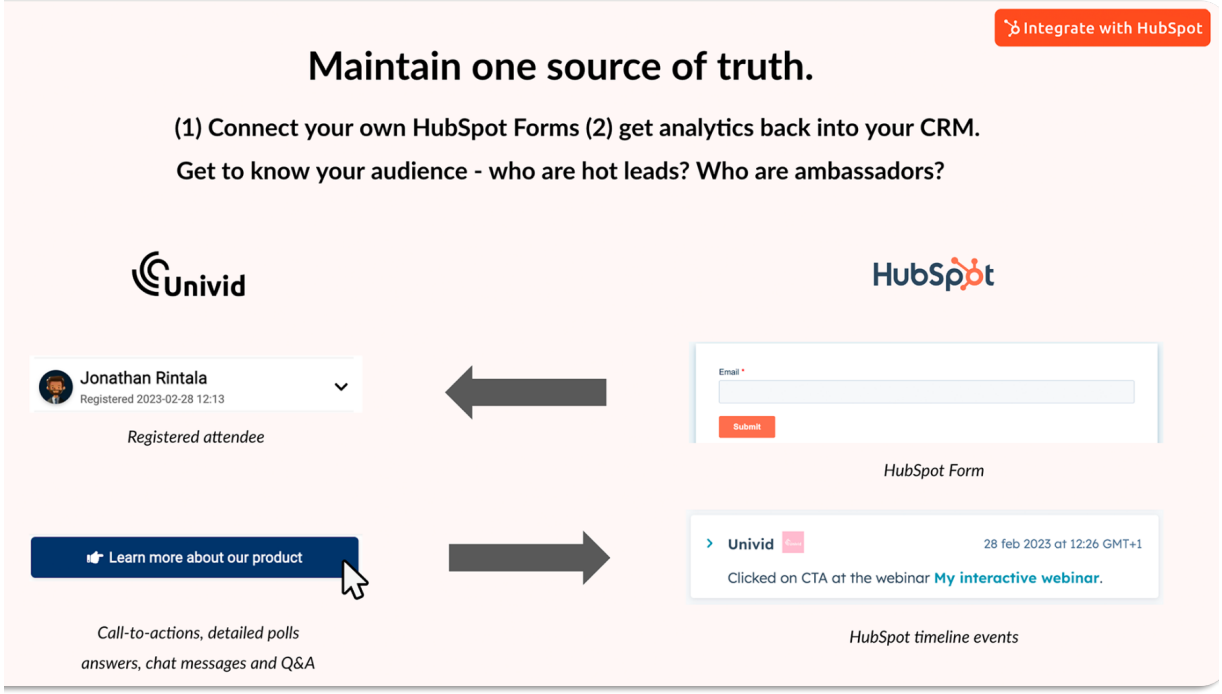
Connecting HubSpot with Univid ⚡

HubSpot integration guide



Intro

We are on the mission of making the fastest webinar platform in the world! By using the automation flow with Univid and HubSpot, you will obtain more time for other activities, which will benefit you and your team. Connecting with HubSpot is easy in Univid. However, if there is anything you believe can be done to further streamline your workflow. Please reach-out.

- Eric Lewerentz, Sales & Customer Success, Team Univid

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1. Authenticate in Univid

Make sure to have access to the wanted Univid room to connect to HubSpot. If you are just getting started create an account and room here: https://app.univid.io/createsession

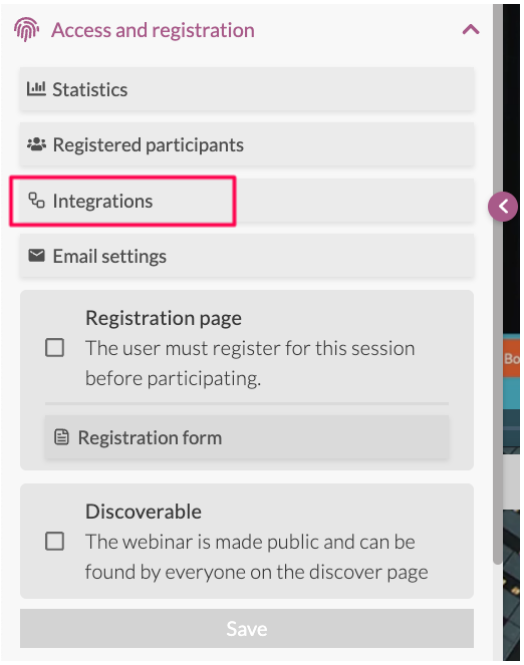
Do the following steps:

1.1. Click Configure HubSpot connection

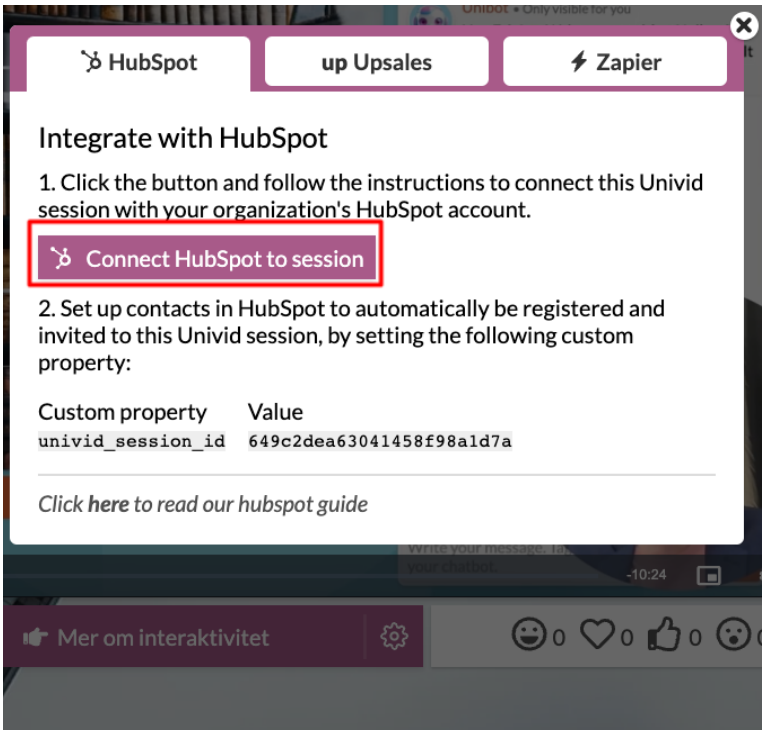
1.2. Click Connect HubSpot to session

1.3. Configure reminders?

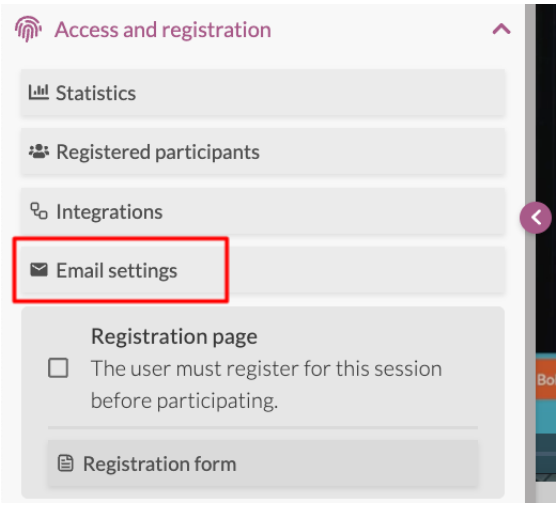
1.1. Click Configure HubSpot connection



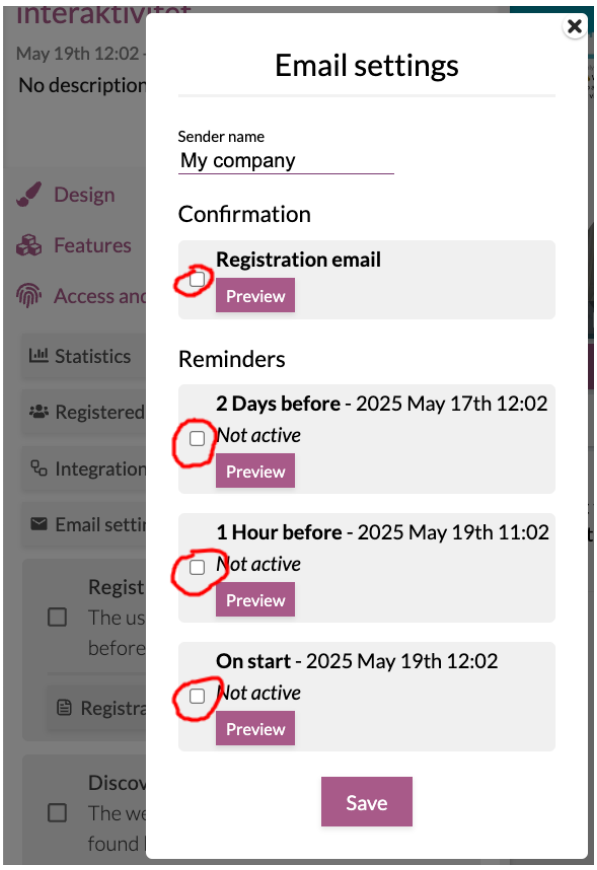
1.2. Click Connect HubSpot to session



1.3. Configure reminders?



While not related to the integration, this is most likely a step you would like to do at this stage: configure email reminders. Remember to disable reminders if you are sending from another tool.



This is done by un-checking/checking in the wanted reminders in email settings.

Remember to change sender name to your company name, if you prefer the emails to “appear more like your own”.

2. Create custom property in HubSpot

Do the following steps:

2.1. Go to property settings

Go to property settings ("Contact properties") (You can search for "contact properties" in the HubSpot search in header)

2.2. Click "Create property"

After clicking *Create property*, you will follow a 3 step wizard.

Step 1
Object type = Contact
Group = Contact information
Label = univid_session_id
Description = *optional*

<press next>

Step 2
Field type = Single-line text

<press next>

Step 3
No changes here, should have an option under property visibility "checked".

3. Last step: notify Univid

Below we instruct how to notify Univid that a registration has been submitted using a workflow (see 3.1). Alternatively a more time consuming method can be used: a HubSpot form with a hidden field (see 3.2).

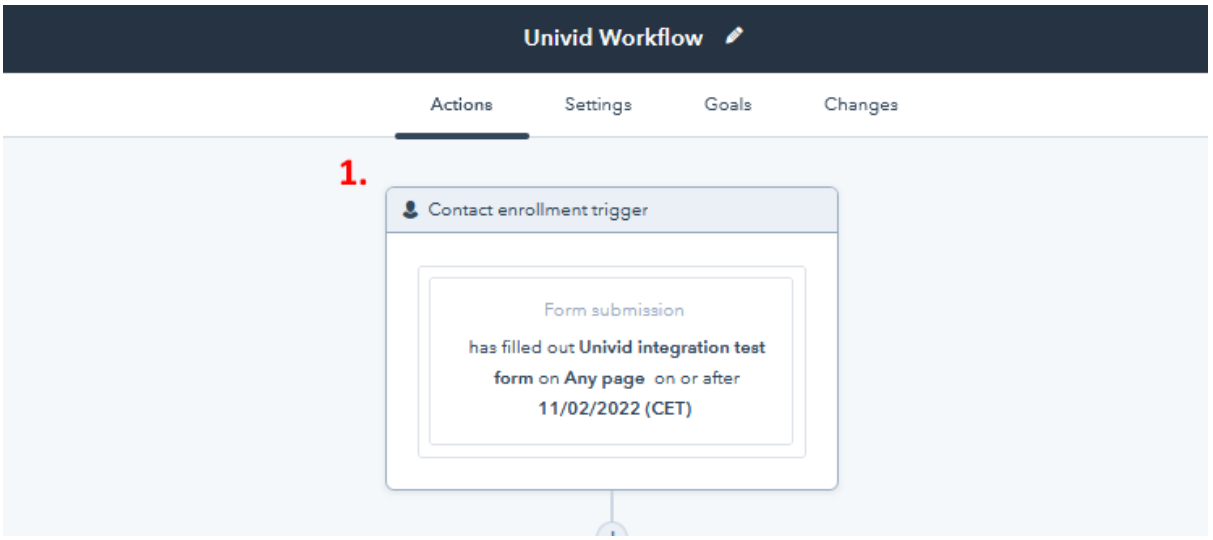
3.1 Create a workflow

Workflows are a highly flexible way of deciding which contacts to be invited to the Univid webinar. Follow our example of a form submission below.

If you have not created a HubSpot form, follow 3.2.1 before proceeding below.

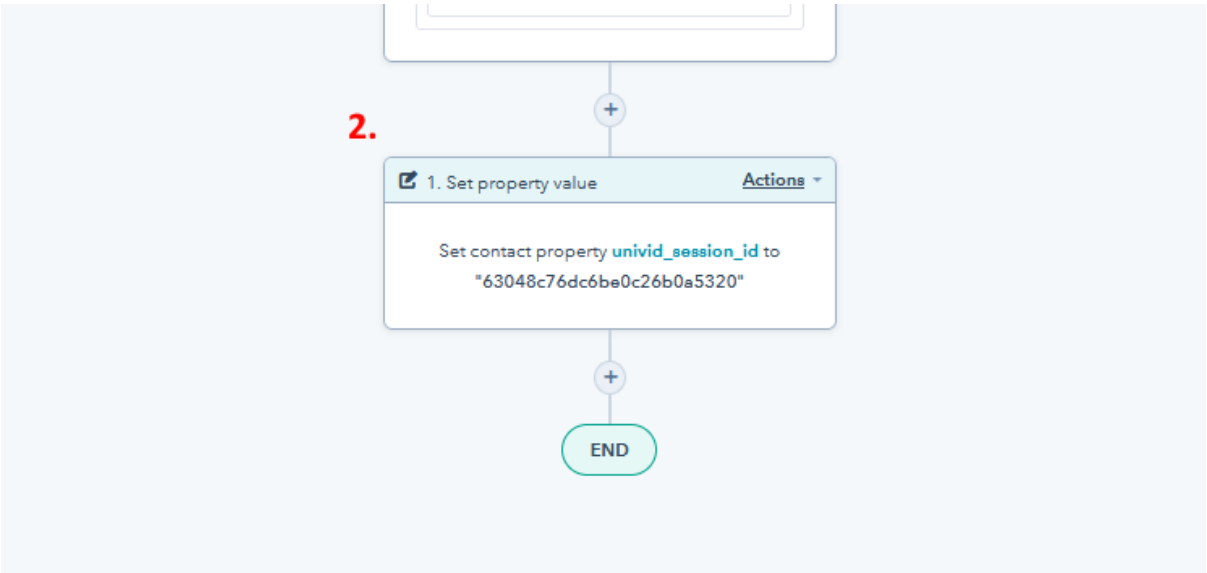
This section covers:

3.1.1 The trigger



Set up a trigger rule of which contacts that should receive a personal invite to Univid.

3.1.2 The custom contact property



Configure a "set property value" for the custom contact property: univid_session_id (created in 2.2). Make sure that the correct session ID is set.

3.1.3 Validate notification

Now it should be all set! A good way to quality assure the flow is to test signing up and checking if the contact is visible inside Univid (obs it can take a few minutes for the contact to appear in Univid). This quality assurance is only possible if you have access to the email you tested with.

Furthermore, make sure the contact (upon being registered in HubSpot) has the following values filled in:

- Email (email)
- First name (firstname)
- Last name (lastname)

3.2 HubSpot forms

3.2.1 Create the form

1. Go to the forms menu. Marketing -> Forms in header.
2. Click create form
3. Create any form type/template you want to
4. Make sure the following regular fields are available, otherwise Univid will not fetch user:
    - Email (email)
    - First name (firstname)
    - Last name (lastname)

3.2.2 Add the "univid_session_id"-property as hidden

If not using a workflow (see 3.1 Create a workflow), a hidden property field must be added to the form.
Under "Contact properties", you will find "univid_session_id". This should be added. However, click the edit button for this property/field. In the settings, make sure to enable "make this field hidden", and then set the default value to the "Session ID" found in the settings in the univid interface. The above example is:

`63048c76dc6be0c26b0a5320`

As long as this hidden field is included in the form, everyone signing up should get this property on their contact, and as a result, be registered to the session in Univid.

4. Read & Export data

You will obtain specific data from the webinar about a certain participant. This data will be added to the corresponding hubspot contact. You can for example see if a participant watched on-demand, this will be indicated as an activity card (timeline activity) on the contact within HubSpot.

Note that webinar statistics are shown in Univid's dashboard and granular data per contact via hubspot activity cards.

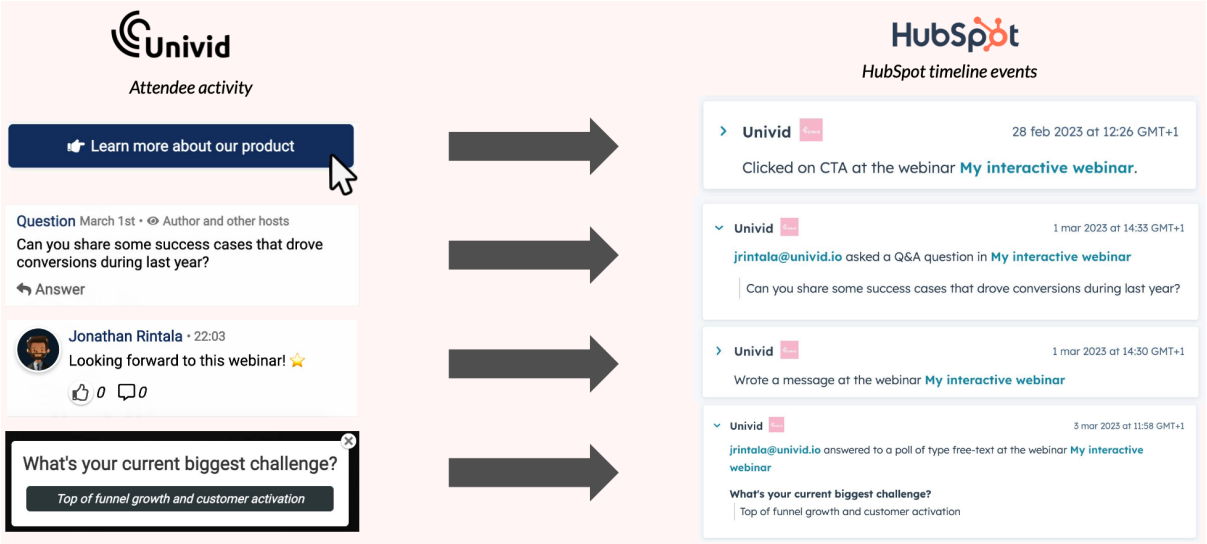
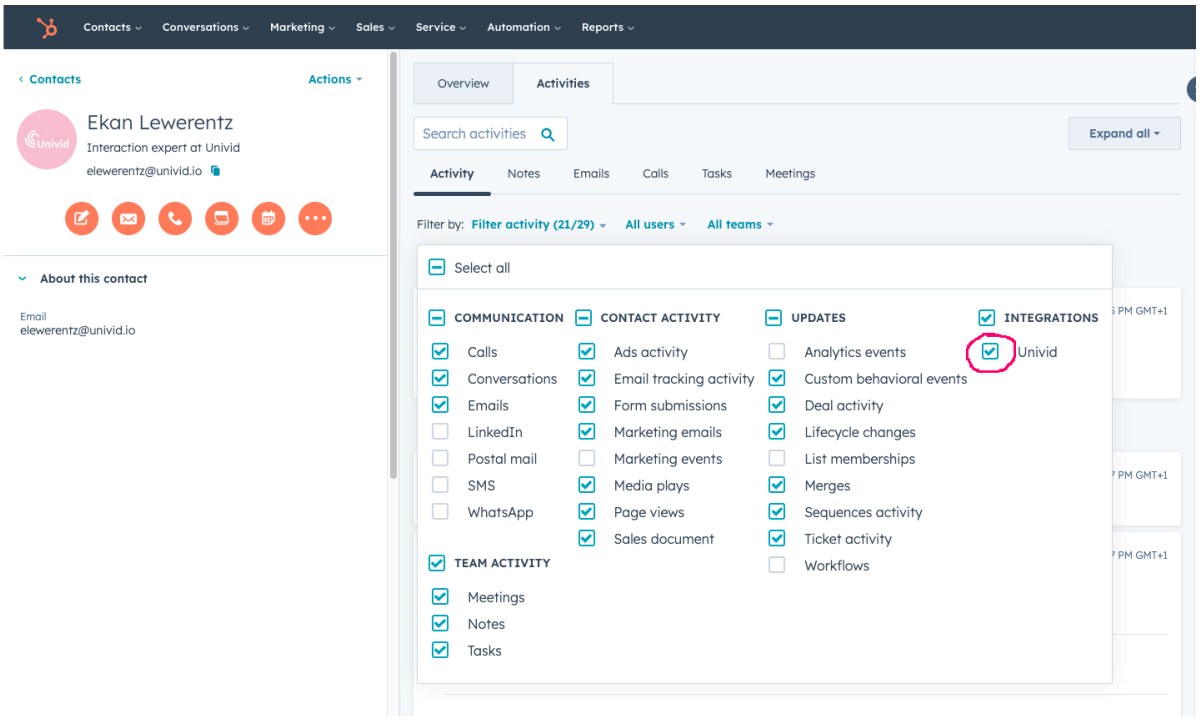


Illustration of call to action, Q&A, chat and poll input in Univid, and how it looks like in HubSpot. Note that there are also activities that appear when the contact registered and attended a webinar.

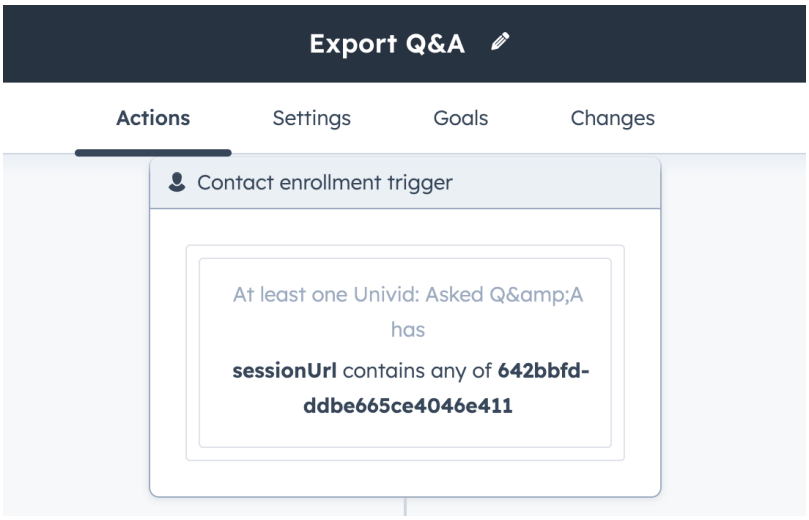
4.1 See activity cards in HubSpot

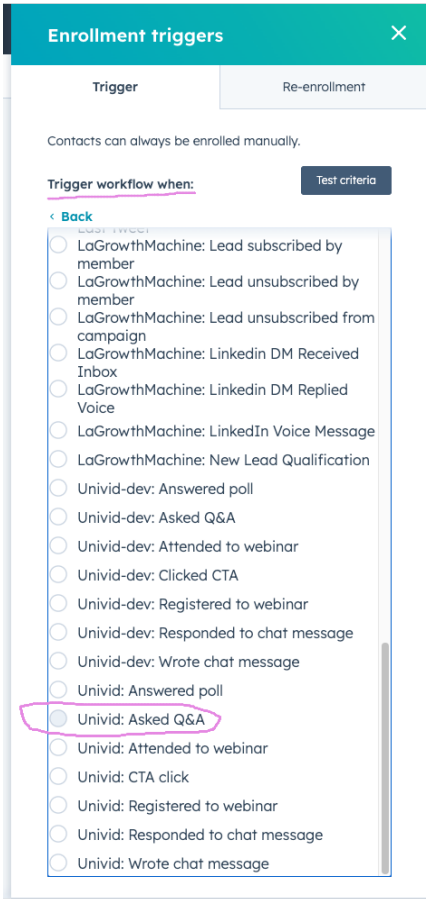


Remember to enable Univid activity cards in order to see them. Go to a contact and select Univid within the Filter activity.

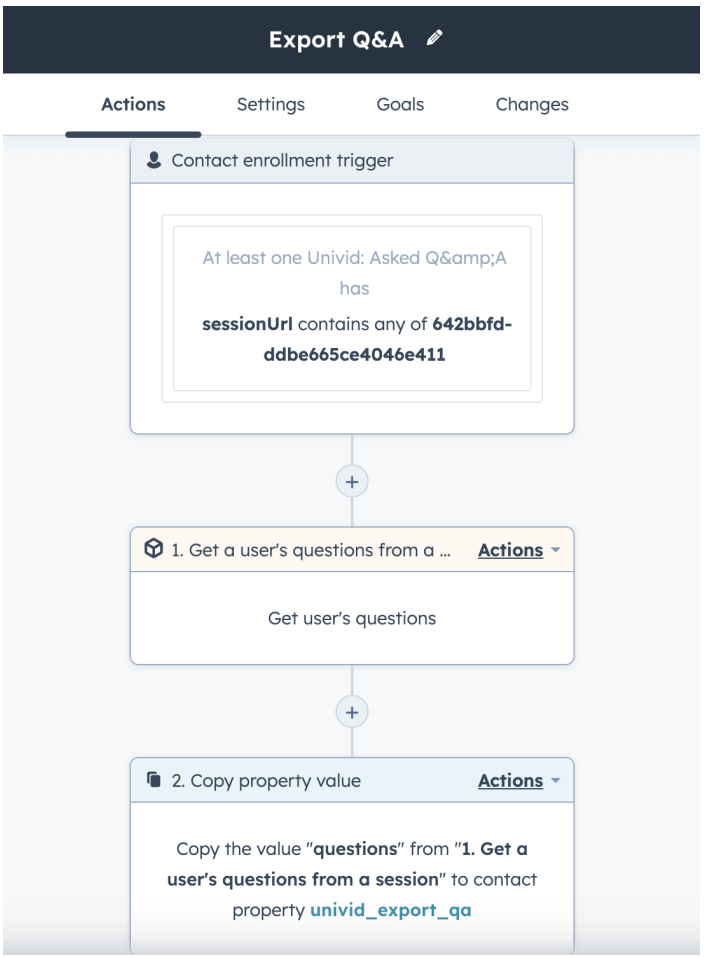
4.2 Use workflows to export all data from Univid

Workflows are a powerful feature, for example you could implement lead-scoring from your Univid webinars! Below we will explain a workflow that enables you to export all contacts Q&A messages. In short this workflow will copy the Q&A data from Univid to a HubSpot property. From there you can export that list (see section 4.3).





Start by choosing the workflow action that should trigger the workflow. Remember to set "contains any" and find the Univid session id within Univid.



Note how Univid has actions for fetching Q&A, chat and polls.

4.3 Create and export lists based on activity cards

Below we demonstrate how to filter participants from a webinar who have done a certain activity. Then we provide a useful excel file which will save you some time formatting the exported data.

4.3.1 Setup the list

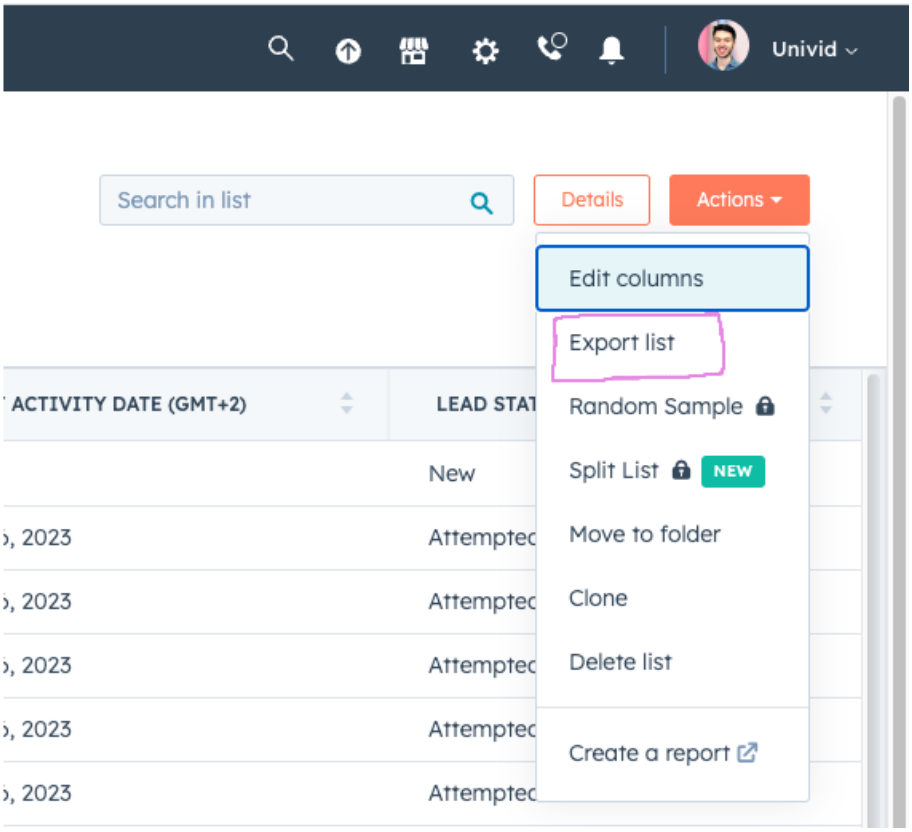
Remember that you can create structured lists in HubSpot based on activity cards (see example video). These are just three examples:

- list everyone who clicked on a certain call to action link during the webinar,
- answered a specific alternative in a poll
- generally wrote a question in Q&A, etc.

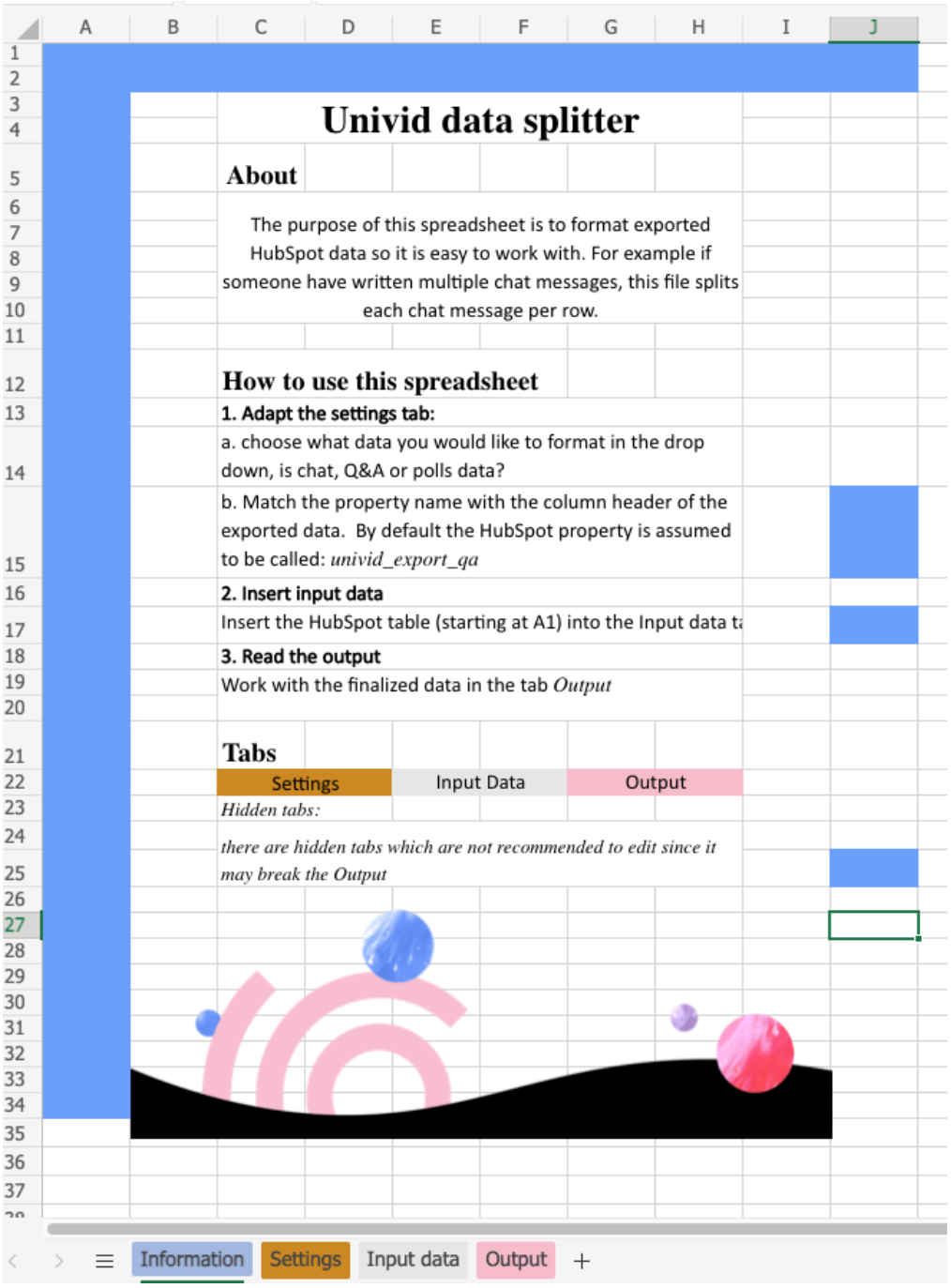
All it takes is some HubSpot configuration know-how. If you seek a more advanced configuration, leverage HubSpot workflows. Via workflows you could even include lead-scoring from your Univid webinars!

4.3.2 Export and format data via excel/google sheets/libreoffice

1. You can export lists in HubSpot via the actions button found in the top right corner within the list page.



2. Next you should download the excel, open it with your favorite spreadsheet tool such as excel, libreoffice or google sheets. Then proceed with 2 steps A and B. A: choose what data to format in the settings tab within the excel file (for example Q&A or chat messages), then copy your downloaded HubSpot data into the Input Data Sheet.



Univid data splitter

About

The purpose of this spreadsheet is to format exported HubSpot data so it is easy to work with. For example if someone have written multiple chat messages, this file splits each chat message per row.

How to use this spreadsheet

1. Adapt the settings tab:

a. choose what data you would like to format in the drop down, is chat, Q&A or polls data?

b. Match the property name with the column header of the exported data. By default the HubSpot property is assumed to be called: *univid_export_qa*

2. Insert input data

Insert the HubSpot table (starting at A1) into the Input data ta

3. Read the output

Work with the finalized data in the tab *Output*

Tabs

Settings | Input Data | Output

Hidden tabs:

there are hidden tabs which are not recommended to edit since it may break the Output

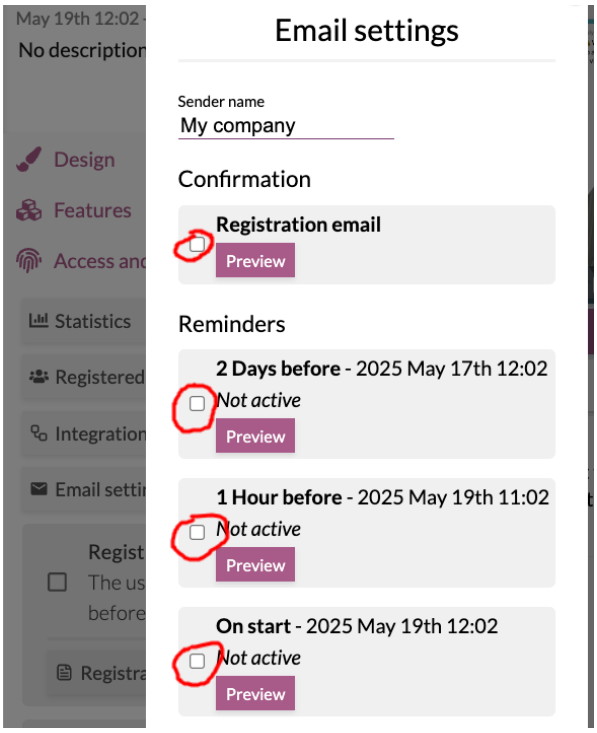
Information | Settings | Input data | Output

To format the data, [download the excel](), edit in the settings tab then copy and paste the HubSpot data into the Input Data tab.

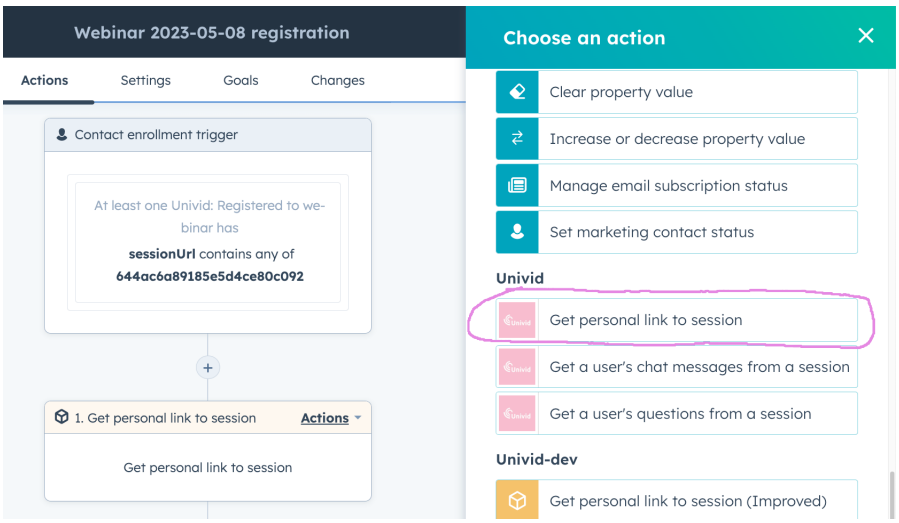
5. Custom emails, registration and reminders

Univid supports sending custom emails from HubSpot. Univid supports that contacts are registered to multiple webinars. Before you can send the email. In short, there are four fundamental steps:

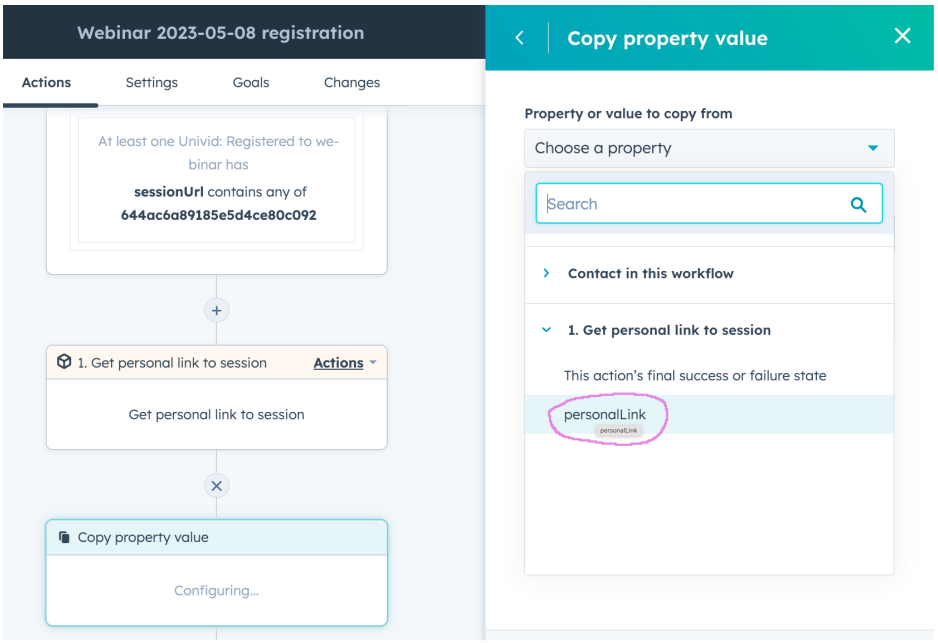
1. Disable Univid emails that you would rather like to send via HubSpot
2. Obtain the unique link via the "Get personal link to session" action
3. Copy the unique link into a contact property field
4. Include the unique link in a HubSpot email via the contact property field



1. Remember to disable unwanted Univid emails



2. You can at any point in time receive the correct personal link by using Univids "Get personal link to session" action.



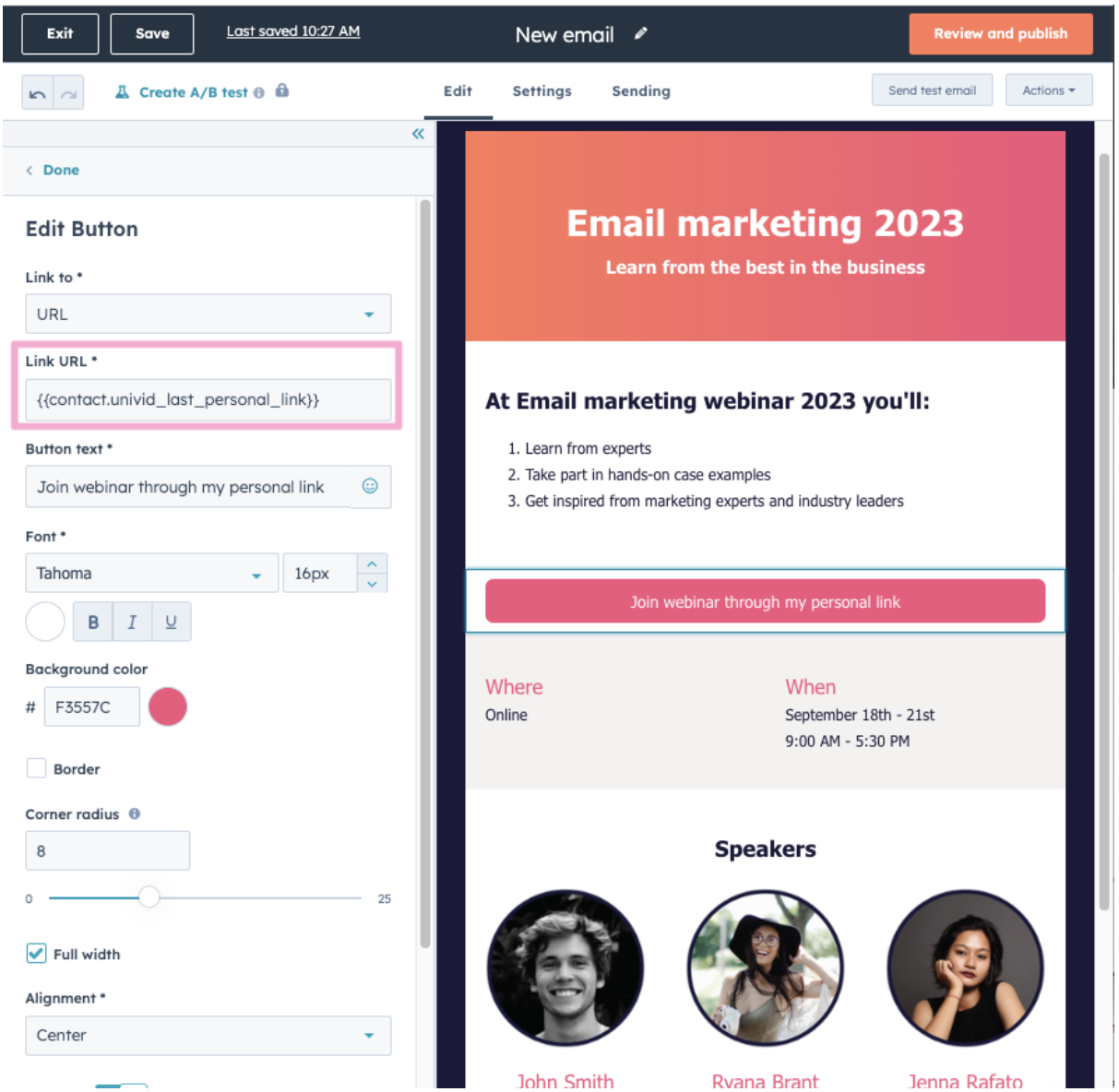
3. Make sure to always include a fresh copy of the personalLink from the action to always work with the correct link. Otherwise another workflow might have overwritten the link. If you create a new property for each webinar, you can skip this step since there can be no overwriting of the property.

5.1 Workflows for custom email

Univid has an in-depth video guide on how to configure (a) registration confirmation email and (b) reminder emails. Remember to set the type of email to an automated emails. Link to guide: https://app.univid.io/session/6453c46de3af3b4d22df7f27/

5.2 HubSpot CTA Button with personal link

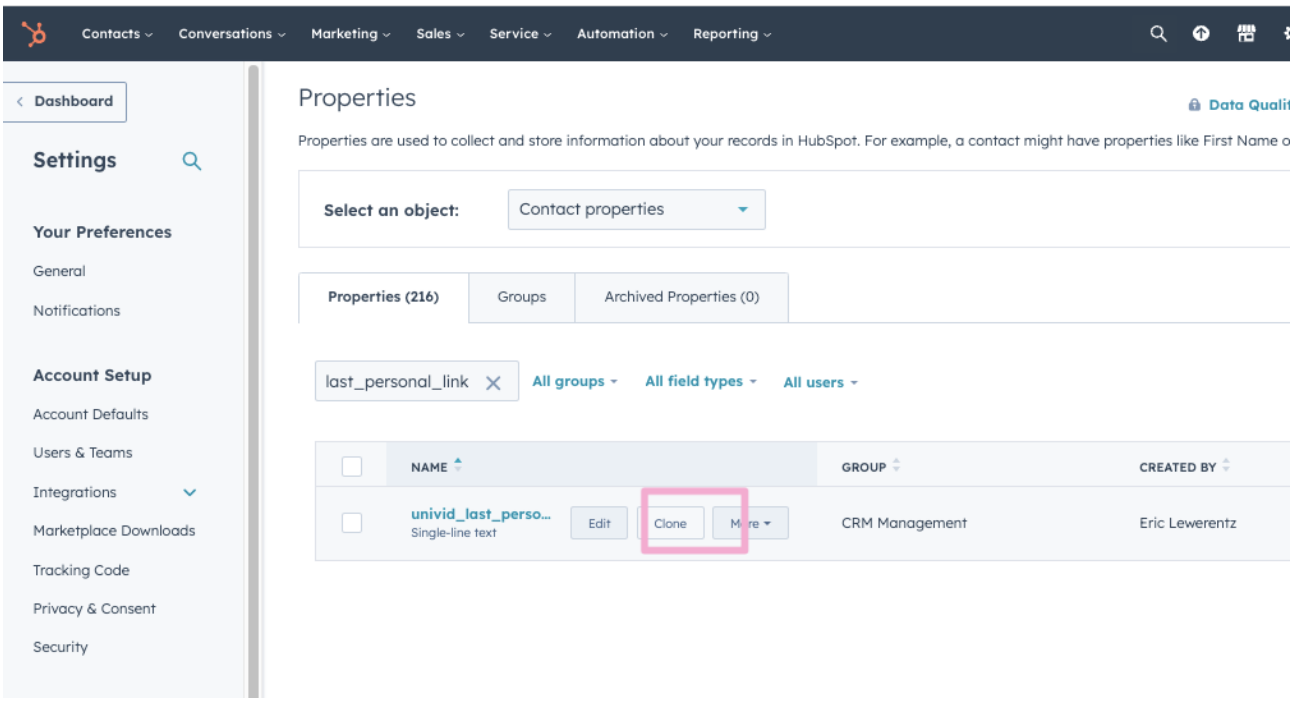
Use HubSpot CTA Button to obtain beautiful buttons just like in Univids default emails. When editing the button, you can personalize the Link URL so it becomes unique for each registrant. Input a contact token using the curly bracket syntax. In the example the property name is called *univid_last_personal_link* which corresponds to the following input value: *{{contact.univid_last_personal_link}}*. The example below is a small adjustment of a predefined template included in HubSpot.



It is easy to include the unique link for a registrant, using the curly bracket syntax {{contact.univid_last_personal_link}}.

5.3 Direct “add to calendar” links

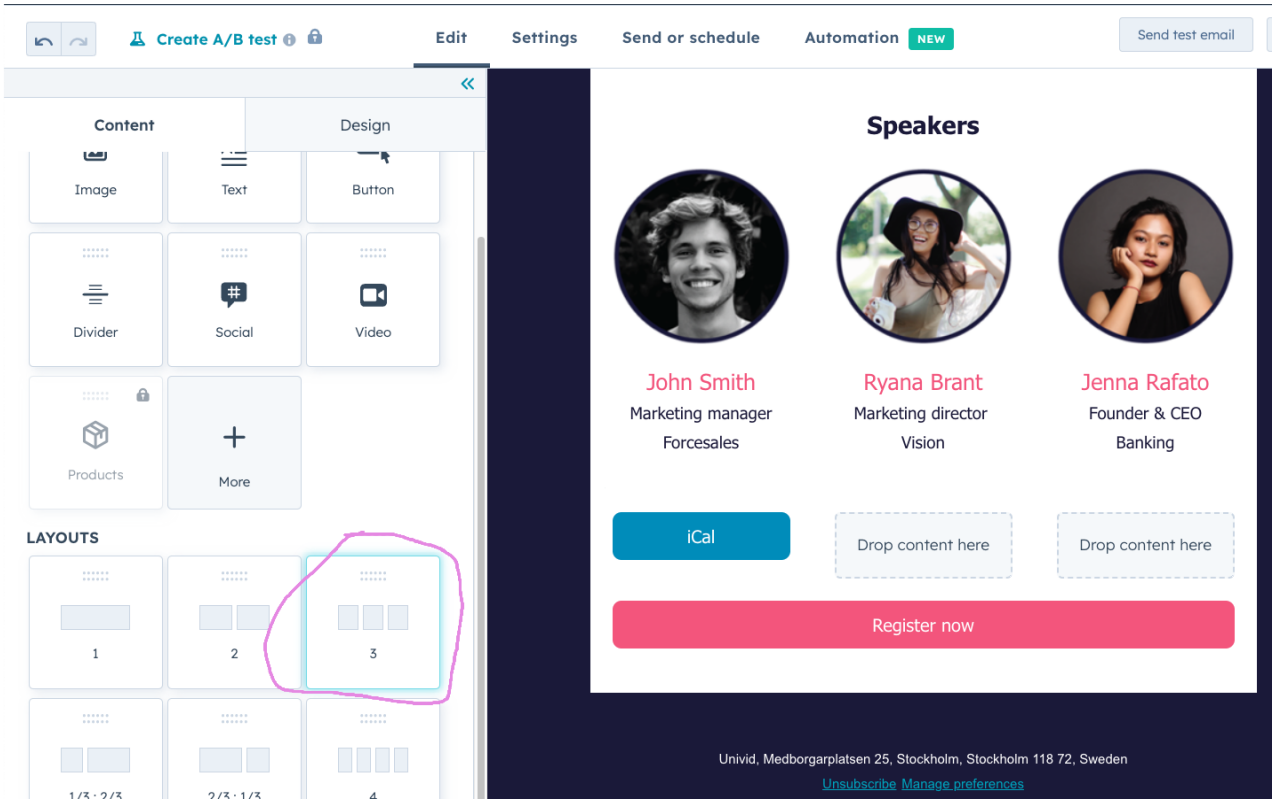
Another good thing is to incorporate direct add to calendar buttons in the email. The outcome tends to be a better show-up rate since registrants manage to block out the time in their calendar - mitigating a double booking. To implement an “add to calendar” link, you could for example use HubSpots CTA Button feature, remember to create new contact properties to store the calendar links (if not already done so). Follow the 4 steps below for an example.



If you need to create new properties, you can use the clone feature to speed up the process.

There is more on next page 👇

Step 1: Add a 3 layout column to the email

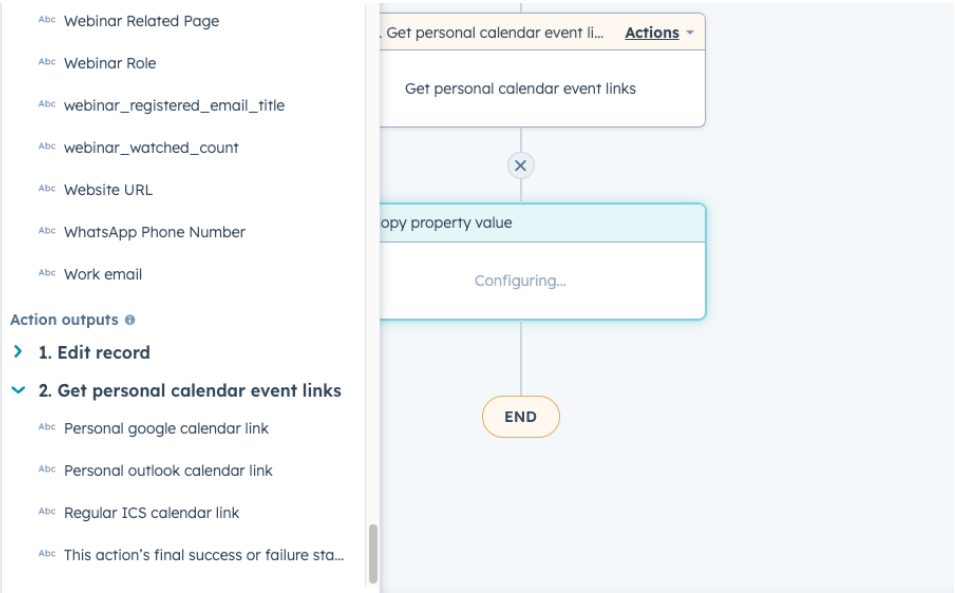


Step 2: Add three HubSpot CTA buttons (one for each column)
Step 3: Input contact properties using HubSpots "curly bracket syntax"

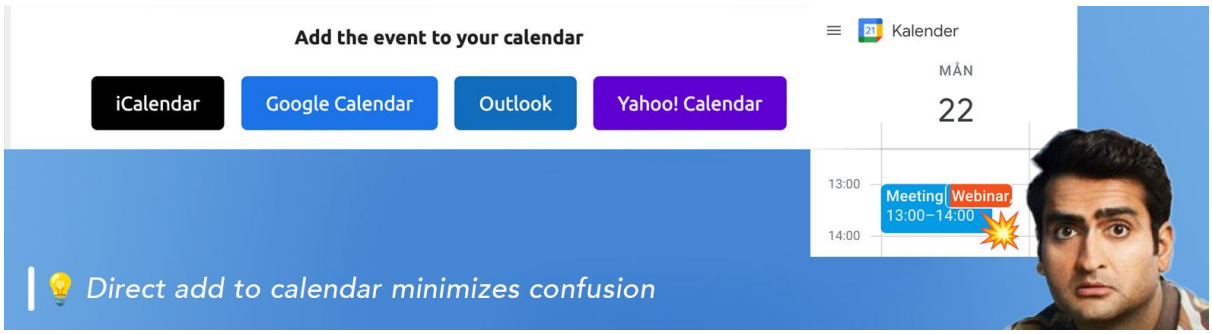
There is more on next page 👇

Step 4: Configure the workflow

Follow the concepts described previously in this chapter, make sure that the action used is Univids "add to calendar" action.



Univid has a workflow action to receive 3 kinds of add to calendar links: ics file, outlook and google.



A good way to increase show-up rate is to incorporate direct add to calendar buttons in the email.

5.3.1 Custom "add to calendar" links on homepage, email or social media

Above we illustrated an example of how Univids add to calendar links was incorporated via a personal link. Univid uses links for the add to calendar functionality, thereby you can use these links directly on anything that can make a link clickable such as homepages, social

media and of course email. There are 3 calendar formats supported: google, outlook and ics file.

- Google:
  https://api.univid.io/room/{{sessionId}}/calendar/google
- Outlook:
  https://api.univid.io/room/{{sessionId}}/calendar/outlook
- File:
  https://api.univid.io/room/{{sessionId}}/calendar/file.ics

6. Common issues

I forgot to connect the Univid app but have obtained sign-ups, now they are in HubSpot but not Univid - what to do?

Check out the solution at:
https://app.univid.io/session/64390a4f61cedc8b75799ef6/

Will there be an issue if I send multiple reminders at the same time to the same contact?

You must not send reminders at the exact point in time to a contact. The issue is that HubSpot may include wrong tracking links. There is an easy fix for this though. Solve the issue by sending reminder emails offsetted by a minute. For example, send a reminder email for webinar A at 10:00 january the 1st in a workflow. Then, configure reminder email for webinar B to be sent at 10:01 january the 1st.
Check out the reminder workflow example:
https://app.univid.io/session/6453c46de3af3b4d22df7f27/