

HubSpot + ConnectWise CRM Integration

Cloud-based Integration-as-a-Service
From a Hubspot Elite Partner



Company Story

SyncSmart is a cloud-based Integration-Platform-as-a-Service provider, backed by Lynton, a HubSpot Elite partner founded in 1999.

As the product arm of Lynton, SyncSmart provides a variety of hassle-free, self-serviced CRM/ERP integrations and apps, as well as managed support packages.



- HubSpot Onboarding & Training
- Marketing Strategy & Implementation
- Website Design/Development



- Integration Development
- Self Service Integration
- Support
- Most Popular Apps: NS, CW, DYN, WIX, Classy

Integration Overview



Integration Benefits & Use Cases

Keep your data aligned with a ConnectWise & HubSpot Integration

- Bi-directional syncing of certain object mappings
- Elimination of manual work and improved data quality
- Enhanced insight for sales and marketing into each other efforts
- Stronger lead scoring, prioritization, and personalization of marketing content
- 360 degree view of your entire customer journey though closed loop reporting

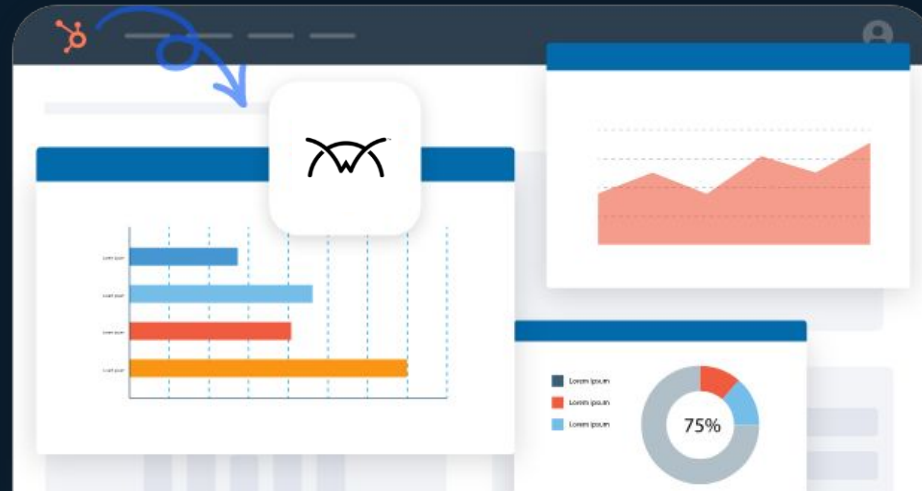


Integration Benefits & Use Cases Cont'd

- Manage sales process in HubSpot
 - Send deal information to ConnectWise
 - Track communication with leads and clients
 - Quote out of HubSpot
- Manage partner relationships
- Utilize HubSpot marketing automation
 - Segment customers by list
 - Cross-sell and cross-promote
 - Leverage products and line items
 - Create specific onboarding campaigns with product and service information
- Optimize paid ads
 - Tap into HubSpot's ad tool with ConnectWise information
 - Create a lookalike audience from the client list
 - Automate activities based on prospect engagement with ads
- Reporting
 - Products or services sold
 - Opportunity reporting
 - Revenue and marketing attribution reporting
 - Executive level reporting
 - Sales rep activities
 - MRR/ARR

Instant Access to HubSpot Analytics in ConnectWise

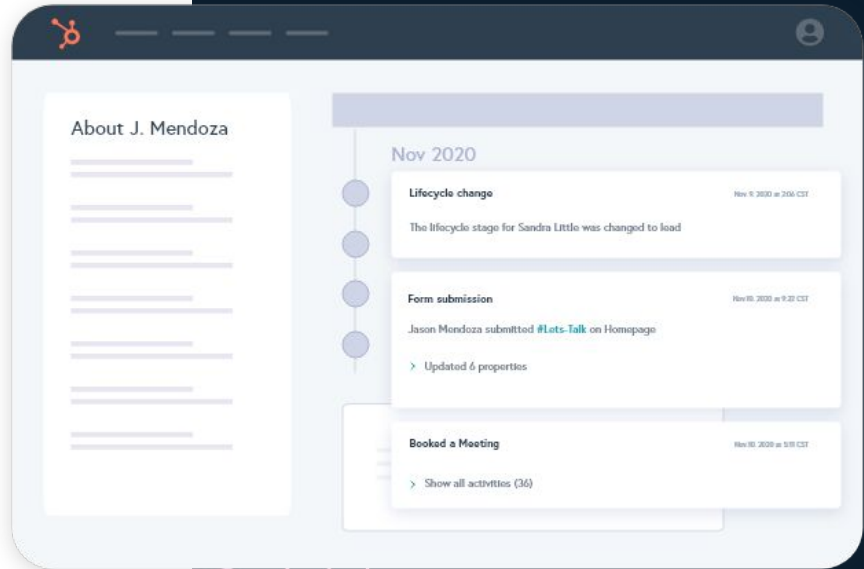
All the context your CRM users need from HubSpot analytics and tracking are at their fingertips



Sync ConnectWise Data Back to HubSpot

Reach your contacts at the right time by segmenting and marketing to them based on synced ConnectWise data.

Valuable information like customer status, assigned sales rep, and other key information syncs directly to HubSpot for use in lead scoring, smart lists, workflows, content personalization, and more.



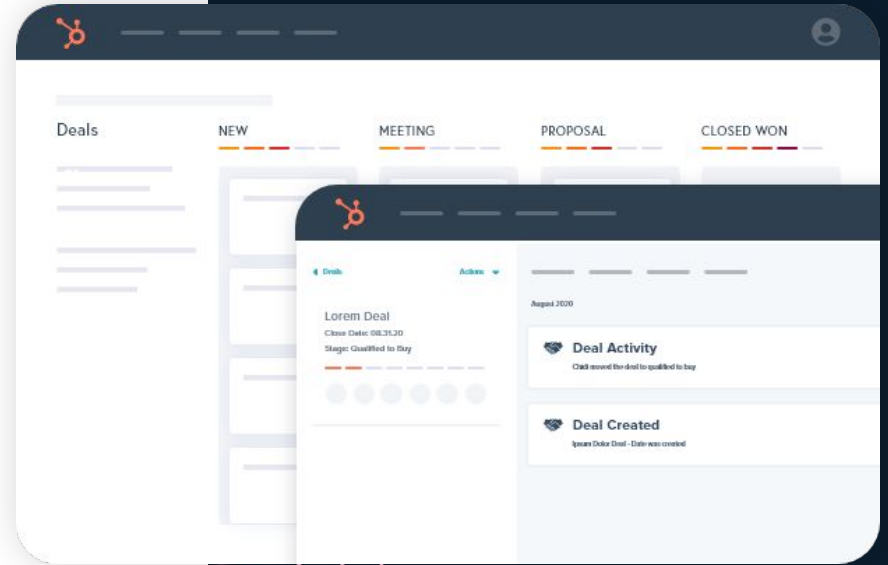


Sync Data Bi-Directionally

Keep information flowing in real-time from one system to the other through supported object mappings.

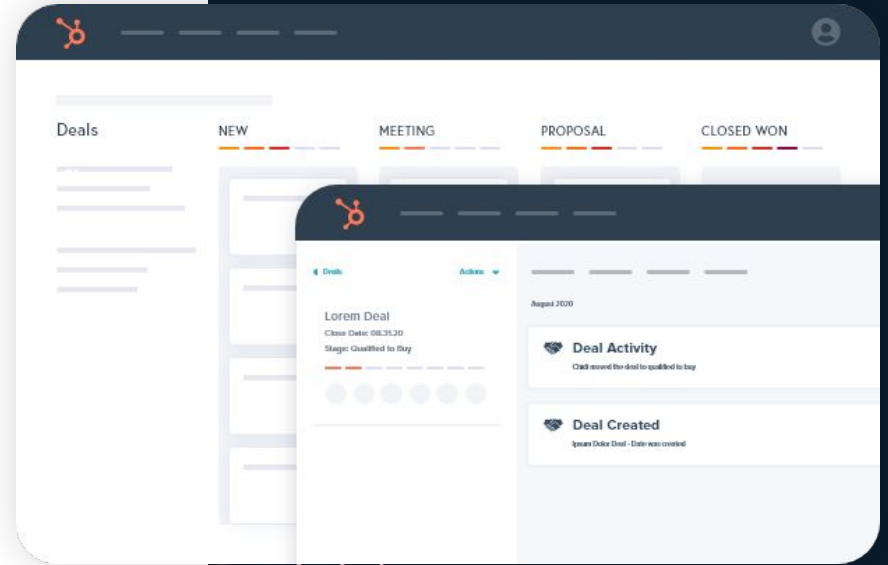
Keep a pulse on sales activities and opportunity movement

Help move the sales needle forward by syncing ConnectWise opportunities to HubSpot deals. You'll gain the visibility you need into your entire sales pipeline for better reporting and automation in HubSpot with the data gathered from ConnectWise.



Closed Loop Reporting

Everything that syncs between HubSpot and ConnectWise can help you close the loop on lifecycle stages, revenue, and deals. Maximize HubSpot's reporting dashboard by syncing customer status to opportunity data and following along with a lead's customer journey.

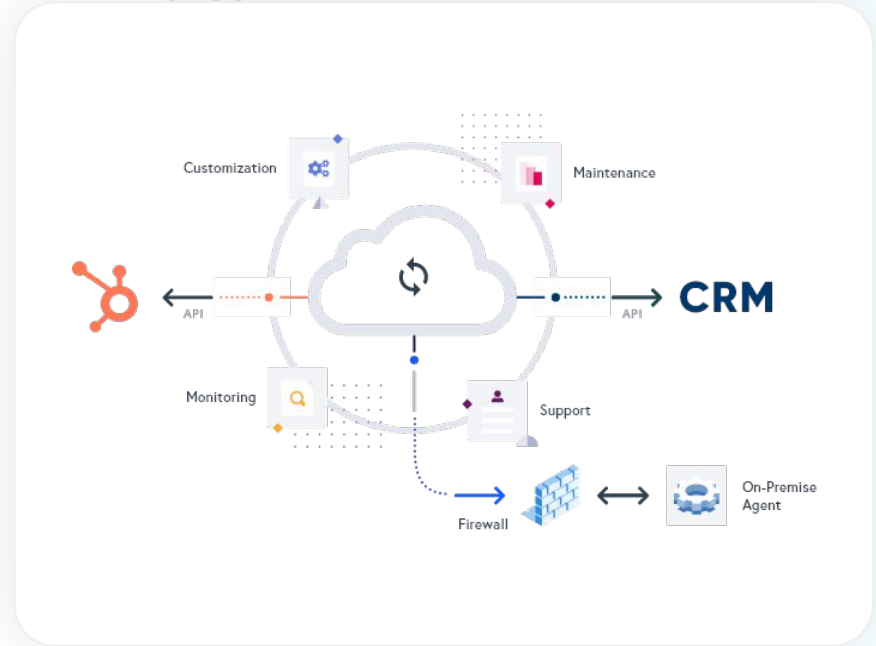




Our Technology & Approach

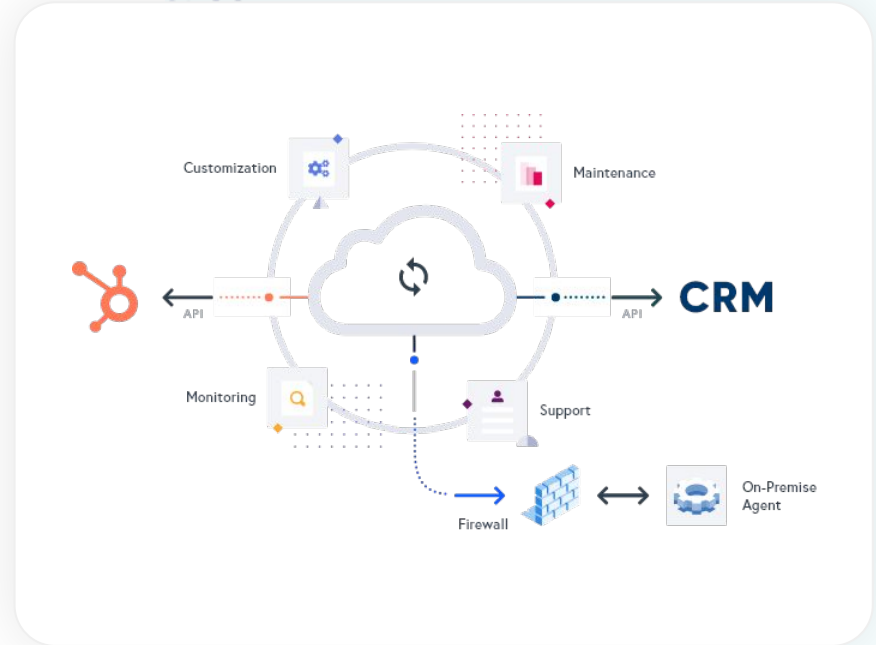
Enterprise Integration Platform

- Cloud-based platform in Microsoft Azure and Amazon AWS
- No restrictions on bandwidth or connections. We sync billions of records per month
- Codeless platform - no custom software development
- Dedicated secure environment, 100% SSL
- Real time, Point A to Point B Connection. No storing or mirroring of your data



Enterprise Integration Platform Cont'd

- HubSpot API connection is OAuth token-based authentication
- ConnectWise polls for new and updated entity records every 5 mins and will send those changes to HubSpot in near-real time
- HubSpot runs on a batch scheduled with a 5 minute default schedule
- SyncSmart maintains HubSpot and ConnectWise connectors to stay up to date with any security, technical, or performance updates



Integration Capabilities

ConnectWise <> HubSpot



Our Processes & Integration Team

The Implementation Consultant Process

Want to integrate but want support along the way?
With our guided implementation consultant process, you'll work with a team of friendly experts.

Why choose this route?

- Years of HubSpot experience
- Expertise in numerous CRMs, ERPs, and other platforms
- Hundreds of certifications in all types of technology
- Available for live Zoom and other training
- Extensive user-acceptance testing to ensure integration accuracy
- Ongoing support with managed support packages

Your Team

Since our company's inception, we've onboarded experienced solution architects to expand our CRM integration offerings as well as polish our processes — working with customers along the way.

Your integration team of project managers, solution architects, developers, and support will do the heavy lifting while you focus on your integrated inbound marketing strategy. Your team will be focused on certain aspects of your project solely to ensure your integration is truly built for you.



**Project
Implementation
Specialist**



Developers



Support

What the Implementation Process Looks Like



How Long Does That Take?

Anyone going through the implementation process can expect to launch their integrations within six to 12 weeks – depending on a number of factors, such as how involved you are with the process. Being active throughout your timeline – particularly the testing phase – can speed your process up significantly.





Coming Soon: DIY SyncSmart User Interface (UI)

What is the UI?

The SyncSmart UI is an easy-to-use web application that allows you to configure object and field mapping data on your own.

You can:

- Set up your integration yourself
- Manage, review, and edit field mappings
- Specify/control sync direction
- Disable or remove any field mappings
- Edit and enter data filter criteria
- Edit billing information as needed
- Add descriptions to object and field mappings
- View past field mappings
- Revert to previous sync settings

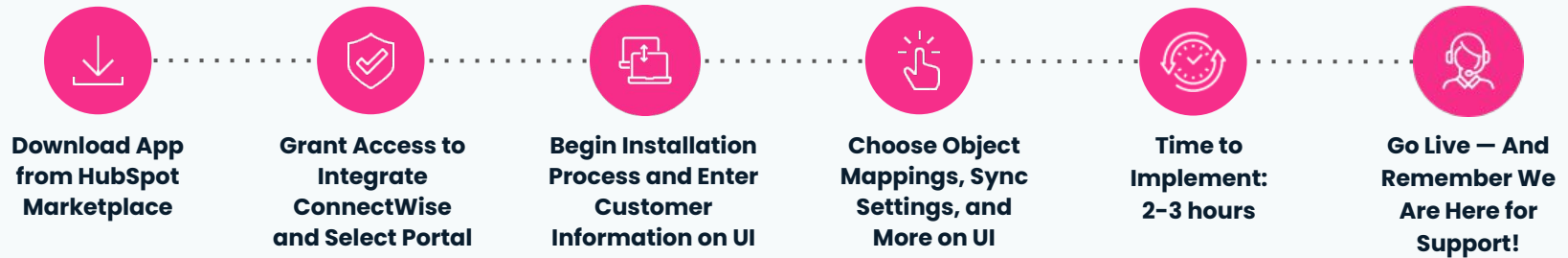
Object Mappings

Hubspot contact to ConnectWise contact Version: 0 [See Versions](#) [Edit](#)

HubSpot Filter CRM Filter

HUBSPOT FIELDS		CRM FIELDS	OPTIONS
First Name	↔	First Name	
Last Name	↔	Last Name	
Email	↔	Email	
Phone Number	↔	Direct Phone Number	
Mobile Phone Number	↔	Mobile Phone Number	
Job Title	↔	Title	
ConnectWise Contact ID	←	Rec ID	

User Interface (UI) Process



Additional Custom Integration Capabilities

- 3rd party ERP, SQL, CSV, API custom data feeds to and from Hubspot
- Control your integration syncing needs on a field by field level
- Hassle free ongoing maintenance and support for your integration
- Create custom CRM extensions for your CRM objects
- True system of record




Support You Can Trust

How We Help

- Proactive maintenance and monitoring of all integrations
- Updates and support for all API connectors
- Dedicated support team to answer questions and make changes to field mappings
- No software to license or maintain



Managed Support Packages

 hello@syncsmart.io

 support.syncsmart.io

Our support is delivered through our ticketing system or email during business hours of:

9 a.m. – 6 p.m. U.S. CT Monday through Friday, excluding U.S. holidays.

	Basic Support \$0	Premium Support \$500/mo
Email-Based Ticketing and Support Portal	☑	☑
Knowledge Base	☑	☑
Support Cases	☑	☑
Field Mapping Updates		☑
Monthly Support Calls		☑
Proactive Monitoring for Downtime, Troubleshooting, and Break-Fix Issues		☑



HubSpot + Connectwise Onboarding Packages

Use Case	Sales Hub Setup	Training	Requirements
<ul style="list-style-type: none"> -Manage Sales Process in CW -Closed Loop Reporting in HS 	<ul style="list-style-type: none"> -Deal Pipeline, Stages, Properties -Dashboards/ Reporting 	<ul style="list-style-type: none"> -Dashboards/ Reporting 	<ul style="list-style-type: none"> -Sales Hub (Any Tier) -CW Contacts <> HS Contacts -CW Companies <> HS Companies -CW Opportunities <> HS Deals
<ul style="list-style-type: none"> -Manage Sales Process in HS 	<ul style="list-style-type: none"> -Contact Segmentation Process -Assignment Automation -Sales Enablement Setup -Deal Creation Process -Deal Pipeline, Stages, Properties -Deal Automation -Dashboards/ Reporting 	<ul style="list-style-type: none"> -Sales Enablement Tools -Deal Object -Dashboards/ Reporting 	<ul style="list-style-type: none"> -Sales Hub (Any Paid Tier) -CW Contacts <> HS Contacts -CW Companies <> HS Companies -CW Opportunities <> HS Deals
<ul style="list-style-type: none"> -Quoting in HS 	<ul style="list-style-type: none"> -Quote Template -Product Library 	<ul style="list-style-type: none"> -Quoting Tool -Products Tool 	<ul style="list-style-type: none"> -Sales Hub (Pro or Enterprise) -CW Product Catalog <> HS Product Libra

Use Case	Sales Hub Setup	Training	Requirements
Manage Sales Process in CW Closed Loop Reporting in HS	<ul style="list-style-type: none"> Deal Pipeline, Stages, Properties Dashboards / Reporting 	<ul style="list-style-type: none"> Dashboards / Reporting 	<ul style="list-style-type: none"> Sales Hub (Any Tier) CW Contacts <> HS Contacts CW Companies <> HS Companies CW Opportunities <> HS Deals
Manage Sales Process in HS	<ul style="list-style-type: none"> Contact Segmentation Process Assignment Automation Sales Enablement Setup Deal Creation Process Deal Pipeline, Stages, Properties Deal Automation Dashboards / Reporting 	<ul style="list-style-type: none"> Sales Enablement Tools Deal Object Dashboards/ Reporting 	<ul style="list-style-type: none"> Sales Hub (Any Paid Tier) CW Contacts <> HS Contacts CW Companies <> HS Companies CW Opportunities <> HS Deals
Quoting in HS	<ul style="list-style-type: none"> Quote Template Product Library 	<ul style="list-style-type: none"> Quoting Tool Products Tool 	<ul style="list-style-type: none"> Sales Hub (Pro or Enterprise) CW Product Catalog <> HS Product Library CW Forecast <> HS Line Items
Recurring Revenue Tracking in HS (ARR)	<ul style="list-style-type: none"> Recurring Revenue Tracking 	<ul style="list-style-type: none"> Recurring Revenue Training 	<ul style="list-style-type: none"> Sales Hub Enterprise CW Opportunities <> Deals CW Product Catalog <> HS Product Library CW Forecast <> HS Line Items



Let's Get Started

www.syncsmart.io • [SyncSmart Support & FAQ](#) • 877.596.8669

