Lumerate Hubspot App Setup Instructions

Connecting your HubSpot Account (once per HubSpot Account)

1. Visit the Lumerate app on the HubSpot Marketplace.
2. Click “Install”
3. Click “Next” then click “Sign in”.
4. You’ll be redirected to a Lumerate page where you’ll select which Lumerate System you’d like to connect to (Zymewire, Zapyrus, Crofter, etc.)
5. Select your HubSpot account
6. You’ll be redirected into the system of your choice.

Signing In

1. Navigate to the Log in page for the Lumerate App (Zapyrus or Zymewire).
2. Click the **"Sign in with HubSpot"** button.
3. Log in using your HubSpot credentials.

Verifying CRM Sync

1. On the “Search” page, Hubspot icons displayed on event panels indicate whether or not a company exists within your Hubspot account.
2. A grey icon indicates that no company record exists in your Hubspot. An orange icon indicates that a matching company record does exist.

Filtering your Search

1. Within the filters panel on the left hand side of the screen, navigate to the “Company Relationship” section.
2. Selecting the “Companies in your CRM” filter should cause the events feed to refresh, only displaying events coming from companies that exist in the users CRM (all Hubspot logos within event panels should be orange).
3. Selecting the “Neglected” filter (Neglected Sponsors in Zymewire, Neglected Medtech Companies in Zapyrus), will trigger the feed to refresh and only show
    a. Companies that don’t have an existing company record in Hubspot.
    b. Companies with no activity logged against them in the last 6 months.

Adding a Company to Hubspot (From Feed and List)

1. Within an event panel, or next to a company name within a list, click on a grey Hubspot icon (representing a company not in your CRM).

2. An “Adding to HubSpot” window will pop up, with some record fields automatically filled out.
3. Fill in any additional fields (Optional).
4. Select “Add company to Hubspot” in the bottom right corner of the panel.

Adding a Company to Hubspot (From Company Dashboard)

1. Click on a company name from the events page, or from a list to be brought to that company’s dashboard.
2. Scroll down to the “HubSpot Details” section, or select it from the top panel.
3. If the company does not exist in your CRM, click “Add to company to Hubspot”.
4. If a record in your CRM already exists, you’ll be shown account details (Name, Account Owner, Number of Deals & Last Modified Date).