

USER GUIDES

Subskr^{ibe} + HubSpot User Guide



Updated 03/07/2024

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Overview

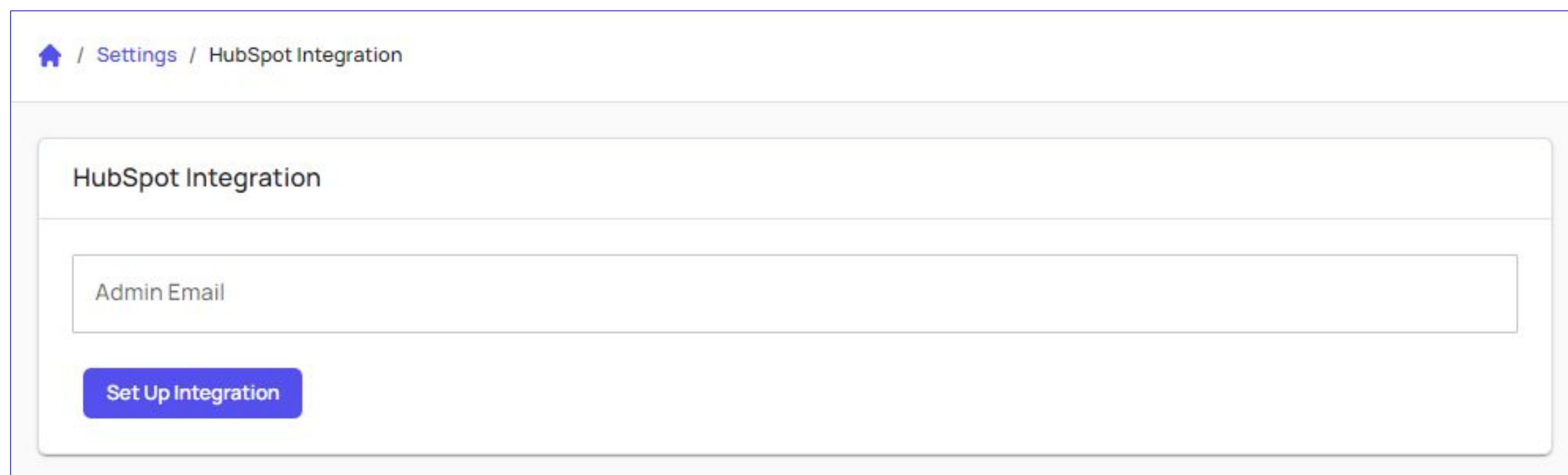
Subskrbe's one-click integration capability with "HubSpot Sales Hub" ensures that your B2B sales teams have a seamless experience as deals transition into proposal negotiation phase and sales reps start engaging with Subskrbe's powerful yet intuitive CPQ capabilities.

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.

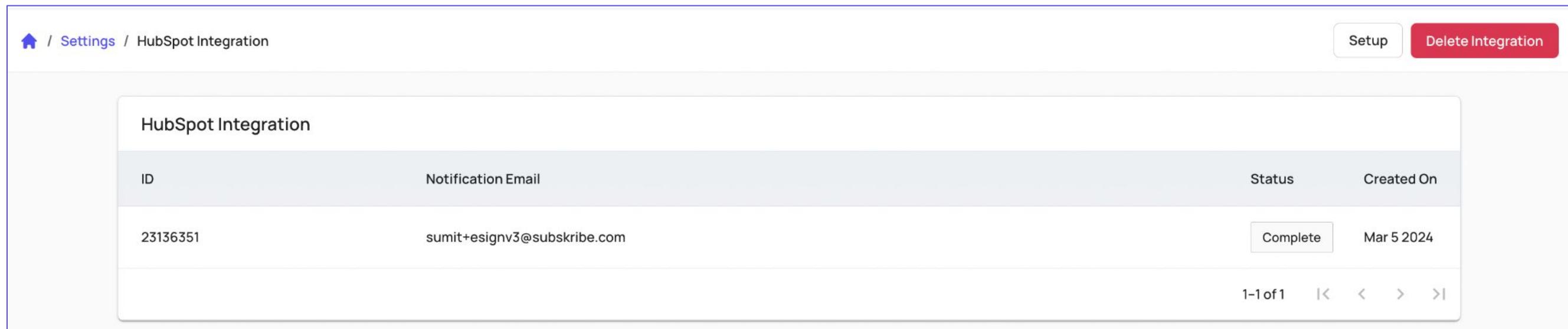
Getting Connected

1. On Subskrbe, 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 Subskrbe to send failure notifications in processing deals.



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



ID	Notification Email	Status	Created On
23136351	sumit+esignv3@subskrbe.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. Subskrbe 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/14vhbvSnDgnP26YIrRtvyDDRFurkvbzW4UXSod3Qzwik/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 “Subskrbe 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.

Pipeline*

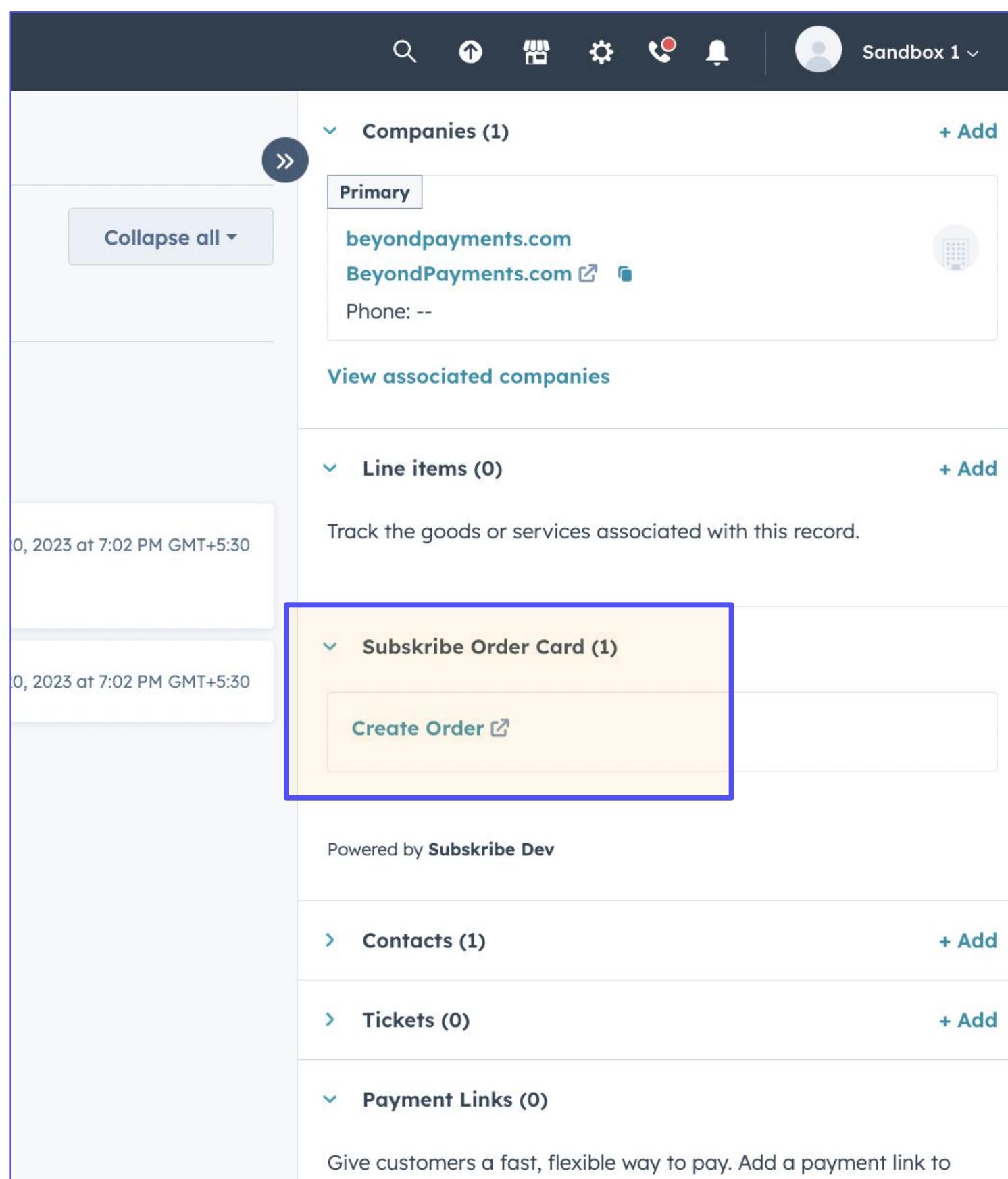
Deal stage*

Subskrbe Order Type*

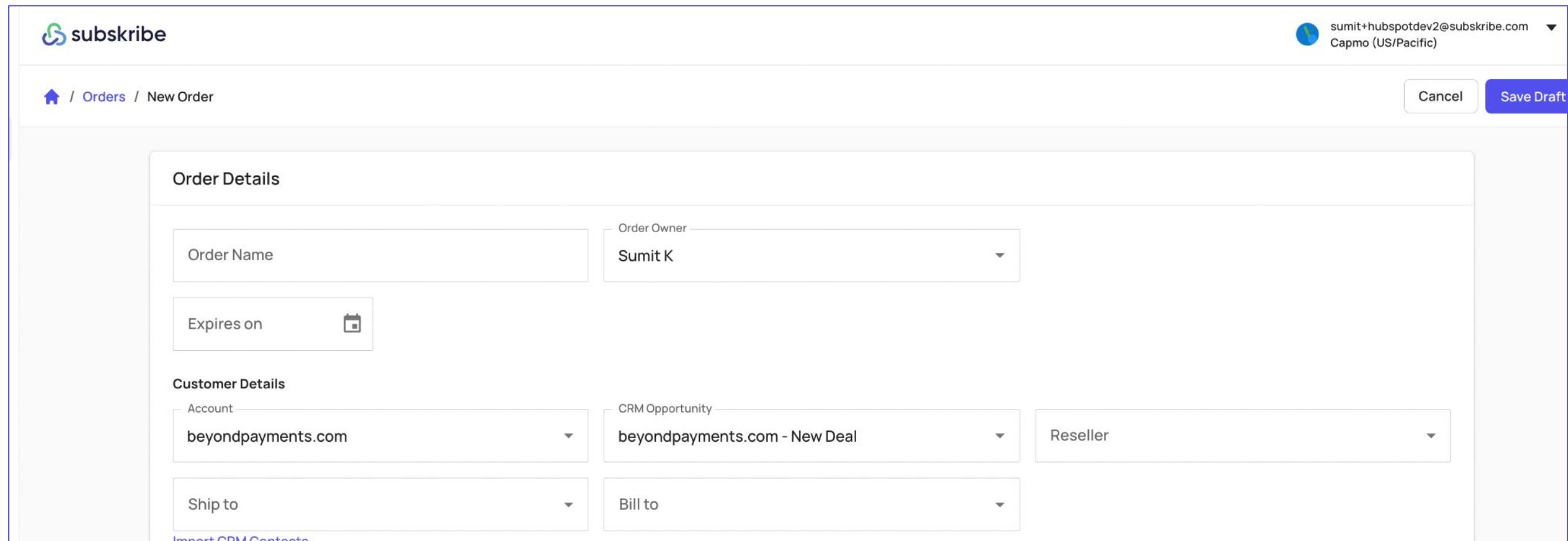
Amount

Create a New Subscription

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

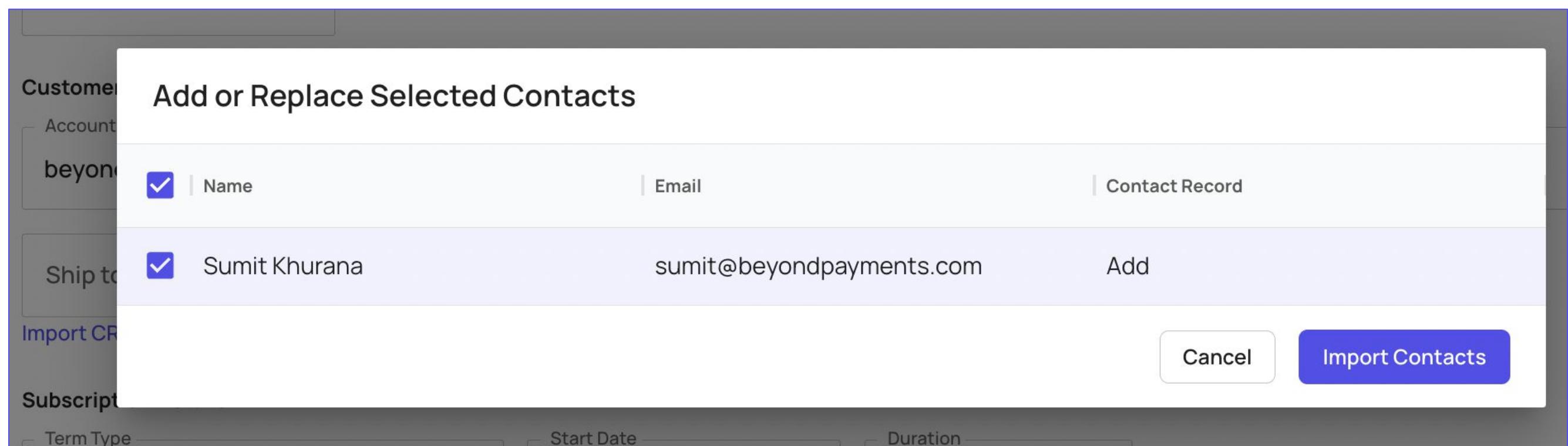


Note: Subskrib automatically creates and populates an account corresponding to the HubSpot company to which this deal belongs, and also auto-populates the HubSpot deal on the order form.



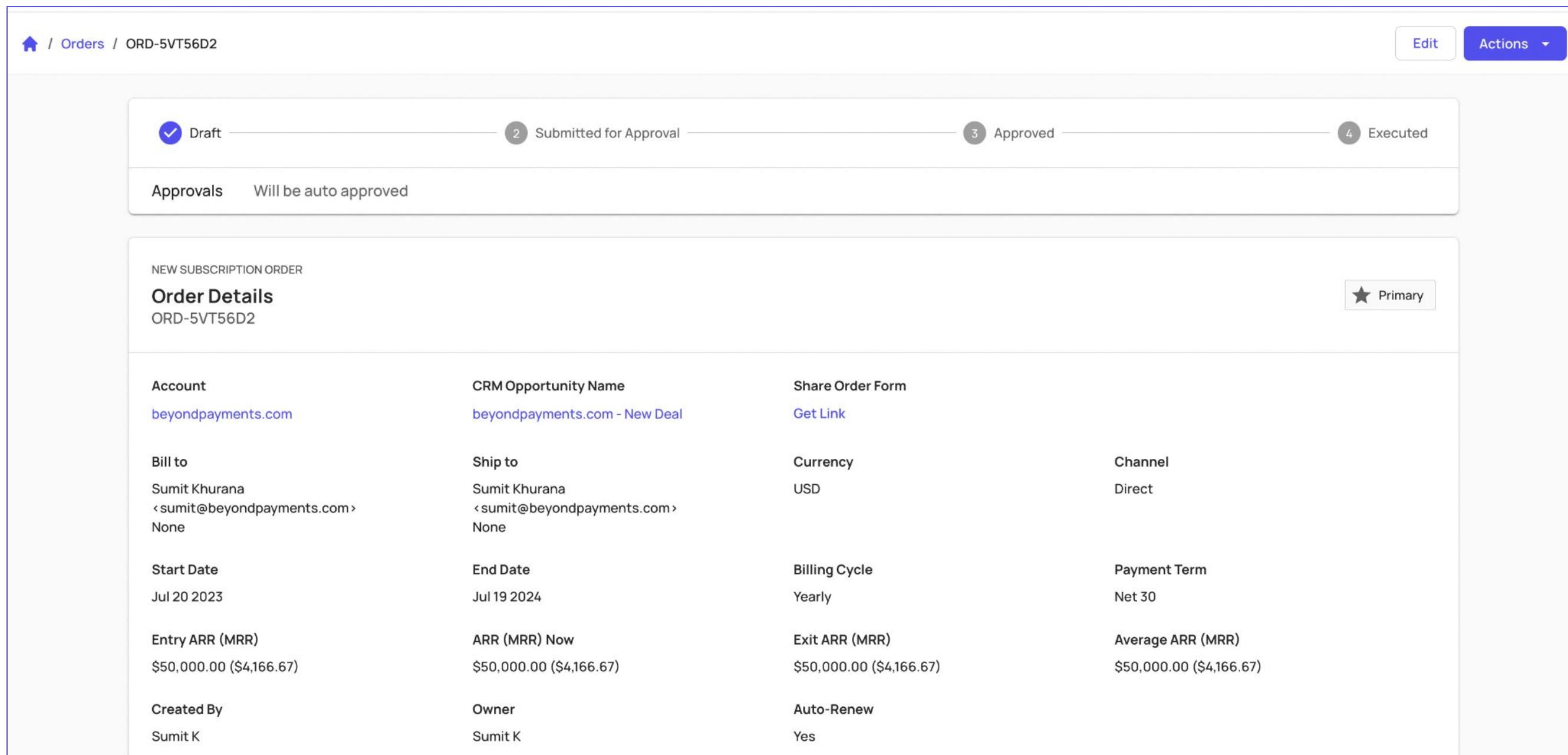
The screenshot shows the 'Order Details' section of the Subskrbe platform. It includes fields for 'Order Name' (Sumit K), 'Expires on' (a date picker), 'Customer Details' (Account: beyondpayments.com, CRM Opportunity: beyondpayments.com - New Deal, Reseller dropdown), and 'Ship to' and 'Bill to' dropdowns. A link 'Import CRM Contacts' is visible at the bottom left. The top right shows the user's email (sumit+hubspotdev2@subskrbe.com) and location (Capmo (US/Pacific)). Buttons for 'Cancel' and 'Save Draft' are at the top right.

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.



The screenshot shows a modal dialog titled 'Add or Replace Selected Contacts'. It lists a contact: 'Sumit Khurana' with email 'sumit@beyondpayments.com'. There are checkboxes for 'Name', 'Email', and 'Contact Record'. A 'Ship to' section is partially visible on the left. Buttons for 'Cancel' and 'Import Contacts' are at the bottom right.

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



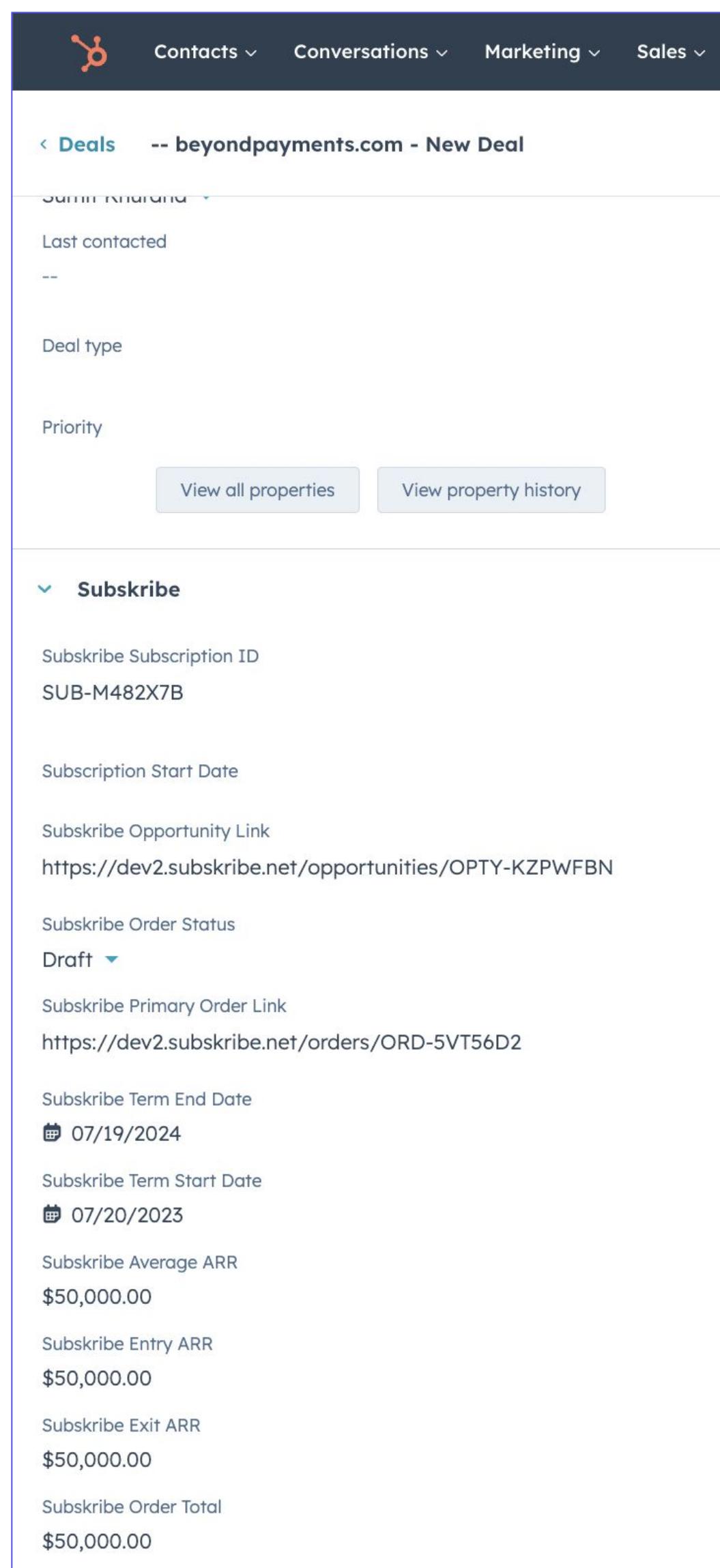
The screenshot shows the Subskrbe order creation interface. At the top, there is a navigation bar with a home icon, 'Orders', and 'ORD-5VT56D2'. On the right, there are 'Edit' and 'Actions' buttons. Below the navigation is a horizontal status bar with four stages: 1 Draft (checked), 2 Submitted for Approval, 3 Approved, and 4 Executed. Stage 1 is highlighted with a blue checkmark. Below the status bar, a note says 'Approvals Will be auto approved'. The main section is titled 'NEW SUBSCRIPTION ORDER' and contains 'Order Details' for 'ORD-5VT56D2'. It includes a 'Primary' label with a star icon. The order details table has four columns: Account, CRM Opportunity Name, Share Order Form, and Get Link. The account is 'beyondpayments.com'. The CRM Opportunity Name is 'beyondpayments.com - New Deal'. The share order form link is 'Get Link'. The 'Bill to' section shows 'Sumit Khurana <sumit@beyondpayments.com> None'. The 'Ship to' section shows 'Sumit Khurana <sumit@beyondpayments.com> None'. The 'Currency' is 'USD' and the 'Channel' is 'Direct'. The 'Start Date' is 'Jul 20 2023', 'End Date' is 'Jul 19 2024', 'Billing Cycle' is 'Yearly', and the 'Payment Term' is 'Net 30'. The 'Entry ARR (MRR)' is '\$50,000.00 (\$4,166.67)', 'ARR (MRR) Now' is '\$50,000.00 (\$4,166.67)', 'Exit ARR (MRR)' is '\$50,000.00 (\$4,166.67)', and the 'Average ARR (MRR)' is '\$50,000.00 (\$4,166.67)'. The 'Created By' is 'Sumit K' and the 'Owner' is 'Sumit K'. The 'Auto-Renew' is 'Yes'.

4. As soon as the order is created, Subskrbe 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 Subskrbe, the data is updated on the deal as well

4. As soon as the order is created, Subskrbe 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 Subskrbe, the data is updated on the deal as well.



The screenshot shows a HubSpot deal page for a new deal. At the top, there are navigation links: Contacts, Conversations, Marketing, and Sales. Below that, the deal title is "beyondpayments.com - New Deal". The deal has a status of "Last contacted" and a deal type of "--". The priority is listed but not explicitly named. There are two buttons at the bottom: "View all properties" and "View property history". A section titled "Subskrbe" is expanded, showing the following properties:

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

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

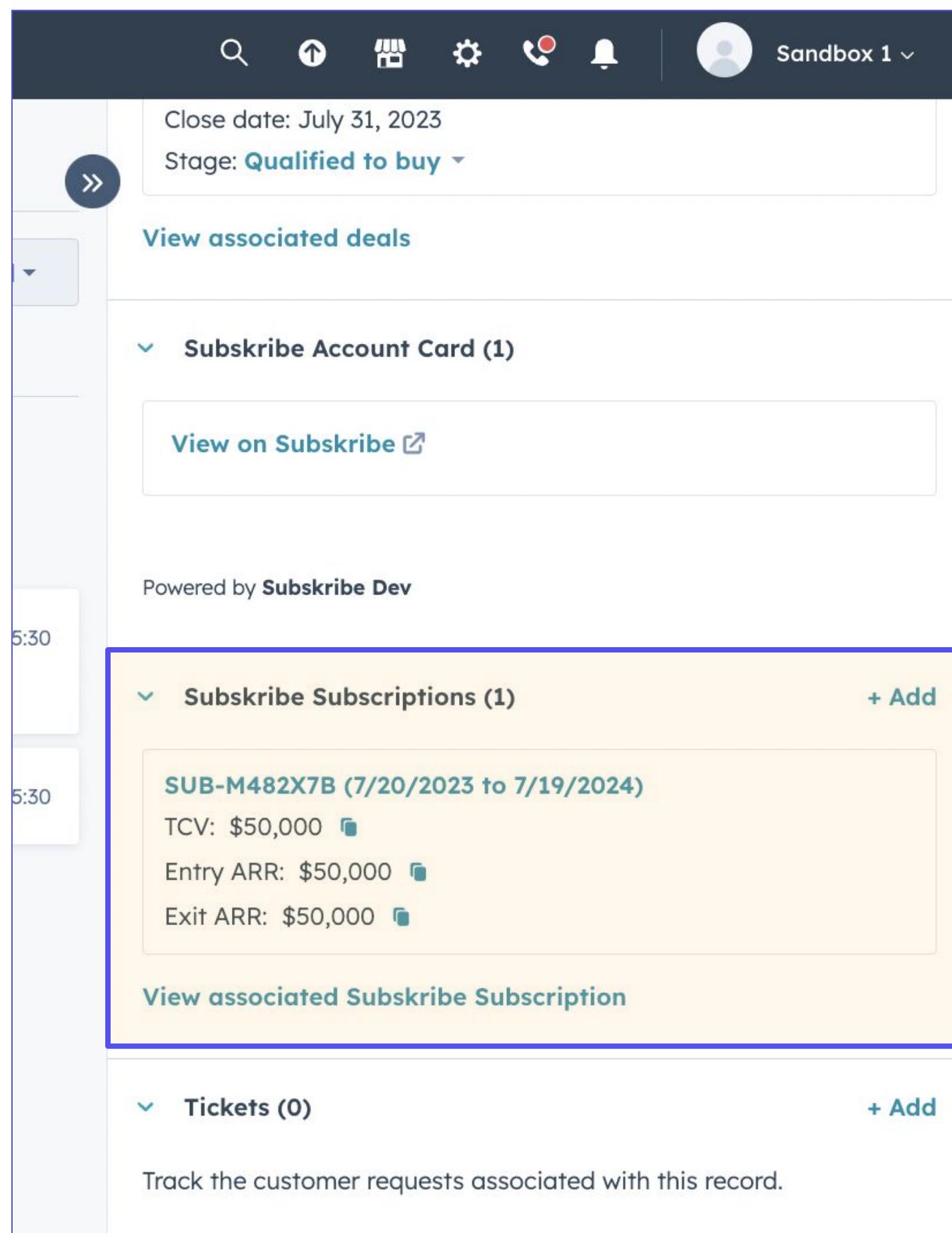
5. Submit the order for approval and, once it is approved, execute the order to create a subscription by clicking on **More → Mark as Executed** on the order form.
6. Subskrib needs the Bill To and Ship To contacts on orders to have addresses populated before the orders can be executed, so if the contacts 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
<input type="checkbox"/> 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	

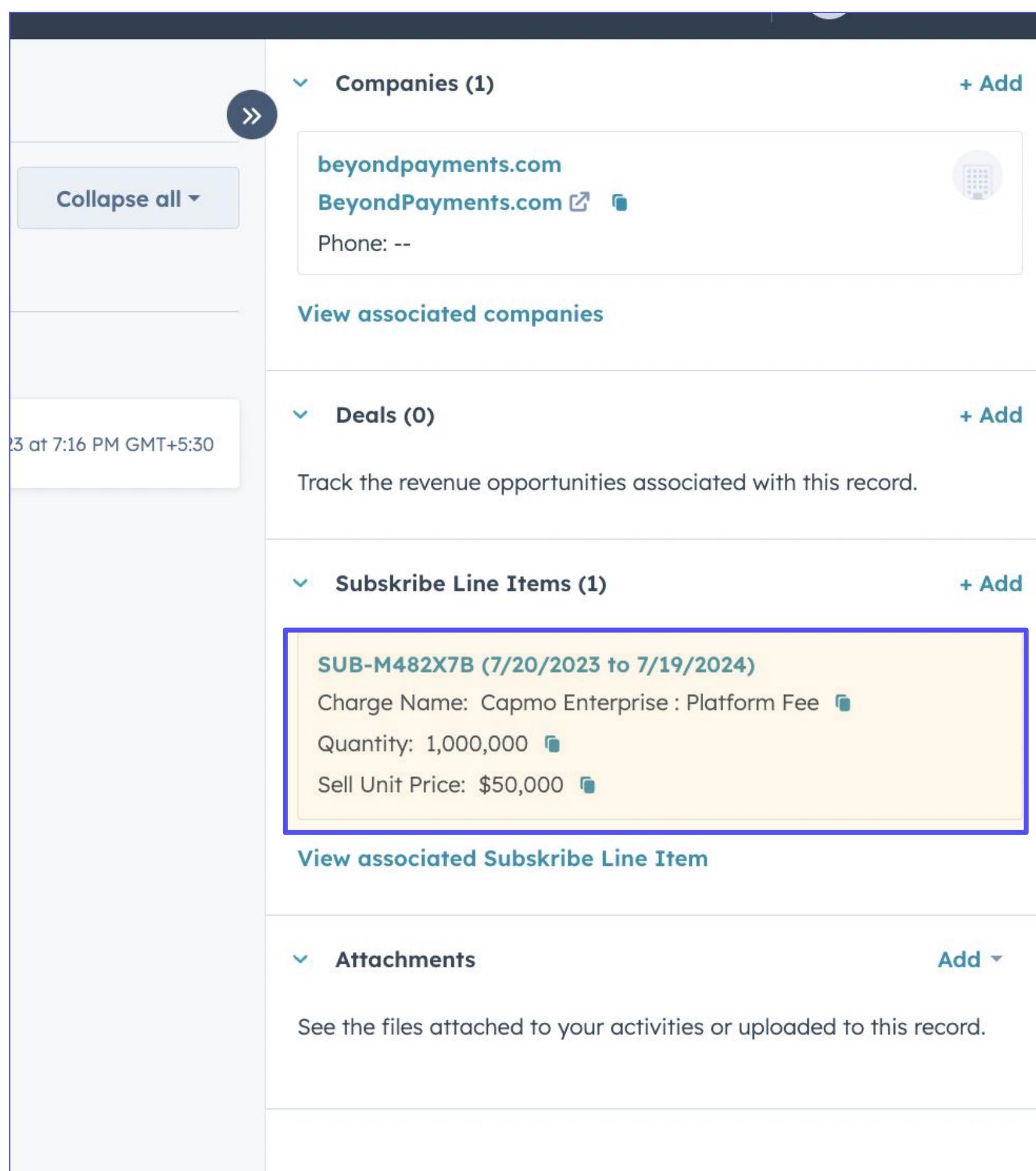
7. Once the subscription is created, Subskrbe writes back the subscription object along with line items on the **Company** page on HubSpot in **Subskrbe Subscriptions** card.

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



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



The screenshot shows a HubSpot record page with the following sections:

- Companies (1)**: beyondpayments.com, BeyondPayments.com, Phone: --, + Add
- Deals (0)**: + Add
- Subskrib Line Items (1)**:
 - SUB-M482X7B (7/20/2023 to 7/19/2024)**
 - Charge Name: Capmo Enterprise : Platform Fee
 - Quantity: 1,000,000
 - Sell Unit Price: \$50,000+ Add
- Attachments**: Add

A blue box highlights the Subskrib Line Item section, specifically the Subscription ID "SUB-M482X7B".

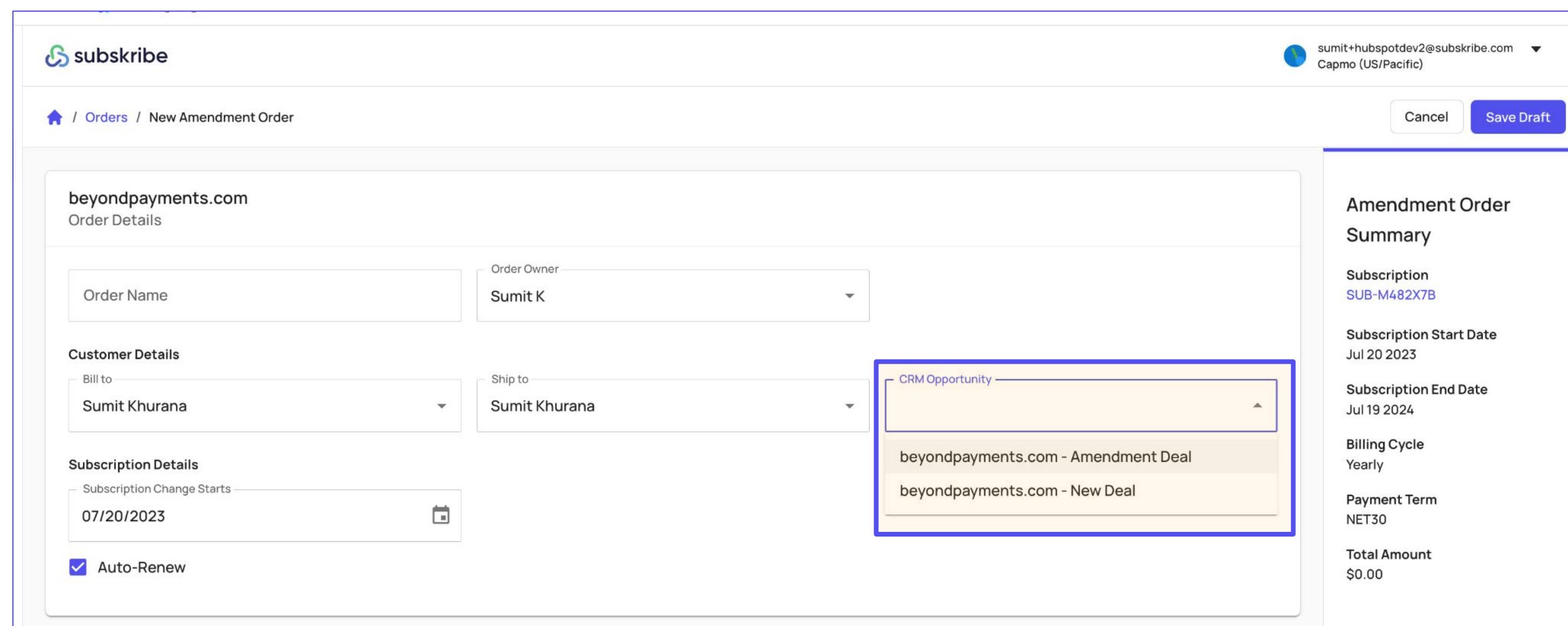
Amendment to an Existing Subscription

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

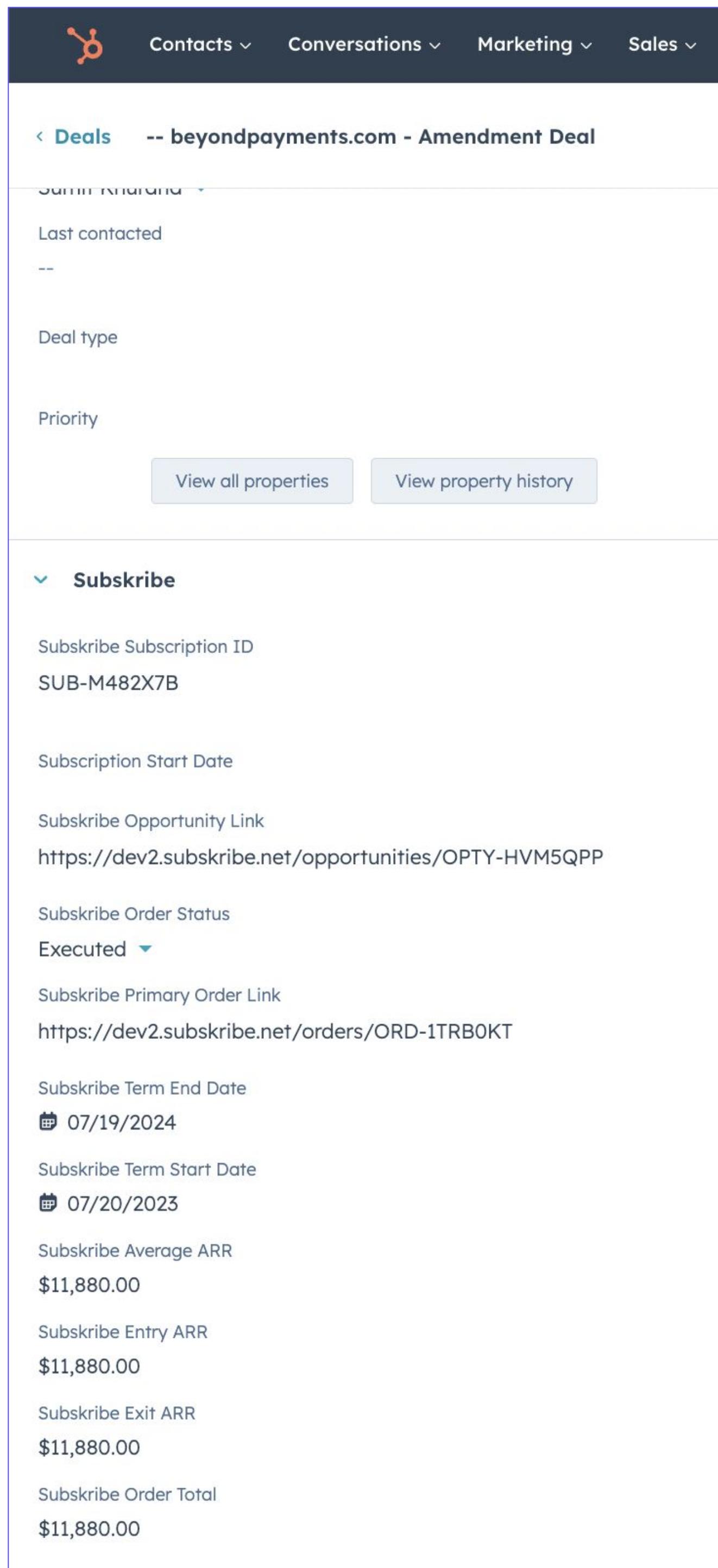
On the right side pane of the HubSpot Deal, click **Create Order** under the **Subskrbe Order Card** to open the order form on Subskrbe.

Alternatively, it can be done from Subskrbe:

On **Subscription** object in Subskrbe, 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.



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 Subskrbe on the **deal page**.

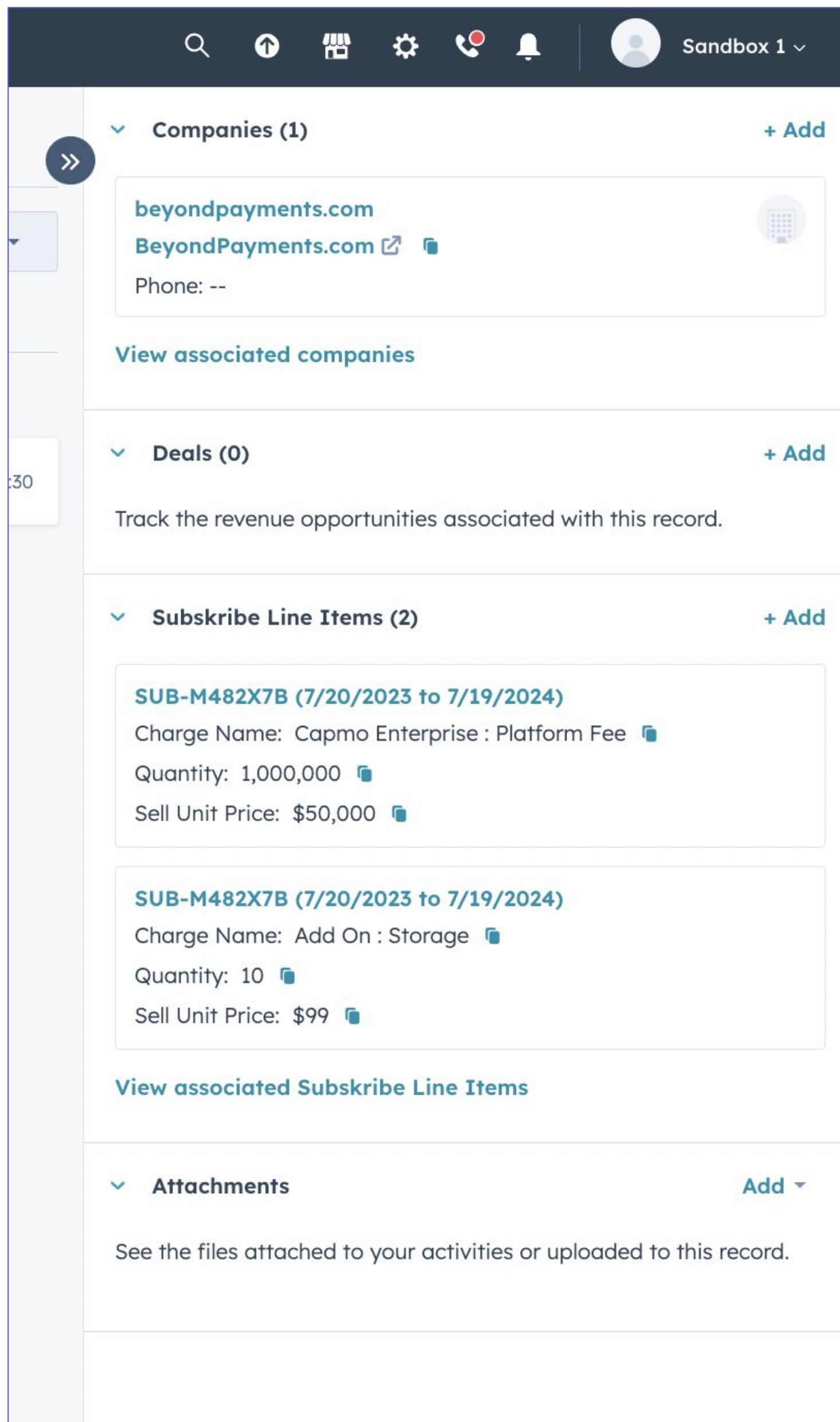


The screenshot shows a HubSpot deal page for 'beyondpayments.com - Amendment Deal'. At the top, there are navigation links: Contacts, Conversations, Marketing, and Sales. Below the header, there are sections for 'Summary' and 'Subskrbe'. The 'Summary' section includes fields for 'Last contacted' (set to '--'), 'Deal type' (set to ''), and 'Priority' (set to ''). Below these are two buttons: 'View all properties' and 'View property history'. The 'Subskrbe' section is expanded and contains the following properties:

- Subskrbe Subscription ID: SUB-M482X7B
- Subskrbe Opportunity Link: <https://dev2.subskrbe.net/opportunities/OPTY-HVM5QPP>
- Subskrbe Order Status: Executed
- Subskrbe Primary Order Link: <https://dev2.subskrbe.net/orders/ORD-1TRB0KT>
- Subskrbe Term End Date: 07/19/2024
- Subskrbe Term Start Date: 07/20/2023
- Subskrbe Average ARR: \$11,880.00
- Subskrbe Entry ARR: \$11,880.00
- Subskrbe Exit ARR: \$11,880.00
- Subskrbe Order Total: \$11,880.00

3. Once the subscription is amended on Subskrib, 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**.



The screenshot shows the Subskrib Company page for the account 'beyondpayments.com'. The 'Subscription' object is displayed on the right side of the page. It contains two line items:

- 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

Below the line items, there is a link to 'View associated Subskrib Line Items'.

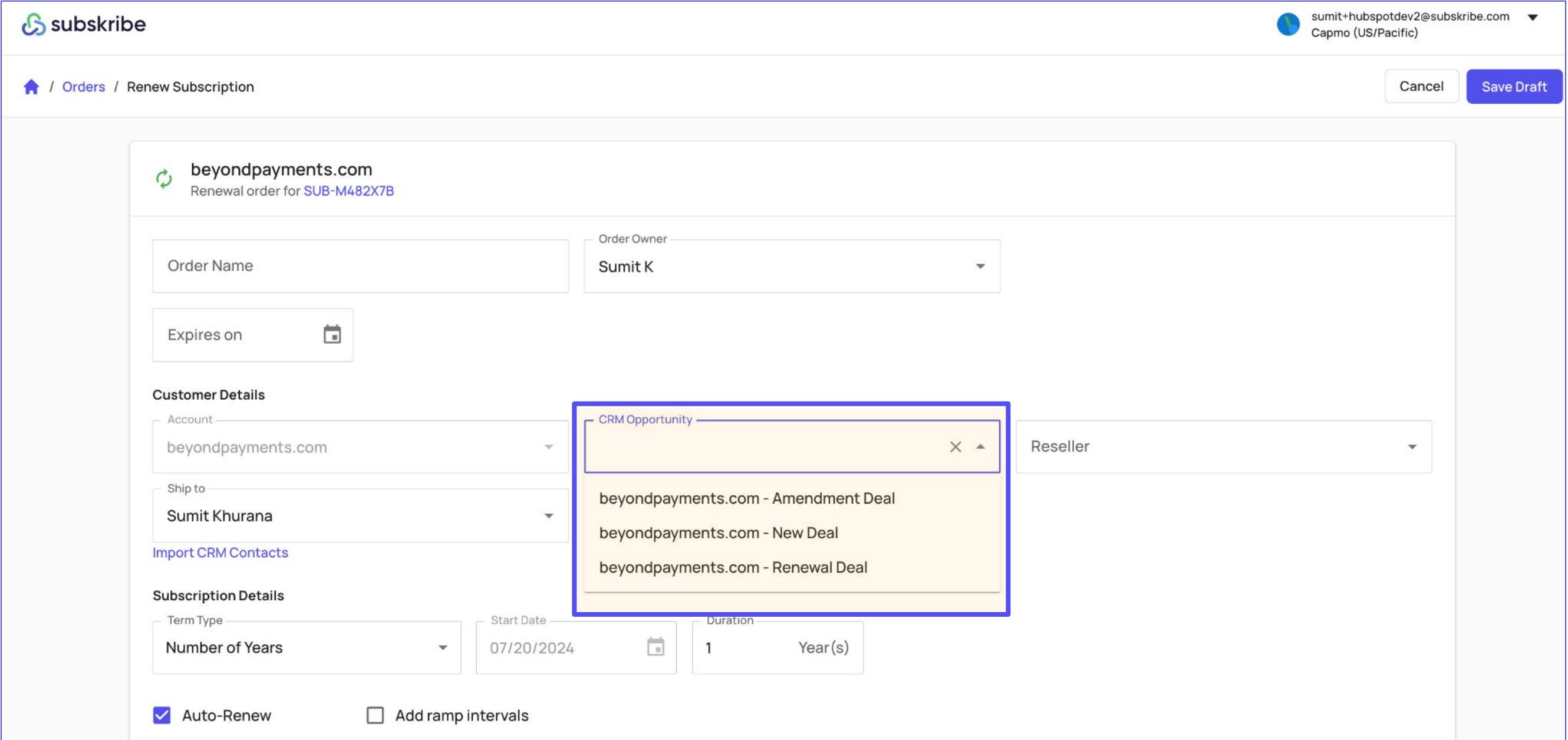
Renewing an Existing Subscription

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

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

Alternatively, it can be done from Subskrbe:

On the **Subscription** object in Subskrbe, 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 shows the Subskrbe interface for renewing a subscription. The top navigation bar includes the Subskrbe logo, a user profile for 'sumit+hubspotdev2@subskrbe.com' (Capmo (US/Pacific)), and buttons for 'Cancel' and 'Save Draft'. The main form is titled 'beyondpayments.com' and 'Renewal order for SUB-M482X7B'. It contains fields for 'Order Name' (set to 'Sumit K'), 'Expires on' (a date picker), 'Customer Details' (Account: beyondpayments.com, Ship to: Sumit Khurana), and 'Import CRM Contacts'. The 'Subscription Details' section includes 'Term Type' (Number of Years), 'Start Date' (07/20/2024), 'Duration' (1 Year(s)), and checkboxes for 'Auto-Renew' and 'Add ramp intervals'. A prominent feature is the 'CRM Opportunity' dropdown menu, which is highlighted with a blue box. The menu lists three HubSpot deals: 'beyondpayments.com - Amendment Deal', 'beyondpayments.com - New Deal', and 'beyondpayments.com - Renewal Deal'.

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 Subskrbe on the **deal page**.

Deals -- beyondpayments.com - Renewal Deal

Last contacted
--

Deal type

Priority

View all properties View property history

Subskrbe

Subskrbe Subscription ID
SUB-6X8H93P

Subscription Start Date

Subskrbe Opportunity Link
<https://dev2.subskrbe.net/opportunities/OPTY-96DQN88>

Subskrbe Order Status
Executed

Subskrbe Primary Order Link
<https://dev2.subskrbe.net/orders/ORD-W1DP0D4>

Subskrbe Term End Date
07/19/2025

Subskrbe Term Start Date
07/20/2024

Subskrbe Average ARR
\$61,880.00

Subskrbe Entry ARR
\$61,880.00

Subskrbe Exit ARR
\$61,880.00

Subskrbe Order Total
\$61,880.00

3. Subskrbe 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 **Subskrbe Subscription** section on the right hand side of the page. Click that to review the line items.

Stage: Qualified to buy

[View associated deals](#)

Subskrbe Account Card (1)

[View on Subskrbe](#)

Powered by **Subskrbe Dev**

Subskrbe Subscriptions (2) [+ Add](#)

- SUB-6X8H93P (7/20/2024 to 7/19/2025)**
TCV: \$61,880 [View](#)
Entry ARR: \$61,880 [View](#)
Exit ARR: \$61,880 [View](#)
- SUB-M482X7B (7/20/2023 to 7/19/2024)**
TCV: \$61,880 [View](#)
Entry ARR: \$61,880 [View](#)
Exit ARR: \$61,880 [View](#)

[View associated Subskrbe Subscriptions](#)

Tickets (0) [+ Add](#)

3 PM GMT+5:30

1 PM GMT+5:30

6 PM GMT+5:30

1 PM GMT+5:30