



FONREACH Manual

Hubspot Integration

V. 1.3

Date: 23. April 2017

Author: Miles Becker

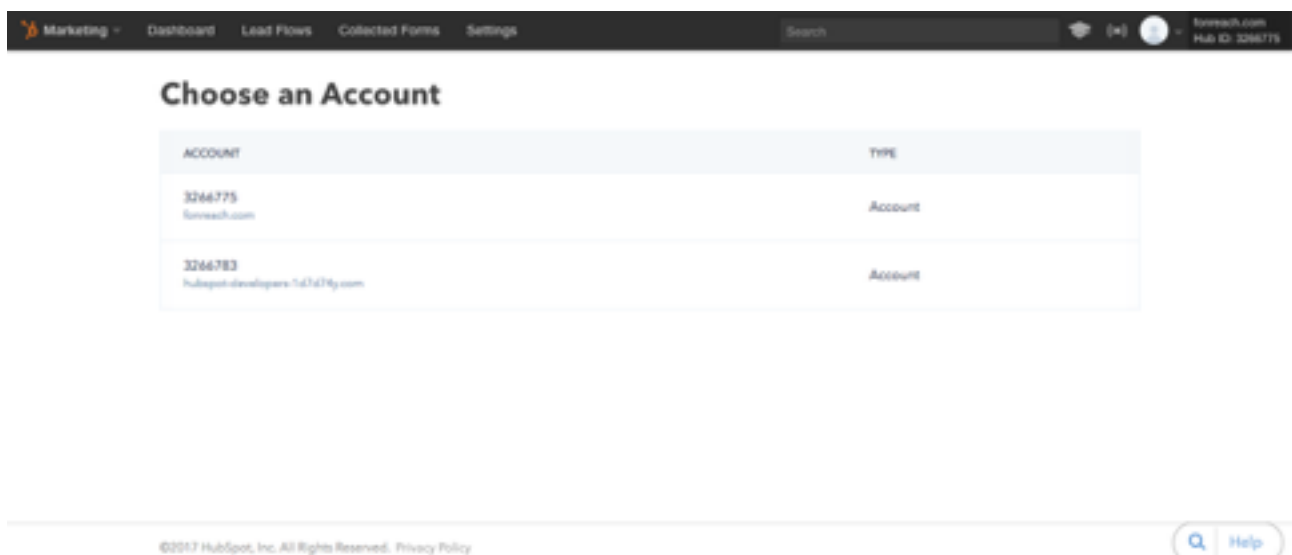
1. Connect FONREACH to your Hubspot Portal

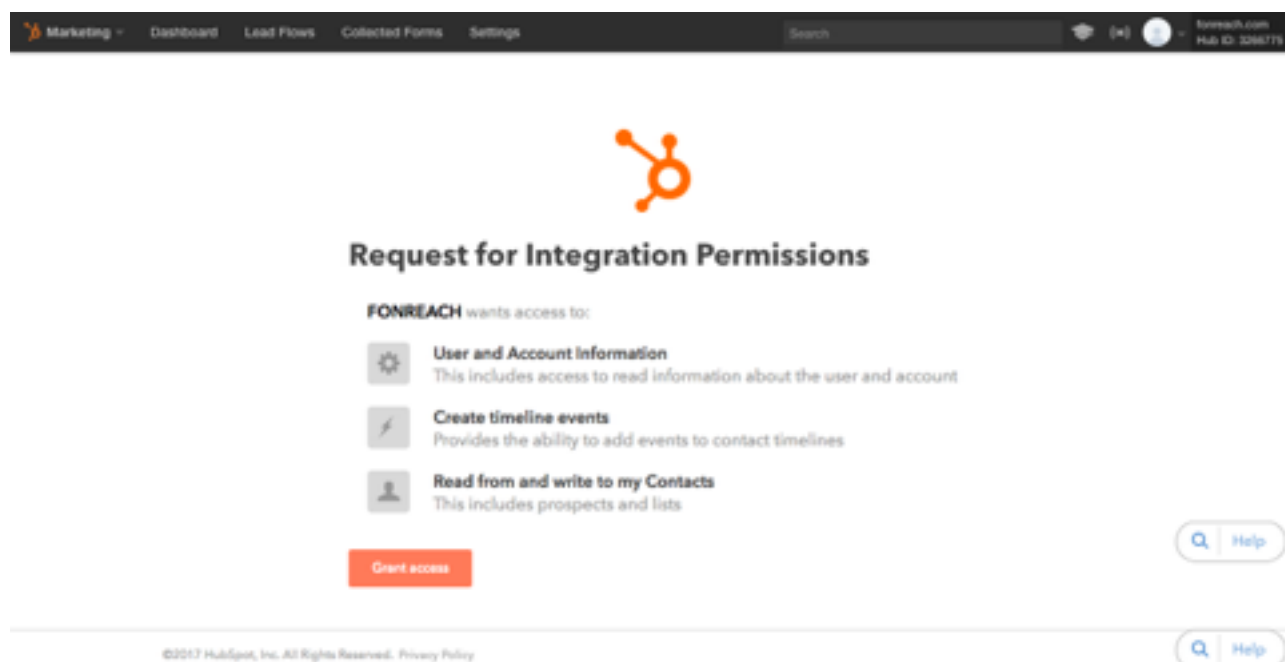
1.1 Enable Hubspot

To enable Hubspot simply click “System Settings” + “External Applications”. Select Hubspot from the selection:

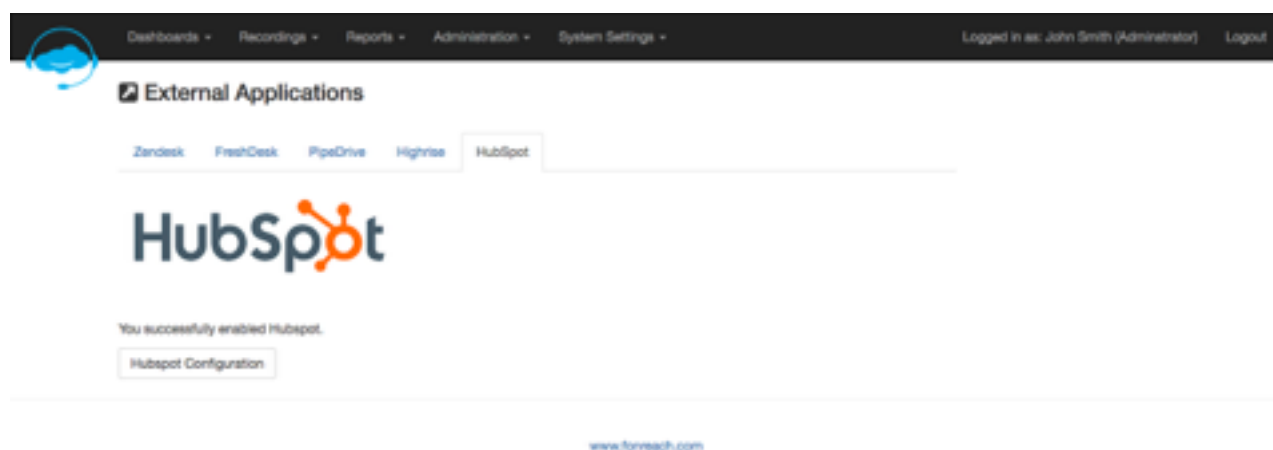


Please click the “Hubspot Access” button. You will be redirected to your Hubspot account. Please select for which Hubspot portal you like to enable FONREACH (in case you have multiple portals):





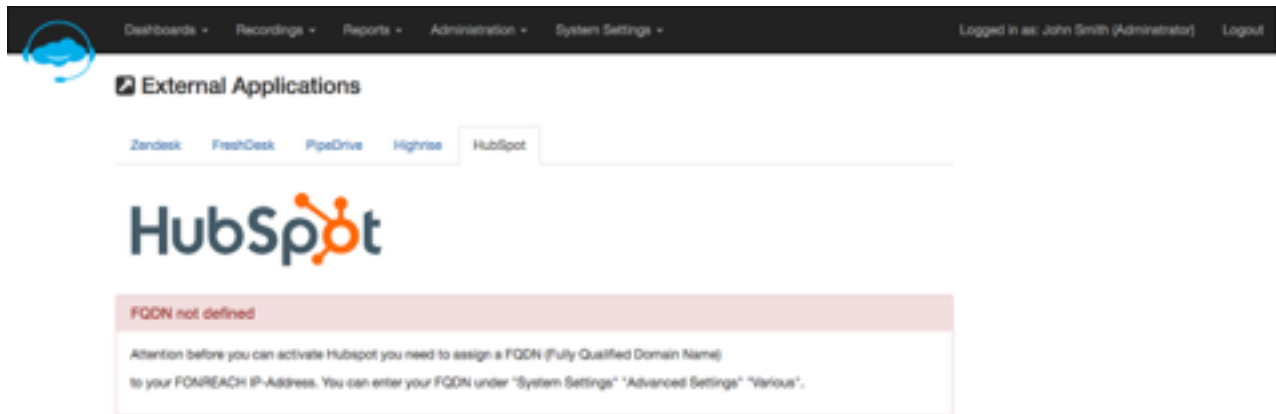
Please press “Grant Access” to allow FONREACH to communicate with your Hubspot Portal via Hubspot API.
You will be redirected back to FONREACH.



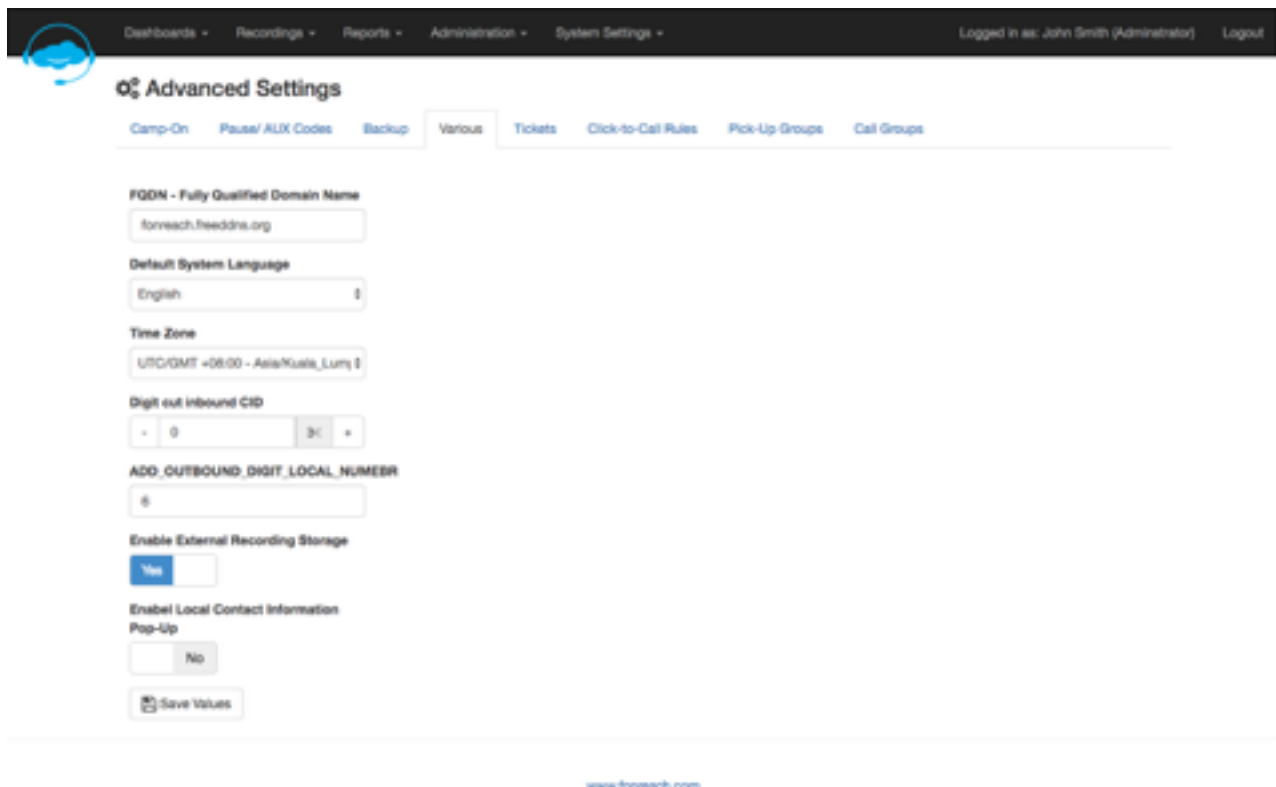
You can now start enabling FONREACH and Hubspot specific integration features by clicking “Hubspot Configuration”.

1.2 FQDN - Fully Qualified Domain Name

Hubspot needs a fully qualified domain name to communicate with FONREACH. Hubspot is not able to communicate with your FONREACH droplet via IP-address.



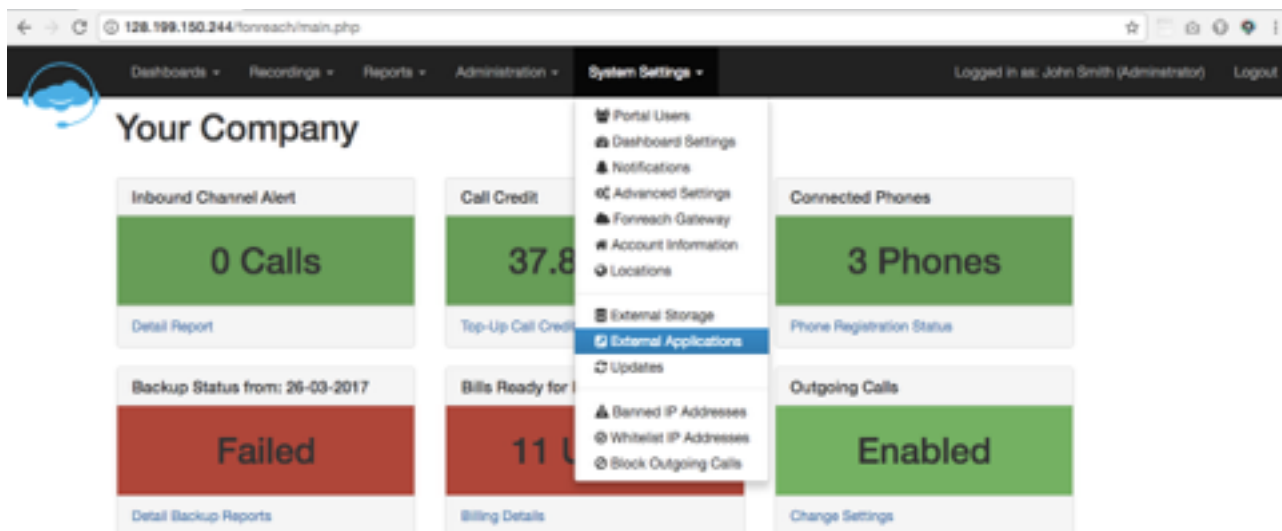
Please enter your FQDN under “System Settings” + “Advanced Settings” + “Various”:



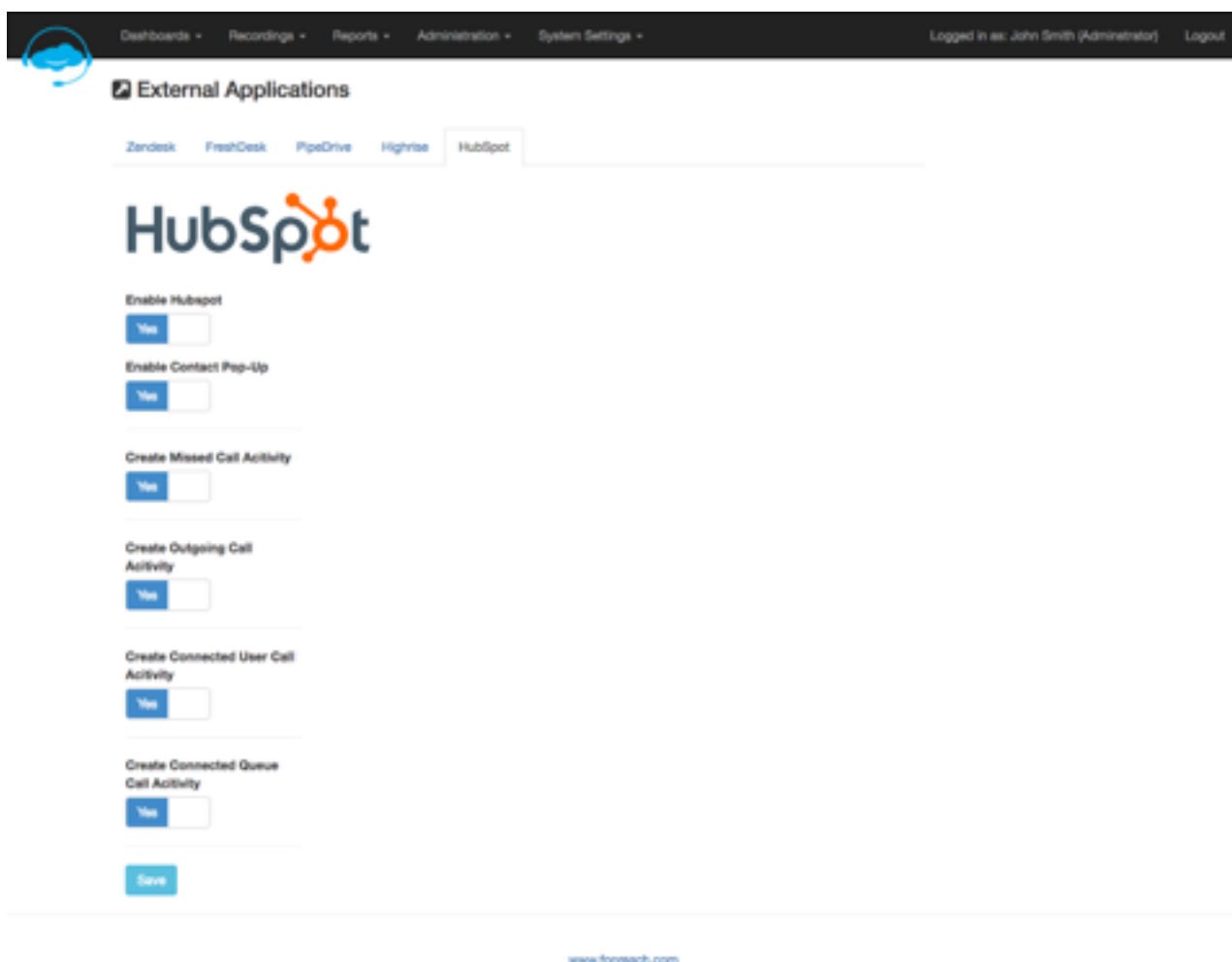
Please save values by clicking “Save Values”.

1.3 Configure Fonreach Hubspot Settings

Please login into your FONREACH account and select “External Applications” from the “System Settings” menu options.

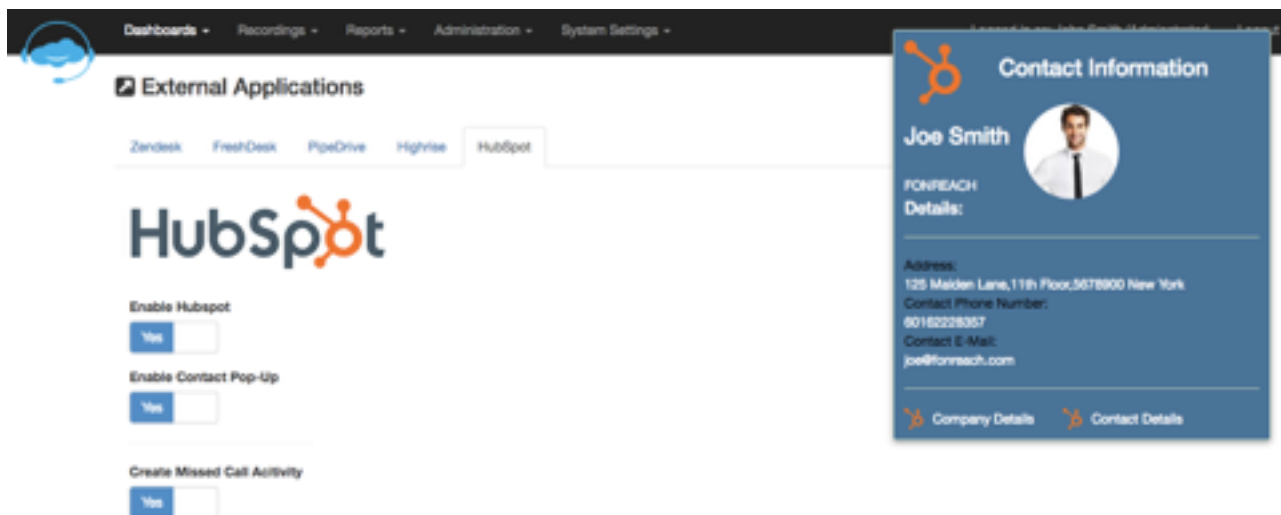


Select “Hubspot”.



1.3.1 Enable Contact-Pop-Up:

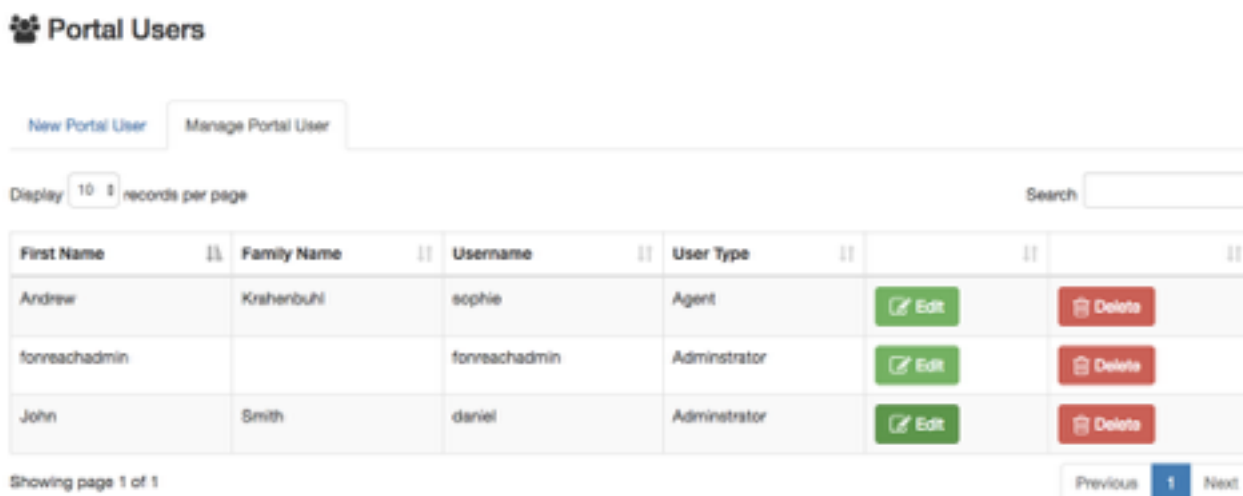
This functions controls if your agents receive a pop-up window in their browser for incoming calls. If the incoming call matches a Hubspot contact, the pop-up will display the respective information.



You also need to assign FONREACH portal user with a agent, to ensure the functioning of the pop-up.

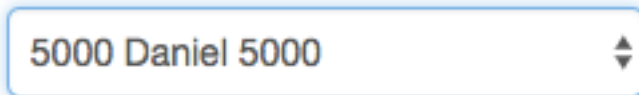
Assign FONREACH portal user to phone user by selecting “System Settings” and “Phones” from the menu.

Select the portal user by clicking the “Edit” button:



Select the phone User from the select box:

Assigned Phone User / Agent



And save the new settings with the “Save” button.

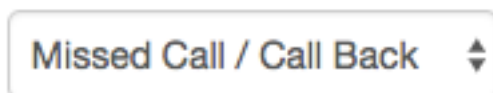
From now onwards the logged in user will receive pop-up notification if his/her phone is ringing.

1.3.2 Create Missed Call Activity:

Create Missed Call Activity



Missed call activity type



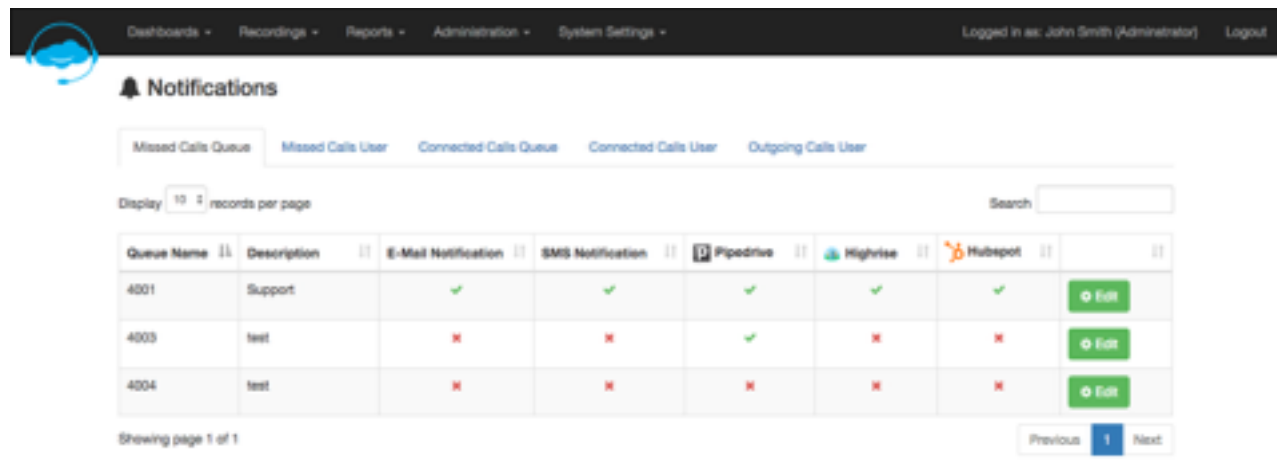
If this setting is enabled FONREACH will create a missed call activity/task in your Hubspot portal (if the incoming call number exist in Hubspot a activity on the specific user will be created, if not we will create a task for the respective Hubspot user)

Attention: You need to enable individual FONREACH users and call queues to create missed call activities as well you need to assign a Hubspot users for which the missed call activity is created.

1.3.3.1 Missed Call Queue Notifications

Select “System Settings” and “Notifications” from the top menu:

Choose “Abandoned Call Queue” and click the “Edit” button on the Queue on which you like to create a missed call activity in Hubspot:



The screenshot shows the FONREACH Notifications page. At the top, there's a navigation bar with links: Dashboards, Recordings, Reports, Administration, and System Settings. The user is logged in as John Smith (Administrator). Below the navigation bar, there's a section titled "Notifications" with tabs for Missed Calls Queue, Missed Calls User, Connected Calls Queue, Connected Calls User, and Outgoing Calls User. The "Missed Calls Queue" tab is selected. Below the tabs, there's a "Display" dropdown set to 10 records per page and a search bar. A table lists three call queues: 4001 (Support), 4003 (test), and 4004 (test). Each queue has columns for E-Mail Notification, SMS Notification, Pipedrive, Highrise, and Hubspot. Queue 4001 has all notifications enabled (green checkmarks). Queue 4003 has E-Mail and SMS notifications enabled, but Pipedrive, Highrise, and Hubspot are disabled (red X). Queue 4004 has all notifications disabled (red X). Each row has an "Edit" button. At the bottom, it says "Showing page 1 of 1" and has "Previous", "1", and "Next" buttons.

Queue Name	Description	E-Mail Notification	SMS Notification	Pipedrive	Highrise	Hubspot	
4001	Support	✓	✓	✓	✓	✓	Edit
4003	test	✗	✗	✓	✗	✗	Edit
4004	test	✗	✗	✗	✗	✗	Edit

Notification Details

Queue Name: 4001

E-Mail Notification

Yes

E-Mail Address

daniel@fonreach.com

SMS Notification

Yes

SMS Number

60162228357

Enable Hubspot

Yes

Hubspot User

Daniel Krahenbuhl

Save


Enable the Hubspot notification and select a Hubspot user under which you like to create the missed call queue task in Hubspot.

Select “Save” to store and activate the new settings. The respective Hubspot user will receive missed call notification task from now onwards.


If the incoming caller number is stored in your Hubspot portal the activity will have the correct organisation and contact assigned. If not, a task is created

for the assigned to the Hubspot user without the respective organisation or contact linked to it.

Hubspot Missed Queue Call Task:

 You created a task for yourself

Edit | Actions ▾


 **Missed Queue Call**


📅 04/22/2017 ⌚ 4:23 PM

Queue: 4001 Number: 60162228357

Type	Assigned to	Email reminder	Queue
To-do	Daniel Krahenbuhl	04/22/2017 at 4:23 PM	None

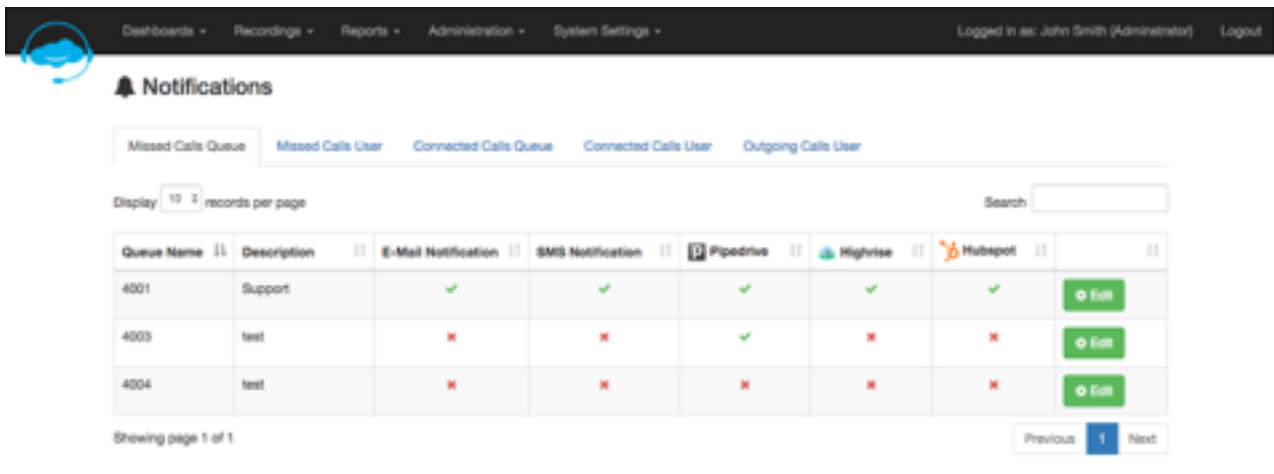
Associated Records

 Joe Smith

 FONREACH

1.3.3.2 Missed Calls User Notifications

Select “System Settings” and “Notifications” from the top menu:



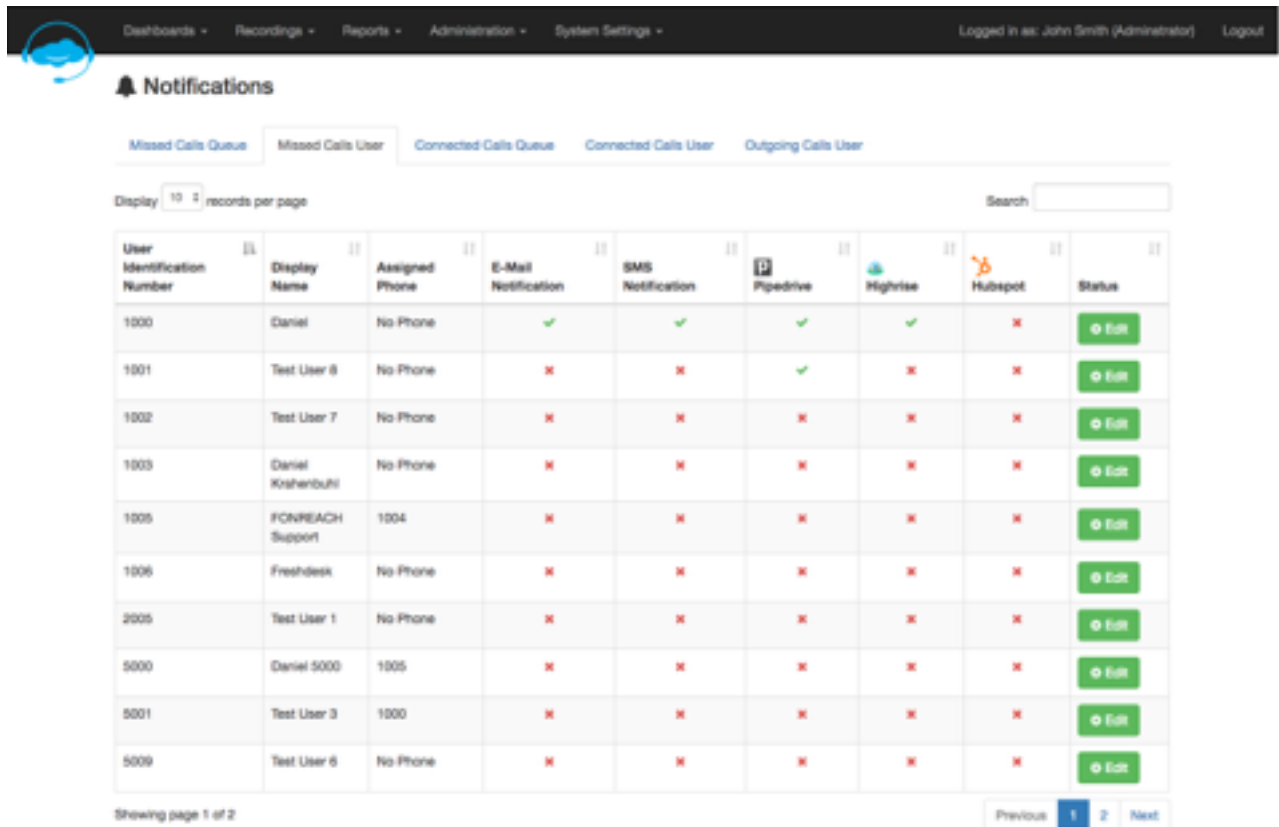
The screenshot shows the FONREACH interface with the top navigation bar containing: Dashboards, Recordings, Reports, Administration, and System Settings. The user is logged in as John Smith (Administrator). The main heading is "Notifications". Below it, there are tabs: Missed Calls Queue (selected), Missed Calls User, Connected Calls Queue, Connected Calls User, and Outgoing Calls User. A "Display 10 records per page" and a "Search" field are present. The table below lists queue configurations.

Queue Name	Description	E-Mail Notification	SMS Notification	Pipedrive	Highrise	Hubspot	
4001	Support	✓	✓	✓	✓	✓	Edit
4003	test	✗	✗	✓	✗	✗	Edit
4004	test	✗	✗	✗	✗	✗	Edit

Showing page 1 of 1

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Choose “Missed Call User” and click the “Edit” button on the user on which you like to create a missed call activity in Hubspot:



The screenshot shows the FONREACH interface with the top navigation bar. The user is logged in as John Smith (Administrator). The main heading is "Notifications". Below it, there are tabs: Missed Calls Queue, Missed Calls User (selected), Connected Calls Queue, Connected Calls User, and Outgoing Calls User. A "Display 10 records per page" and a "Search" field are present. The table below lists user configurations.

User Identification Number	Display Name	Assigned Phone	E-Mail Notification	SMS Notification	Pipedrive	Highrise	Hubspot	Status
1000	Daniel	No Phone	✓	✓	✓	✓	✗	Edit
1001	Test User 8	No Phone	✗	✗	✓	✗	✗	Edit
1002	Test User 7	No Phone	✗	✗	✗	✗	✗	Edit
1003	Daniel Kshenbuhl	No Phone	✗	✗	✗	✗	✗	Edit
1005	FONREACH Support	1004	✗	✗	✗	✗	✗	Edit
1006	Freshdesk	No Phone	✗	✗	✗	✗	✗	Edit
2005	Test User 1	No Phone	✗	✗	✗	✗	✗	Edit
5000	Daniel 5000	1005	✗	✗	✗	✗	✗	Edit
5001	Test User 3	1000	✗	✗	✗	✗	✗	Edit
5009	Test User 6	No Phone	✗	✗	✗	✗	✗	Edit

Showing page 1 of 2

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Notification Details ×

User Number: 5010

E-Mail Notification


☐ No

E-Mail Address

SMS Notification

☐ No

SMS Number

 Enable Hubspot

☒ Yes

Hubspot User

Milo Krahenbuhl

↓


Save


Enable the Hubspot notification and select a Hubspot user under which you like to create the missed call task in Hubspot.

Select “Save” to store and activate the new settings. The respective Hubspot user will receive missed call notification tasks from now onwards.

If the incoming caller number is stored in your Hubspot portal the task will have the correct organisation and contact assigned. If not, a task is created for the assigned to the Hubspot user without the respective organisation or contact linked to it.

Hubspot Missed Call Task:


 You created a task for Milo Krahenbuhl Edit | Actions


 **Missed Call** 04/21/2017 10:31 AM

You got a missed call
Number: 60162228357

Type	Assigned to	Email reminder	Queue
To-do	Milo Krahenbuhl	04/21/2017 at 10:31 AM	None

Associated Records

 Joe Smith

 FONREACH

1.3.4 Enable Outgoing Call Activity

Create Outgoing Call Activity

☒ Yes

If this setting is enabled FONREACH will create a outgoing call log activity in your Hubspot portal.

Attention: You need to enable individual FONREACH users to create outgoing call activities as well you need to assign a Hubspot user user witch the missed call activity is created.

1.3.4.1 Outgoing Calls User Notifications

Select “System Settings” and “Notifications” from the top menu:

The screenshot shows the FONREACH Notifications page. The top navigation bar includes 'Dashboards', 'Recordings', 'Reports', 'Administration', and 'System Settings'. The user is logged in as 'John Smith (Administrator)'. The 'Notifications' section is active, and the 'Outgoing Calls User' tab is selected. Below the tabs, there is a search bar and a 'Display 10 records per page' option. The main table lists users with their identification numbers, display names, assigned phones, and integration status for Pipedrive, Highrise, and Hubspot. The user 'Daniel Krahenbuhl' (ID 1003) is highlighted. The table also includes an 'Edit' button for each user.

User Identification Number	Display Name	Assigned Phone	Pipedrive	Highrise	Hubspot	Status
1000	Daniel	No Phone	✗	✗	✓	Edit
1001	Test User 6	No Phone	✓	✗	✗	Edit
1002	Test User 7	No Phone	✗	✗	✗	Edit
1003	Daniel Krahenbuhl	No Phone	✗	✗	✗	Edit
1005	FONREACH Support	1004	✗	✗	✗	Edit
1006	Freshdesk	No Phone	✗	✗	✗	Edit
2005	Test User 1	No Phone	✗	✗	✗	Edit
5000	Daniel 5000	1005	✗	✗	✗	Edit
5001	Test User 3	1000	✗	✗	✗	Edit
5009	Test User 6	No Phone	✗	✗	✗	Edit

Showing page 1 of 2

Choose “Outgoing Call User” and click the “Edit” button on the user on which you like to create a outgoing call activity in Hubspot:

Connected Call Notification

User Number: 1000

Enable Hubspot

☒ Yes

Hubspot User

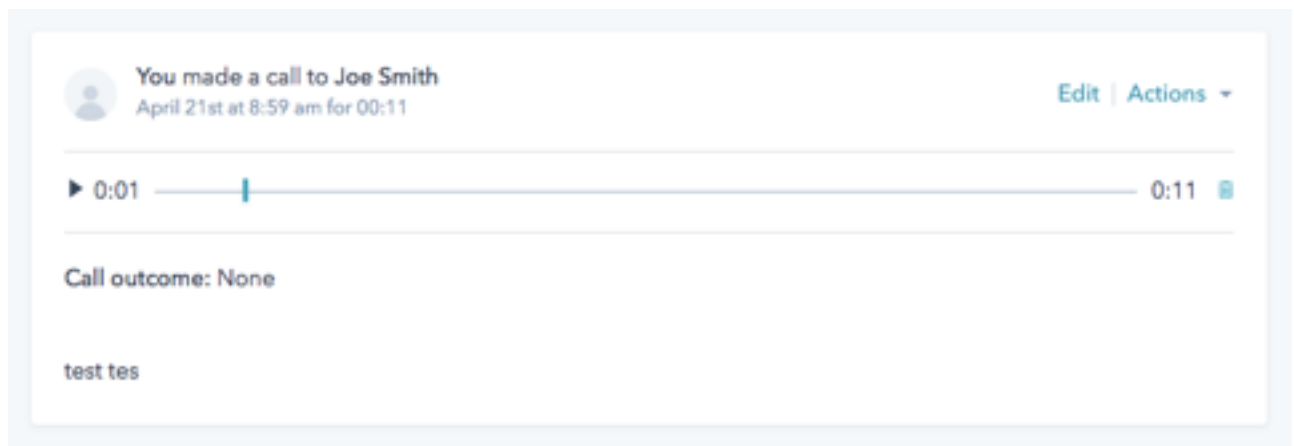
Milo Krahenbuhl

[Save](#)

Enable the Hubspot notification and select a Hubspot user under which you like to create the outgoing call activity log in Hubspot.

Select “Save” to store and activate the new settings. The respective Hubspot user will receive outgoing call notification activities from now onwards.

Hubspot Outgoing Call Activity:



If call recording is enabled in FONREACH you can directly listen to the call in Hubspot.

1.3.5 Create Incoming Connected Call User Activity

You can create a task in Hubspot for every connected call to a Fonreach extension / user.

Calls can be assigned to individual Hubspot users and tasks, therefore you can easily create reports in Hubspot and see how many calls a specific user received in a period of time.

The call recording are referenced as note in the Hubspot task.

Activate this functionality by clicking “Yes” on the “Create Connected User Call Activity” switch.

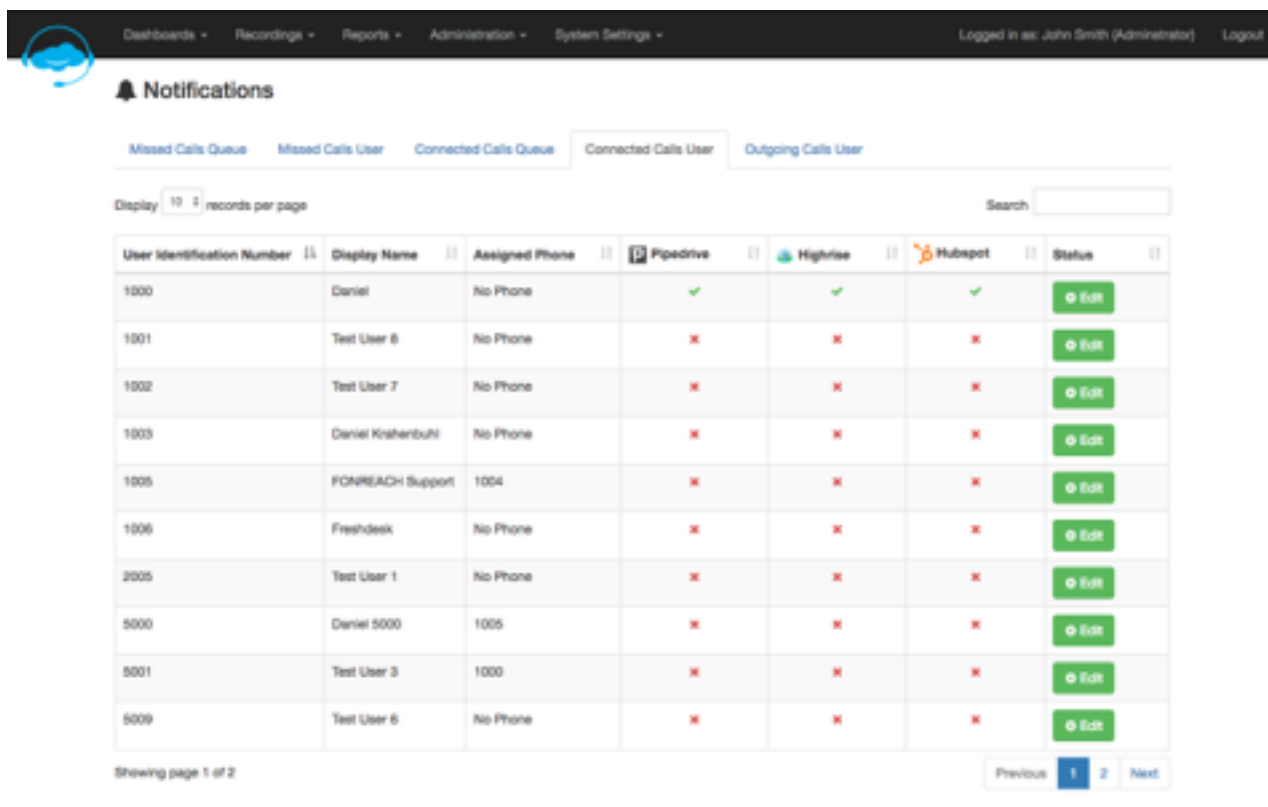
Then hit the “Save” button.

Create Connected User Call Activity

☒ Yes

1.3.5.1 Connected Calls User Notifications

Select “System Settings” and “Notifications” from the top menu.



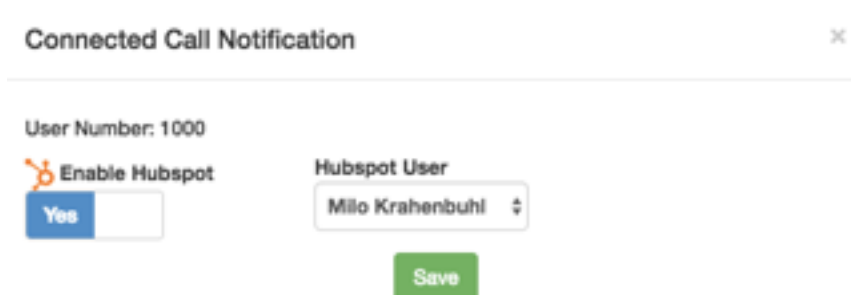
The screenshot shows the FONREACH interface with the 'Notifications' section selected. The 'Connected Calls User' tab is active, displaying a table of users and their integration status with various services.

User Identification Number	Display Name	Assigned Phone	Pipedrive	Highrise	Hubspot	Status
1000	Daniel	No Phone	✓	✓	✓	Edit
1001	Test User 6	No Phone	✗	✗	✗	Edit
1002	Test User 7	No Phone	✗	✗	✗	Edit
1003	Daniel Krahenbuhl	No Phone	✗	✗	✗	Edit
1005	FONREACH Support	1004	✗	✗	✗	Edit
1006	Freshdesk	No Phone	✗	✗	✗	Edit
2005	Test User 1	No Phone	✗	✗	✗	Edit
5000	Daniel 5000	1005	✗	✗	✗	Edit
5001	Test User 3	1000	✗	✗	✗	Edit
5009	Test User 6	No Phone	✗	✗	✗	Edit

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Choose “Connected Calls User” and click the “Edit” button on the user on which you like to create a connected call activity in Hubspot:



The form is titled 'Connected Call Notification' and is for User Number: 1000. It includes a checkbox to 'Enable Hubspot' (checked), a dropdown for 'Hubspot User' (Milo Krahenbuhl), and a 'Save' button.

User Number: 1000

☒ Enable Hubspot

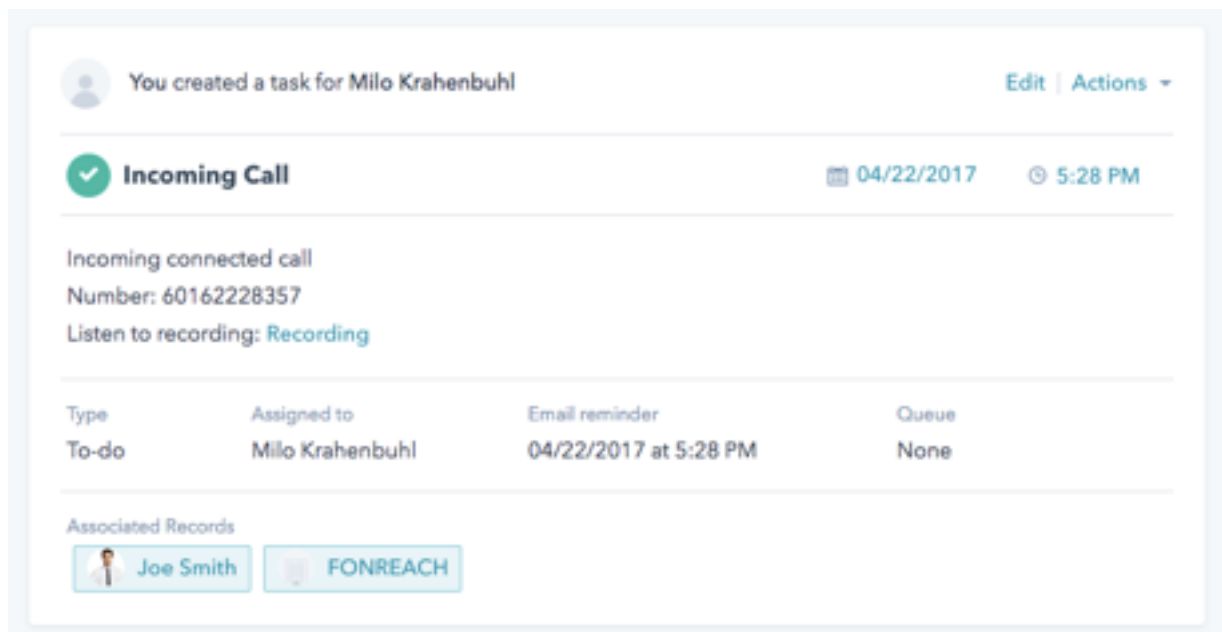
Hubspot User: Milo Krahenbuhl

[Save](#)

Enable the Hubspot notification and select a Hubspot user under which you like to create the connected call activity in Hubspot.

Select “Save” to store and activate the new settings. The respective Hubspot user will receive connected call notification activities from now onwards.

If the incoming caller number is stored in your Hubspot the task will have the correct organisation and contact assigned. If not, a task is created for the assigned to the Hubspot user without the respective organisation or contact linked to it.



The screenshot shows a HubSpot task card titled "Incoming Call". At the top, it says "You created a task for Milo Krahenbuhl" with "Edit" and "Actions" links. The task is marked with a green checkmark. It includes a calendar icon for "04/22/2017" and a clock icon for "5:28 PM". The description reads "Incoming connected call" and "Number: 60162228357", with a link "Listen to recording: Recording". Below this is a table with four columns: Type, Assigned to, Email reminder, and Queue. The row shows "To-do", "Milo Krahenbuhl", "04/22/2017 at 5:28 PM", and "None". At the bottom, under "Associated Records", there are two buttons: "Joe Smith" (with a person icon) and "FONREACH" (with a logo icon).

Type	Assigned to	Email reminder	Queue
To-do	Milo Krahenbuhl	04/22/2017 at 5:28 PM	None

If call recording is enabled in FONREACH the link to the call recording is attached to the activity. You can click the “Recording” link and a new browser window will display the respective recording.



The screenshot shows a web interface for a call recording. At the top, there's a navigation bar with links: "Dashboards", "Recordings", "Reports", "Administration", and "System Settings". It also shows "Logged in as: John Smith (Administrator)" and a "Logout" link. Below the navigation bar, the title is "Outgoing Calls Agent/User". The recording details show "Filesize: 62.86 KB" and "Duration: 00:00:06". The main area displays a blue audio waveform. At the bottom, there are controls: "Play / Pause", "Download", and "E-Mail". The URL "www.fonreach.com" is visible at the very bottom.

1.3.6 Create Incoming Connected Call User Activity

You can create a task in Hubspot for every connected queue call to a Fonreach extension / user.

Queue calls can be assigned to an Hubspot users and activities, therefore you can easily create reports in Hubspot and see how many calls a specific queue received in a period of time.

The call recording are referenced as HTML note in the Hubspot task.

Activate this functionality by clicking “Yes” on the “Create Connected Queue Call Activity” switch.

Then hit the “Save” button.

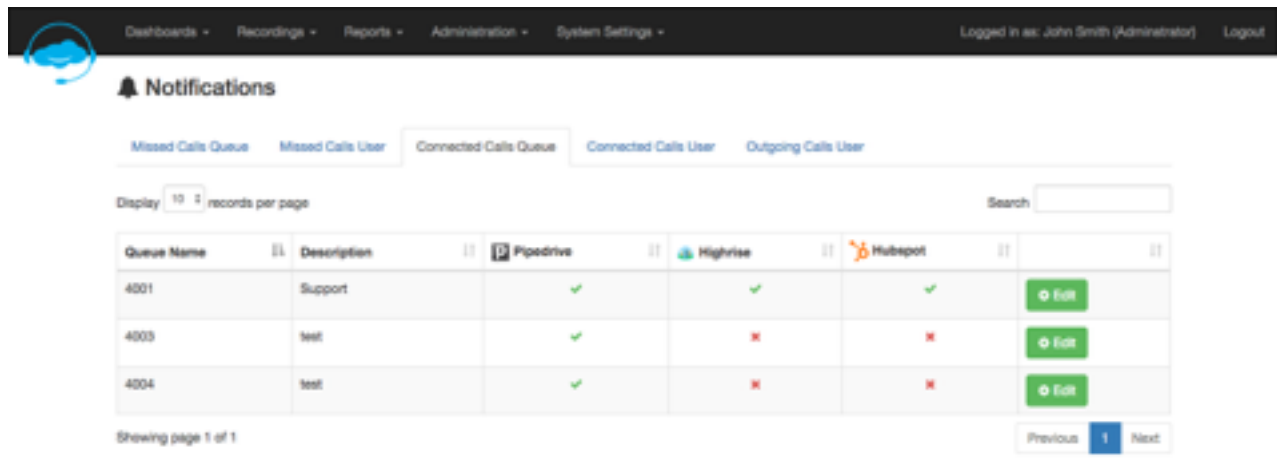
**Create Connected Queue
Call Acitivity**

☒ Yes ☐

1.3.6.1 Connected Calls Queue Notifications

Select “System Settings” and “Notifications” from the top menu:

Choose “Connected Calls Queue” and click the “Edit” button on the user on which you like to create a connected queue call activity in Hubspot:



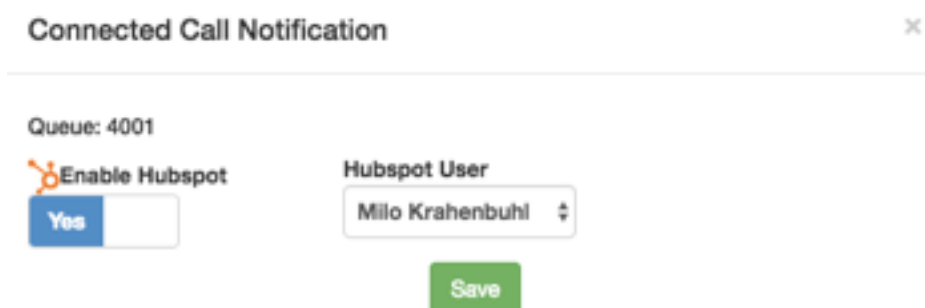
The screenshot shows the FONREACH interface with the top navigation bar containing links for Dashboards, Recordings, Reports, Administration, and System Settings. The user is logged in as John Smith (Administrator). The main section is titled "Notifications" and has tabs for Missed Calls Queue, Missed Calls User, Connected Calls Queue (selected), Connected Calls User, and Outgoing Calls User. Below the tabs, there is a "Display 10 records per page" option and a search bar. A table lists the queues with columns for Queue Name, Description, and integration status for Pipedrive, Highrise, and Hubspot. Queue 4001 (Support) is enabled for all three. Queue 4003 (test) is enabled for Pipedrive but disabled for Highrise and Hubspot. Queue 4004 (test) is also disabled for Highrise and Hubspot. Each row has an "Edit" button. The footer shows "Showing page 1 of 1" and navigation buttons for Previous, 1, and Next.

Queue Name	Description	Pipedrive	Highrise	Hubspot	
4001	Support	✓	✓	✓	Edit
4003	test	✓	✗	✗	Edit
4004	test	✓	✗	✗	Edit

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Enable the Hubspot notification and select a Hubspot user under which you like to create the connected call queue activity in Hubspot.

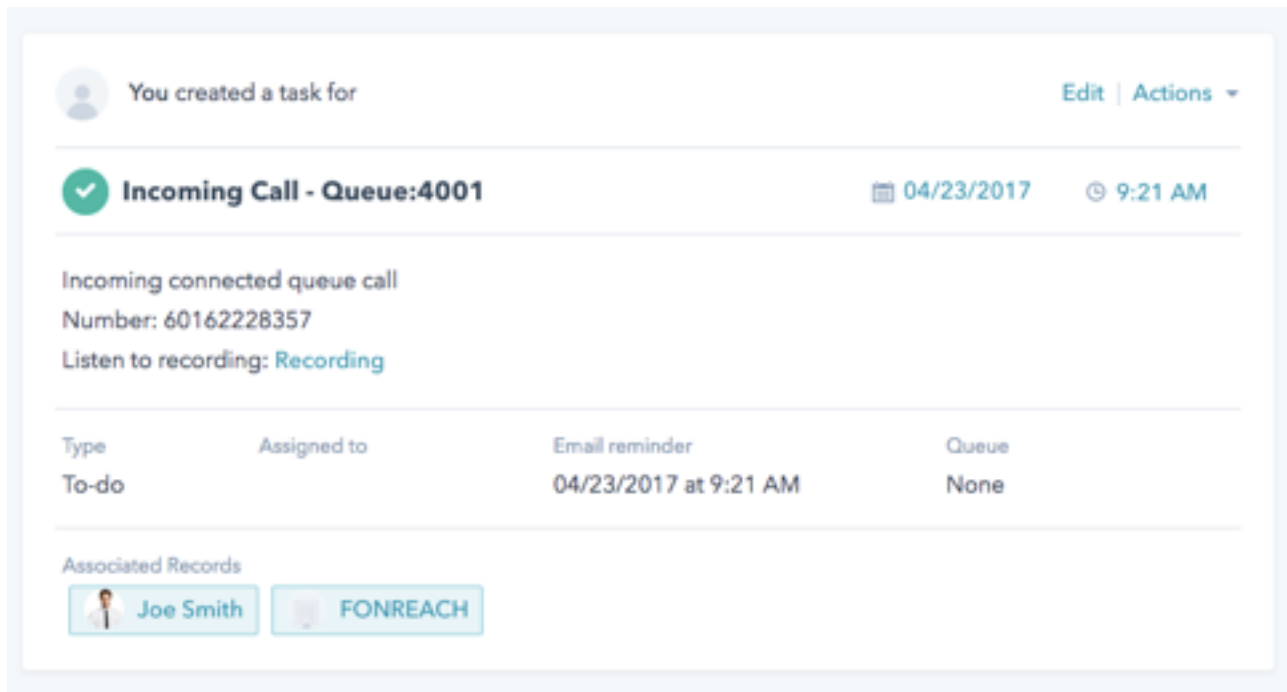
Select “Save” to store and activate the new settings. The respective Hubspot user will receive connected queue call notification activities from now onwards.



The screenshot shows a modal window titled "Connected Call Notification" with a close button (X) in the top right corner. The form contains the following elements:

- Queue: 4001
- Enable Hubspot**: A blue "Yes" button next to an empty input field.
- Hubspot User**: A dropdown menu showing "Milo Krahenbuhl" with a downward arrow.
- Save**: A green button at the bottom.

If the incoming caller number is stored in your Hubspot the task will have the correct organisation and contact assigned. If not, a task is created for the assigned to the Hubspot user without the respective organisation or contact linked to it.



The screenshot shows a HubSpot task card. At the top, it says "You created a task for" with a user icon and links for "Edit" and "Actions". The task title is "Incoming Call - Queue:4001" with a green checkmark icon. To the right of the title, it shows the date "04/23/2017" and time "9:21 AM". Below the title, the task description reads: "Incoming connected queue call", "Number: 60162228357", and "Listen to recording: [Recording](#)". Below the description is a table with four columns: "Type", "Assigned to", "Email reminder", and "Queue". The table contains one row with the following values: "To-do", "Assigned to", "04/23/2017 at 9:21 AM", and "None". Below the table, there is a section titled "Associated Records" which includes two buttons: "Joe Smith" (with a user icon) and "FONREACH" (with a company icon).

Type	Assigned to	Email reminder	Queue
To-do	Assigned to	04/23/2017 at 9:21 AM	None

If call recording is enabled in FONREACH the link to the call recording is attached to the task. You can click the "Recording" link and a new browser window will display the respective recording.



The screenshot shows the FONREACH call recording interface. At the top, there is a navigation bar with links for "Dashboards", "Recordings", "Reports", "Administration", and "System Settings". On the right side of the navigation bar, it says "Logged in as: John Smith (Administrator)" and "Logout". Below the navigation bar, there is a section titled "Outgoing Calls Agent/User" with a microphone icon. Below this section, it shows the file size "Filesize: 62.86 KB" and the duration "Duration: 00:00:06". Below the file size and duration, there is a large blue waveform representing the audio recording. Below the waveform, there are three buttons: "Play / Pause", "Download", and "E-Mail".