HubSpot's eCommerce Integration Guide.

AGENDA

1 Question & Answers.

Q & A

- What cart are you using?
  - HubSpot supports out-of-the-box integration for some shopping carts, including BigCommerce, Magento, and Shopify.
- If there is not an out-of-the-box integration, does your system have an open API?
  - An open API will allow you to post and pass data into HubSpot.
- How many steps are there in your checkout process?
  - In order to do abandoned shopping cart nurturing, there must be two steps to the checkout process that can be recognized as separate conversion events in HubSpot.

2 HubSpot Tools and Documentation.

DEVELOPERS.HUBSPOT.COM:
A ONE STOP SHOP FOR ALL OF
YOUR API NEEDS!

- There are two phases of any shopping cart integration:
  - The Forms API allows developers to submit form data and form submissions into HubSpot. Forms also enable the gathering of lead intelligence.
    - https://developers.hubspot.com/docs/endpoints#forms-api
  - The Contacts API passes contact data from your shopping cart into HubSpot and vice versa.
    - https://developers.hubspot.com/docs/endpoints#contacts-api

3 Phase 1: Forms API.

- The shopping cart will post data collected during the checkout process into your HubSpot database through a form post.

- Prior to creating the post, you must do two things:

STEP 1

- Determine and create any Custom Properties that will be posted into HubSpot. It is important to create the Properties using the correct Field Type for proper list segmentation (date picker for a date, number field for numeric values, etc.).
- These custom properties can only represent data related to that individual purchase and will be overwritten with every new purchase and subsequent post of data.
  - Examples :
    - Last Products Purchased
    - Last Purchase Date
    - Last Purchase Amount.
- Documentation link: http://help.hubspot.com/articles/How_To_Doc/create-custom-fields-contacts

STEP 2

- Create a corresponding Form and name it appropriately while noting the Form GUID which is located in the URL of that Form's page within the application. The Form GUID will be used as part of the post and the name of the Form will be what the conversion event is recognized as.
- Documentation Link: http://help.hubspot.com/articles/How_To_Doc/how-to-create-a-form

ADDITIONAL INFORMATION

- The integration must collect and pass the HubSpot user token, a.k.a. HubSpot tracking cookie, from the contact's browser and post it within the HS Context optional parameters. Please pass all Optional Parameters along with the custom properties.
    - Documentation Link: https://developers.hubspot.com/docs/methods/forms/submit_form

4 Phase 2: Contacts API.

- Post data stored in your shopping cart's database into HubSpot. These posts will represent historical purchase history data for contacts currently in HubSpot, as well as any new contacts you want to move into HubSpot from your database.
- Prior to creating these posts:
  - Determine and create any Custom Properties that will be posted into HubSpot. These Custom Properties should only represent data related to their entire purchase history or additional contact and demographic information.
  - Make sure to use the correct field type (i.e. Date Picker for date field, number field for numeric values, etc)

- Three most common posting methods:
  - Create Contacts:
    https://developers.hubspot.com/docs/methods/contacts/create_contact
  - Update an Existing Contact:
    https://developers.hubspot.com/docs/methods/contacts/update_contact
  - Retrieve Contacts:
    https://developers.hubspot.com/docs/methods/contacts/get_recently_updated_contacts