



StarterPak: NetSuite and HubSpot Contact Synchronization

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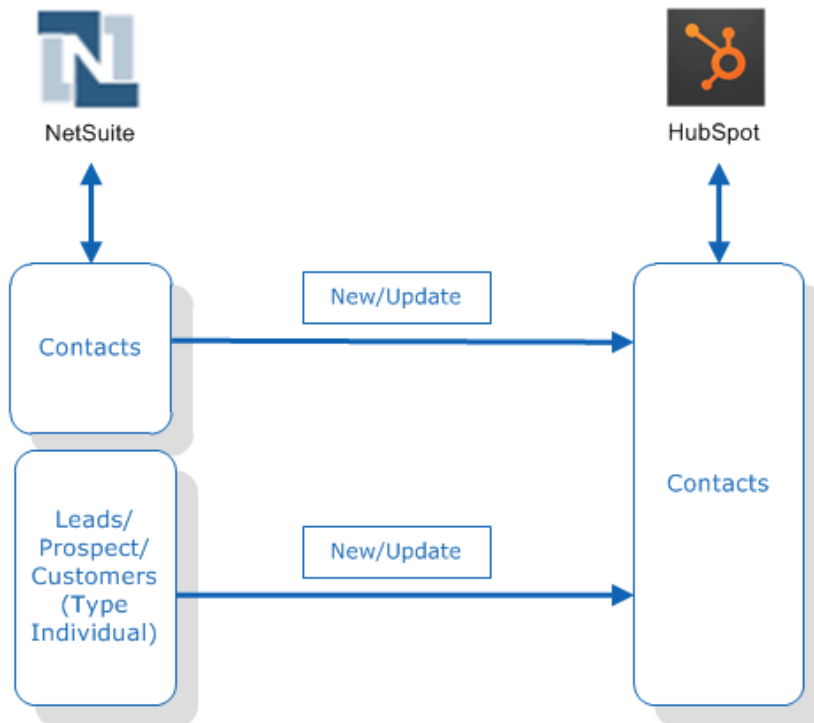
NetSuite And HubSpot Contact Synchronization StarterPak

StarterPaks provide a base set of Maps and configuration files you can leverage when integrating data between applications. Each StarterPak requires customization to integrate your data properly. Therefore, it is important that you read and understand the entire document before attempting to use the contents of the StarterPak.

TIBCO StarterPaks are meant to be used as a starting point for your own projects, and should not be considered “plug and play”. StarterPaks are available as is, with no guarantee or commitment of support for the associated Maps and configuration files.

Welcome to TIBCO’s StarterPak for NetSuite And HubSpot Contact Synchronization. This StarterPak uses one TIBCO Scribe® Online Solution to integrate contacts and individual customers in NetSuite into contacts in HubSpot.

Data is synchronized between NetSuite and HubSpot as shown:



TIBCO StarterPak: NetSuite And HubSpot Contact Synchronization

All references in this document to NetSuite Customers include NetSuite Customers in the Lead, Prospect, and Customer stage.

StarterPak Contents

You can download this StarterPak from the [TIBCO Scribe® Online StarterPaks](#) page as a downloadable ZIP file, **ScribeStarterPak-NetSuite-HubSpot-Contact-Synch_v1_1.zip**.

The **ScribeStarterPak-NetSuite-HubSpot-Contact-Synch_v1_1.zip** file includes:

- **NetSuite-HubSpot-Contacts&IndividualCustomers.xml** – An XML file containing TIBCO Scribe® Online Maps that define mappings between NetSuite contacts and HubSpot contacts, and NetSuite Leads/Prospects/Customers of type Individual and HubSpot contacts. Import this file into your TIBCO Scribe® Online Solution.
- **NetSuite-HubSpot-Country.csv** – A text-based sample file used in the Map for transforming the country field between NetSuite and HubSpot.

Requirements

This StarterPak does not support professional services accounts.

In addition to the StarterPak, your site needs:

- A trial or paid subscription to TIBCO Scribe® Online Integration Services (IS).
- Access to a NetSuite single company account.
- Access to a HubSpot account.

Preparing The StarterPak

This section describes the high-level tasks for creating a TIBCO Scribe® Online Solution. For information about a task or TIBCO Scribe® Online, see the [TIBCO Scribe® Online Help Center](#).

Download And Extract The Files From The Zip File

The Maps provided in this StarterPak support integrating contact and individual customer information.

Download **ScribeStarterPak-NetSuite-HubSpot-Contact-Synch_v1_1.zip** from the the [TIBCO Downloads page](#). Extract the files to a folder accessible by TIBCO Scribe® Online.

Configuring The TIBCO Scribe® Online Connections

Connections are used in multiple Maps, therefore, TIBCO recommends creating Connections from the Connections page and adding them to the Maps as needed. For information, see [Adding Connections](#).

Configure The NetSuite Marketing Connection

Configure the NetSuite Marketing Connection as described in [TIBCO Scribe® Online Connector For NetSuite](#).


Configure The HubSpot Connection

Configure the HubSpot Connection as described in [TIBCO Scribe® Connector For HubSpot](#).

Configure The TIBCO Scribe ® Online Solution

After you create TIBCO Scribe ® Online Connections, configure a Solution.

TIBCO suggests that you leave the schedule set to On Demand until you have implemented and tested the StarterPak.

1. Configure a new Solution. See [Adding Or Editing An Integration Solution](#).
2. In the Maps section of the Solution, select **Import** from the Menu .
3. Browse to the **NetSuite-HubSpot-Contacts&IndividualCustomers.xml** file, and import that file. See [Exporting And Importing Maps](#).

The imported Maps show as Incomplete.

4. Open each Map and configure the Connections. See [Defining An Integration Map](#).

NetSuite And HubSpot Maps

This section provides details about the Maps included in this StarterPak. For more information on the specific field mappings, review the Maps in TIBCO Scribe® Online.

Map Descriptions

- **NetSuite Individual Customer -> HubSpot Contact create and update** – Updates the HubSpot Contact corresponding to an updated NetSuite Customer with the type of ‘individual’. If a corresponding Contact does not exist in HubSpot, creates one.
- **NetSuite Contact -> HubSpot Contact create and update** – Updates the HubSpot Contact corresponding to an updated NetSuite Contact. If a corresponding Contact does not exist in HubSpot, creates one.

Use Cases Behind The Maps

The Maps in this StarterPak were developed based on a number of use cases and are intended as starting points from which you can build a complete Solution.

Use cases are written in the format, “As a [role name], I want [functionality],” and may include specific acceptance criteria. In developing this StarterPak, the use cases were used to define the scope and functionality of the Maps.

In the use cases, changes in records are determined by filtering source queries for records that have been recently updated.

Use Cases

This section describes the use cases on which the Maps are based to help you determine the scope of the out-of-the-box StarterPak.

NetSuite Individual Customer To HubSpot Contact

As a Solution implementer, I want to create as a HubSpot Contact any active Customer with a type of individual that is created or updated in the integrated NetSuite system but that does not exist in HubSpot. If the Contact does exist in HubSpot, that Contact should be updated. The Email Address should be used as the match key to determine if a Contact exists in HubSpot. Customers with the following should be filtered out:

- Type of Company
- Type of Individual that:
 - Are Inactive
 - Have no Email Address
 - Have a global subscription status of Soft Opt Out
 - Have a global subscription status of Confirmed Opt Out

Map Name: NetSuite Individual Customer -> HubSpot Contact create and update

NetSuite Contact To HubSpot Contact

As a Solution implementer, I want to create as a HubSpot Contact any active Contact that is created or updated in the integrated NetSuite system but that does not exist in HubSpot. If the Contact exists in HubSpot, that Contact should be updated. The Email Address should be used as the match key to determine if a Contact exists in HubSpot. Contacts should be filtered out if they:

- Have no Email Address
- Have an inactive status
- Are marked as private
- Have a global subscription status of Soft Opt-Out
- Have a global subscription status of Confirmed Opt-Out

Map Name: NetSuite Contact -> HubSpot Contact create and update

Additional Notes And Known Issues

This StarterPak was designed to be flexible in a variety of business use cases. You may need to modify the Maps to support your specific business process.

Making Schema Changes

After you create your Connections, if you add any fields to either the HubSpot or NetSuite Marketing schemas, you must refresh your metadata for any HubSpot or NetSuite Connections. See [Resetting Metadata](#).

To Map these new fields:

1. Open the desired Map.
2. View the new fields.
3. Map the new fields as appropriate.

Time Lag

Changes made in HubSpot may not be immediately available for querying by the API. Target systems do not reflect HubSpot changes until those changes are available to the API. Because of this internal processing by HubSpot, changes made in HubSpot may take more than one Solution run to appear in the target system. The length of this delay depends on the timing of HubSpot internal processing and the run interval of Solutions with HubSpot as the source.