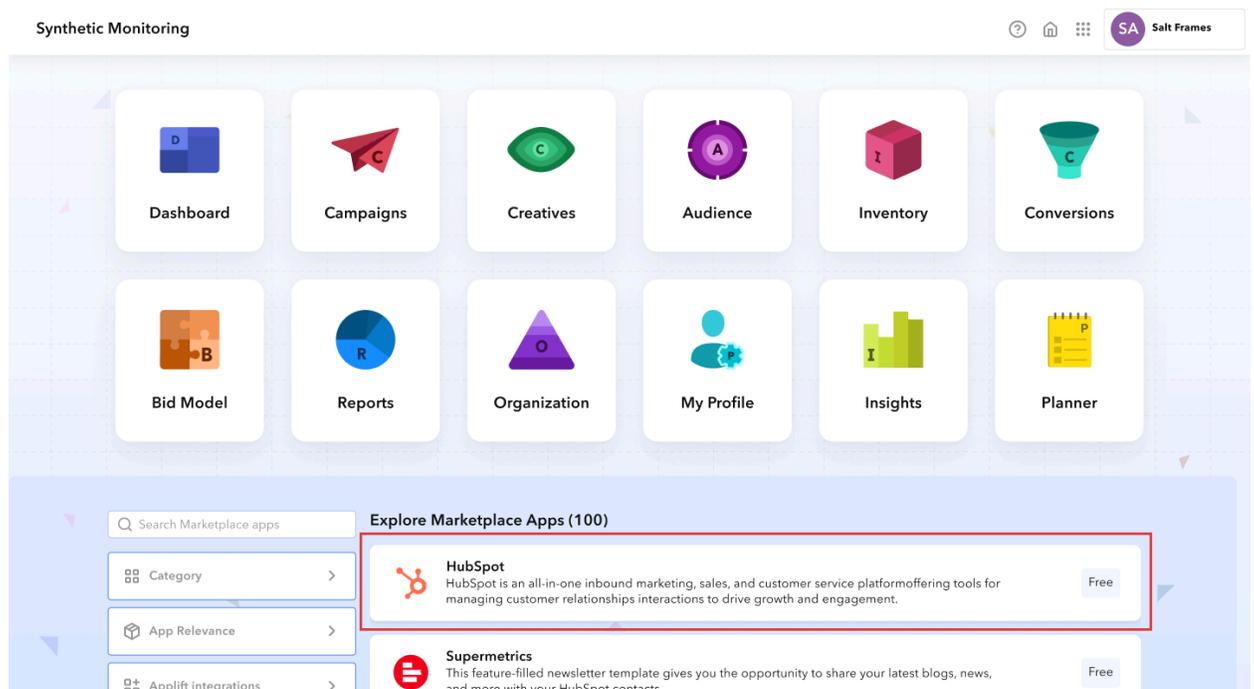


How can I create a Matched Audience using my HubSpot contact list?

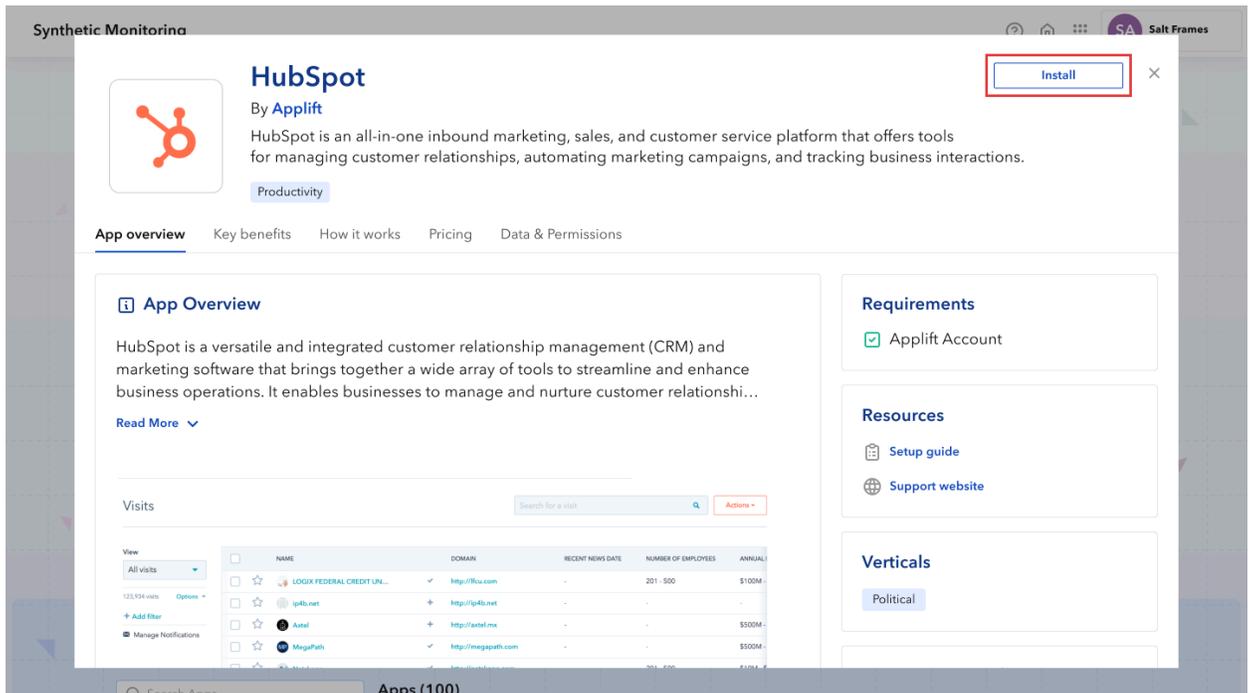
Install and Authorize HubSpot from Marketplace Apps

Step 1: Install the HubSpot app from Marketplace apps

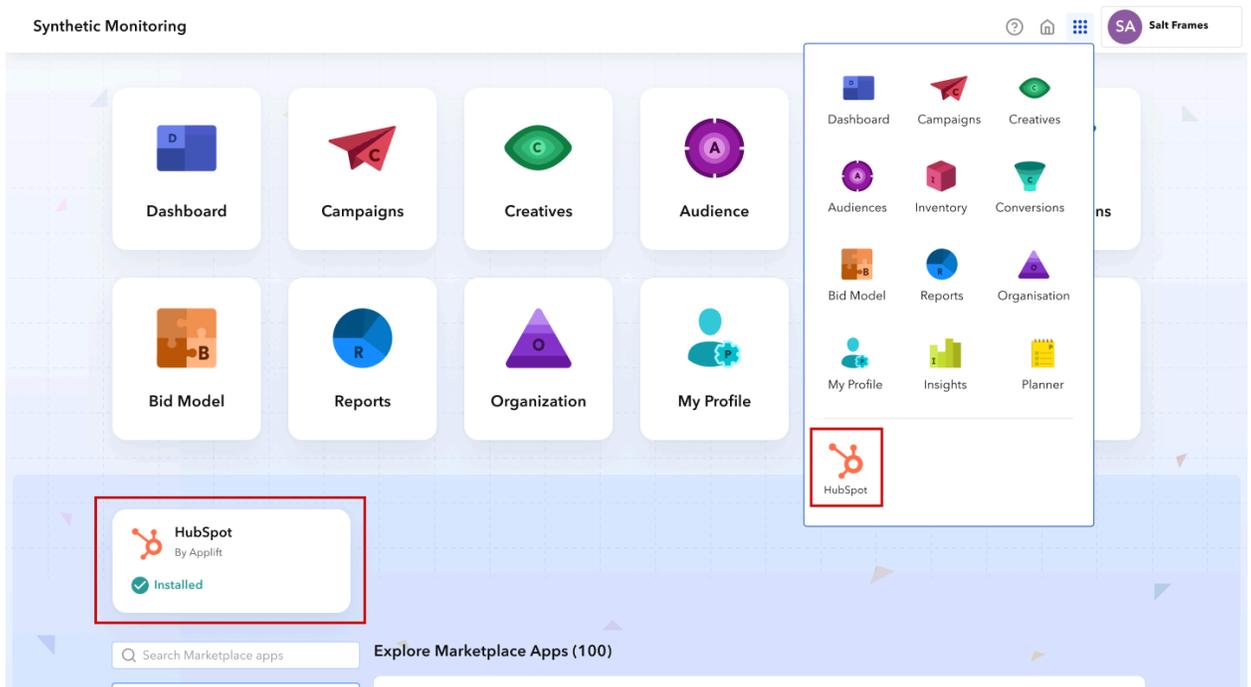
- Visit marketplace apps on **iqm.com** and select 'HubSpot' app.



- Open the **HubSpot** app and click on the **'Install'** button.



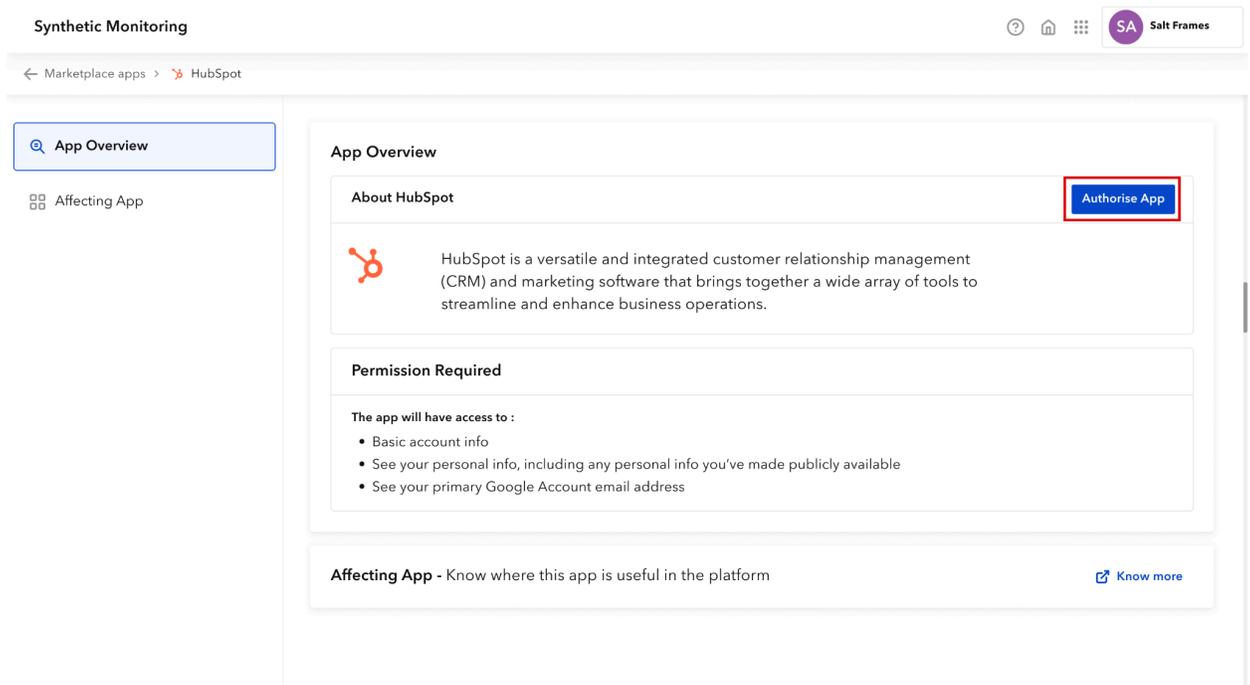
- Once the app is installed, access it from the home page of available apps OR select the **9 dots** icon in the top right of the header. **HubSpot** will appear at the bottom of the list.



~~Authorise your IQM accounts and allow permission to access your HubSpot data.~~

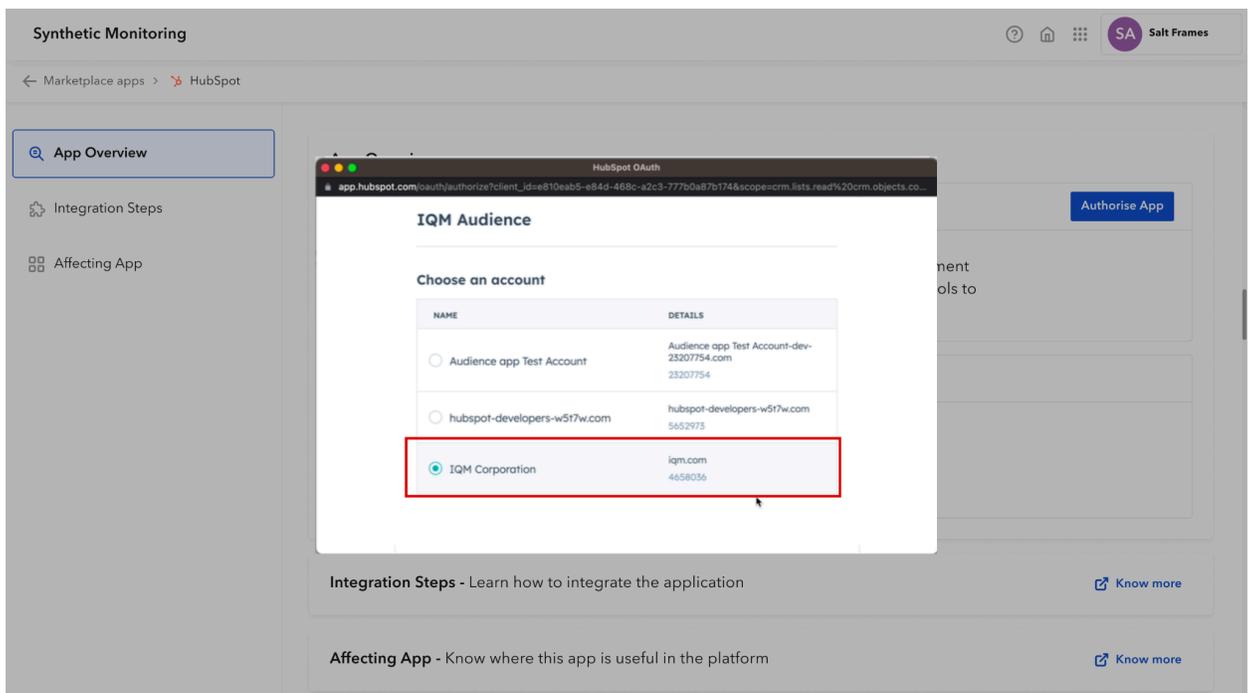
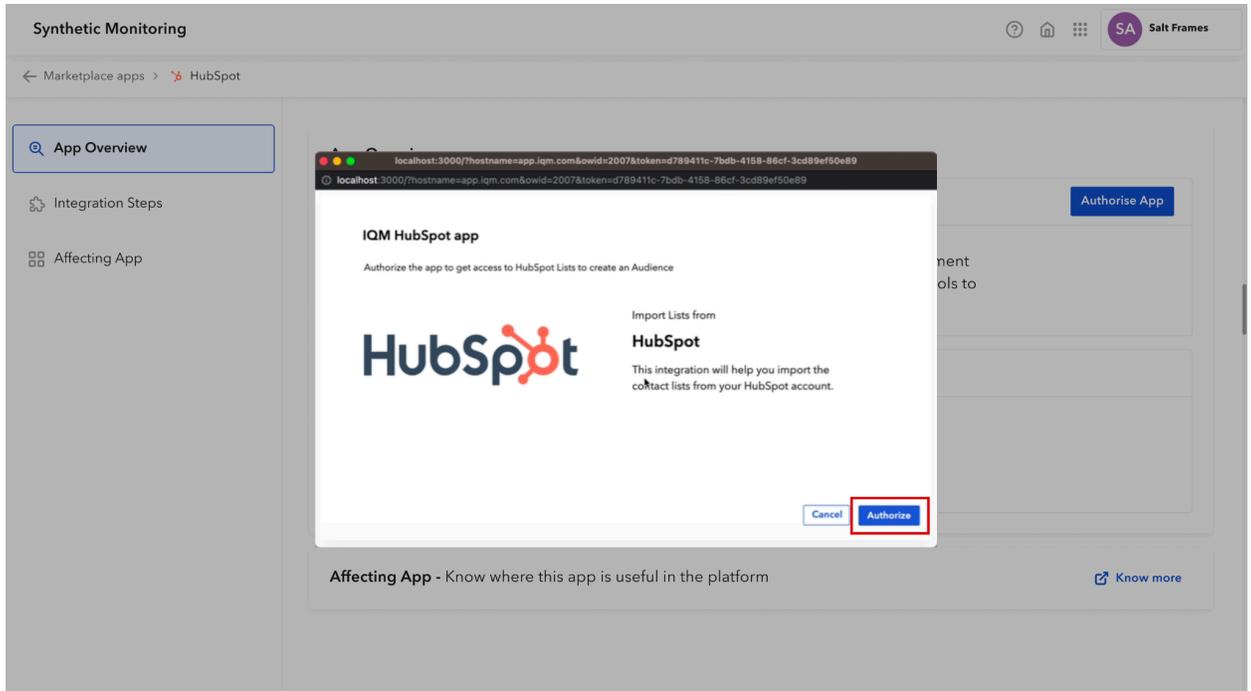
Step 2: Authorise the IQM access to the Hubspot account

- Click on the **'Authorise App'** button in the app overview page.



The screenshot shows the 'Synthetic Monitoring' interface. At the top, there's a navigation bar with 'Marketplace apps > HubSpot'. Below this, a sidebar on the left contains 'App Overview' (highlighted) and 'Affecting App'. The main content area is titled 'App Overview' and is divided into three sections: 'About HubSpot', 'Permission Required', and 'Affecting App'. The 'About HubSpot' section includes the HubSpot logo and a description, with a blue 'Authorise App' button highlighted by a red box. The 'Permission Required' section lists the access the app will have: basic account info, personal info, and primary Google Account email address. The 'Affecting App' section at the bottom provides a link to 'Know more'.

- Select your **HubSpot account** and Authorise IQM access with the **HubSpot** account.



- If the **Hubspot** account is not logged in, then go to **hubspot.com** and log in into the Hubspot account and Authorise.



Don't have an account? [Sign up](#)

Email address

Password

[Show Password](#)

[Forgot my password](#)

Remember me

Log in



Log in with SSO

Notification of availability of a new app by the Admin

- Users will be notified whenever an app is added into the platform ecosystem.
- Users will receive notification in the **Intercom icon** and on the **9 dots icon** in the top right of the header.

Dashboard

Campaigns

Creatives

Audience

Inventory

Conversions

Bid Model

Reports

My Profile

Insights

Planner

HubSpot
By Applift
Installed

Search Marketplace apps

Explore Marketplace Apps (100)

Vikash from Applift
Active

Hey <> First name .

<App Name> got added to your organisation 🎉

This means you can:

- Import data directly onto the platform
- Export the reports to the app

Take a look

SA Salt Frames

New App Available

It's the perfect way to save time and be more productive.

Dashboard

Campaigns

Creatives

Audience

Inventory

Conversions

Bid Model

Reports

My Profile

Insights

Planner

HubSpot
By Applift
Installed

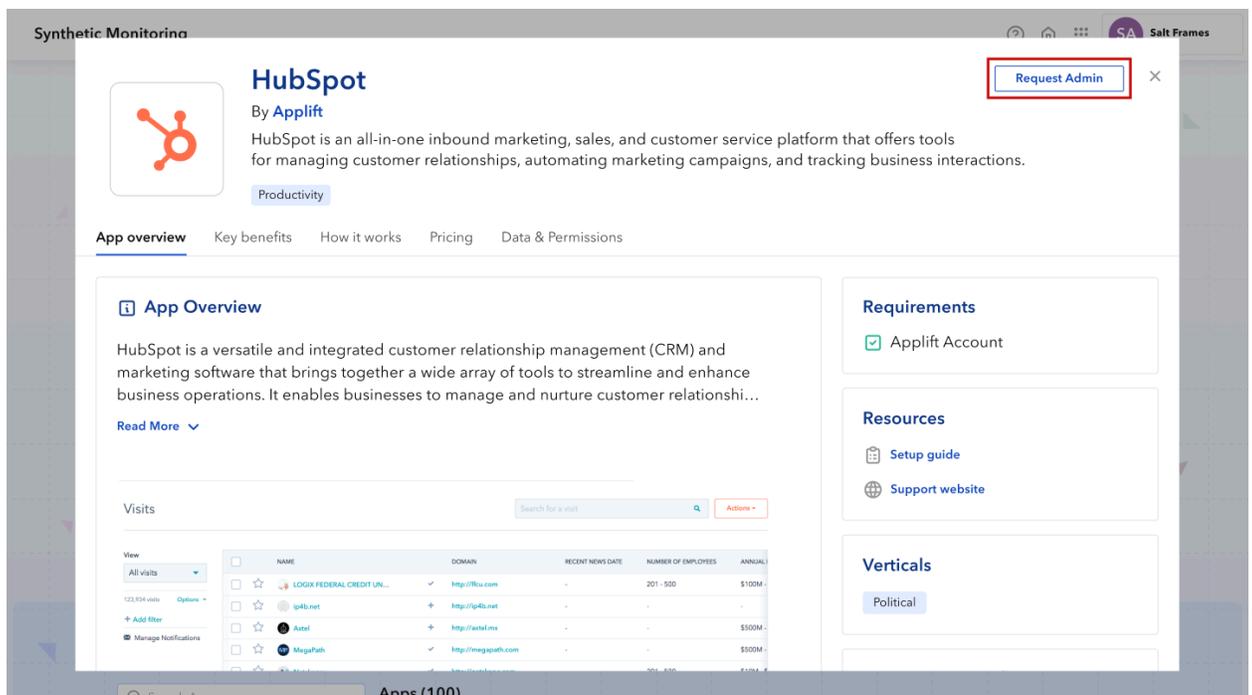
Search Marketplace apps

Marketplace Apps (100)

Installing the HubSpot App for Additional Users in Your Organization

Any other user within your organization must also install the HubSpot app within their instance of IQM's Platform.

- Each user selects the **HubSpot** app from the marketplace apps in IQM's platform.
- User clicks on the **'Request Admin'** button to send a request for the app.



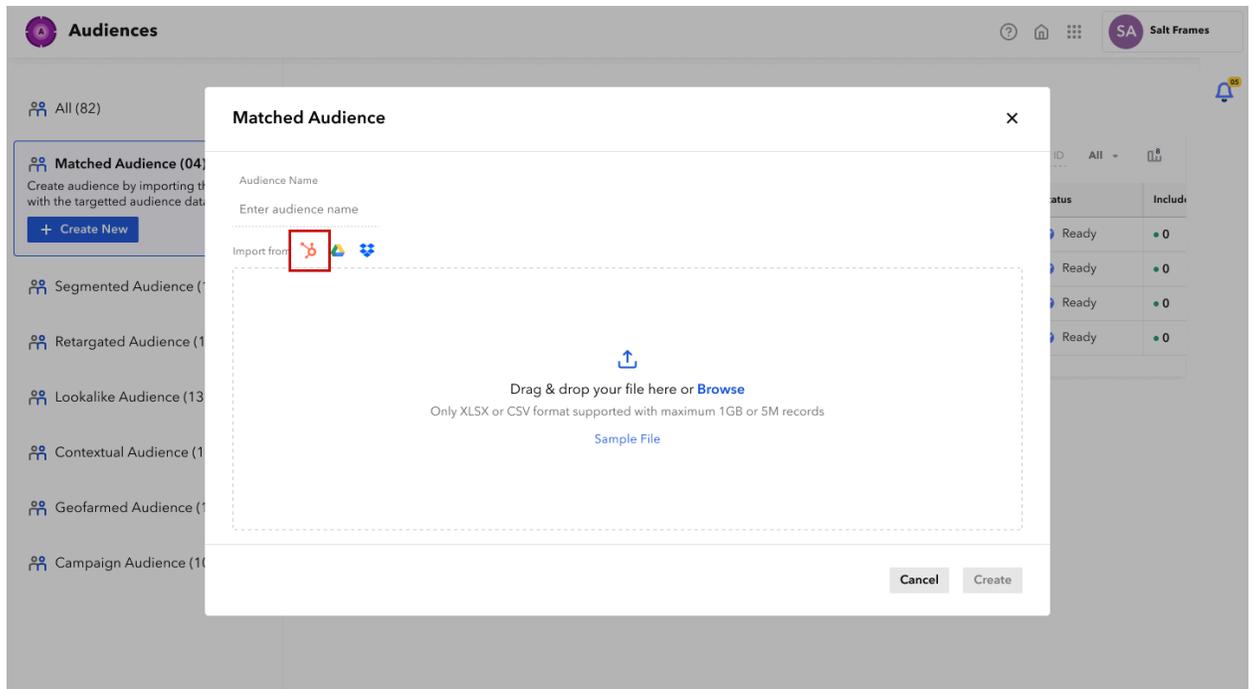
The screenshot displays the HubSpot app page in the IQM Platform marketplace. The app is titled "HubSpot" and is provided by "Applift". It is categorized as a "Productivity" app. A red box highlights the "Request Admin" button in the top right corner. The page includes an "App Overview" section with a description of HubSpot as a CRM and marketing software. Below this is a "Visits" table with columns for Name, Domain, Recent News Date, Number of Employees, and Annual Revenue. The table lists several domains, including LOGIX FEDERAL CREDIT UN..., ip4b.net, Antel, and MegaPath. On the right side, there are sections for "Requirements" (Applift Account), "Resources" (Setup guide, Support website), and "Verticals" (Political).

View	NAME	DOMAIN	RECENT NEWS DATE	NUMBER OF EMPLOYEES	ANNUAL...
<input type="checkbox"/>	LOGIX FEDERAL CREDIT UN...	http://fcu.com	-	201 - 500	\$100M -
<input type="checkbox"/>	ip4b.net	http://ip4b.net	-	-	-
<input type="checkbox"/>	Antel	http://antel.me	-	-	\$500M -
<input type="checkbox"/>	MegaPath	http://megapath.com	-	-	\$500M -

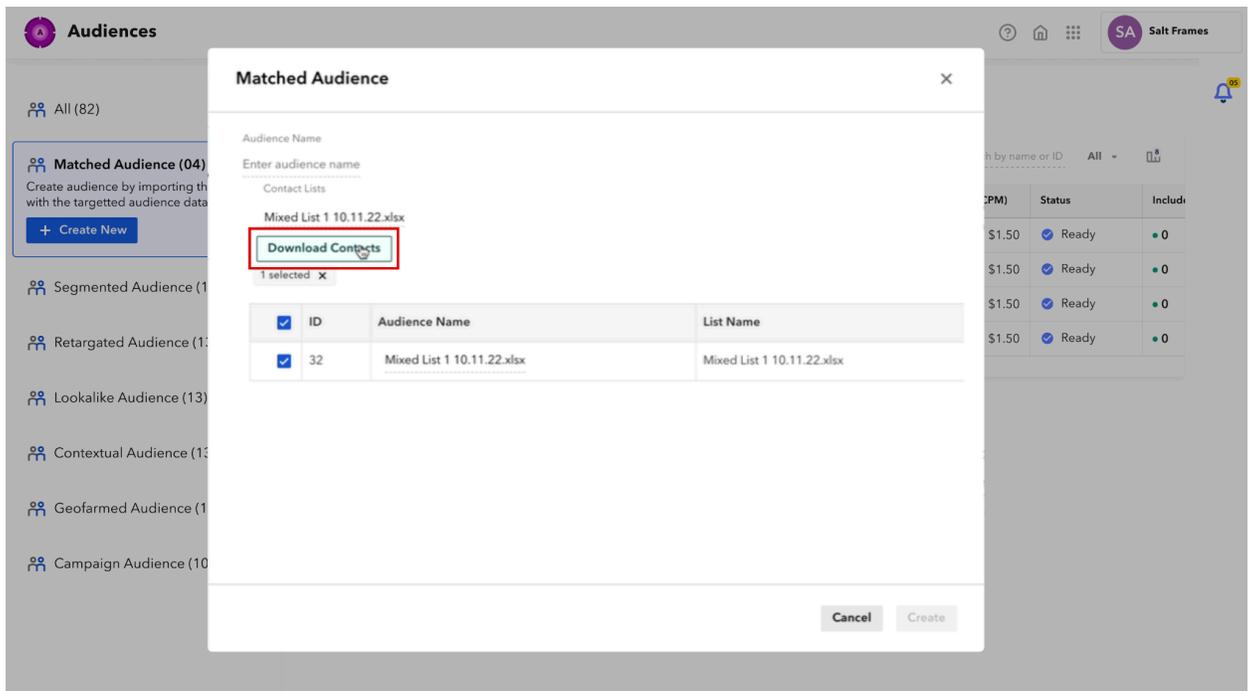
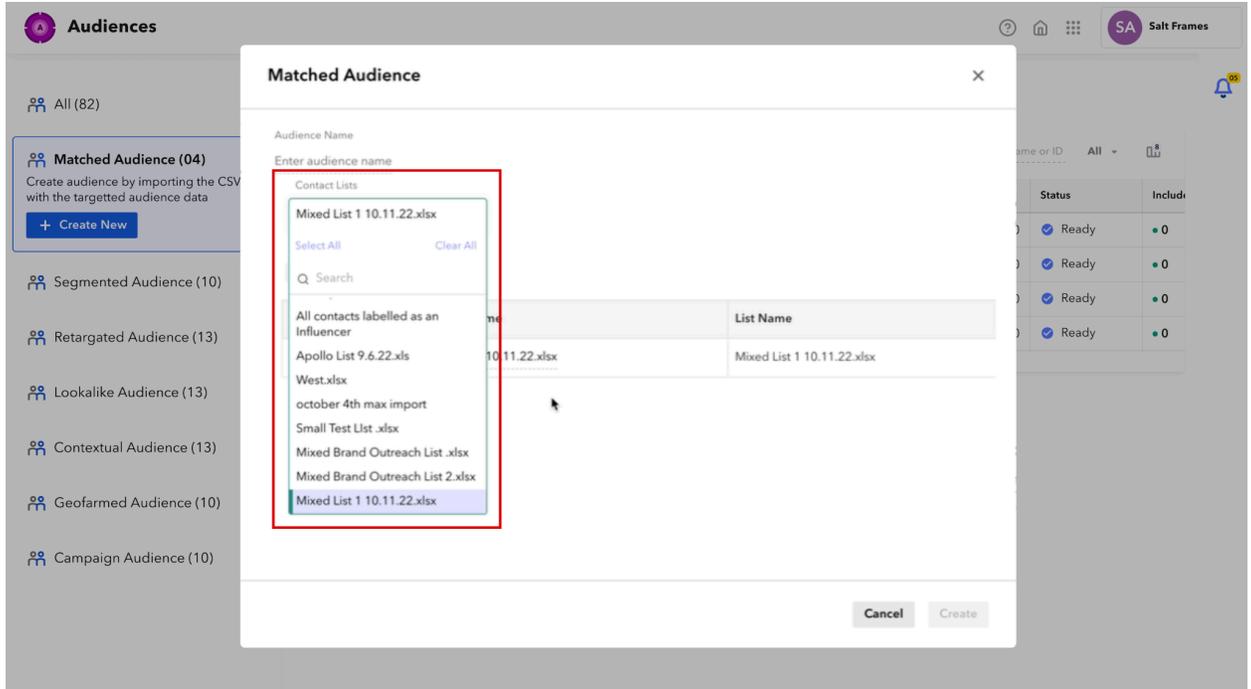
Your HubSpot app is now integrated and ready for activation in IQM's Platform!

Create a Matched audience using HubSpot Contact List

- Go to the **Audience** app from the top right corner of the platform
- Click on the '**Create Matched Audience**' button.
- Select import from **HubSpot** option.



- Select the '**hubspot-contact-file name**' from the contact lists dropdown and download the data.



- Match the columns with the uploaded file column names and click on the **'Create'** to create the matched audience from the HubSpot-contact-list.

<https://help.iqm.com/en/articles/5651480-selecting-a-matched-audience>

matching criteria

The screenshot shows the HubSpot Audiences interface with a 'Matched Audience' modal open. The modal is titled 'Matched Audience' and has a close button (X) in the top right corner. It contains the following elements:

- Audience Name:** A text input field containing 'Matched Audience Example 1'. To its right is a file upload box showing 'matched_audience_example(1).csv' with a green checkmark and file details: '568 kb · 10 columns · 25 rows'.
- Match Columns:** A section with a checkbox 'I have a Voter ID/ NPI Number/ Phone/ Email/ Full Address in file'. Below it, a note states: 'One of the following system fields combinations are required for matching:'. Three options are listed: 'First name, Last name, Zip, State', 'Last name, Street address, Zip, State', and 'Street address, Zip, State'. A 'Know More' link is to the right.
- Table:** A table with three columns: 'System Fields', 'Uploaded File Columns', and 'Sample Data'. It has three rows, each with a 'Select field' dropdown in the first column, a 'Select match' dropdown in the second column, and a hyphen '-' in the third column. An '+ Add Field' button is at the bottom left of the table.
- Buttons:** 'Cancel' and 'Create' buttons are at the bottom right of the modal.

FAQs

What do I do if I face connection issues while I'm trying to use the HubSpot integration in the IQM Platform?

- If the connected app faces the connection issues, the user can re-establish the connection by clicking on the **'Re-establish Connection'** button.

Synthetic Monitoring

Marketplace apps > HubSpot

App Overview

Affecting App

App Overview

About HubSpot

 HubSpot is a versatile and integrated customer relationship management (CRM) and marketing software that brings together a wide array of tools to streamline and enhance business operations.

Account Settings

[Re-establish Connection](#) [Log Out](#)

Account Connected:  [james.fox@gmail.com](#)

Date Connected: 3rd Aug, 2023

Last Accessed: Today, 11:50 am

Permission Granted

[Revoke Access](#)

Has access to: Basic account info
See your personal info, including any personal info you've made publicly available
See your primary Google Account email address

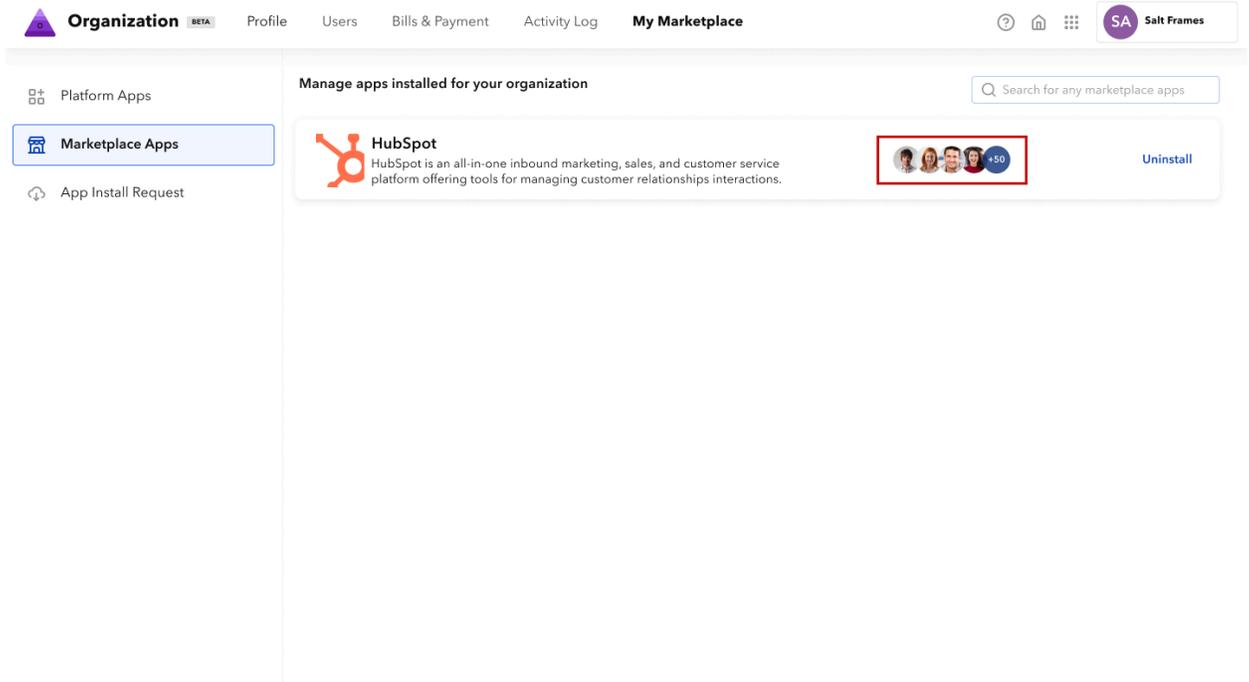
Homepage: <https://googledrive.com>

Access given on: May 31, 9:41AM

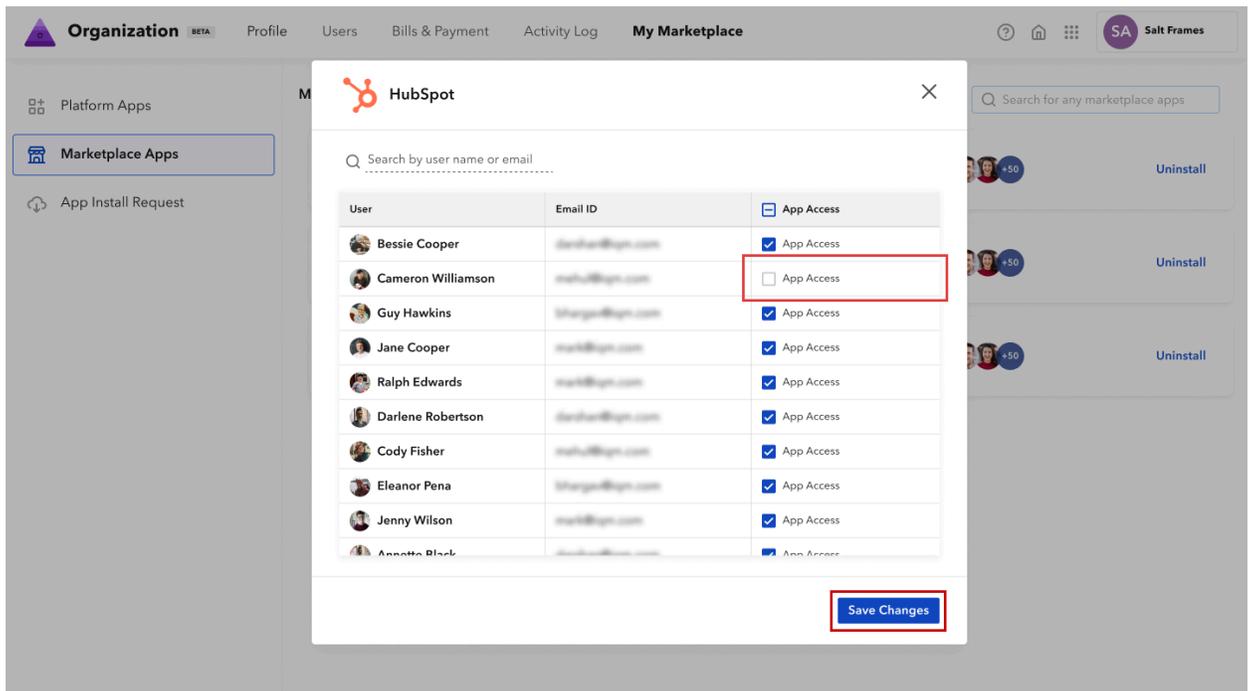
How do I revoke users from accessing HubSpot from the IQM Marketplace?

- Go to marketplace apps and click on the **HubSpot** app.

- Click on the 'User Avatars' to open the user list with app access.



- De-select the user you would like to revoke access for.
- Click on the 'Save Changes' to complete the action.



How do I revoke access to HubSpot from my IQM Marketplace?

Users can revoke access from two different locations within IQM's platform: The App Marketplace and the My Profile section.

- From the App Marketplace:
 - Enter into the HubSpot App Overview Page
 - Click on '**Revoke access**'

The screenshot shows the 'App Overview' page for HubSpot in the IQM Marketplace. The page is titled 'Synthetic Monitoring' and includes a navigation bar with 'Marketplace apps > HubSpot'. The main content area is divided into three sections: 'About HubSpot', 'Account Settings', and 'Permission Granted'. The 'Account Settings' section shows the user is connected to a Google account, with details like 'Date Connected: 3rd Aug, 2023' and 'Last Accessed: Today, 11:50 am'. The 'Permission Granted' section lists the permissions granted to the app, such as 'Basic account info' and 'Homepage: https://googledrive.com'. A red box highlights the 'Revoke Access' button in the top right corner of the 'Permission Granted' section.

- From "My Profile" page:
 - Enter into My Profile in IQM's Platform
 - Select HubSpot
 - Click on '**Revoke access**'

My Profile BETA SA Salt Frames

Upload Photo reset your password

Organisation Access

Search by name, email or ID

- IQM Corporation** Active \$25,44,248.00
ID 2350 • contact Molly Smathers
email jinesh.p+ihpcust@iqm.com
- Programmatic India** Active \$25,44,248.00
ID 2350 • contact Molly Smathers
email jinesh.p+ihpcust@iqm.com
- Synergy Intermediate Digitl...** Active \$25,44,248.00
ID 2350 • contact Kevin Hines
email jinesh.p+ihpcust@iqm.com
- SB Digital** Active \$25,44,248.00
ID 2350 • contact Molly Smathers
email jinesh.p+ihpcust@iqm.com
- Leanback Digital LLC** Active \$25,44,248.00
ID 2350 • contact Kevin Hines
email jinesh.p+ihpcust@iqm.com
- Buying Time Digital** Active \$25,44,248.00
ID 2350 • contact Kevin Hines
email jinesh.p+ihpcust@iqm.com
- Act Digital** Active \$25,44,248.00
ID 2350 • contact Kevin Hines
email jinesh.p+ihpcust@iqm.com
- Digital Attic** Suspended \$25,44,248.00
ID 2350 • contact Molly Smathers
email jinesh.p+ihpcust@iqm.com

Marketplace App Access

Search by name, email or ID

- HubSpot** By Applift
Connected

My Profile BETA SA Salt Frames

Upload Photo reset your password

Organisation Access

Search by name, email or ID

- IQM Corporation** Active \$25,44,248.00
ID 2350 • contact Molly Smathers
email jinesh.p+ihpcust@iqm.com
- Leanback Digital LLC** Active \$25,44,248.00
ID 2350 • contact Kevin Hines
email jinesh.p+ihpcust@iqm.com

Marketplace App Access

Search by name, email or ID

- HubSpot** By Applift
Connected

HubSpot

Permission granted to this app

Signed in with: [jinesh.p+ihpcust@gmail.com](#)

Has access to:

- Basic account info
- See your personal info, including any personal info you've made publicly available
- See your primary Google Account email address

Homepage: <https://lookerstudio.com>

Access given to: lookerstudio.com

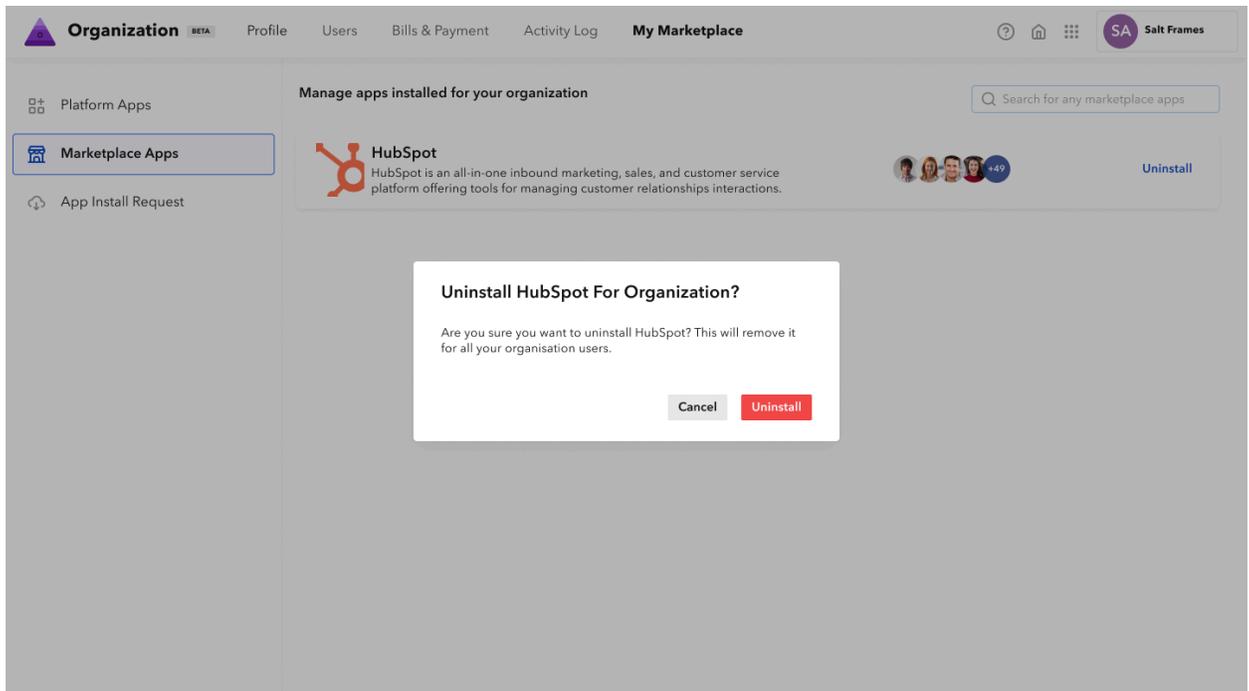
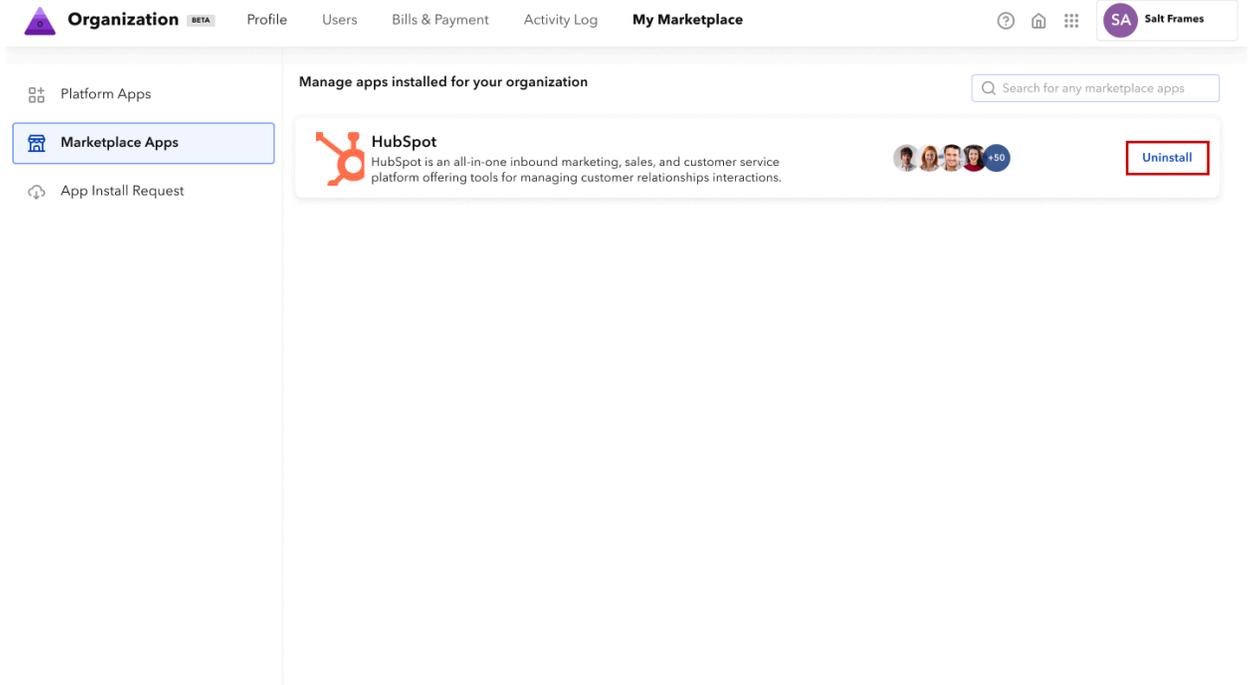
Access given on: May 31, 9:41AM

[Revoke Access](#) [Log out](#)

- Once revoked, users need to integrate the app again to use.

How do I uninstall the HubSpot app from IQM entirely?

- Users can click on **'Uninstall'** in the marketplace apps to remove applications from the platform.



How do I switch to another HubSpot account?

- To switch HubSpot accounts, users can first **'Log out'** from their current account in the Marketplace App Overview page and then integrate with another HubSpot account.

The screenshot displays the 'Synthetic Monitoring' interface for the HubSpot app. The top navigation bar includes 'Synthetic Monitoring', a help icon, a home icon, a grid icon, and a user profile icon labeled 'SA Salt Frames'. Below the navigation bar, the breadcrumb trail reads 'Marketplace apps > HubSpot'. The main content area is titled 'App Overview' and is divided into three sections:

- About HubSpot:** Contains the HubSpot logo and a description: 'HubSpot is a versatile and integrated customer relationship management (CRM) and marketing software that brings together a wide array of tools to streamline and enhance business operations.'
- Account Settings:** Shows the connected account as 'james.blee@gmail.com', with connection details: 'Date Connected: 3rd Aug, 2023' and 'Last Accessed: Today, 11:50 am'. A red box highlights the 'Log Out' button in the top right corner of this section.
- Permission Granted:** Lists the permissions granted to the app: 'Has access to: Basic account info' (with sub-points: 'See your personal info, including any personal info you've made publicly available' and 'See your primary Google Account email address'), 'Homepage: https://googledrive.com', and 'Access given on: May 31, 9:41AM'. A 'Revoke Access' link is located in the top right corner of this section.