



HubSpot V2 Installation Guide

POWERING BUSINESS DECISIONS

HubSpot Installation Guide

This guide provides a step-by-step process for installing and configuring the CreditSafe integration in Hubspot. It covers prerequisites, module setup, API credential configuration, connection testing, and validation to ensure your Hubspot environment is ready to perform real-time credit checks and company data lookups reliably.

Prerequisites (Hubspot)

- Hubspot account created
- Databridge Installation Key (only for first-time install).

Select Software

- Choose Hubspot from software list.
- Only one software is selected in this step.

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Selected Software

Choose the software system you use

 Odoo

 Sage X3

 HubSpot



Validate Installation Key (first install only)

If Hubspot is not already installed for this user, enter installation key.

Click Next to validate key.

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Enter Installation Key

Validate your installation key before software setup.

Installation Key

Previous Next

Configure Hubspot Credentials

Click "Install on Hubspot" button

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Configure software credentials

Configure credentials for the software selected

 HubSpot

Install on HubSpot ↗

Keep this page open and return once the installation is complete.

Credentials

Access Token

Refresh Token

Previous Next

Choose your Hubspot account



Connecting **Softsales-Consulting** to **HubSpot**

Softsales-Consulting

Choose an account

NAME	DETAILS
☐ micro_test_account	micro-test-account-dev-147399184.com 147399184
☐ second_test_account	second-test-account-dev-147648815.com 147648815
☐ Soft Sales Consulting	softsales-consulting.com 147399070

Choose Account

Accept Hubspot Terms

- Check that you understand the connection risk
- Click "Connect app" button

Softsales-Consulting

This app is requesting access to your HubSpot account. Continue connecting if you agree.

☒

Manage and view your CRM data
View properties and other details about companies.
Create, delete, or make changes to companies.

View properties and other details about contacts.

View details about property settings for companies.
Create, delete, or make changes to property settings for companies.

☐

Files
This includes access to File Manager.

☐

Download files submitted through a form
Download files submitted through a form

☐

Basic HubSpot account information
View properties about the installing account including primary domain and user emails.

☐ I understand the risks of connecting an **unverified app** to my account. I acknowledge that this app has not been reviewed or approved by HubSpot.

Connect app

Cancel

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

Complete Installation by Sign in again

English

Welcome Back

Sign in to your account

Email address *

xxxxxxx@gmail.com

Password *

.....

☒ Remember me

Forgot password?

Sign In

Don't have an account? Sign up

After signing in you will be redirected to Hubspot connected apps

Connected Apps

Add more connections

Connections home (2)

Connections insights

Notifications

My Apps

Search for an app

App status

APP	STATUS	INSTALLED DATE	INSTALLED BY	LAST ACTIVITY DATE
HubSpot Local Development Tools		Jan 22, 2026 6:04 PM GMT+2	Rami Kadaweh rami.kadaweh@softsales-consulting.com	Actions
Softsales-Consulting		Mar 6, 2026 11:12 AM GMT+2	Rami Kadaweh rami.kadaweh@softsales-consulting.com	Actions

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Click "Next" button

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Configure software credentials

Configure credentials for the software selected

 HubSpot

Install on HubSpot ↗

Keep this page open and return once the installation is complete.

Credentials

Access Token

 ENC:d9c7089fe97b64fe75c336f77fe553d8:63e1f6ef6a8710ee76d16ec5ef3466f

Refresh Token

 ENC:f059269a073ec3fd37aab92ca18b3d05:81a5b0985b1b5fd42e6cf1b6bd450f

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Select Data Source = CreditSafe

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Data Source Setup

Selected data source

 CreditSafe



Add CreditSafe Credentials

- Enter Username and Password.
- Click Next.

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Configure credentials

Enter Basic Auth credentials

 **CreditSafe**
Basic Authentication

Credentials

Base URL



Username *



Password *

 

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Bridge Setup

Software: Hubspot (CRM credential)

Data Source: CreditSafe (source credential)

Choose Mapping Type

For Hubspot, mapping options appear:

- Standard (recommended)
- Dynamic

If Standard, optionally expand See more to show obligatory fields by operation.

Click Create Bridge.

Bridge Setup

Connect your Software to a data source

Selected Software



HubSpot

Selected data source



CreditSafe

Select your configuration type

Recommended ⚡ Fast

Standard Configuration

Standard option with pre-configured field setup, including field mapping, default monitoring rules, default matching criteria, and also allows custom selections. Recommended for most users.

[see more](#)

Technical Knowledge Required ⌚ ~2 h

Custom Configuration

Fully customizable field configuration for advanced control over how your data syncs.



HubSpot



CreditSafe

✓ Ready to Connect

Create Bridge

Finalize on Success Screen



Select your preferred country and preferred language.

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Bridge Created Successfully

HubSpot

CreditSafe

Select Your Preferred Country

Preferred Country

Preferred Language

Preferred Language

Save and Configure your Bridge

Setup Hubspot Card

- 1 - Go to your hubspot account
- 2 - Click Crm located on sidebar
- 3 - Choose Companies

