

Installation of Sales Intelligence for HubSpot

🕒 2 minutes • 📅 April 26, 2023

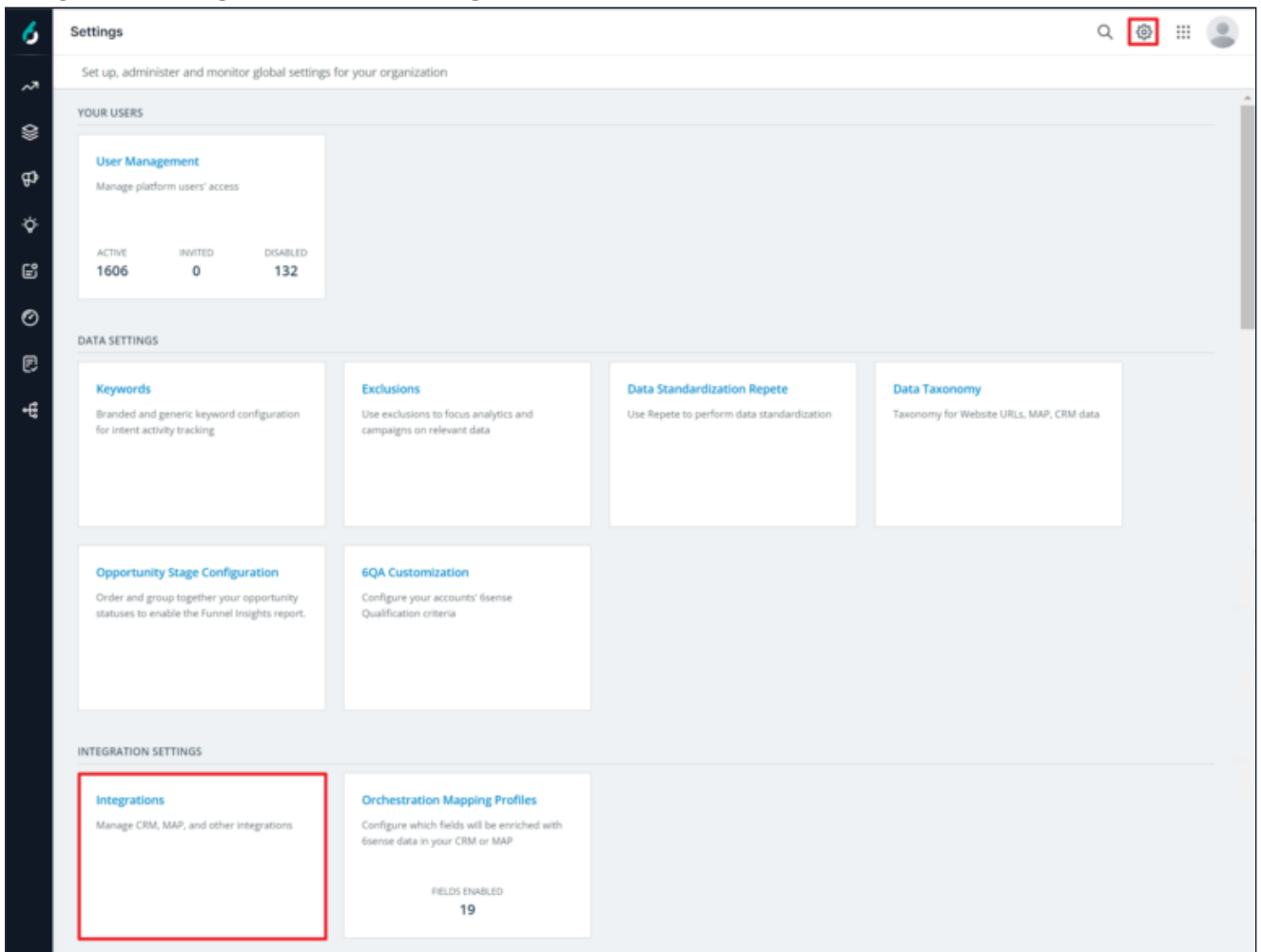
This how-to guide is for 6sense administrators and users with access to the **6sense ABM Settings**, describing the process of integrating 6sense with your HubSpot instance in order to access Sales Intelligence in HubSpot.

Before integrating Sales Intelligence with HubSpot CRM cards, you must first perform the [HubSpot CRM integration](#).

📘 This is an organization level configuration, not user level.

Step-by-Step Instructions

1. Navigate to **Settings** and select the **Integrations** section.

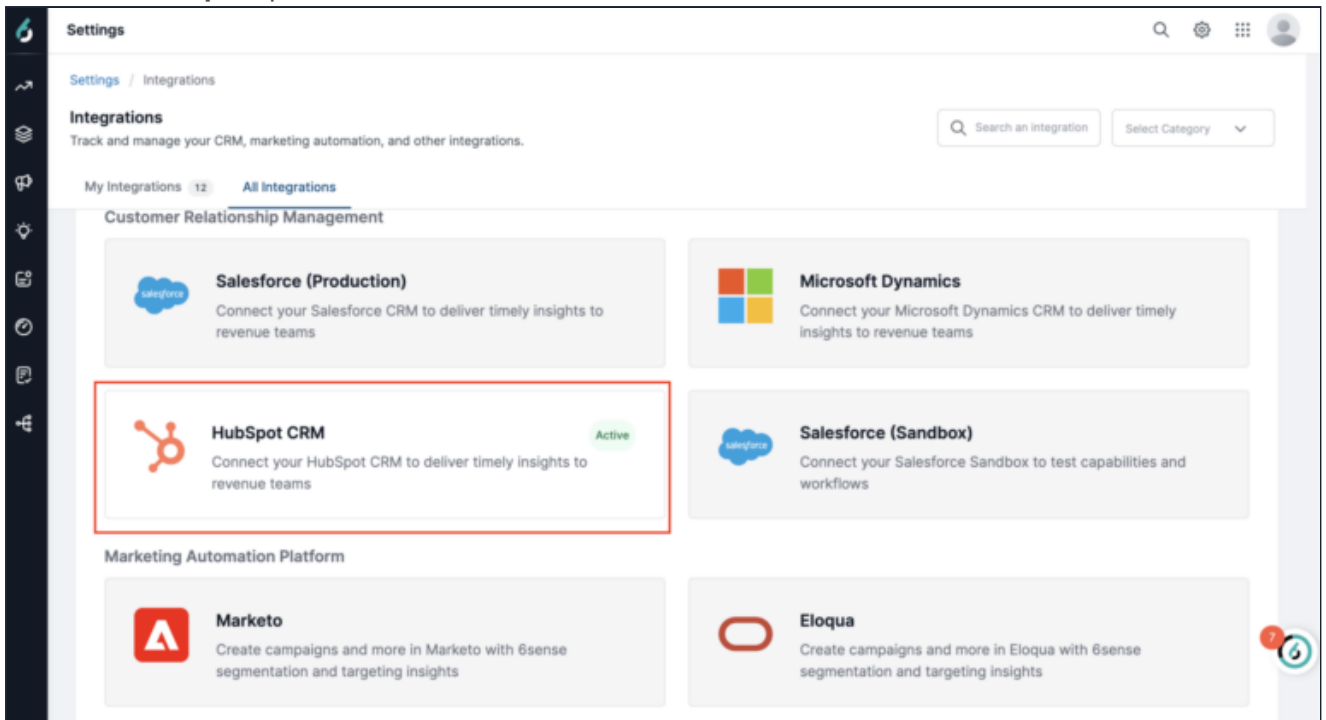


The screenshot displays the 6sense Settings interface. At the top, the title 'Settings' is visible, along with a search icon, a gear icon (highlighted with a red box), and a user profile icon. Below the title, the subtitle reads 'Set up, administer and monitor global settings for your organization'. The main content area is divided into several sections:

- YOUR USERS**: Contains a 'User Management' card with a table showing user counts: ACTIVE (1606), INVITED (0), and DISABLED (132).
- DATA SETTINGS**: Contains four cards: 'Keywords', 'Exclusions', 'Data Standardization Repete', and 'Data Taxonomy'.
- INTEGRATION SETTINGS**: Contains two cards: 'Integrations' (highlighted with a red box) and 'Orchestration Mapping Profiles'.

The 'Integrations' card in the Integration Settings section shows the text 'Manage CRM, MAP, and other integrations'.

2. Select the **HubSpot** option from the list of CRMs.



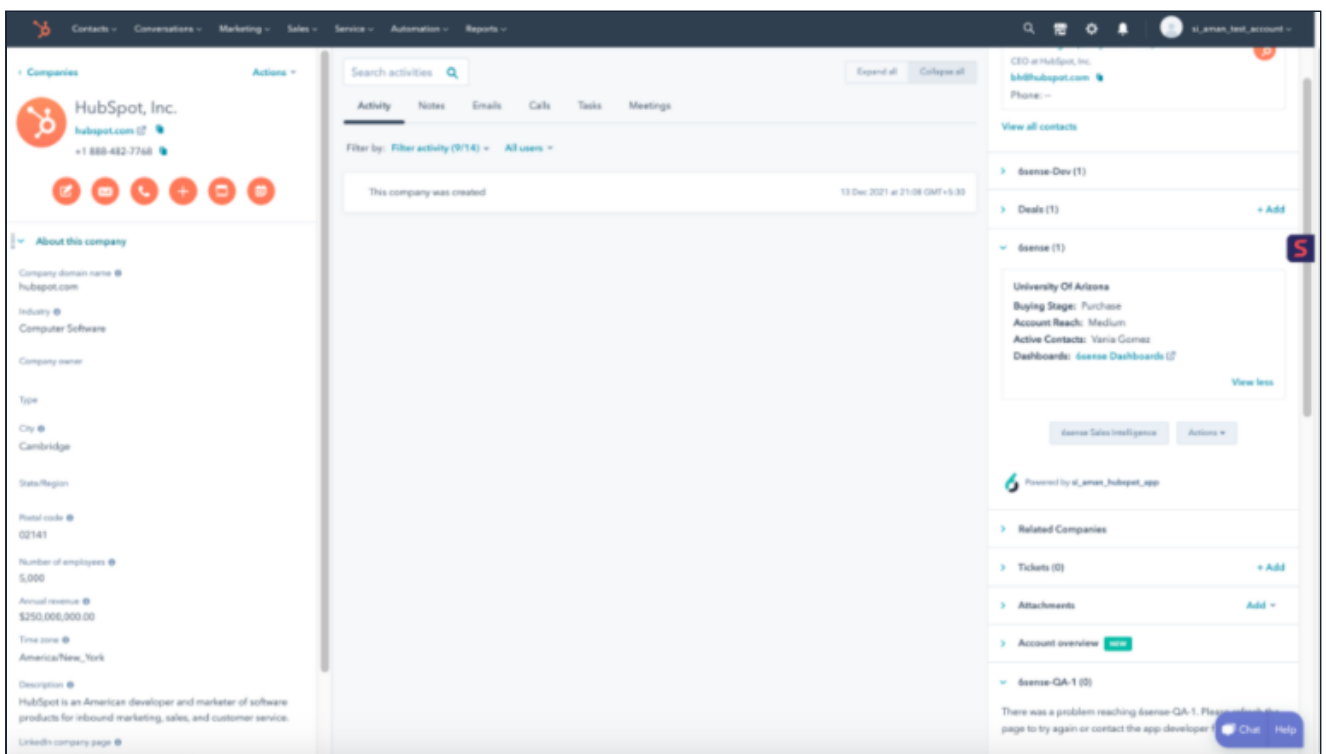
3. Click on **Connect** and then select a suitable account from the list, opened in the new tab.

4. Click **Connect App** in the pop-up displayed.

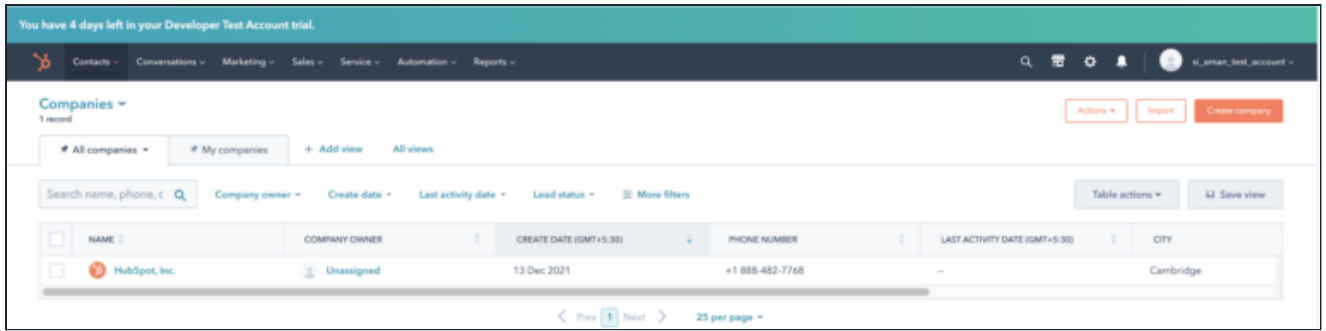
5. Once the OAuth authentication is complete with the organization, the CRM cards will start showing up on the company and contact pages. HubSpot has a unique way to integrate with third-party apps. On the right hand side of the company and the contact object pages, the cards are added. Card action buttons open up a modal to access the respective apps and functionalities.

Card name: 6sense

App name: 6sense Sales Intelligence



6. Log in to HubSpot and click on **Companies** inside the Contacts menu.

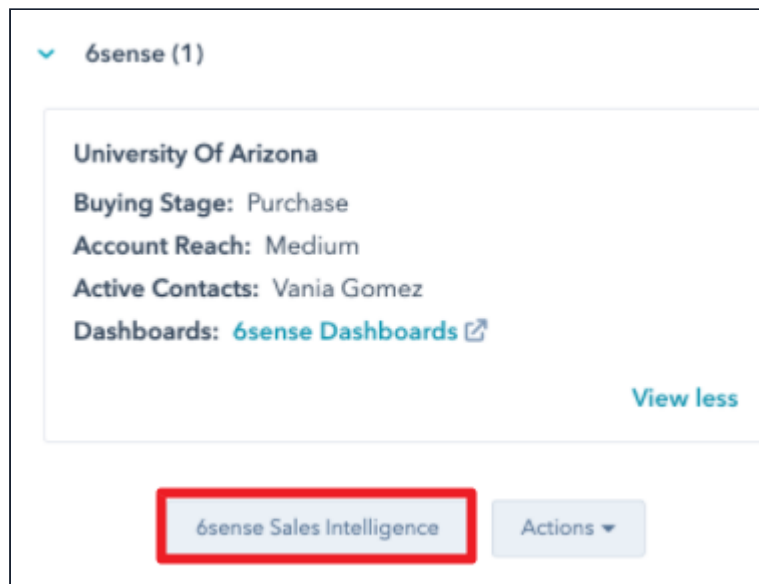


Please note the following features are not yet available in HubSpot:

- "Purchase Contact Info" action
- "No Longer w/ Company" action

Q: How can I access the Sales Intelligence extension within HubSpot?

A: Click on the 6sense card button **Sales Intelligence** and a modal opens containing the Sales Intelligence extension. Please note that only one modal can be accessed at a time. So, you need to close this modal to open the **6sense Dashboards** modal from the **Actions** button on the same card.



Q: How can I access Dashboards within HubSpot?

A: Click on the **Actions** button in the 6sense card and select **6sense Dashboards** to open the Sales Intelligence Dashboard modal. Please note that only one modal can be accessed at a time. So, you need to close this modal to open the **Sales Intelligence** modal.

☰ ✓ Aman-qa (1)

WANdisco, Inc.

Buying Stage: Decision

Account Reach: High

Active Contacts: Daniel Berezcki (Staff, Business Development), Renee Griffin (Manager, Marketing), Elena Adame (Staff, Business Development)

Dashboards: [6sense Dashboards](#) ↗

[View less](#)

6sense Sales Intelligence

Actions ▾

6sense Dashboards



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