

USER GUIDES

Subskribe + HubSpot User Guide



Updated 03/07/2024

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Overview

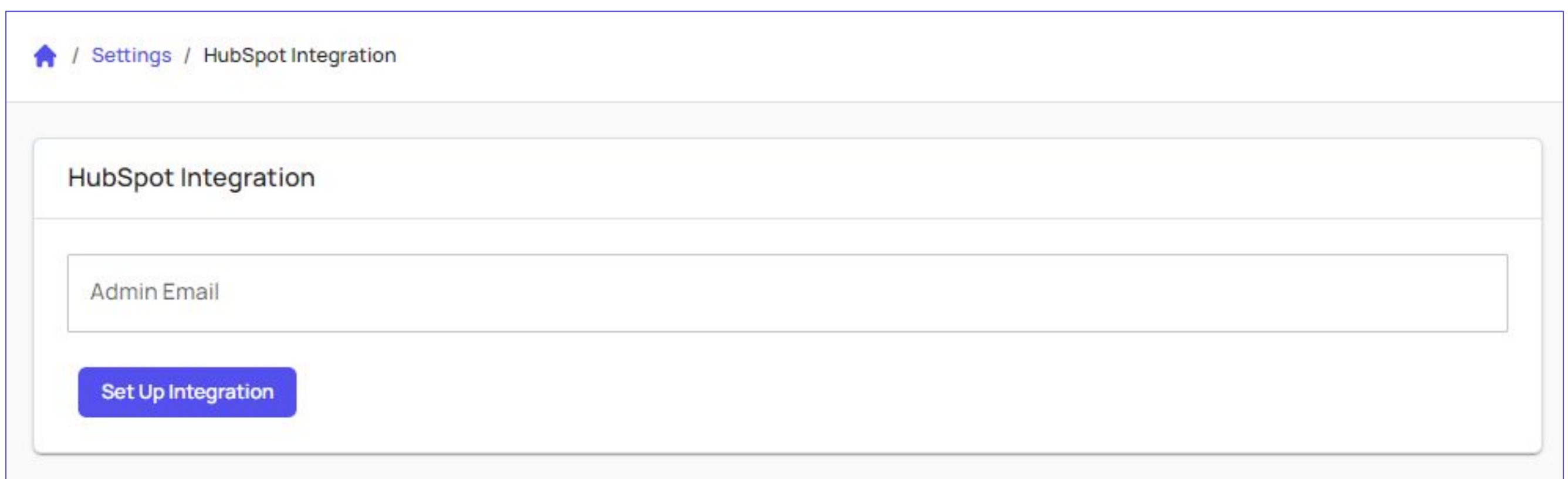
Subskribe's one-click integration capability with "HubSpot Sales Hub" ensures that your B2B sales teams have a seamless experience as deals transition into proposal negotiation phase and sales reps start engaging with Subskribe's powerful yet intuitive CPQ capabilities.

Sales reps can initiate quotes/orders directly from their HubSpot deals as the critical order and the subscription data is synced back to the HubSpot deals and company objects, thereby offering sales reps a frictionless selling experience.

Getting Connected

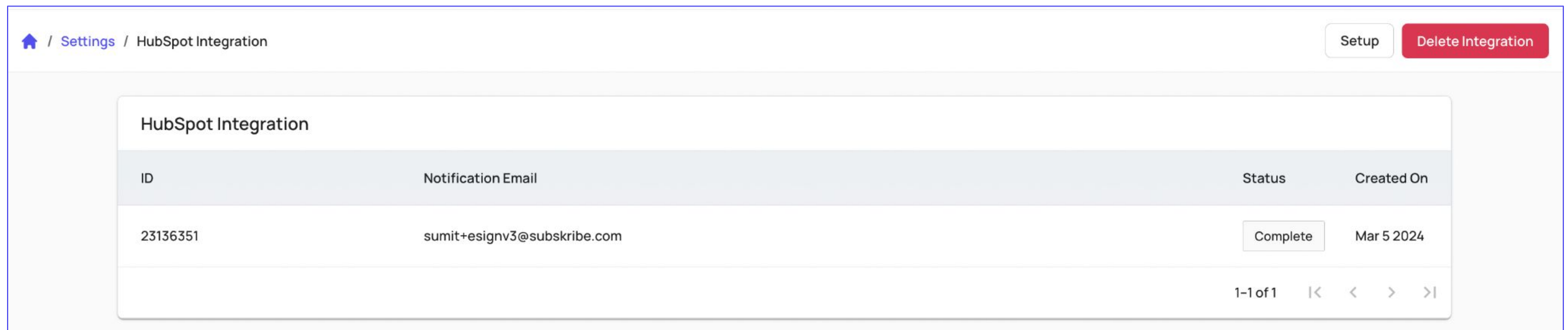
1. On Subskribe, navigate to **Settings** → **Integration** → **HubSpot**, specify your HubSpot admin's email address and click on "Set Up Integration."

Note: The admin email address is used by Subskribe to send failure notifications in processing deals.



The screenshot shows the 'HubSpot Integration' settings page. At the top, there is a breadcrumb trail: Home / Settings / HubSpot Integration. Below this, the page title 'HubSpot Integration' is displayed. Underneath the title, there is a text input field labeled 'Admin Email'. At the bottom of the form, there is a blue button labeled 'Set Up Integration'.

2. Review the necessary permissions and click on Connect App, to complete the integration.



HubSpot Integration			
ID	Notification Email	Status	Created On
23136351	sumit+esignv3@subskribe.com	Complete	Mar 5 2024

Create Custom Fields and Objects on HubSpot

Before you begin creating orders and subscriptions, perform following steps to create custom fields and objects on Hubspot. Subskribe uses these to write back subscription and order line related data on your HubSpot:

Please note: You must have “**Enterprise**” level license of your “HubSpot Sales Hub” for custom objects to be created.

1. Go to **Settings** → **Integration** → **HubSpot**, click on the **Setup** button on the top right.
2. Refer to the following spreadsheet to see the list of properties created per object on Hubspot:

<https://docs.google.com/spreadsheets/d/14vhbvSnDgnP26YlrRtvvyDDRFurkvbzW4UXSod3Qzwik/edit#gid=0>

Please customize your Hubspot views appropriately.

3. Visit Hubspot and verify the presence of these properties.
4. Customize the “Create Deal Form” on Hubspot and add “Subskribe Order Type” as a mandatory property. This property presently has 3 values: **New**, **Amendment**, and **Renewal**, and the sales reps are expected to choose the value depending on the nature of the deal.

Edit Deal form

Create Deal

Deal name*

This default value only appears when a deal is created from a contact, company, or custom object. The token used will only appear when its value is present in the originating object.

Company name

- New Deal

Pipeline*

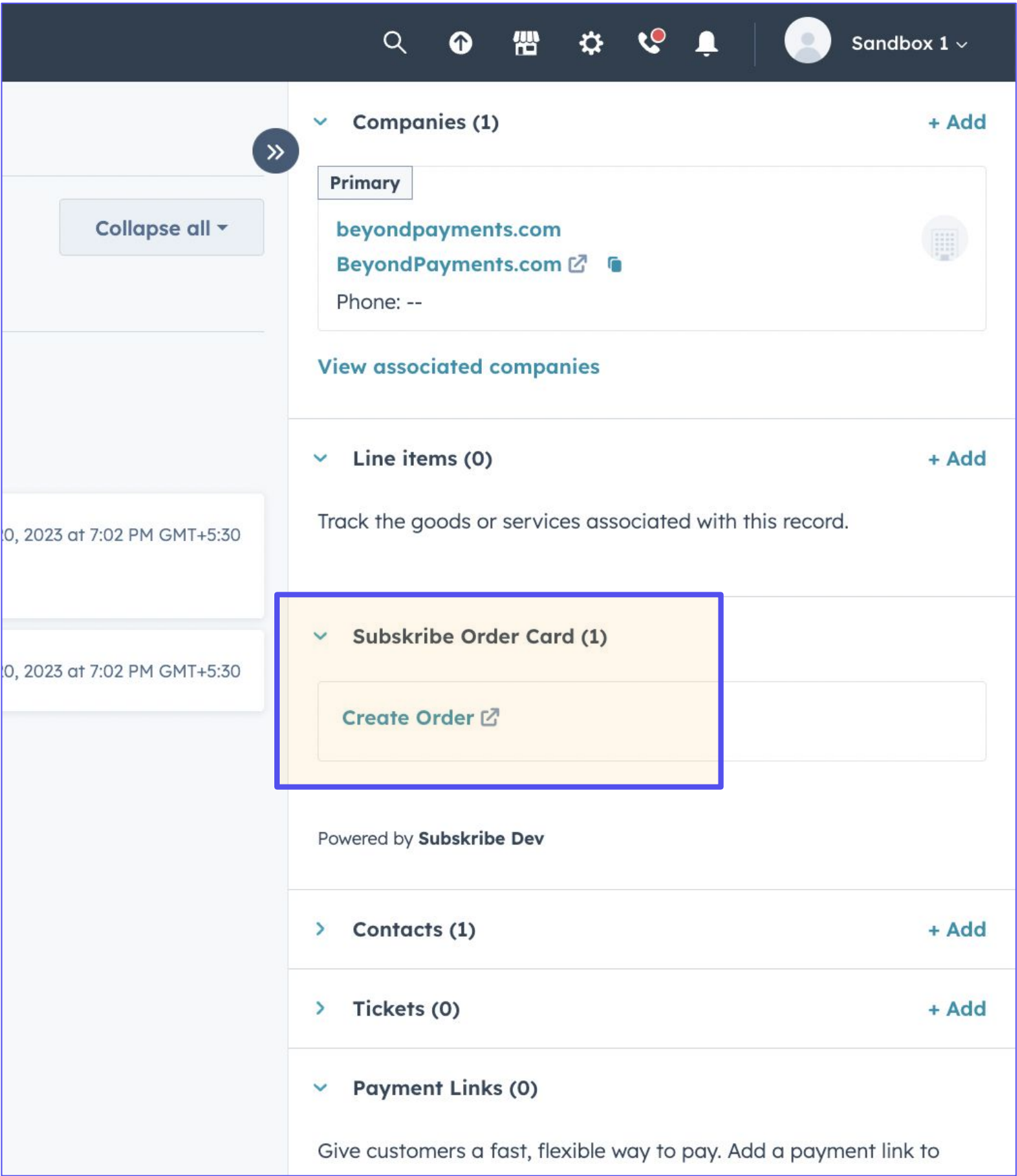
Deal stage*

Subskribe Order Type*

Amount

Create a New Subscription

1. On the right side pane of the HubSpot Deal, click **Create Order** under the **Subskribe Order Card** to open the new order form on Subskribe.



Note: Subskribe automatically creates and populates an account corresponding to the HubSpot company to which this deal belongs, and also auto-populates the HubSpot deal on the order form.

subskribe

sumit+hubspotdev2@subskribe.com
Capmo (US/Pacific)

[Home](#) / [Orders](#) / [New Order](#)

CancelSave Draft

Order Details

Order Name

Expires on

Order Owner

Sumit K

Customer Details

Account

beyondpayments.com

CRM Opportunity

beyondpayments.com - New Deal

Reseller

Ship to

Bill to

[Import CRM Contacts](#)

2. Click the **Import CRM Contacts** link on the order page to import contacts from the HubSpot company that need to be used as Ship To and Bill To contacts for this order.

Customer Details

Account

beyondpayments.com

Ship to

[Import CRM Contacts](#)

Subscriptions

Term Type

Start Date

Duration

Add or Replace Selected Contacts

☒

Name

Email

Contact Record

☒

Sumit Khurana

sumit@beyondpayments.com

Add

Cancel

Import Contacts

3. Complete the order form and save it in draft status, by clicking **Save Draft** on the top right of the page.

Home / Orders / ORD-5VT56D2

EditActions

1 Draft

2 Submitted for Approval

3 Approved

4 Executed

ApprovalsWill be auto approved

NEW SUBSCRIPTION ORDER

Order DetailsORD-5VT56D2

★ Primary

Account	CRM Opportunity Name	Share Order Form	
beyondpayments.com	beyondpayments.com - New Deal	Get Link	
Bill to	Ship to	Currency	Channel
Sumit Khurana <sumit@beyondpayments.com> None	Sumit Khurana <sumit@beyondpayments.com> None	USD	Direct
Start Date	End Date	Billing Cycle	Payment Term
Jul 20 2023	Jul 19 2024	Yearly	Net 30
Entry ARR (MRR)	ARR (MRR) Now	Exit ARR (MRR)	Average ARR (MRR)
\$50,000.00 (\$4,166.67)	\$50,000.00 (\$4,166.67)	\$50,000.00 (\$4,166.67)	\$50,000.00 (\$4,166.67)
Created By	Owner	Auto-Renew	
Sumit K	Sumit K	Yes	

4. As soon as the order is created, Subskribe writes back key order attributes on the deal. Open the deal on HubSpot and review these on the left hand side of the deal page.

As order status/attributes changes on Subskribe, the data is updated on the deal as well

4. As soon as the order is created, Subskribe writes back key order attributes on the deal. Open the deal on HubSpot and review these on the left hand side of the deal page.

As order status/attributes changes on Subskribe, the data is updated on the deal as well.

The screenshot shows a HubSpot deal page for a contact named 'beyondpayments.com'. The deal is titled 'New Deal'. On the left sidebar, under the 'Deals' section, there is a 'Subskribe' section with a dropdown arrow. Below this, various properties are listed, including 'Subskribe Subscription ID' (SUB-M482X7B), 'Subscription Start Date', 'Subskribe Opportunity Link' (https://dev2.subskribe.net/opportunities/OPTY-KZPWFBN), 'Subskribe Order Status' (Draft), 'Subskribe Primary Order Link' (https://dev2.subskribe.net/orders/ORD-5VT56D2), 'Subskribe Term End Date' (07/19/2024), 'Subskribe Term Start Date' (07/20/2023), 'Subskribe Average ARR' (\$50,000.00), 'Subskribe Entry ARR' (\$50,000.00), 'Subskribe Exit ARR' (\$50,000.00), and 'Subskribe Order Total' (\$50,000.00). There are also buttons for 'View all properties' and 'View property history'.

Subskribe Subscription ID	SUB-M482X7B
Subscription Start Date	
Subskribe Opportunity Link	https://dev2.subskribe.net/opportunities/OPTY-KZPWFBN
Subskribe Order Status	Draft
Subskribe Primary Order Link	https://dev2.subskribe.net/orders/ORD-5VT56D2
Subskribe Term End Date	07/19/2024
Subskribe Term Start Date	07/20/2023
Subskribe Average ARR	\$50,000.00
Subskribe Entry ARR	\$50,000.00
Subskribe Exit ARR	\$50,000.00
Subskribe Order Total	\$50,000.00

Note: Users will need to add these Subskribe-generated properties to their deals views.

5. Submit the order for approval and, once it is approved, execute the order to create a subscription by clicking on **More** → **Mark as Executed** on the order form.
6. Subskribe needs the Bill To and Ship To contacts on orders to have addresses populated before the orders can be executed, so if the contacts imported from HubSpot do not have addresses populated, edit **Contact** from the **Accounts** pane and update the address fields.

Edit Contact

First Name

Sumit

Last Name

Khurana

Title

Email Address

sumit@beyondpayments.com

Phone Number

9723123123

☐ Address is the same as account address

Street 1

635, South Ellis St

Street 2

Street 2 (Optional)

City

Chandler

State

AZ

ZIP Code

85525

Country

United States

Delete

Cancel

Save

- Once the subscription is created, Subskribe writes back the subscription object along with line items on the **Company** page on HubSpot in **Subskribe Subscriptions** card.

Note: “Subskribe Subscriptions” is a custom object on HubSpot, and this information will not be available if you don’t have an “Enterprise” level license.

The screenshot displays a HubSpot record page for a company. At the top, a dark navigation bar contains icons for search, upload, marketplace, settings, call, and notifications, along with a user profile icon and the text "Sandbox 1". Below this, a summary section shows "Close date: July 31, 2023" and "Stage: Qualified to buy" with a dropdown arrow. A "View associated deals" link is present. The main content area features a "Subskribe Account Card (1)" with a "View on Subskribe" link. Below this, it says "Powered by Subskribe Dev". A blue-bordered box highlights the "Subskribe Subscriptions (1)" card, which includes a "+ Add" button and details for "SUB-M482X7B (7/20/2023 to 7/19/2024)": TCV: \$50,000, Entry ARR: \$50,000, and Exit ARR: \$50,000, each with a document icon. A "View associated Subskribe Subscription" link is at the bottom of this card. Below the highlighted card is a "Tickets (0)" section with a "+ Add" button and the text "Track the customer requests associated with this record."

8. You can now click on the **Subscription ID** (in the example shown below, it is “SUB-M482X7B”) to open the subscription page and review subscription line items on the right side of page.

Note: “Subskribe Line Items” is a custom object on HubSpot, and this information will not be available if you don’t have an “Enterprise” level license.

>>

Collapse all

23 at 7:16 PM GMT+5:30

Companies (1)

+ Add

beyondpayments.com

BeyondPayments.com

Phone: --

View associated companies

Deals (0)

+ Add

Track the revenue opportunities associated with this record.

Subskribe Line Items (1)

+ Add

SUB-M482X7B (7/20/2023 to 7/19/2024)

Charge Name: Capmo Enterprise : Platform Fee

Quantity: 1,000,000

Sell Unit Price: \$50,000

View associated Subskribe Line Item

Attachments

Add

See the files attached to your activities or uploaded to this record.


Amendment to an Existing Subscription


1. Sales reps can trigger amendments from expansion/upsell/downsell Hubspot deals (deals with **Subskribe Order Type = Amendment**):

On the right side pane of the HubSpot Deal, click **Create Order** under the **Subskribe Order Card** to open the order form on Subskribe.

Alternatively, it can be done from Subskribe:

On **Subscription** object in Subskribe, click **More** → **Update Subscription** and select “**Amend Subscription**” to amend the subscription, and from the **CRM Opportunity** drop down of Amendment Order header, choose the appropriate HubSpot deal.

subskribe

sumit+hubspotdev2@subskribe.com
Capmo (US/Pacific)

[Home](#) / [Orders](#) / New Amendment Order

Cancel

Save Draft

beyondpayments.com

Order Details

Order Name

Order Owner

Sumit K

Customer Details

Bill to

Sumit Khurana


Ship to

Sumit Khurana

Subscription Details

Subscription Change Starts

07/20/2023



☒ Auto-Renew

CRM Opportunity

beyondpayments.com - Amendment Deal

beyondpayments.com - New Deal

Amendment Order Summary

Subscription

SUB-M482X7B

Subscription Start Date

Jul 20 2023

Subscription End Date

Jul 19 2024

Billing Cycle

Yearly


Payment Term

NET30

Total Amount

\$0.00

2. Save the order in draft state and execute order to amend the subscription, and then open the corresponding HubSpot deal and review that the order-related attributes are written back by Subskribe on the **deal page**.



Contacts ▾Conversations ▾Marketing ▾Sales ▾

< Deals

-- beyondpayments.com - Amendment Deal

Sumit Khurana ▾

Last contacted

--

Deal type

Priority

View all properties

View property history

▼ Subskribe

Subskribe Subscription ID

SUB-M482X7B

Subscription Start Date

Subskribe Opportunity Link

https://dev2.subskribe.net/opportunities/OPTY-HVM5QPP


Subskribe Order Status

Executed ▾


Subskribe Primary Order Link

https://dev2.subskribe.net/orders/ORD-1TRB0KT

Subskribe Term End Date

 07/19/2024

Subskribe Term Start Date

 07/20/2023

Subskribe Average ARR

\$11,880.00

Subskribe Entry ARR


\$11,880.00

Subskribe Exit ARR

\$11,880.00

Subskribe Order Total

\$11,880.00

subskribe

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- Once the subscription is amended on Subskribe, the system updates the **Subscription** object on **Company page** appropriately, with amended quantities and/or new line items added as part of the amendment.

Go to the Company page for this account, click on the **Subscription** object on the right hand side of the page, and review the amended **subscription line items**.

Sandbox 1

>>

Companies (1)

+ Add

beyondpayments.com

BeyondPayments.com

Phone: --

View associated companies

Deals (0)

+ Add

Track the revenue opportunities associated with this record.

Subscribe Line Items (2)

+ Add

SUB-M482X7B (7/20/2023 to 7/19/2024)

Charge Name: Capmo Enterprise : Platform Fee

Quantity: 1,000,000

Sell Unit Price: \$50,000

SUB-M482X7B (7/20/2023 to 7/19/2024)

Charge Name: Add On : Storage

Quantity: 10

Sell Unit Price: \$99

View associated Subscribe Line Items

Attachments

Add

See the files attached to your activities or uploaded to this record.

Renewing an Existing Subscription

1. Sales reps can trigger amendments from renewal HubSpot deals (deals with **Subskribe Order Type = Renewal**):


On the right side pane of the HubSpot Deal, click **Create Order** under the **Subskribe Order Card** to open the order form on Subskribe.

Alternatively, it can be done from Subskribe:

On the **Subscription** object in Subskribe, click **More** → **Update Subscription** and select “**Renew Subscription**” to renew the subscription, and from the **CRM Opportunity** drop down of the Renewal Order header, choose the appropriate HubSpot deal.

The screenshot displays the 'Renew Subscription' form in the Subskribe application. The form is titled 'beyondpayments.com' and is a renewal order for 'SUB-M482X7B'. The 'Order Owner' is 'Sumit K'. The 'Expires on' field is empty. The 'Customer Details' section includes 'Account' (beyondpayments.com) and 'Ship to' (Sumit Khurana). The 'Subscription Details' section includes 'Term Type' (Number of Years), 'Start Date' (07/20/2024), and 'Duration' (1 Year(s)). The 'CRM Opportunity' dropdown is open, showing three options: 'beyondpayments.com - Amendment Deal', 'beyondpayments.com - New Deal', and 'beyondpayments.com - Renewal Deal'. The 'Auto-Renew' checkbox is checked, and the 'Add ramp intervals' checkbox is unchecked.

2. Save the order in draft state and execute the order to create a renewal subscription. Open the corresponding HubSpot deal and review that the order-related attributes are written back by Subskribe on the **deal page**.



Contacts ▾

Conversations ▾

Marketing ▾

Sales ▾

< Deals

-- beyondpayments.com - Renewal Deal

Sumit Khurana ▾

Last contacted

--

Deal type

Priority

View all properties

View property history

▼ Subskribe

Subskribe Subscription ID

SUB-6X8H93P

Subscription Start Date

Subskribe Opportunity Link

<https://dev2.subskribe.net/opportunities/OPTY-96DQN88>


Subskribe Order Status

Executed ▾


Subskribe Primary Order Link

<https://dev2.subskribe.net/orders/ORD-W1DP0D4>

Subskribe Term End Date

 07/19/2025

Subskribe Term Start Date

 07/20/2024

Subskribe Average ARR

\$61,880.00

Subskribe Entry ARR

\$61,880.00

Subskribe Exit ARR

\$61,880.00

Subskribe Order Total

\$61,880.00

3. Subskribe creates a new subscription for renewals.

Go to the **Company** page for this account, observe that a new **Subscription** object is created for the renewed subscription in the **Subskribe Subscription** section on the right hand side of the page. Click that to review the line items.

