



Connecting SP_CE Partner portal with HubSpot

With SP_CE Partner portal integrated with Hubspot you extend the CRM to your Partners. Let partners register and update Deals and Tickets directly in the portal. Get real-time visibility into your partner pipeline, and let partners follow the progress of tickets, with full dual sync.

The screenshot shows the 'Deal management' section of the SP_CE Partner portal. The page has a dark blue header with the title 'Deal management' and a sub-header 'Here you can add and maintain your leads and deals.' Below the header, there is a navigation bar with links for 'Welcome', 'News & Updates', 'Content Sharing', 'Training', 'Deal management', and 'Ticket management'. The main content area features a 'Deals' section for 'Distributor 1 - Sales Pipeline'. It includes a search bar, a filter button, and an 'ADD +' button. A summary box shows '3 No. of deals' and '\$58,000 Deal value'. Below this is a table with the following data:

TITLE	VALUE	STAGE	PARTNER PERSON	CUSTOMER	CUSTOMER CONTACT	CLOSED DATE	DEAL DESCRIPTION
Deal 400	\$14,000	Appointment Sched	John Doe	Hewlett Packard	CONTACTS	--	Test
Deal 200	\$22,000	Contract Sent	Lena Andersson	Customer 800	--	--	--

Functionality

Deal management

1. Partners register Deals directly in the SP_CE Partner portal, with automatic sync to your dedicated Hubspot pipeline. You can also add and allocate deals to a partner and follow their progress in both Hubspot and SP_CE.
2. Partners can be connected either Direct or Indirect to the Deal. Choose "Direct" if you prefer to connect both the End customer company and Partner company to the Deal, or the "Indirect" setup if you prefer to have only the End customer company connected to the Deal. Then, your Partner company is instead connected to the Customer.
3. Get real-time notifications when partners update their deals. Less time on check-in calls. More time helping partners close.



Ticket management

1. Partners register Tickets directly in the SP_CE Partner portal, with automatic sync to your dedicated Hubspot pipeline. You can also of course register the Tickets, and they will show up for the respective Partner.
2. Partners can be connected either Direct or Indirect to the Ticket. Choose “Direct” if you prefer to connect both the End customer company and Partner company to the Ticket, or the “Indirect” setup if you prefer to have only the End customer company connected to the Ticket. Then, your Partner company is instead connected to the Customer.
3. Your partner get real-time notifications from SP_CE when the ticket status is. The result: Increased transparency and Less time on check-in calls.

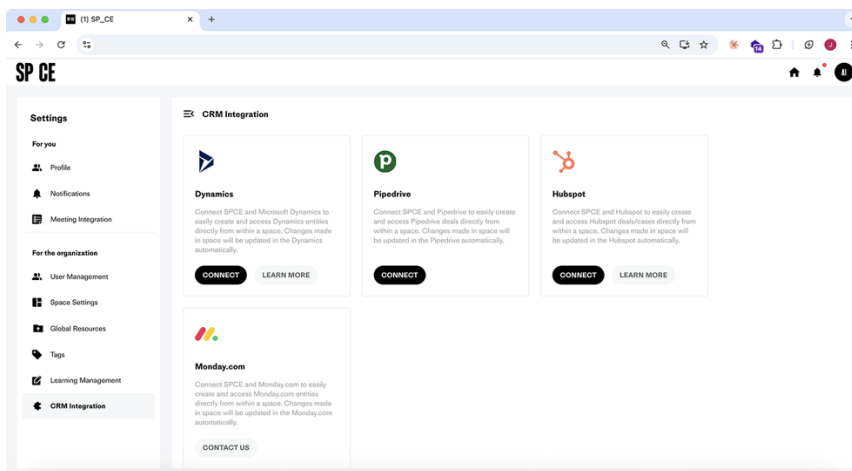


How to activate Hubspot for SP_CE Instructions

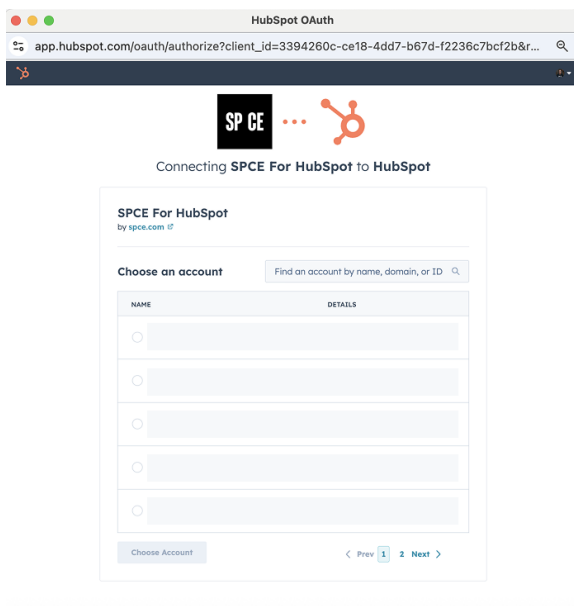
Step 1 – Activation

The installation is all made from SP_CE with some simple clicks.

1. In SP_CE Partner portal, go to Settings and CRM.
2. Click Connect on the Hubspot integration.

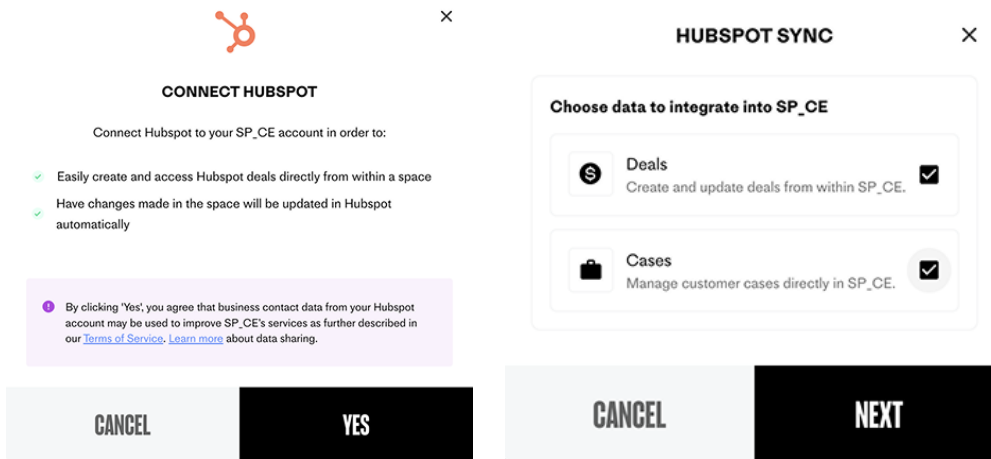


3. Login with your Hubspot user and choose account

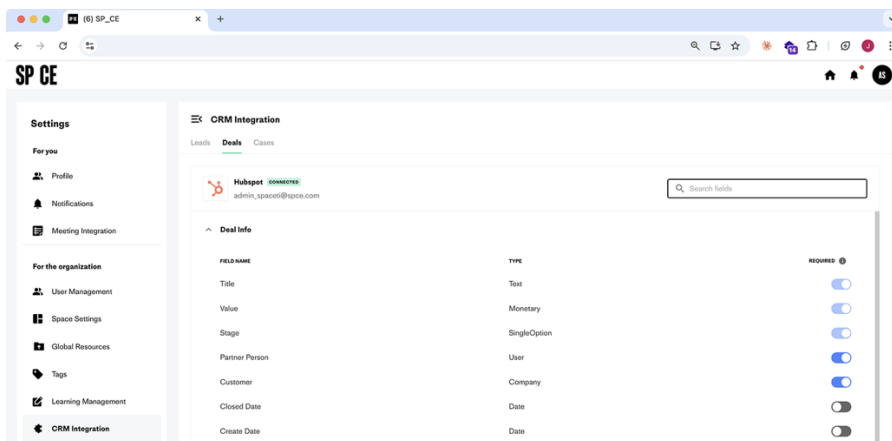




4. Choose if you want only Deals, Tickets or both to be synced.



5. Map the fields that you want to add to SP_CE from Deals/Tickets.



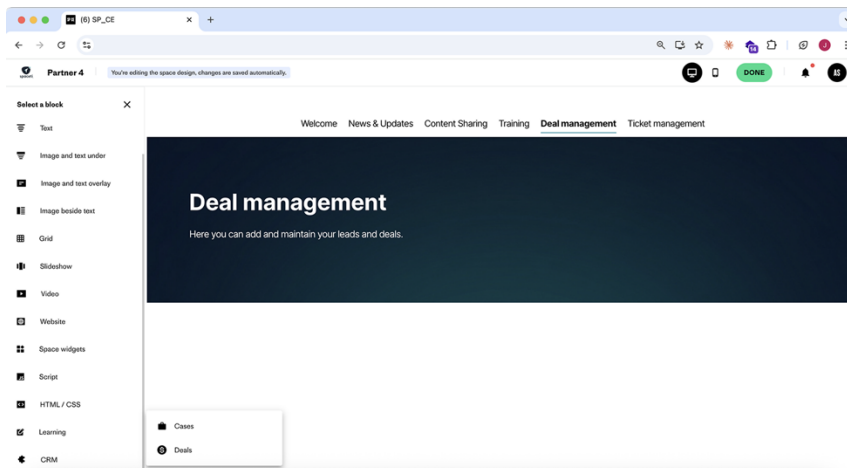
By default the setup is “Direct” (aka that your Partner company gets connected to the Deals/Cases). If you want to change this, please contact support@spce.com.



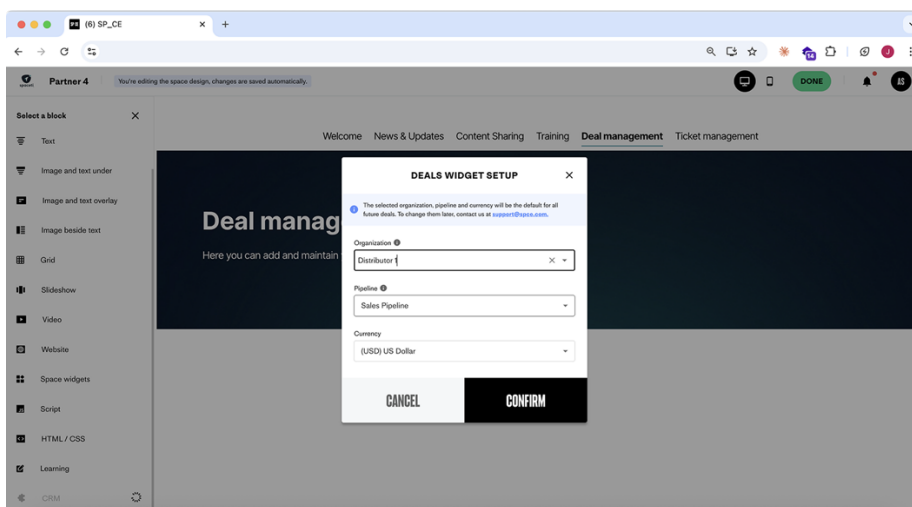
Step 2 – Add the Deal / Ticket widget(s) to the Partner space(s)

You add the widgets easy to a partner space with SP_CE Designer.

1. In SP_CE Partner portal, go to “Edit Design”.
2. Choose “Add widget” and pick the respective widget that you want to add to the space.

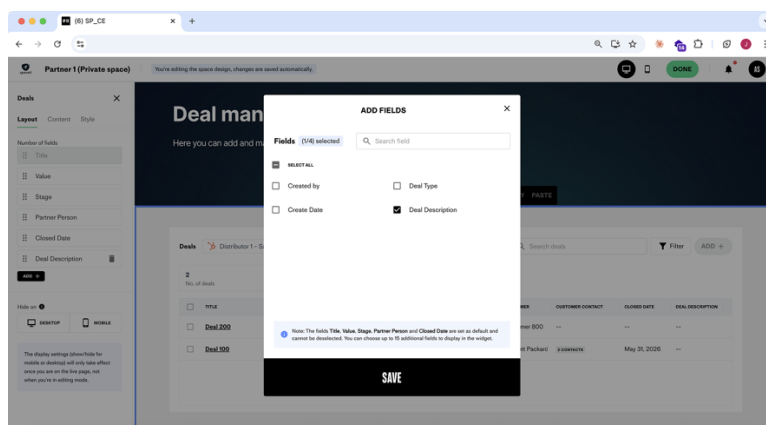
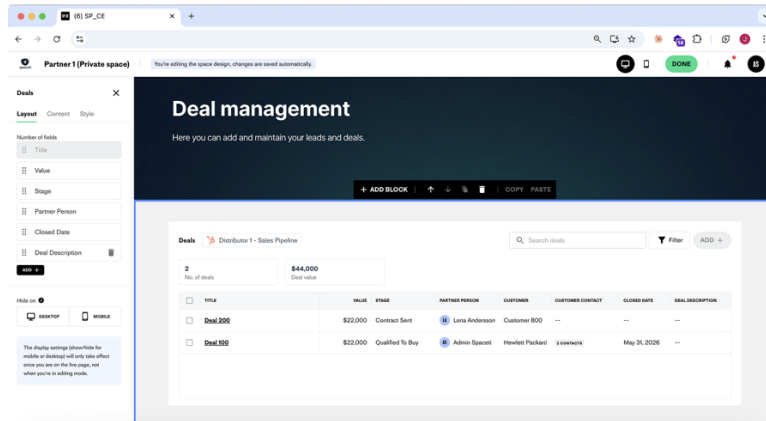


3. Search for your Partner company, choose Pipeline and Currency.





4. If you want to adjust the design, or add columns from all field that you earlier chose as available in Step 1. You do so in Design mode, by simply clicking on the widget and click the “Add +” button in the left pane.



Removal instructions

If you want to disconnect and remove the Hubspot integration, this is done with a simple email to support@spce.com naming your Organization and “Remove Hubspot” as subject. Please note that your email must be registered as an Organization Admin in SP_CE to add or remove integrations.