and website pages.

- ✓ Can be tied to contact records and populate event properties with metadata about the event.
- ✓ Use the web analytics API for retrieval.
- ✓ Events can be triggered using the event's internal name, which is assigned automatically when the event can be created.
- ✓ Can be found in HubSpot or by using the events API.

Three types of events that can be created in HubSpot:

## ▪ Clicked element events

- Tied to clickable elements on a website page.
- Will automatically populate a set of default HubSpot event properties through the tracking code.
- Can be customized further with track Custom Behavioral Event function.

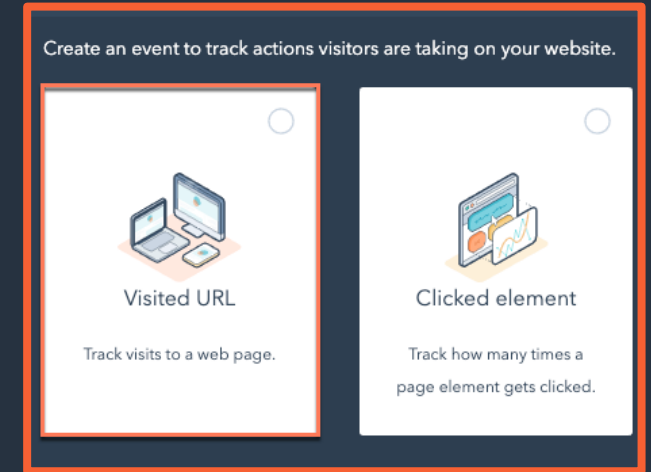


## ▪ Visited URL events:

- Tied to page loads at specified URLs.
- Will automatically populate a set of default HubSpot event properties through the tracking code.
- Can be further customized with track Custom Behavioral Event function.

## ▪ Manually tracked behavioral events:

- Are unique to the business
- May not be automatically captured by HubSpot or by integration.
- Manually send data to HubSpot events through the HTTP API.
- ✓ Any events triggered through the JavaScript API will automatically be associated with the visitor's *hubspotutk* cookie
- ✓ Would automatically be tied to the contact associated with that user token.



# Email Events API

## HubSpot Custom APIs

The Email Events API is used to get information about events generated by marketing emails or email campaigns sent through a HubSpot account. Every email sent via HubSpot generates a number of events detailing its lifecycle and how the recipient interacts with its content.

### GET

Get all campaign IDs for a portal

Get campaign IDs with recent activity for a portal

Get campaign data for a particular Campaign

Get event data for a campaign or recipient

Get event data for a specific event

### Select recipients

Add recipients  Save for automation  Save for single send API



After publishing, you'll be able to use this email with our single send API.

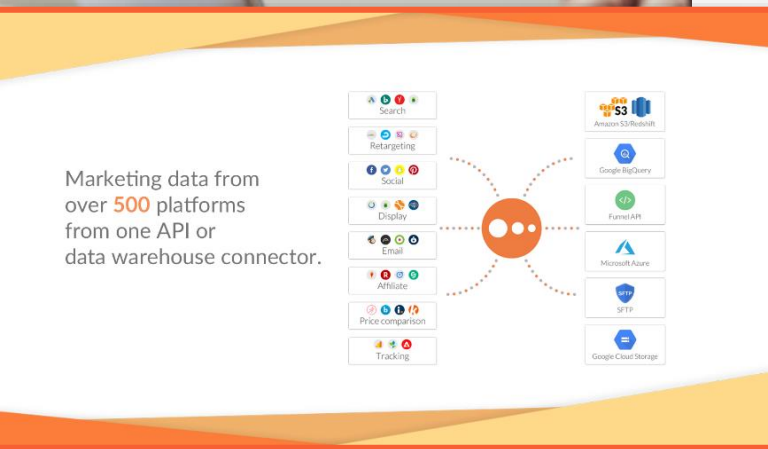
# Marketing API.

## Marketing Events

- ✓ Marketing event object helps streamline all your event data
- ✓ Add new events, edit existing ones, and create custom properties by connecting an event app like Eventbrite, [Zoom](#), or GoToWebinar
- ✓ Integration attempts to make an initial connection to the user's account
- ✓ Define what permissions (scopes) integration needs in the user's HubSpot account.

## Marketing Emails

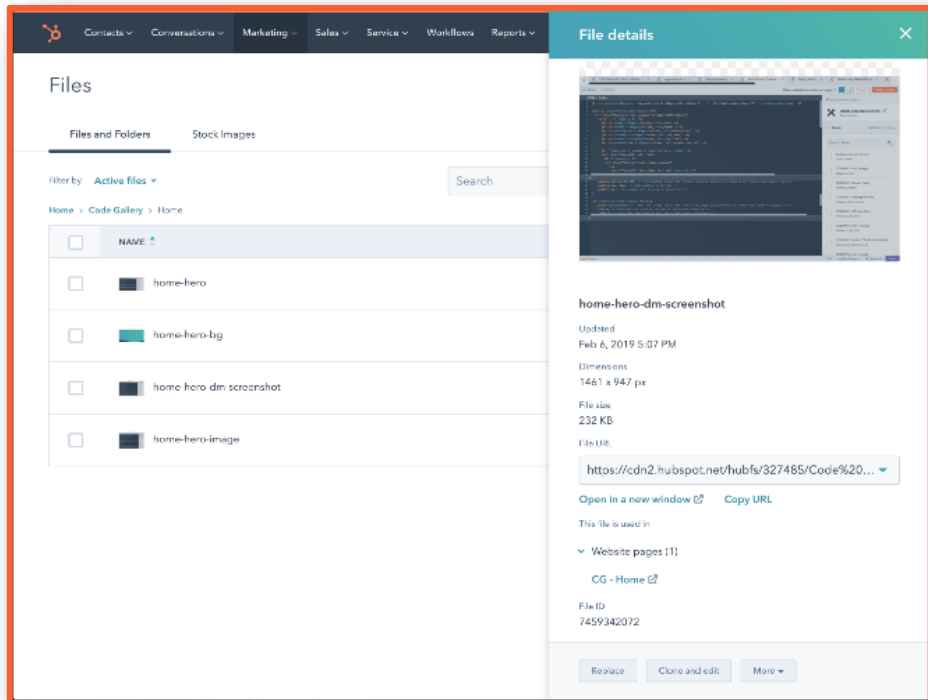
- ✓ Programmatically create marketing emails
- ✓ Get details about marketing emails
- ✓ Update marketing emails
- ✓ Email related statistics



<u>GET</u>	<u>POST</u>	<u>PUT</u>	<u>DELETE</u>
Get all marketing emails	Create a marketing email	Update a marketing email	Delete a marketing email
Get a marketing email	Clone a marketing email	Restore a deleted marketing email	-
Get campaign data for a particular Campaign	-	-	-
Get event data for a campaign or recipient	-	-	-
Get event data for a specific event	-	-	-
Get revisions of a marketing email	-	-	-
Determine the buffer of a marketing email	-	-	-
Get the statistics for a marketing email	-	-	-
Get all marketing email statistics	-	-	-

# Files API.

- ✓ Use files tool to manage and store files in HubSpot.
- ✓ Files hosted in HubSpot can be uploaded
- ✓ Used in both HubSpot and external content.
- ✓ Can also be attached to records using the engagement API.
- ✓ Can be used to upload and store assets in HubSpot,
- ✓ Serve it through the HubSpot CMS.



# Conversation inbox and messages API

- ✓ Search conversations inboxes, channels, threads, and messages.
- ✓ Update thread statuses.
- ✓ Delete and restore threads.
- ✓ Send messages via existing conversations channels.
- ✓ Send an internal comment to an agent.
- ✓ Retrieve conversation data to create advanced reports and analytics in external tools.

# Other Conversation APIs

- ✓ Chat Widgets SDK
- ✓ Visitor identification API
- ✓ Working with chatbots





# Testing HubSpot live

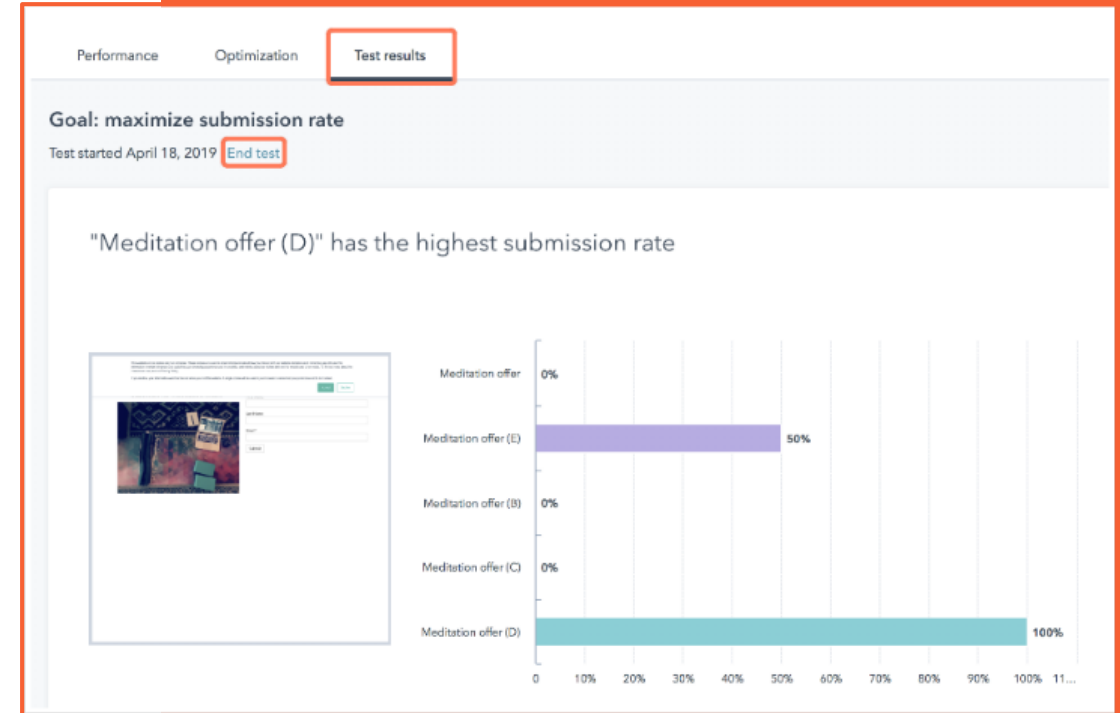
Critical piece of the development phase is testing the changes in the content creation tools. We provide the following consulting services.

- ✓ Create pages in the development environment to ensure the content editing experience is as intended it to be.
- ✓ Drag modules around into odd configurations
- ✓ Enter dummy content to make sure marketers can not “break” the modules when building pages.
- ✓ Illustrate what guardrails want to build into the templates and modules.
- ✓ Making it impossible to move content, such as pages or blog posts, between HubSpot accounts.

# Deploying

Once the changes are tested and are ready to take them live, it is time to deploy the changes to production portal.

- ✓ Uploading files to the production account
- ✓ Pay attention if there were any errors to diagnose
- ✓ Working as part of a web development team
- ✓ Recommended to have entire production codebase source of truth in version control
- ✓ Deploy to product portal when changes are merged in master.
- ✓ Use user’s favorite version control system to collaborate
- ✓ Track changes
- ✓ Easily roll-back changes



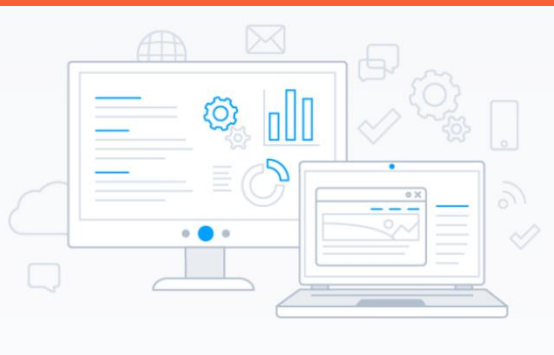
All Projects	All	All Builds	All Revisions	All Users	Finish Time (filter)	Duration
content_web_proc	QA	1167	ee932955d...		11/14/13 02:10 pm	a minute
public_content_web_proc	QA	1167	ee932955d...		11/14/13 02:10 pm	a minute
SignUp	Failed QA	4353	e157c6a2b...		11/14/13 02:10 pm	7 minutes
content_editor	QA	100050	245a64bf2...		11/14/13 02:08 pm	a few seconds
content_editor	PROD	100044	5bbce9c7a...		11/14/13 02:07 pm	a few seconds
marketplace_web	PROD	213	0a85f3caa...		11/14/13 02:05 pm	a minute
CommentsService	QA	674	e9fb73c36f...		11/14/13 02:05 pm	3 minutes
social_sandbox	PROD	101135	6352725c6...		11/14/13 02:02 pm	a few seconds
social_sandbox	QA	101135	6352725c6...		11/14/13 02:02 pm	a few seconds
forms_web	PROD	555	2c9a1da8e...		11/14/13 02:02 pm	2 minutes
Bucky	PROD	1215	7fa397737...		11/14/13 01:58 pm	2 minutes
Statsd	PROD	6	dbbc8ee61...		11/14/13 01:58 pm	2 minutes
marketplace_web	PROD	213	0a85f3caa...		11/14/13 01:56 pm	2 minutes



# HubSpot Integrations.

In HubSpot, integrations allow data to be passed to and from external/internal systems and the HubSpot COS. Businesses are forced to utilize several different applications at once to serve a singular purpose.

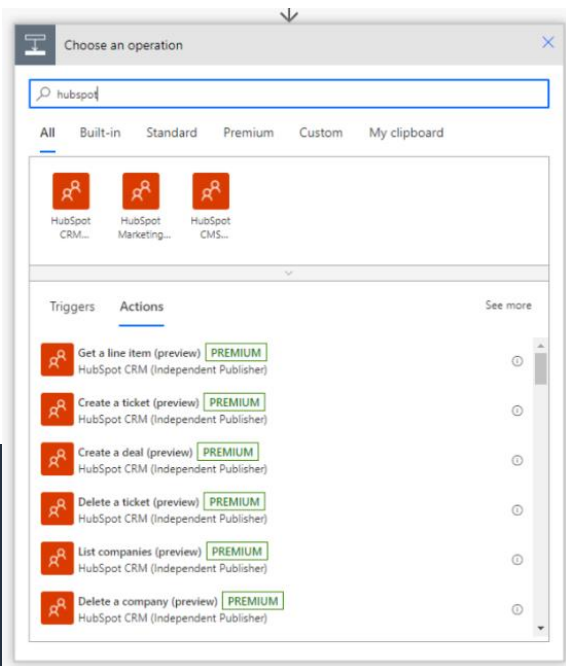
- ✓ Connect your software to third-party applications
- ✓ Can share information with others.
- ✓ Share data from one system to the next
- ✓ Provides you with more features and options while using your software.
- ✓ HubSpot's integrations can be done on following platforms:
  - Power Automate
  - BI & Analytics
  - Zapier
  - Workflow Automation
  - Data Virtualizations



## POWER BI & ANALYTICS

- ✓ Offer the fastest and easiest way to connect real-time HubSpot data analytics
- ✓ Reporting and data visualization technologies.
- ✓ Provide unmatched query performance
- ✓ Comprehensive access to HubSpot data and metadata
- ✓ Seamlessly integrate with your favorited analytics tools.

# HubSpot Integrations Consultancy Services



## Power Automate

An online service that automates events (known as workflows) across the most common apps and services.

- ✓ When paired with CData Connect Server, cloud-to-cloud access is granted to HubSpot data
- ✓ Visualizations, dashboards
- ✓ Integrate live HubSpot data into your workflows and tasks.

## Workflow and Automation

- ✓ Connect to HubSpot from popular data migration, ESB, iPaaS, and BPM tools.
- ✓ Drivers and adapters provide straightforward access to HubSpot data
- ✓ Popular applications like BizTalk, MuleSoft, SQL SSIS, Microsoft Flow, Power Apps, Talend, and many more use Power Automate.

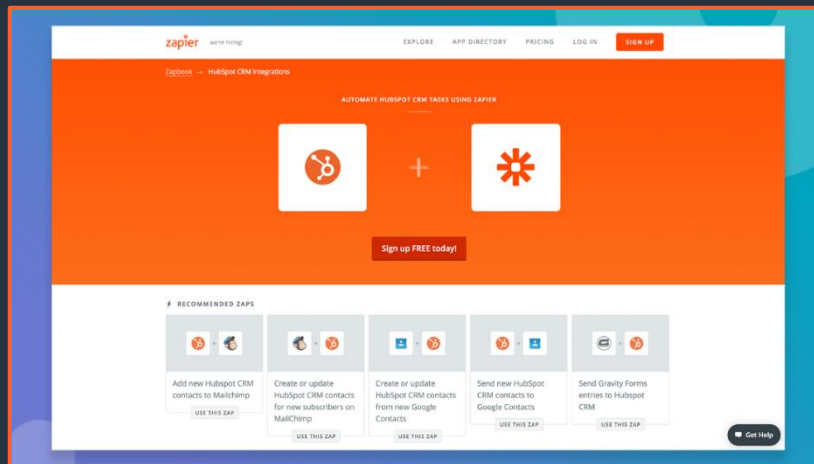


# HubSpot Integrations Consultancy Services

## Data Virtualization

Data virtualization is an umbrella term used to describe an approach to data management that allows an application to retrieve and manipulate data without requiring technical details about the data

- ✓ Provide a virtual database abstraction on top of HubSpot data
- ✓ Support popular data virtualization features like query federation through advanced capabilities for query delegation / predicate pushdown.



## Zapier

- ✓ Easy automation for busy people.
- ✓ Moves info between HubSpot and apps automatically
- ✓ Important work can be focused.
- ✓ Link apps with a few clicks, so data can be shared
- ✓ Time-saving workflows called Zaps are set up in minutes
- ✓ Manual effort can be cut out and tedious copy-pasting
- ✓ Apply that time to customers and for more important work.

# HubSpot Data Visualization Integrations.



- Reconcile your Marketing data with your Sales and ERP data.
- Develop complex reports that integrate multiple data sources.
- Create dashboards and visualizations in using your HubSpot data.



- HubSpot data can be queried and edited inside of Looker, without affecting the integrity of the HubSpot database
- Easy-to-use dashboard that contains all of your company's key data



- Reconcile your HubSpot data with your other data.
- Works as a data backup with a secure server. Your HubSpot data can be exported to a CSV and manually imported into HubSpot.



- Empowering customers to build reports with the most up to date additions from HubSpot including Custom Objects.
- Unlimited Users, Unlimited Storage, No hidden fees or lock in period

# Best HubSpot Marketing content analytics tools.



1. HubSpot Marketing Analytics and Dashboard Software

2. Buffer

3. Google Analytics

4. SimilarWeb

5. Moz

6. Hotjar

7. Semrush

8. Qunitly

9. BuzzSumo

10. Kissmetrics

11. Databox

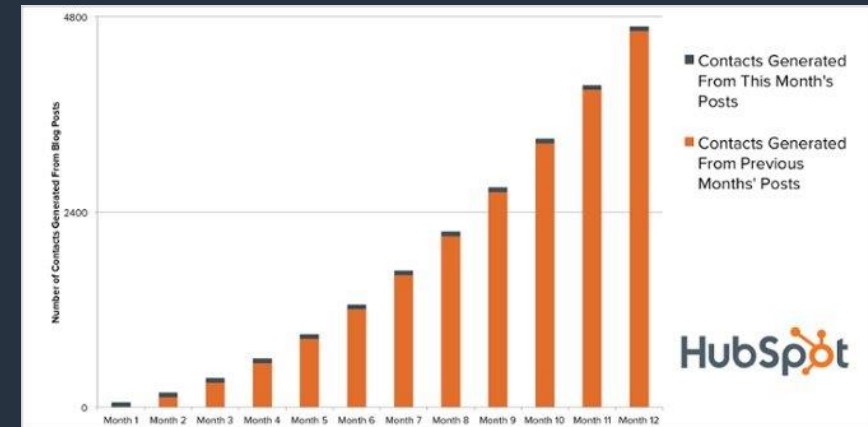
12. Supermetrics

13. Demand Sage

14. Grow.com

15. Plecto

16. Adverity



# Contact Us

HubSpot  
Development

- HubSpot Consulting Services of MarConvergence/Cognitive Convergence offers strategic opportunities to clients, investors, and partners that are:
- Unique and industry defining
- Mutual interest-centric business approach
- Significantly enhance the company's footprint
- Turn grow revenues by entering new and exciting
- Technology Domains, App development ideas, Solution Development, and Joint venture projects
- ✓ 1st mover advantage with
- ✓ Talent: 100%
- ✓ Timing: 100%
- ✓ Technology: 100%
- ✓ Technique: 100%

THE END

THANK YOU

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