Hubspot Magento 2 Extension Guide

by CedCommerce Products Documentation

1. Overview

Companies today spend a considerable amount of time on planning their marketing strategies but they quite often miss the inbound marketing factor that can help them reach their target customers using their own ‘company created internet content – something that ends customers care about the most. That’s where HubSpot takes the reins for all your worries.

HubSpot is an inbound marketing and sales platform. It is a marketer and developer of the software products that help companies plan their inbound marketing strategies. HubSpot provides tools for social media marketing, content management, web analytics, search engine optimization etc for customized content to attract the end users.

Keeping these factors in mind to help the online sellers, CedCommerce presents the HubSpot Integration for Magento 2 Extension. Using this extension by CedCommerce, the sellers can not only create the customized content for their customer base but can also **sync the comprehensive product and details from their Magento 2 admin panel to HubSpot.** Result? you can manage your business well by in-depth details of products.

A glance at its Features-

Product Sync – Sync the product along with its details such as Name, Image, Price, and Description to HubSpot for your e-commerce store.

Customer Sync – Sync all the customer details from your e-commerce store to HubSpot. The customer details that you may sync are – Email, First Name, Last Name, Company Name, Telephone Number, Street, City, Region, Country, Post Code, and Contact Stage.

Deal Sync – Get all the orders from your e-commerce store synced with HubSpot. The order details that can be synced using HubSpot E-Commerce Integration are – Deal Stage, Deal Name, Closed Won Reason, Closed Lost Reason, Close Date, Amount, Pipeline, Abandoned Cart URL, Discount Amount, Increment ID, Shipment IDs, Tax Amount, and Contact Ids.

Line Item Sync – Sync the Line Items to HubSpot and know in detail about products’ performance – which is being ordered or is high in demand. The HubSpot E-Commerce Integration lets you sync the Product ID, Deal ID, Discount Amount, Quantity, Price, Name, and SKU.

E-Mail – With the HubSpot E-Commerce Integration, you may create the e-mail pattern with personalized content from the HubSpot panel itself and make your presence more prominent amongst your target clientèle.

Marketing Automation – Forget the hassles of e-mail marketing. Operate and experience the automated e-mail marketing from HubSpot panel with the HubSpot E-Commerce Integration, and rely on the self-operating e-mail marketing.

Analytics – Understand your customers’ behaviour and purchasing pattern by understanding the analytics from the HubSpot panel. Get the comprehensive details with HubSpot E-Commerce Integration, have deeper insights about your marketplace analytics, and turn it into your forte.

Abandoned Cart Recovery – HubSpot E-Commerce Integration enables you to send emails to the customers from your HubSpot panel in the case of Abandoned Shopping Cart, to procure the recovery. After a specific time period, communicate with the shoppers through an email to persuade them to take the desired action.

Customer Welcome – On your customers’ first purchase, send the welcome email to them within a specific time period. From your HubSpot panel, initiate the email communication with shoppers once they have completed the buying process, within a definite time period.

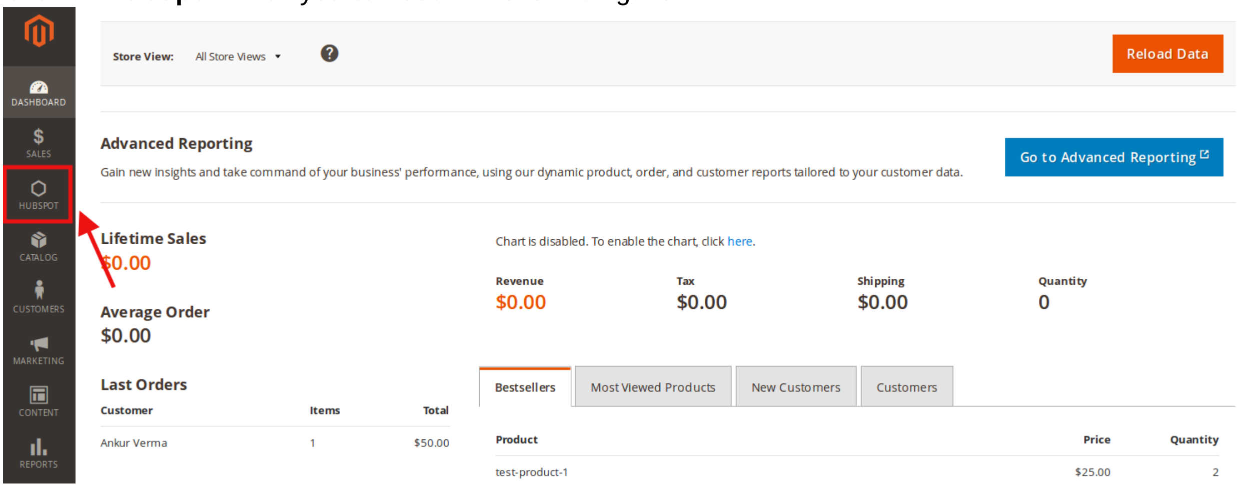
Customer Re-engagement – With the HubSpot E-Commerce Integration, re-engage with your customers and draw their attention towards your brand once again. The HubSpot E-Commerce Integration authorizes you to send emails to communicate with your users who haven't made a purchase with you lately.

2. Configuration Settings

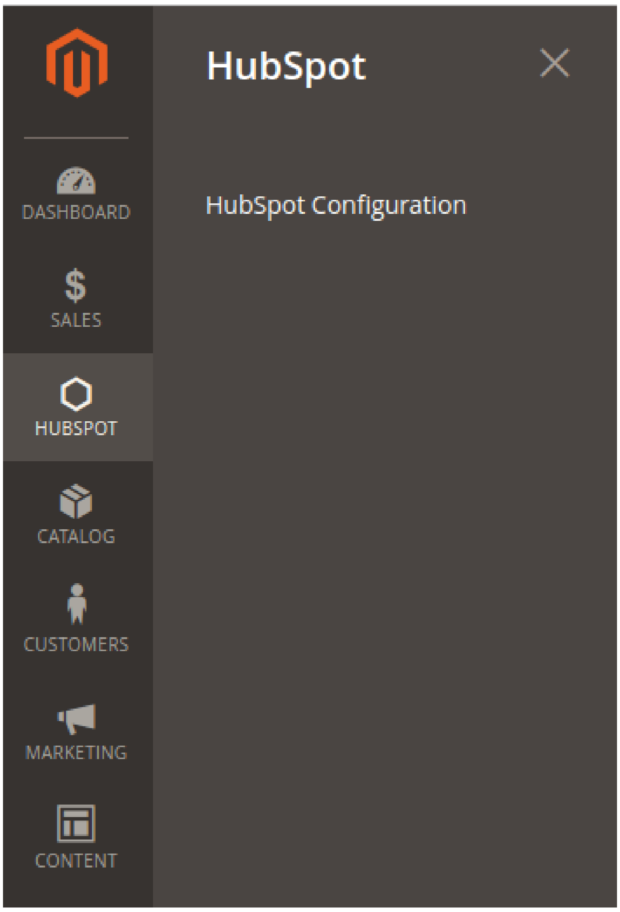
The first step in the process of integrating your Magento 2 store with HubSpot is the Configuration.

To do the Configuration,

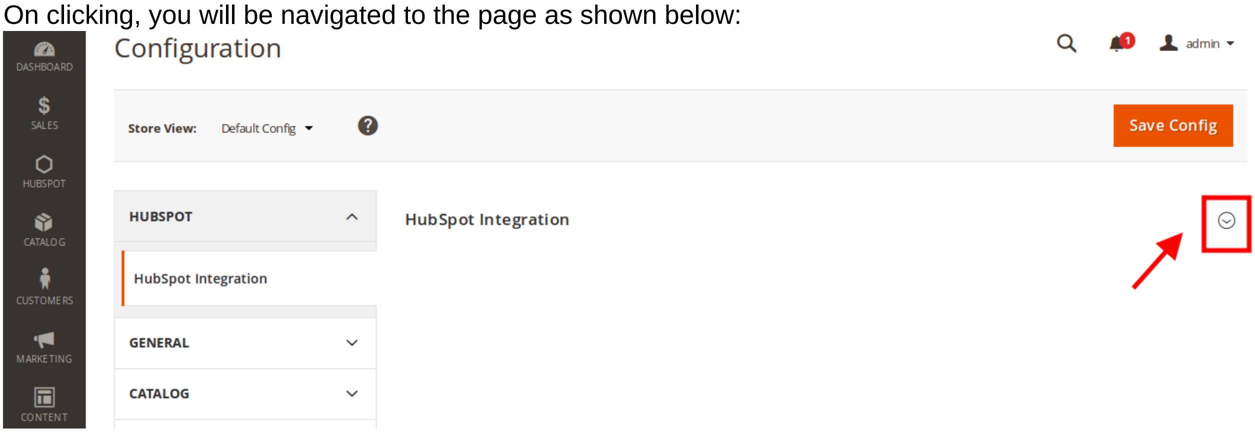
- Go to your Magento Admin Panel.
- Click on **HubSpot** which you can see in the left navigation bar.



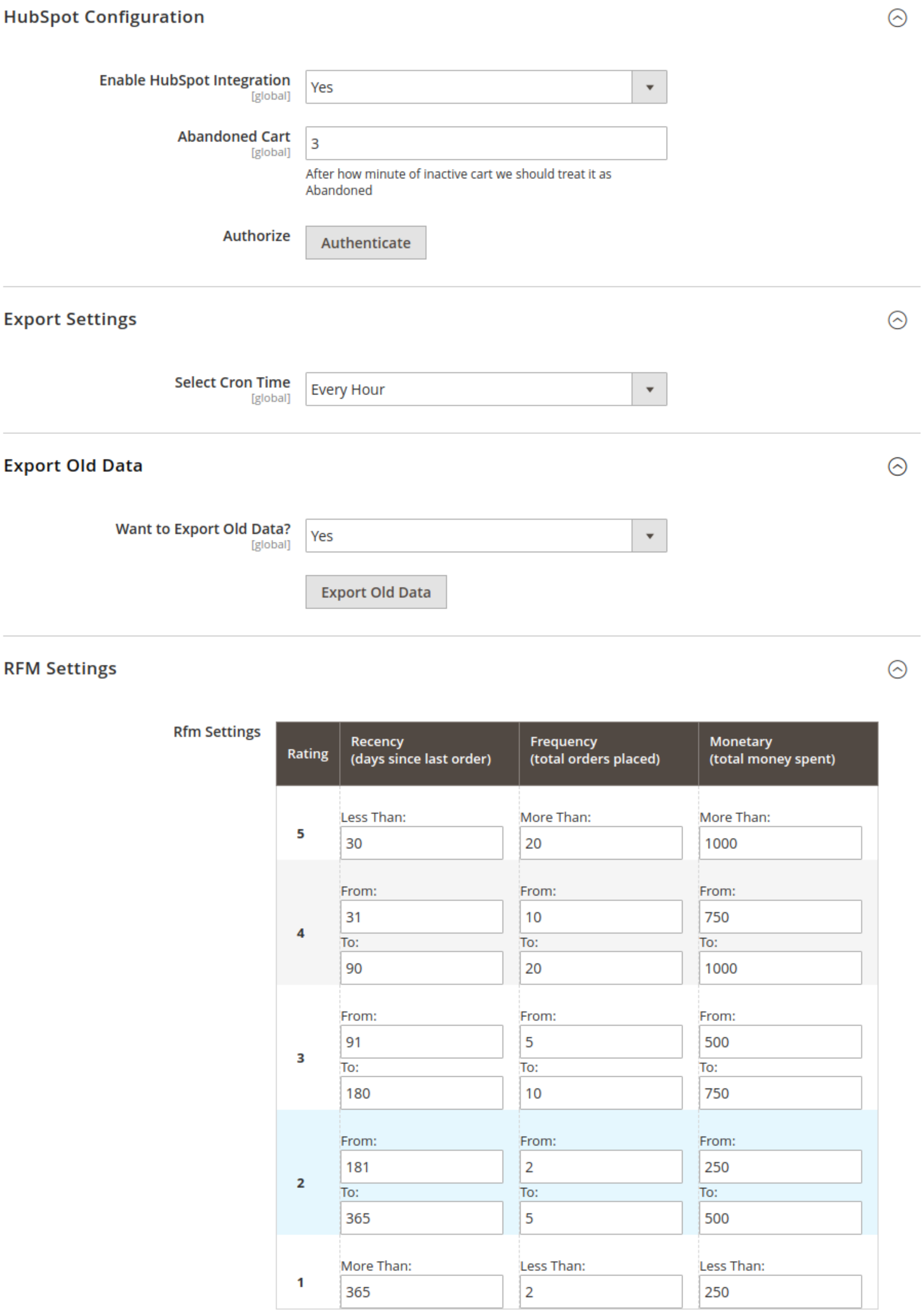
- On clicking it, the bar will get expanded as shown below:



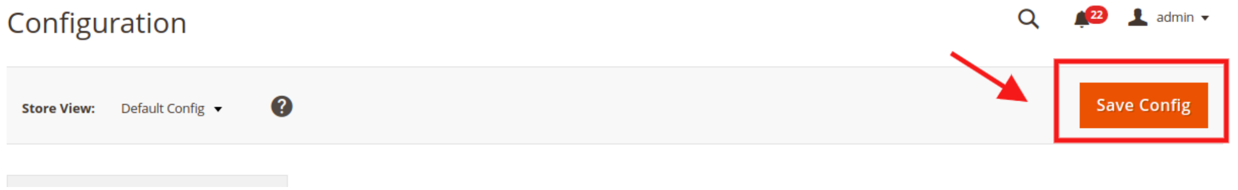
- Now click on **HubSpot Configuration** as shown in the above image.
- On clicking, you will be navigated to the page as shown below:



- Click on HubSpot Integration and the section will get expanded as shown below:


HubSpot Configuration
Enable HubSpot Integration
[global]
Yes
Abandoned Cart
[global]
3
After how minute of inactive cart we should treat it as Abandoned
Authorize
Authenticate
Export Settings
Select Cron Time
[global]
Every Hour
Export Old Data
Want to Export Old Data?
[global]
Yes
Export Old Data
RFM Settings
Rfm Settings
Rating
Recency (days since last order)
Frequency (total orders placed)
Monetary (total money spent)
5
Less Than: 30
More Than: 20
More Than: 1000
4
From: 31 To: 90
From: 10 To: 20
From: 750 To: 1000
3
From: 91 To: 180
From: 5 To: 10
From: 500 To: 750
2
From: 181 To: 365
From: 2 To: 5
From: 250 To: 500
1
More Than: 365
Less Than: 2
Less Than: 250

- In **Enable HubSpot Integration,** select **Yes** to enable the extension. (*Yes is the default state which is already selected.)*
- In **Abandoned Cart,** enter the time in minutes after which you want the inactive shopping cart to be treated as abandoned**.**
- **Select Cron Time –** You can decide in what frequency data get sync, it can be once in a day, twice in a day, four times a day or every hour.
- **Want to Export old Data**– If a user selects yes and click on the **Export Old Data** then old data (products, customers, orders and line items) will get export to HubSpot.
- In **RFM Settings,** you may categorize your customers on the basis of the Recency (How frequently they are ordering your product?), Frequency (How many orders they are placing?), and Monetary (How much your customers are spending on your product?), and then rate them on the scale of 1 to 5, where 5 indicates the customers who are most inclined towards your product and 1 indicates those who are least inclined.
  1. In **Recency** column, you need to enter the numbers as a parameter for days and decide on its basis which type of customers are visiting your store most frequently. You may rate them accordingly.
  2. In **Frequency** column, you need to enter the numbers for the total orders placed by a customer, and on the basis of that, you can decide about the customers who are placing most orders and who are placing the least number of orders.
  3. In **Monetary** column, enter the numbers as a parameter and decide on its basis that who are the customers who are spending the most on your product and who are spending the least.
- Once you've selected and entered the information mentioned above, click on the **Save Config** button on the top right side of the page.

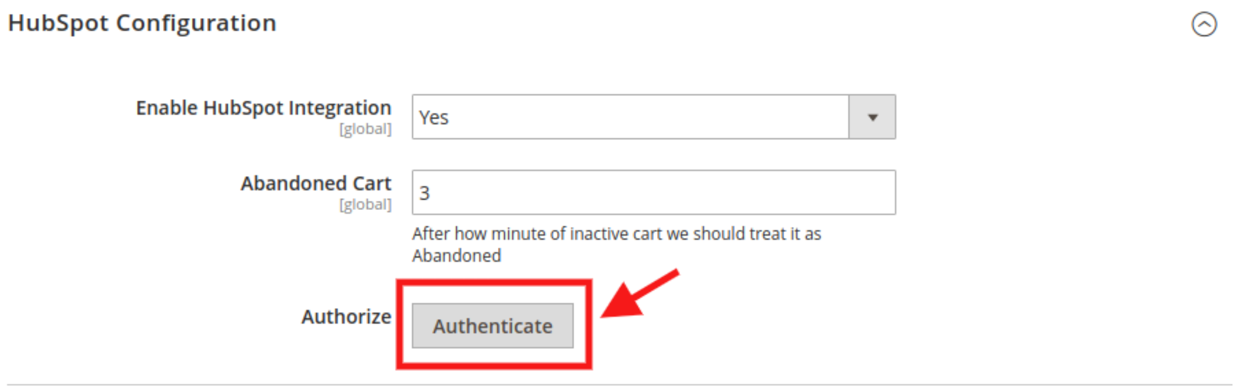


- The configuration will be **saved**.

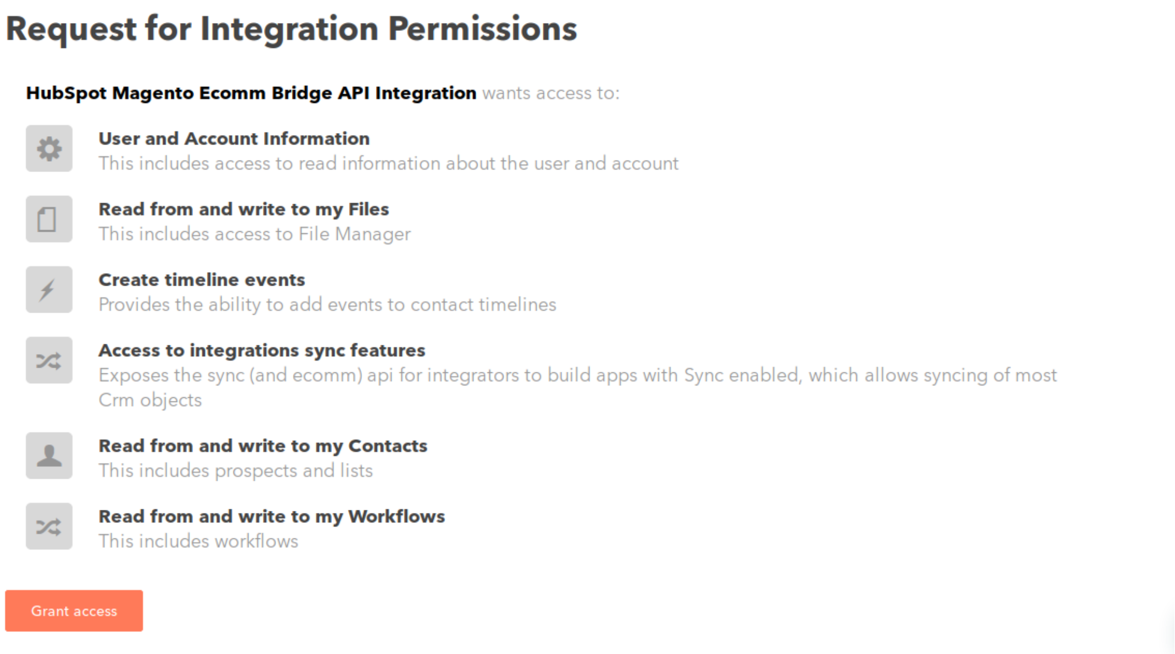
3. Installation

After the Configuration is done successfully, you may move a step further and take the necessary steps for installation.

- Click on the **Authenticate** button to authorize and connect to HubSpot.



- On clicking it, a new tab of **HubSpot** will be opened,
  – **Login** to your Hubspot account
  – On Logging, in the HubSpot account page will appear as-



– Click on **Grant Access** which is mentioned in the above image and authentication process will get complete.

4. HubSpot Custom Group and Properties

1-Customer view

Overview:

The HubSpot custom group **Customer Group** holds the general contact information like their user role, customer ID on the store, etc. The group has **three custom properties** for HubSpot contacts and they are as:

Properties:

Accepts Marketing- (field type is drop-down select) The property shows the status of whether a contact accepts marketing on your store or not. Also, there is a filter for the property value so it can be easily modified according to your needs.

Customer Group/User Role- (field type is multi-line text) The property holds the information regarding the user role of the contact on the Magento store. It can be either customer, subscriber, etc.

Shopping Cart ID- (field type is number) The property contains the customer's ID which is a unique ID alloted in the Magento store.

2-Shopping Cart Information

Overview:

The HubSpot custom group **Shopping Card Fields** contains information regarding the shopping and billing address of the contact on the Magento Store. It contains **twelve** custom HubSpot properties for contact and they are as:

Properties:

Shipping Address line 1- (field type is single-line text) Represents shipping address line 1

Shipping Address line 2- (field type is single-line text) Represents shipping address line 2

Shipping city- (field type is single-line text) Represents the shipping city of the contact on Magento store

Shipping state- (field type is single-line text) Represents the shipping state of the contact

Shipping postal code- (field type is single-line text) Represents the shipping post/zip code given by the contact

Shipping country- (field type is single-line text) Represents the shipping country of the contact

Billing Address Line 1- (field type is single-line text) Billing Address line 1 of the contact on Magento Store

Billing Address Line 2- (field type is single-line text) Billing address line 2 of the contact

Billing city- (field type is single-line text) Billing city used by the contact on store

Billing state- (field type is single-line text) Billing State given by the contact

Billing postal code- (field type is single-line text) Billing post/zip code

Billing country- (field type is single-line text) Billing country of the contact

3-Order

Overview:

The HubSpot custom group **Order Information** contains the whole information regarding the last order placed by the customer on the Magento Store. It contains **seven** custom HubSpot properties and they are as:

Properties:

Last Order Status- (drop-down select) Shows the status of the last order made by the customer on the Magento store.

Last Order Fulfillment Status- (drop-down select) Last order fulfillment status on Magento store.

Last Order Tracking Number (number field) Last order tracking number. It can be modified according to need.

Last Order Tracking URL- (single-line text) Last order tracking URL. It can be modified as per need.

Last Order Shipment Date- (date-picker) Last order shipment date. It can be modified as per need.

Last Order Number- (number field) Last order number of the customer on the Magento store.

Total Number of Current Orders- (number-field) Total count of current orders of the customer on the store. We have assumed those orders as Current orders which are in either processing or on-hold or pending status. It means they are likely to be completed.

4-Last Products Bought

Overview:

The HubSpot custom group **Products Bought** contains the full purchase history of contact in terms of store products. It contains the whole information regarding what the customer has purchased from you, how many products they have purchased etc. The group has **twenty** custom HubSpot properties and they are as:

Properties:

Last Product Bought- (multi-line text) name of the last product of the last order.

Last Product Types Bought- (multi-line text) Last product types purchased by the customer

Last Products Bought- (multi-line text) Shows the names of the product last purchased by the customer

Last Products Bought HTML- (multi-line text) Holds the full HTML of the last purchased products.

Last Total Number Of Products Bought- (number field) Shows the count of the total number of purchased products in the last order.

Product Types Bought- (multi-line text) Full history of product types bought by the customer till current date. Holds all the types of products separated by the semicolon.

Products Bought- (multi-line text) Full history of products bought by the customer till the current date. Holds all the names of the product separated by the semicolon.

Total Number of Products Bought- (number field) Shows the count of the total number of products bought by the customer.

Last Products Bought Product 1 Image URL- (single-line text) shows the product image URL of the last purchased product.

Last Products Bought Product 1 Name- (single-line text) Shows the Name of the second last purchased product.

Last Products Bought Product 1 Price- (number field with currency symbol) Shows the price of the last purchased product.

Last Products Bought Product 1 Url- (single-line text) Shows the URL of the last purchased product.

Last Products Bought Product 2 Image URL- (single-line text) shows the product image URL of the second last purchased product.

Last Products Bought Product 2 Name- (single-line text) Shows the Name of the second last purchased product.

Last Products Bought Product 2 Price- (number field with currency symbol) Shows the price of the second last purchased product.

Last Products Bought Product 2 Url- (single-line text) Shows the URL of the second last purchased product.

Last Products Bought Product 3 Image URL- (single-line text) shows the product image URL of the third last purchased product.

Last Products Bought Product 3 Name- (single-line text) Shows the Name of the third last purchased product.

Last Products Bought Product 3 Price- (number field with currency symbol) Shows the price of the third last purchased product.

Last Products Bought Product 3 URL- (single-line text) Shows the URL of the third last purchased product.

5-Catagories Bought

Overview:

The HubSpot custom group **Categories Bought** shows the full purchase history in terms of the categories of the purchased products. The group contains **two** custom HubSpot properties and they are as:

Properties:

Last Categories Bought- (multi-line text) categories for the last order of the customer on Magento store

Categories Bought- (multi-line text) categories for all the orders of the customer till the current date.

6-RFM Information

Overview:

The HubSpot custom group **RFM Information** provides the true power of RFM segmentation through its properties **Order Recency Rating, Order Frequency Rating,** and **Monetary Rating.** Through this group and its properties, you can easily segment your customers which will help you to target your best as well as lost customers, The group contains **twelve** custom HubSpot properties and they are as:

Properties:

Total Value of Orders- (number field) Shows the total value of orders of the customer

Average Order Value- (number field with currency symbol) average order value of the customer

Total Number of Orders- (number field) total number of orders of the customer

First Order Value- (number field with currency symbol) first-order value of the customer

First Order Date- (date-picker) first-order date of the customer

Last Order Value- (number field with currency symbol) last order value of the customer on the store

Last Order Date- (date-picker) last order date of the customer on your store

Average Days Between Orders- (number field) Average days between orders of the customer

Account Creation Date- (date-picker) Date when the customer registered on the store

Monetary Rating- (drop-down select) Rating to the customer in between 1-5 in terms of money spent on the store

Order Frequency Rating- (drop-down select) Rating to the customer in between 1-5 in terms of number of orders placed

Order Recency Rating- (drop-down select) Rating to the customer in between 1-5 in terms of how recently the order being placed.

7-SKUs Bought

Overview:

The HubSpot custom group **(Store Keeping Unit) SKUs Bought** contains a full purchase history of the customer in terms of Product SKUs bought. It basically contains the information for all order SKUs and last order SKUs of the customer. The group contains **two** custom HubSpot properties and they are as:

Properties:

Last SKUs Bought- (multi-line text) SKUs of the last order products

SKUs Bought- (multi-line text) SKUs of all the orders placed by the customer till the current date.

8-ROI Tracking

Overview:

The HubSpot custom group (**Return On Investment)ROI Tracking** manages the whole data regarding the customer conversion and the revenue gained per campaign triggered by HubSpot. It tracks and updates the customer property for every campaign data as well as the date and amount gained by their conversion.

Properties:

Current ROI Campaign- (drop-down select) sets the current ROI campaign for the customer through which he is currently passing.

Abandoned Cart Recovery Workflow Conversion- (dropdown select) sets the value in yes/no for the abandoned cart conversion

Abandoned Cart Recovery Workflow Conversion Amount- (number field with currency symbol) sets the total amount gained per customer through the abandoned cart conversion

Abandoned Cart Recovery Workflow Conversion Date- (date-picker) sets the date when the customers abandoned cart has been converted

Abandoned Cart Recovery Workflow Start Date- (date-picker) sets the date when the Abandoned Cart Recovery Campaign was started for the customer.

Customer Reengagement Workflow Conversion- (drop-down select) sets the value for the customer reengagement campaign if the customer gets converted through this campaign.

Customer Reengagement Workflow Conversion Amount- (number field with currency symbol) total amount gained by the customer conversion through this campaign

Customer Reengagement Workflow Conversion Date- (date-picker) the date when the customer gets converted through this campaign

Customer Reengagement Workflow Start Date- (date-picker) date when the customer reengagement campaign was started for the customer

Customer Rewards Workflow Conversion- (drop-down select) status whether the customer has been converted through a customer rewards campaign or not.

Customer Rewards Workflow Conversion Amount- (number field with currency symbol) amount gained per customer from the conversion

Customer Rewards Workflow Conversion Date- (date-picker) date when the customer was successfully converted through the customer rewards campaign

Customer Rewards Workflow Start Date- (date-picker) date when the campaign was started for the customer

MQL Capture, Nurture & Conversion Conversion- (drop-down select) status whether the customer has been converted through MQL nurturing campaign or not.

MQL Capture, Nurture & Conversion Conversion Amount- (number field with currency symbol) amount gained per customer from the conversion

MQL Capture, Nurture & Conversion Conversion Date- (date-picker) date when the customer gets converted through the campaign.

MQL Capture, Nurture & Conversion Start date- (date-picker) date when the campaign was started for the customer

New Customer Workflow Conversion– (drop-down select) status whether the customer has been converted through this campaign or not.

New Customer Workflow Conversion Amount- (number field with currency symbol) amount gained per customer from the conversion

New Customer Workflow Conversion Date- (date-picker) date when the customer was successfully converted through this campaign

New Customer Workflow Start Date- (date-picker) date when the campaign was started for the customer

Second Purchase Workflow Conversion- (drop-down select) status whether the customer has been converted through a second purchase campaign or not.

Second Purchase Workflow Conversion Amount- (number field with currency symbol) amount gained per customer from the conversion

Second Purchase Workflow Conversion Date- (date-picker) date when the customer was successfully converted through this campaign

Second Purchase Workflow Start Date- (date-picker) date when the campaign was started for the customer

Third Purchase Workflow Conversion- (drop-down select) status whether the customer has been converted through third purchase campaign or not.

Third Purchase Workflow Conversion Amount- (number field with currency symbol) amount gained per customer from the conversion

Third Purchase Workflow Conversion Date- (date-picker) date when the customer was successfully converted through this campaign

Third Purchase Workflow Start Date- (date-picker) date when the campaign was started for the customer

5. HubSpot Smart Contact Lists

Best Customers-

This list will enroll customers according to their customer's lifecycle stage. Whenever any customer's lifecycle changes it would filter all those customers.

Big Spenders-

This list shows the contact property whose Monetary rating is equal to 5. These are the customers who are spending lavishly and purchasing more often from your store.

Loyal Customers-

It is the list of those customers whose Frequency and Recency of order is 5. It is the list that exhibits customer loyalty when they consistently purchase a certain product or brand over an extended period of time and describes the loyalty which is established between a customer and companies.

Churning Customers-

It is the list of those customers whose Monetary and Order frequency is 5 but Recency is 1. The churning rate, also known as the rate of attrition, it is the percentage of subscribers to a service who discontinue their subscriptions to the service within a given time period.

Low-Value Lost Customers-

It is the list of those customers whose Recency, Frequency & Monetary is 1. These are the customer who is on the verge of getting lost as their engagement with the website is very low.

New Customers-

This list shows new contact whose Frequency and Recency is 1. They are the new customer they are not yet engaged with your website.

Customers Needing Attention-

In this list, Monetary and Frequency of the customer are 3 but Recency lies between 1 & 2. This list shows that the customer has spent time and money both on your website but his last order was long-ago.

About to Sleep-

It is the list in which customers whose Recency Frequency and Monetary (RFM) value lie between 1 & 2 and they are about to sleep. It means that their engagement with your website is getting less on each successive day.

Mid Spenders-

This list shows the contact property whose Monetary rating is equal to 3. It means that he not frequently buying from your store.

Low Spenders-

This list shows the contact property whose Monetary rating is equal to 1. It notifies that your customer is not spending much on your store.

Newsletter Subscriber-

It will list all those newsletter subscribers who have subscribed for a printed report containing news (information) of the activities of a business or an organization (institutions, societies, associations) that is sent by mail regularly to all its members, customers, employees or people, who are interested.

One Time Purchase Customers-

It will list all those customers whose total number of orders is 1. As the list shows, the total number of orders is 1, so you have to work hard on these customers and start nurturing them and educate them about your product and services.

One Time Purchase Customers-

It will list all those customers whose total number of orders is 1. As the list shows, the total number of orders is 1, so you have to work hard on these customers and start nurturing them and educate them about your product and services.

Two-Time Purchase Customers-

It will list all those customers who have brought only 2 times from your store. You can pay special attention to those customers as they are interested but you have to educate them about your product and service.

Three-Time Purchase Customers-

It will list all those customers who have purchased only three times from your store. You can encourage them to buy more frequently.

Bought Four or More Times-

It will list all those customers who have purchased 4 times from your store. You can provide special benefits to those customers.

Leads-

It will list all those leads who have indicated interest in your company’s product or service in some way, shape, or form.

Marketing Qualified Leads-

It will enlist all those marketing qualified lead (MQL) who has been deemed more likely to become a customer compared to other leads. This qualification is based on what web pages a person has visited, what they’ve downloaded, and similar engagement with the business’s content.

Customers-

This list will enroll customers according to their customer’s lifecycle stage. Whenever any customer’s lifecycle changes it would filter all those customers.

Engaged Customers-

Engaged Customers is the smart list of HubSpot that will list all your contacts whose last brought item is less than 60days. It will show the list of your loyal and regular customers.

Disengaged Customers-

Disengaged Customers is the smart list where you can see the list of customers that didn’t reach you from more than 60-180 days. It is the most useful list where you can target those customers who are disengaged for a long period of time.

Repeat Buyers-

Repeat Buyers is the smart list of HubSpot which helps to segment customers those who shop on your store regularly and their HubSpot property **Average days between orders** is also under the count of 30 days.

6. HubSpot Workflows

MQL to Customer lifecycle stage Conversion –

Aims at nurturing the marketing qualified leads (MQLs) of your store and focus on converting them to customers. The workflow automatically creates a well automated series of emails and send them to the MQLs at an appropriate time. On the other hand, the other workflows help in tracking the leads and customer’s conversion rates as well.

Welcome New Customer & Get the 2nd Order –

focuses on getting second order from the same customer after they place the very first order on your store. The workflow sends the **First Order ThankYou** mail with **getting Second-Order** mail to the customer repeatedly at appropriate delays. It also tracks and sets the current ROI campaign for the customer.

2nd Order Thank You & Get the 3rd Order-

Focuses on getting third order from the same customer after they place their second order on your store. The workflow sends the **Second Order ThankYou** mail with **getting Third Order** mail to the customer repeatedly at appropriate delays. It also tracks and sets the current ROI campaign for the customer. Basically the workflows, however, manage to make all your customers as repeat customers.

3rd Order Thank You –

Focuses on keeping your customers happy and delighted. It sends the customer an automated **Third Order ThankYou** email on placing a successful order third time on your store.

ROI Calculation-

Helps in calculating the Return On Investment(ROI) for different campaigns such as MQL Nurturing, Welcome New Customer and Get 2nd Order and so on. The workflow checks for the contact's current ROI campaign and accordingly sets the campaign conversion date, status and amount for the contact on getting a new order. The workflow focuses on full tracking of contact conversion through different campaigns triggered.

Order Workflow-

captures the new order of Magento store and checks for last order value and last order date. When any customer's property last order date and last order value is found to be known it changes the contact lifecycle stage to Customer on HubSpot and enrolls the contact to **ROI Calculation** workflow. The workflow basically works whenever a contact's new order comes to HubSpot and manages their HubSpot lifecycle stage.

Set Order Recency 1 Ratings –

Sets the HubSpot contact property **Order Recency Rating** to **1** if contact's custom HubSpot property **last order date** is more than **360 days ago**. It means that the customer hasn't made any order in your store for almost one year. And whenever any contact is found active in **Order Workflow**, then it gets removed from the existing workflow and this leads to workflow's goal achievement.

Set Order Recency 2 Ratings –

Sets the HubSpot contact property **Order Recency Rating** to **2** if contact's custom HubSpot property **last order date** is between **180 to 360** days ago. It means that the customer hasn't made any order in your store for at least six months. And whenever any contact is found active in **Order Workflow**, then it gets removed from the existing workflow and this leads to workflow's goal achievement.

Set Order Recency 3 Ratings –

Sets the HubSpot contact property **Order Recency Rating** to **3** if contact's custom HubSpot property **last order date** is between **90 to 180** days ago. It means that the customer hasn't made any order in your store for at least three months. Actually these are the customers that require some attention from your side. And whenever any contact is found active in **Order Workflow**, then it gets removed from the existing workflow and this leads to workflow's goal achievement.

Set Order Recency 4 Ratings –

Sets the HubSpot contact property **Order Recency Rating** to **4** if contact's custom HubSpot property **last order date** is between **30 to 90** days ago. It means that the customer hasn't made any order in your store for at least one month. Actually these are the customers that can be really valuable for your store. And whenever any contact is found active in **Order Workflow**, then it gets removed from the existing workflow and this leads to workflow's goal achievement.

Set Order Recency 5 Ratings –

Sets the HubSpot contact property **Order Recency Rating** to **5** if contact's custom HubSpot property **last order date** is **30 days** ago. It means that the customer has made his/her last order on your store within one month. These are the customers that were recently active on your store .

Update Historical Order Recency Rating –

Works to manage the real-time **Order Recency Rating** of the customer. Automatically sets the rating by checking their last order date and enrolls to specified workflow such as **Set Order Recency 5 Ratings –** or **Set Order Recency 4 Ratings –** for further processing. It means the workflow will take care of the customer's Order

Recency Rating on HubSpot even if they do not shop regularly.

After Order Workflow-

Captures the new order of HubSpot contact and then decides the contact enrollment to different campaign workflows such as **Welcome New Customer and Get 2nd Order** or **Third Order ThankYou.** The workflow automatically enrolls the contact to different campaign workflows and again gets ready for further order decisions.