SymphonySync™

SymphonySync™ for HubSpot

Set-up Guide by TopLine Results Corporation

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What is SymphonySync™

SymphonySync™ is an advanced email and CRM data integration tool built to streamline your lead-to-sale process. Its syncing capabilities allow the bidirectional or unidirectional flow of properties/fields between HubSpot Marketing Hub and Dynamics 365 for centralized data and advanced reporting.

Available Plans

SymphonySync™ offers free, standard, and premium plans highlighted below:

SymphonySync™ Plans

Features	Free	Standard	Premium
Monthly Subscription	$0	$499	$850
Set-up Fees	$0	$2,500 Set-up and Training	$7,000 Set-up and Training
# of Records	100 per Contact, Lead, Account, Opportunity	Unlimited	Unlimited
Field Types	Standard Fields	Standard Fields	Standard and Custom
Entities	Standard*	Standard*	Standard* and Custom
Dashboards	Standard	Standard	Standard and up to 5 custom dashboards
Support Levels	Limited	Limited	Unlimited

*Entities include Lead, Contact, Account, Opportunity, and Marketing Event Forms

About the Developers

At TopLine Results, our consultants bring over 20 years of experience customizing Microsoft Dynamics 365 and integrating data with various marketing solutions. This expertise helps businesses generate more leads, build detailed reports, and access dashboards to help boost ROI. As a HubSpot Certified Partner, we specialize in implementing HubSpot's vast array of tools, allowing you to dive deep into your marketing data, understand your audience better, and drive significant business growth.

Who to Contact

If you have any questions regarding SymphonySync™ plans or syncing capabilities, our team can be reached at symphonysync@toplineresults.com or by phone at 800-880-1960.

When signing up, you will be assigned the free version; we must be contacted to upgrade to the Standard or Premium version.

Before Beginning SymphonySync™

As an integration tool, SymphonySync™ exchanges data between HubSpot and Dynamics 365. As with any integration, you may overwrite existing data using SymphonySync ™, depending on how you set up your field sync map. Additionally, the unique configurations in your HubSpot and/or Dynamics 365 databases may result in unexpected/unwanted changes to data.

Before syncing large sets of records, it is strongly recommended that you test how the data in your databases will sync by syncing very small sets of records (five or fewer on the first sync to start) and then validating the results. Continue adding records to the sync in small increments until you are comfortable with the mappings and data being brought back and forth between systems.

Our Standard and Premium subscriptions offer customized onboarding, including setup and testing guidance. **Standard and Premium subscribers should not make any changes to the standard configuration prior to onboarding. Any changes made prior to your consultation carry the risk of data loss and other unwanted changes.**

Contact us at symphonysync@toplineresults.com or 800-880-1960 with any questions regarding your subscription.

What Syncs

Free and Standard subscriptions include syncing of these objects/entities:

HubSpot	Data Flow	Microsoft Dynamics 365
Contacts	Bidirectional	Leads and or Contacts*
Companies	Bidirectional	Accounts
Deals	Dynamics 365 to HubSpot**	Opportunities
Form Submissions	HubSpot to Dynamics 365	Marketing Events***

*Syncing with Dynamics 365 contacts comes pre-enabled, with the option to enable syncing for leads.
**Bidirectional sync is available with Premium subscriptions.
*** Custom entity

Each object/entity includes a standard set of data that is synced between HubSpot and Dynamics 365. Review the individual sync steps to see what data is synced in each sync step.

Premium subscriptions offer the option to customize your integration by adding additional mappings and entities. To discuss your custom integration needs, Contact us at symphonysync@toplineresults.com or 800-880-1960.

Considerations for Syncing HubSpot Contacts to Dynamics 365 Leads and/or Contacts

SymphonySync™ offers the ability to sync HubSpot contacts with both leads and/or contacts in Dynamics 365. Free and Standard subscriptions include the following sync steps:

HubSpot Contacts to Dynamics 365 Contacts (enabled by default)

Dynamics 365 Contacts to HubSpot Contacts (enabled by default)

HubSpot Contacts to Dynamics 365 Leads (disabled by default)

Dynamics 365 Leads to HubSpot Contacts (disabled by default)

When you first activate SymphonySync™, only the Dynamics 365 contacts sync steps bolded above are enabled. By default, both sync steps for leads are disabled. SymphonySync™ offers the ability to enable the leads sync steps and disable the contact sync steps.

Enabling sync steps for both leads and contacts may cause unexpected/unwanted changes to your data, including data loss, and requires careful planning and testing.

We strongly recommend that you sync with one or the other before syncing both leads and contacts.

For example, if you choose contacts, the bolded sync steps above will be enabled. Both lead sync steps should be manually disabled.

Alternatively, if you choose leads, the non-bolded lead sync steps will be enabled, and the bolded contact sync steps should be manually disabled.

Before enabling either of the lead sync steps, disable the contact sync steps.

Our Standard and Premium subscriptions offer guided setup for subscribers who may need to sync with both leads and contacts. **Before enabling either of the lead sync steps, contact us to schedule a consultation.**

Sync Step Order and Data Conflicts

Free and Standard subscriptions offer our standard sync.

Before activating your integration, it is important to understand how the standard sync works. The order of the sync steps determines how data syncs and how data conflicts are resolved. The below sections outline how data syncs, including how records are created and matched.

How Records are Created and Matched

The standard configuration of SymphonySync™ matches records between HubSpot and Dynamics 365 as outlined:

HubSpot Contacts and Dynamics 365 leads and contacts match on email.

HubSpot Companies and Dynamics 365 Accounts match on Name.

Dynamics 365 Opportunities and HubSpot Deals match on Name.

The first time a record syncs, SymphonySync™ looks for a record in the opposite database that meets the matching outlined above. If a match is found, SymphonySync™ will update the matching record. If no match is found, SymphonySync™ will create a new record.

Syncing records with empty matching fields may create duplicates in the opposite database. To prevent duplicates, include only records with data in the matching field.

Standard Sync Configuration – Contacts Exclusive

SymphonySync™ comes with these standard sync steps:

Using this standard sync setup, data will sync as outlined below.

1. Any Companies in HubSpot included in the sync set will sync to the Account entity in Dynamics 365.
2. Any Contacts in HubSpot included in the sync set will sync to the Contact entity in Dynamics 365.

When there is a data conflict in a property mapped from HubSpot to Dynamics 365, HubSpot will update the Account or Contact record in Dynamics 365.

3. Any Accounts in Dynamics 365 included in the sync set will sync with the Companies object in HubSpot.

4. Any Contacts in Dynamics 365 included in the sync set will sync with the Contacts object in HubSpot.

When there is a data conflict in a field mapped from Dynamics 365 to HubSpot, Dynamics 365 may update what is on the Company or Contact record in HubSpot.

5. Any Opportunities in Dynamics 365 included in the sync set will sync with the standard Deals object in HubSpot.

When there is a data conflict in a field that is mapped from Dynamics 365 to HubSpot, Dynamics 365 may update what is on the Deal record in HubSpot.

Standard Sync Configuration – Leads Exclusive

As outlined in Considerations for syncing HubSpot Contacts to Dynamics 365 Leads and/or Dynamics 365 Contacts, there are optional sync steps for Dynamics 365 leads**.**

As a reminder, we strongly advise against syncing both Dynamics leads and contacts. Before enabling either of the lead sync steps, disable the contact sync steps.

When lead syncing is enabled, the lead sync steps will occur as the first and second steps, and the remaining steps will sync as outlined in the section above.

1. Any Contacts in HubSpot included in the sync set will sync with the standard Lead entity in Dynamics 365.
2. Any Leads in Dynamics 365 included in the sync set will sync with the standard Contact object in HubSpot.

When there is a data conflict in a property mapped from HubSpot to Dynamics 365, the HubSpot data will overwrite what is on the Lead record in Dynamics 365.

When there is a data conflict in a field mapped from Dynamics 365 to HubSpot, the Dynamics 365 data will overwrite what is on the Lead record in HubSpot.

Option Set Fields and Dropdown Select Properties

SymphonySync™ standard mappings include certain dropdown select properties from HubSpot to/from option set fields in Dynamics 365. For example, the Lifecycle Stage property in HubSpot is mapped to the Lifecycle Stage field in Dynamics 365.

SymphonySync™ is configured with the standard options provided by HubSpot/Dynamics 365. Any additional custom values will not automatically sync. To sync custom values, the missing option must be added to the mapped field in the opposite database with the exact same field label. Records using any options that are not present in the opposite database will still sync; however, that field/property will not.

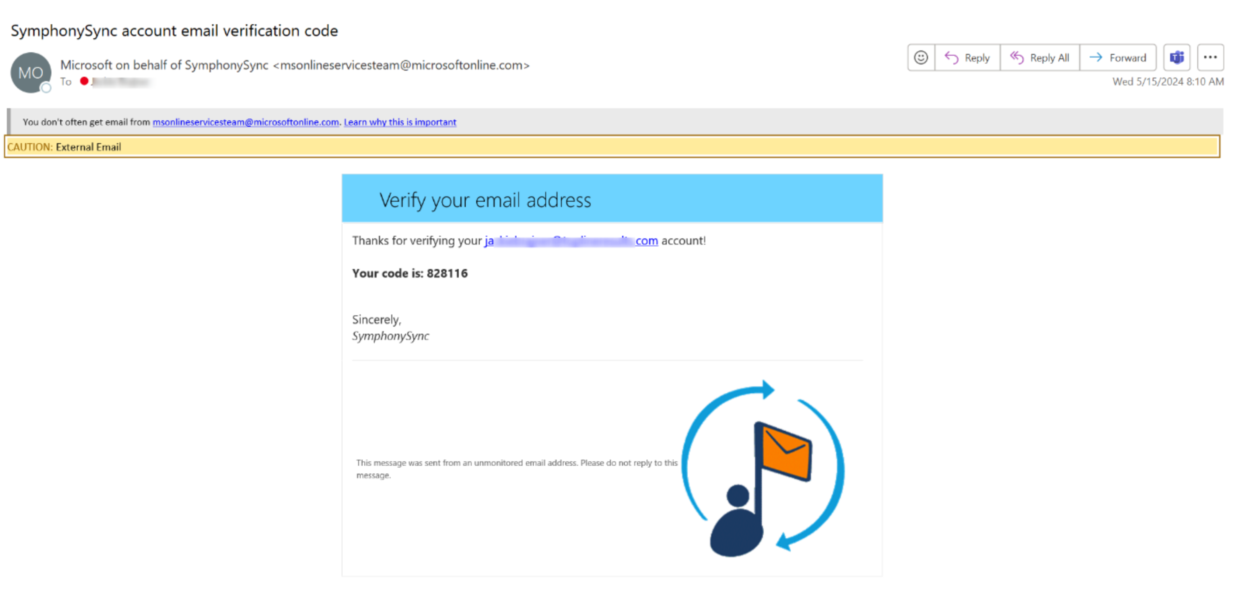
If you need a current list of the mapped option set fields and the values included, email symphonysync@toplineresults.com

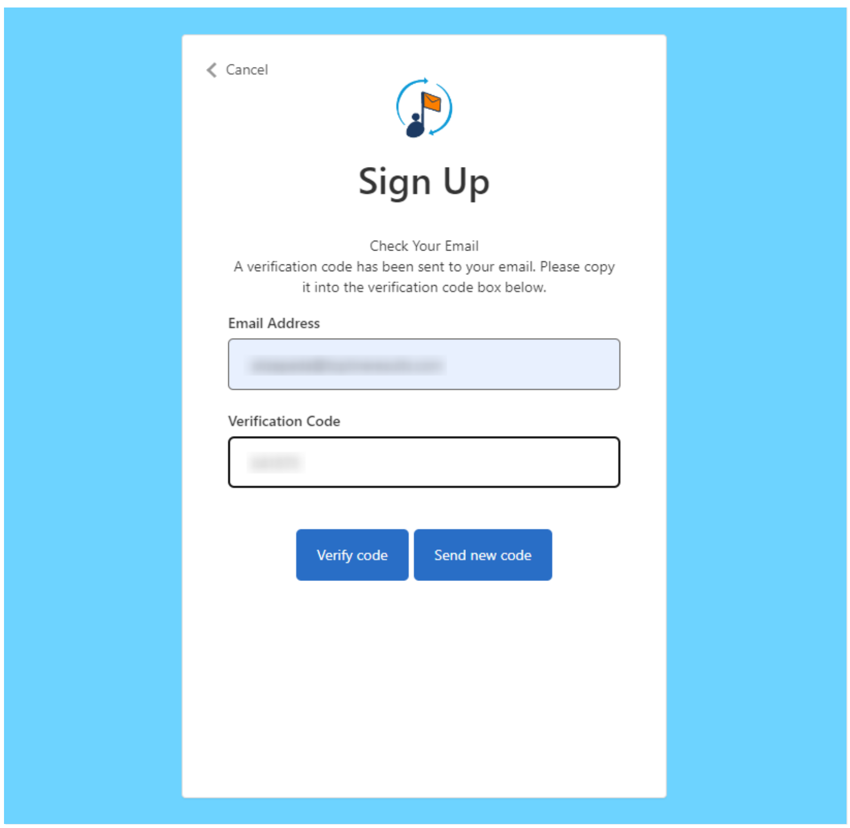
Creating an account with SymphonySync™

1. Go to the SymphonySync™ Portal: https://portal.symphony-sync.com/ and click "Sign Up Free" or "Sign In."

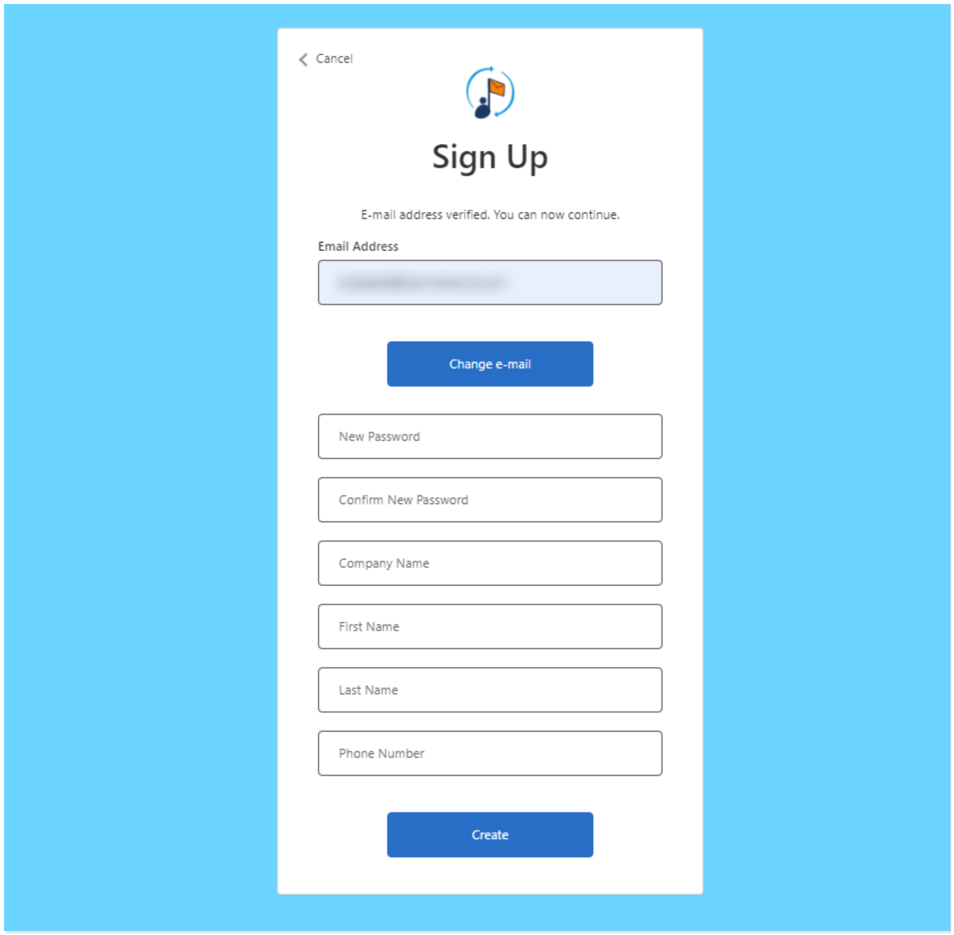
2. On the Sign In page, click "Sign up now."

3. Enter your email address, click "Verify Email," and check your inbox for an email from **Microsoft on behalf of SymphonySync** with your verification code. Enter the verification code and click "Verify Code."

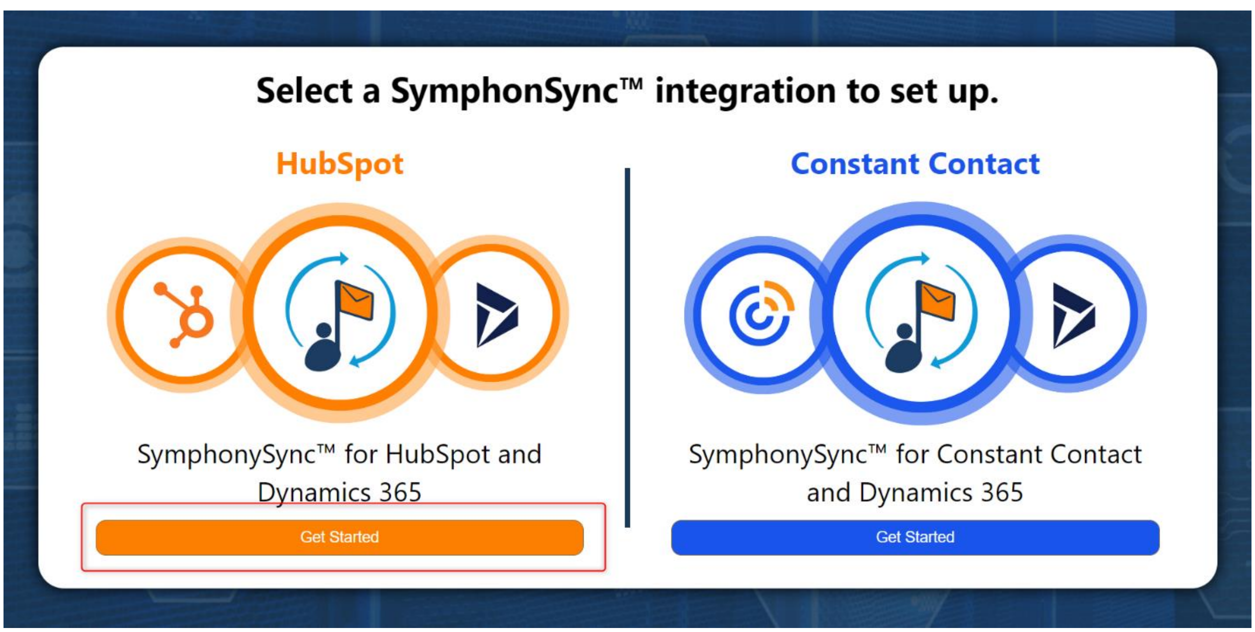




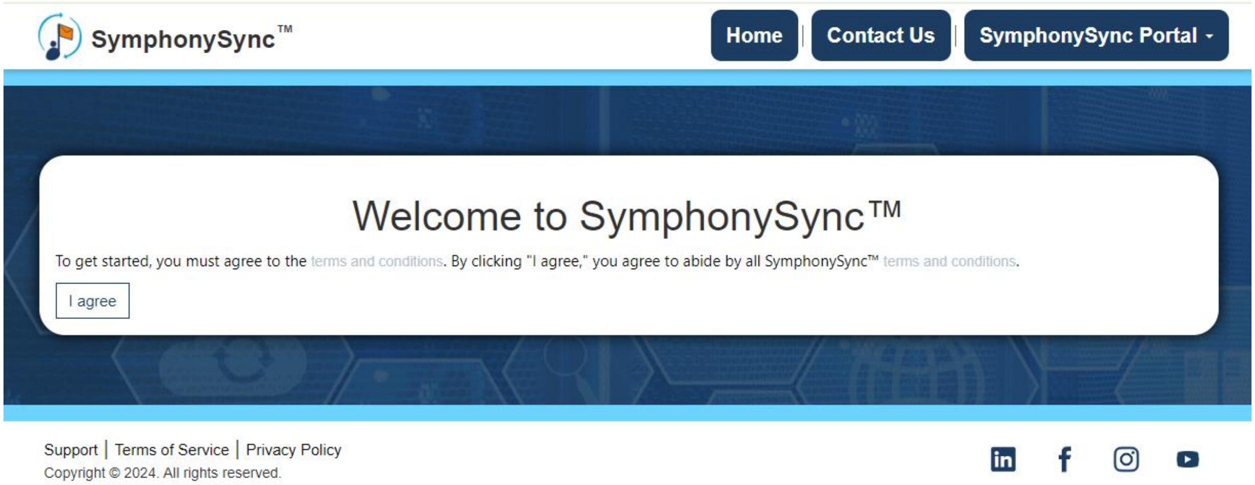
4. Once your email has been verified, fill out the rest of the sign-up form. All fields are required. By clicking "Create," SymphonySync™ will create a profile using the first and last name entered.



5. Once logged in, click on “Get Started” under the HubSpot integration.



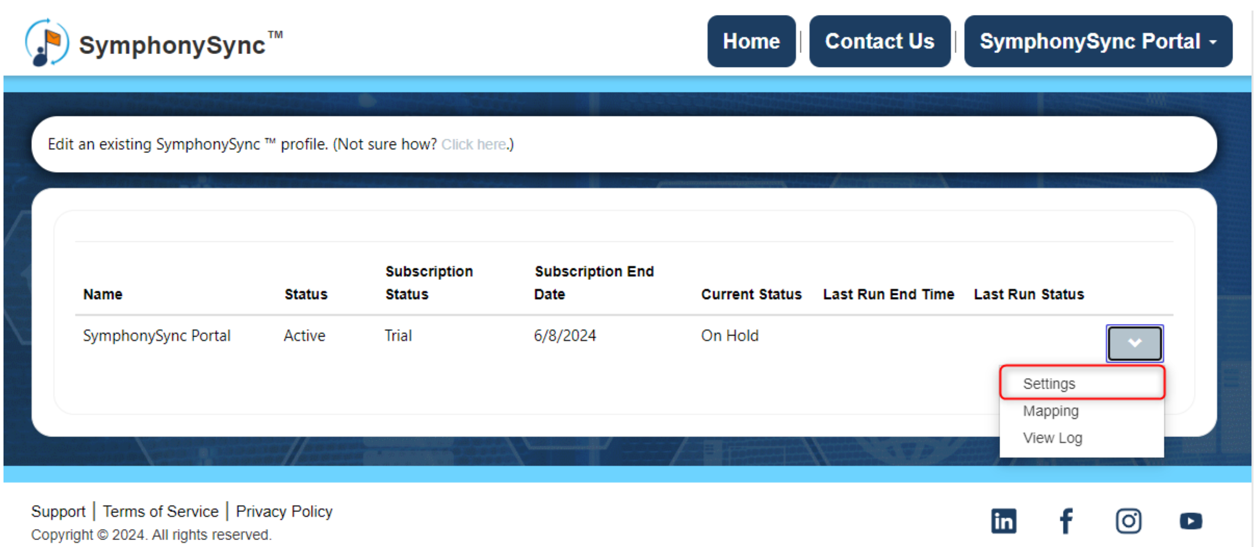
6. Next, you must accept the terms and conditions by clicking "I agree" to continue using SymphonySync™.



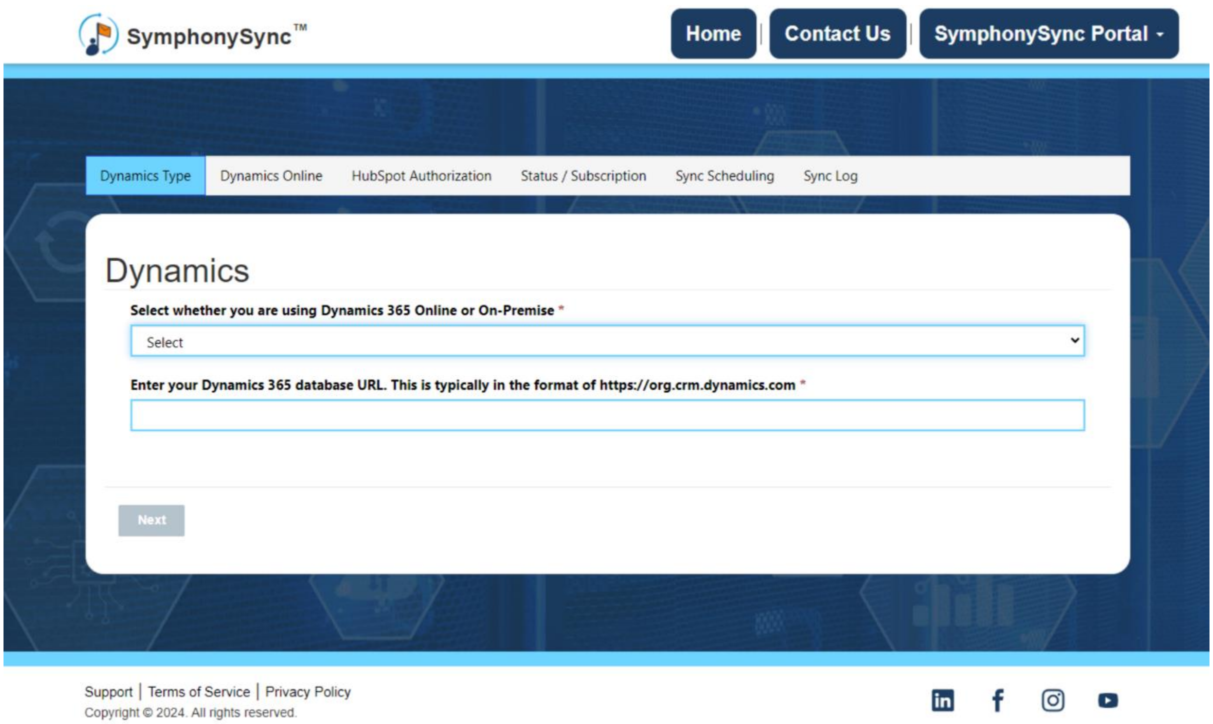
7. After clicking "I agree," you will be redirected to the home page.

Setting up SymphonySync™

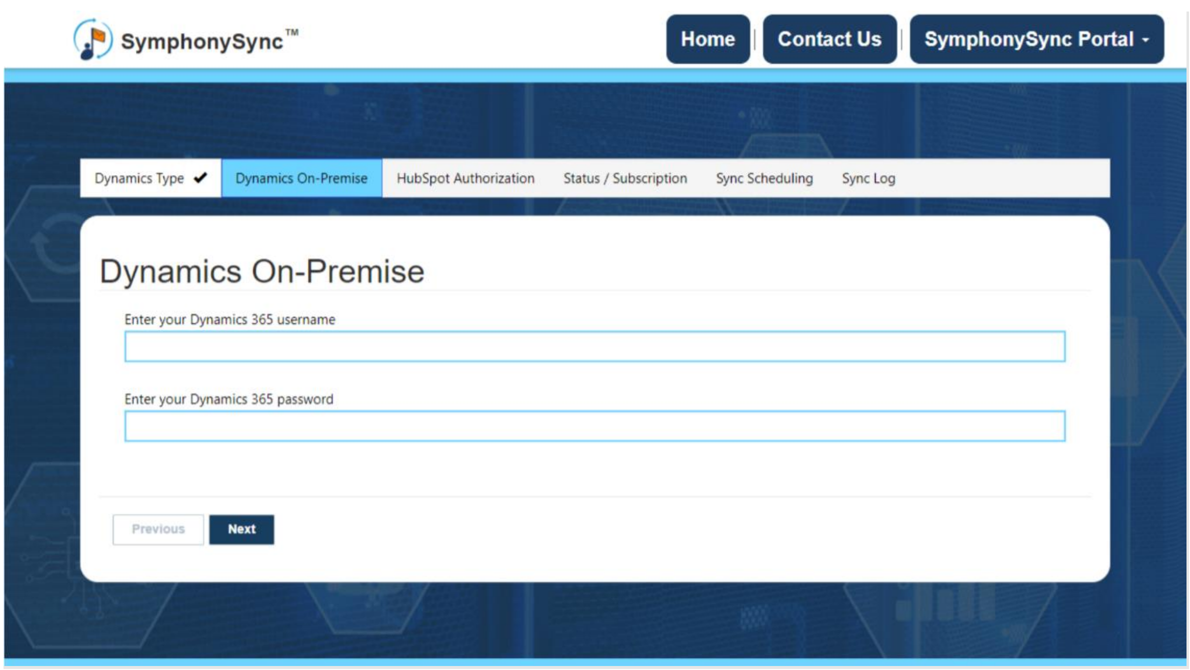
1. If you are not already on the home page, navigate to it to set up your SymphonySync™ account. Click the caret dropdown and select "Settings" to authorize your Dynamics 365 and HubSpot accounts.



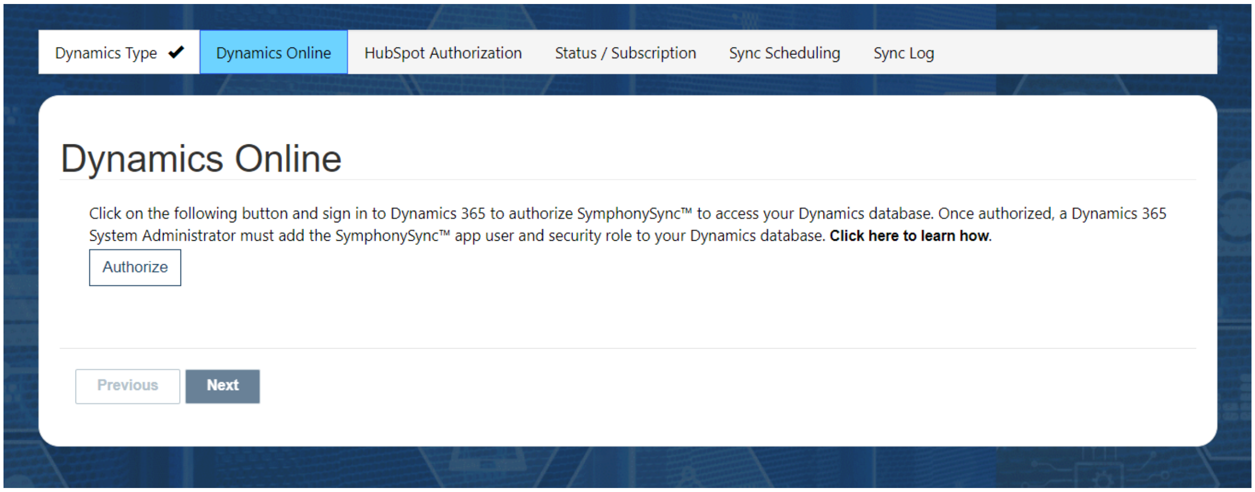
2. On the Dynamics Type form, select whether you are using Dynamics 365 Online or On-Premise. Then, enter your Dynamics 365 URL. If you choose On-Premise go to step 3. If you choose Online go to Step 4.



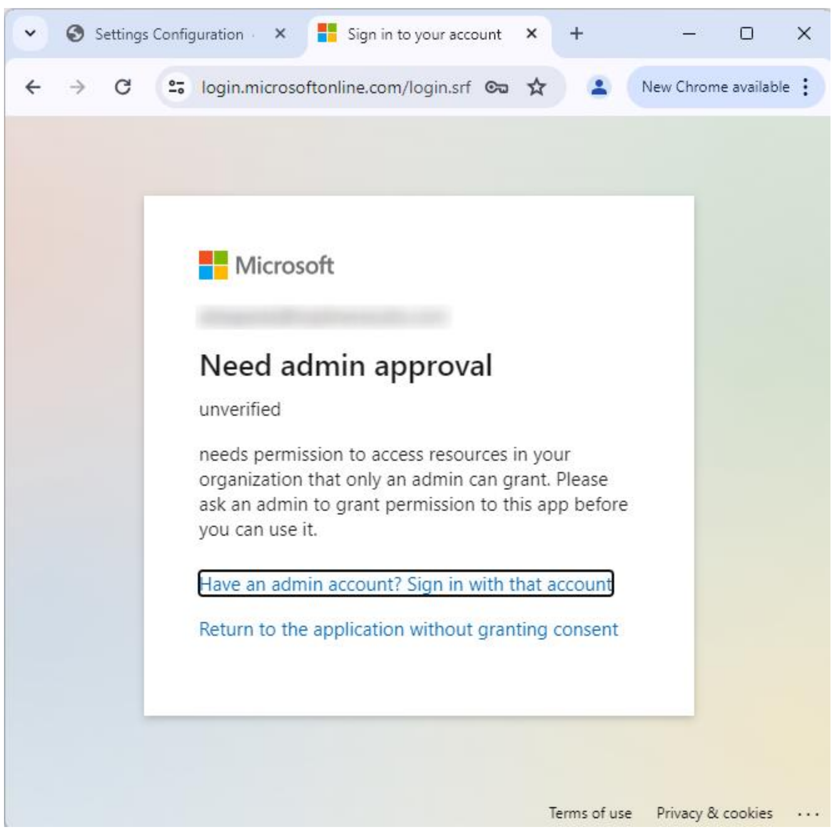
3. If you select On-Premise, after you click Next you will see the Dynamics On-Premise form. Here you will enter your Dynamics 365 username and password. To authorize your Dynamics 365 account, click Next. (**Note:** If the information you input is incorrect it will not let you proceed.)



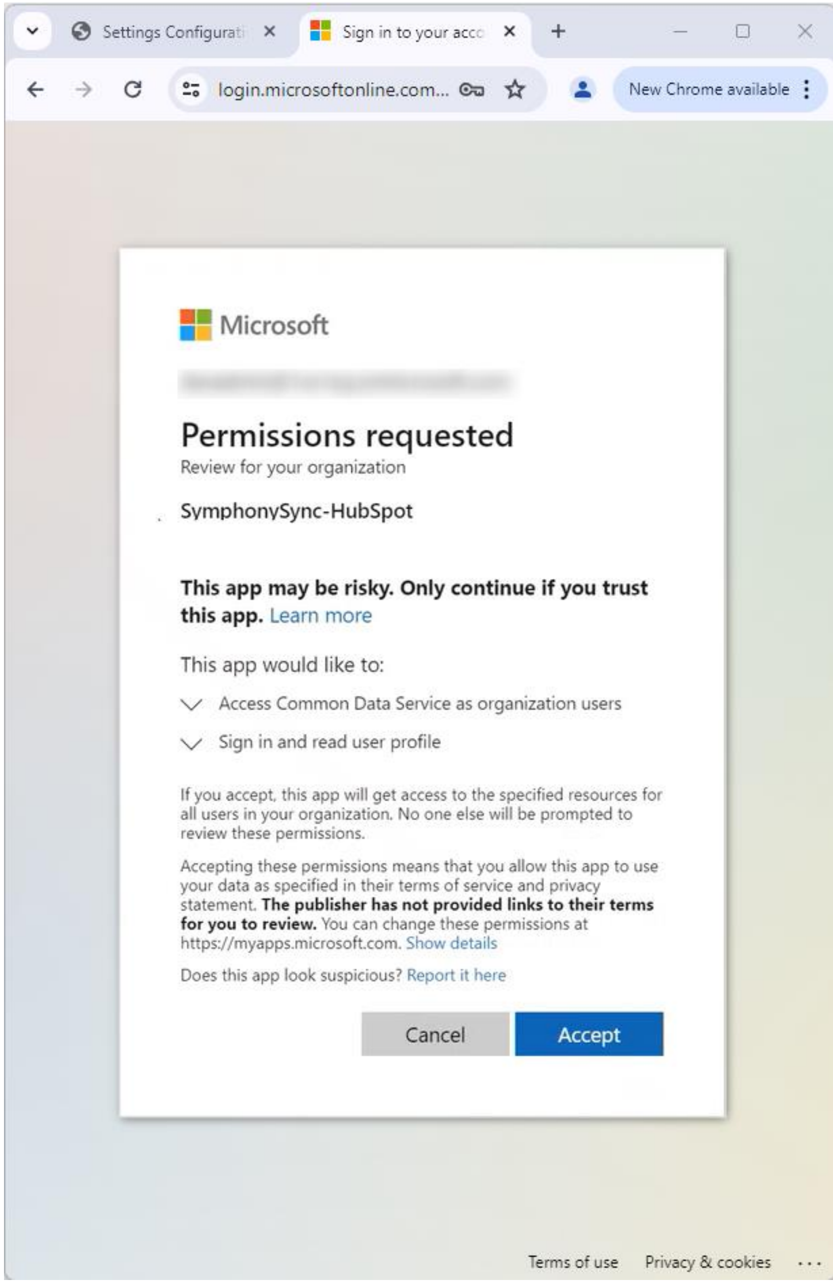
4. If you select Online, after you click Next you will see the Dynamics Online form. **Note: A Dynamics 365 System Administrator must complete the Authorization on the Dynamics Online form.** Click Authorize.



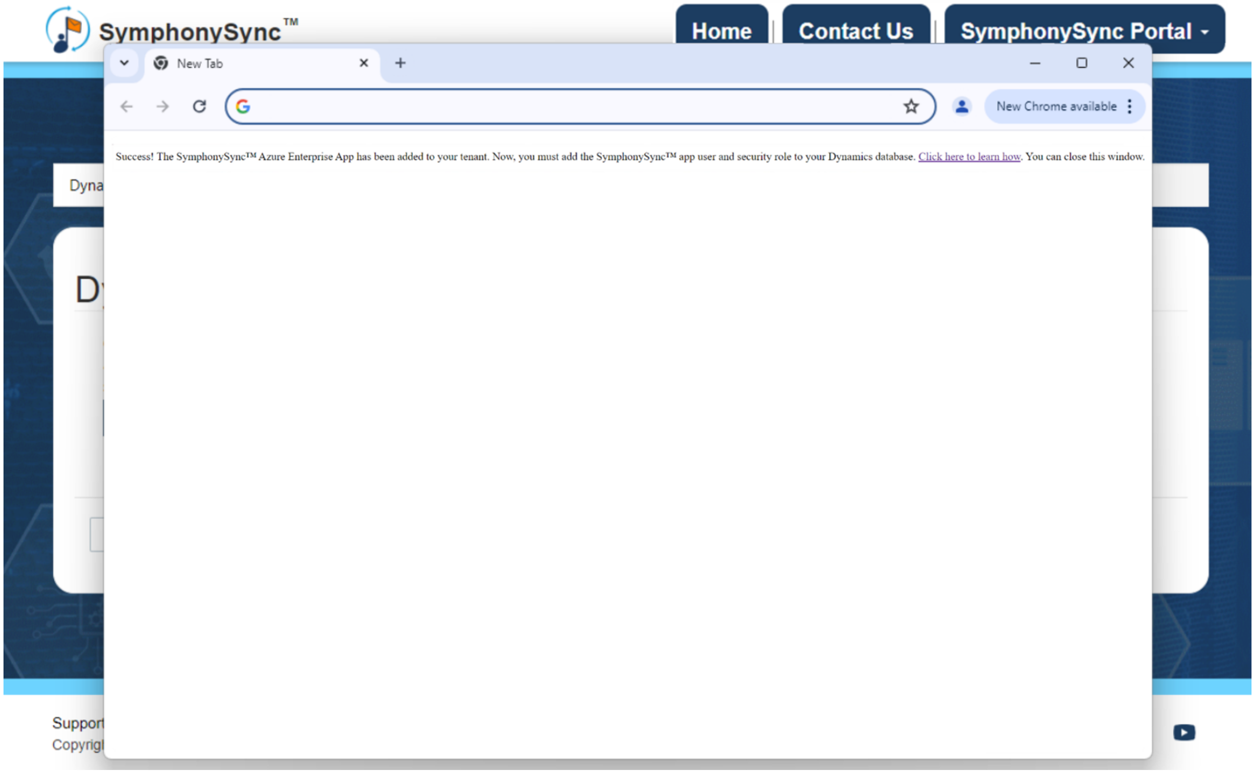
a. A new tab will open, prompting a System Administrator to sign into your Dynamics 365 account. (**Note:** If you do not have the correct permission, you will see a message like the screenshot below upon signing in.)



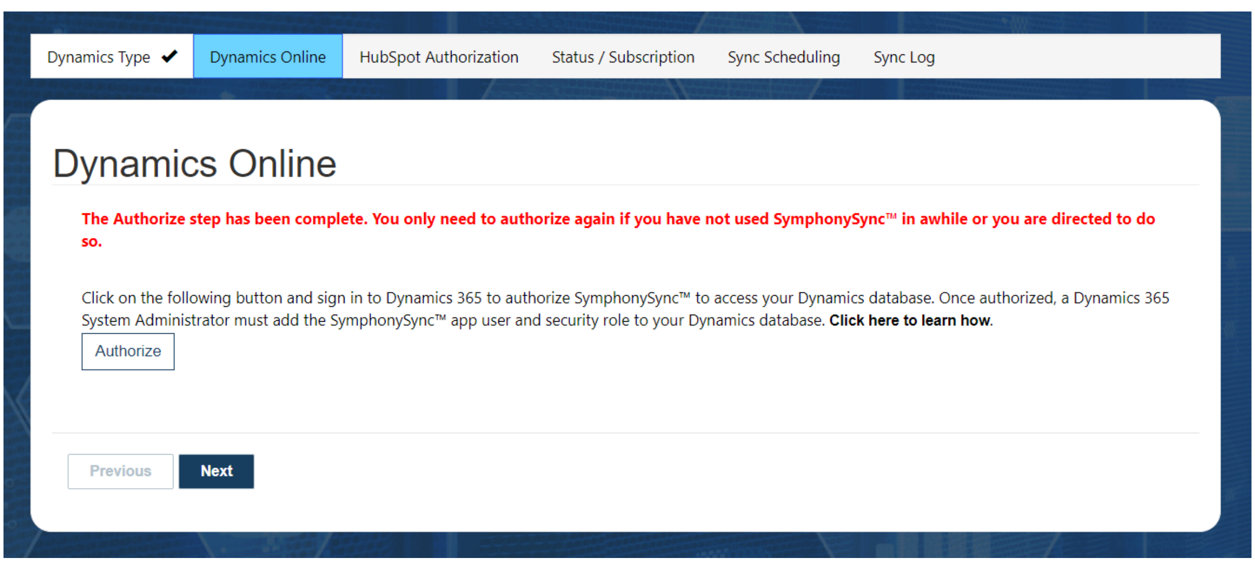
b. Otherwise, if you have the correct **Dynamics 365 System Administrator** permissions, review the requested access and click "Accept" if you agree.



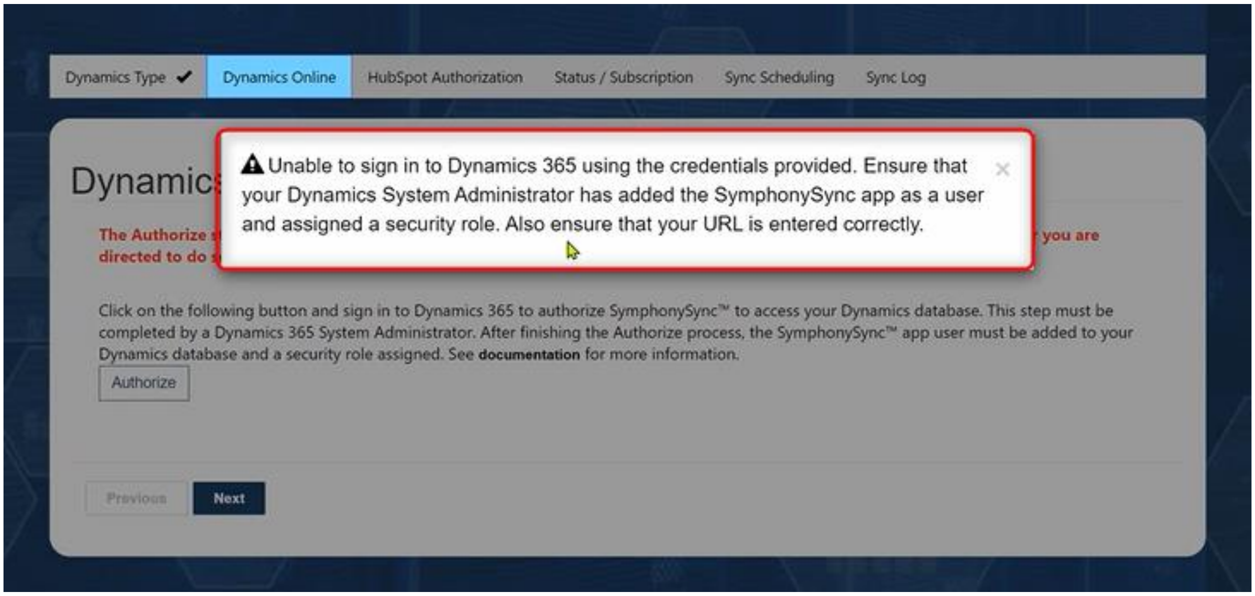
c. Once you Accept, you will see the text below in the top left corner of the window. You can close that tab and return to the SymphonySync™ portal.



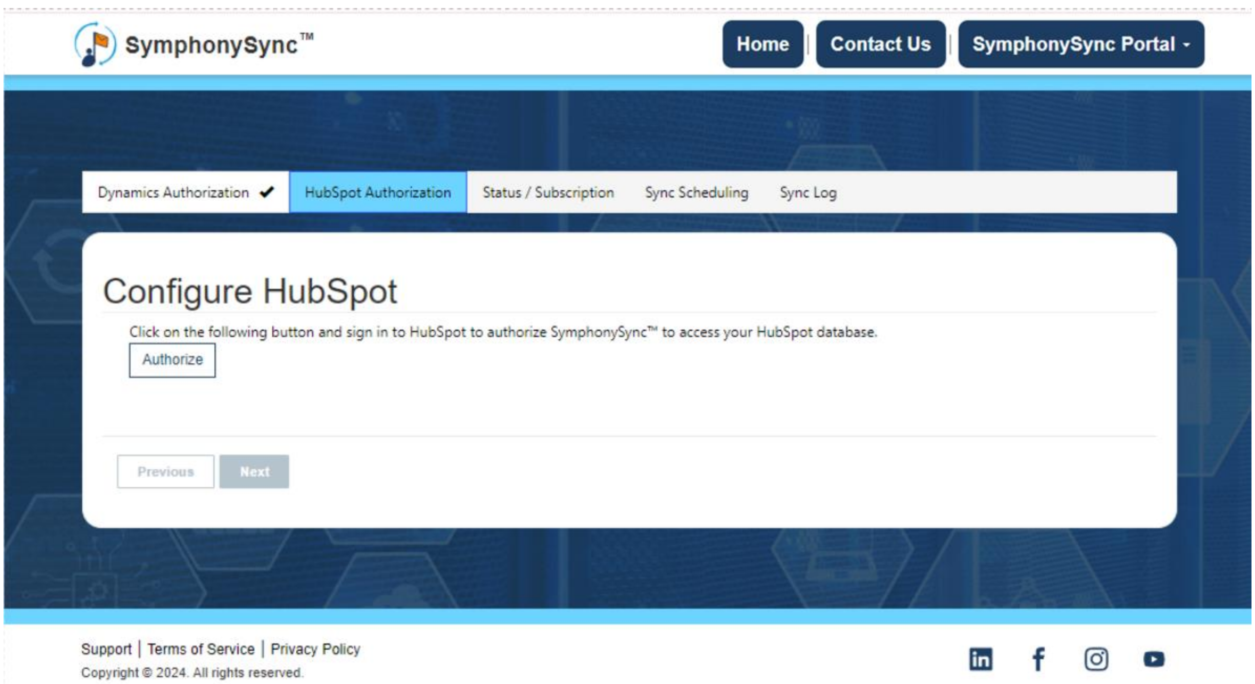
d. The red text below will appear on the Dynamics Online form to confirm that your Dynamics 365 Online account is authorized.



e. Before you can click "Next", **a Dynamics 365 System Administrator must add the SymphonySync™ app user and security role to your Dynamics 365 database.** See how here. If you do not add the app user and security role, you will see the error message below.

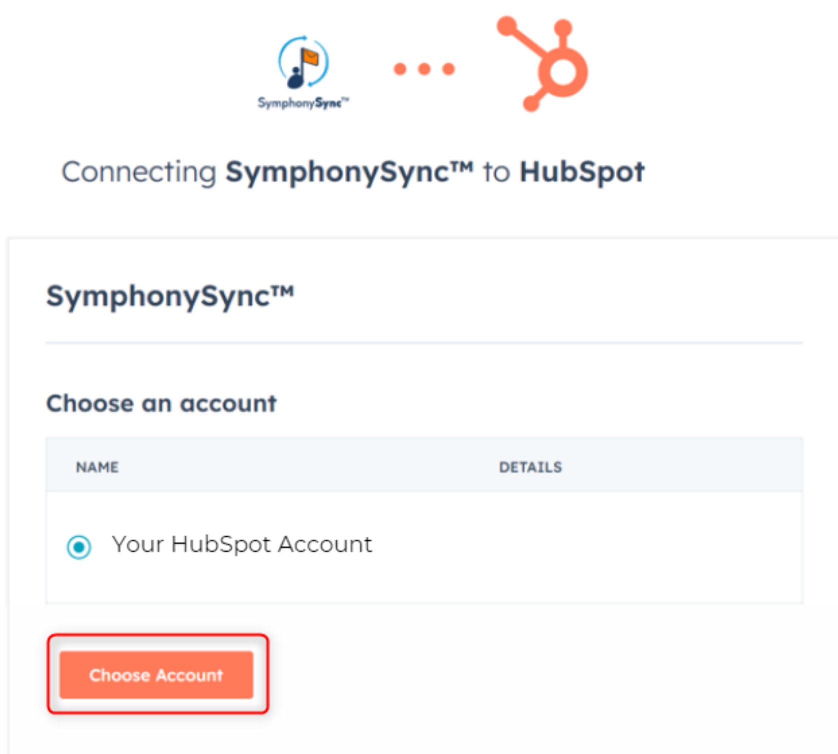


5. Click "Authorize" to configure your HubSpot Marketing Hub account.

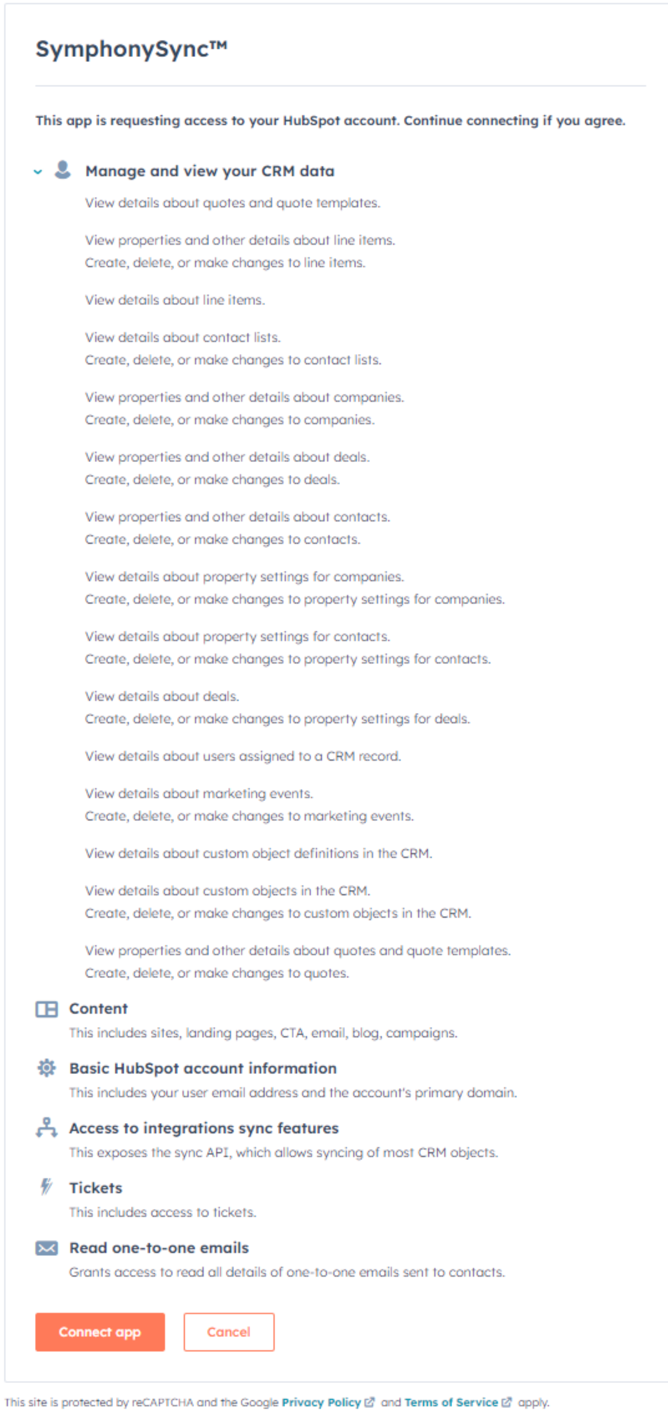


   a. A new tab will open asking you to sign in to your HubSpot account.

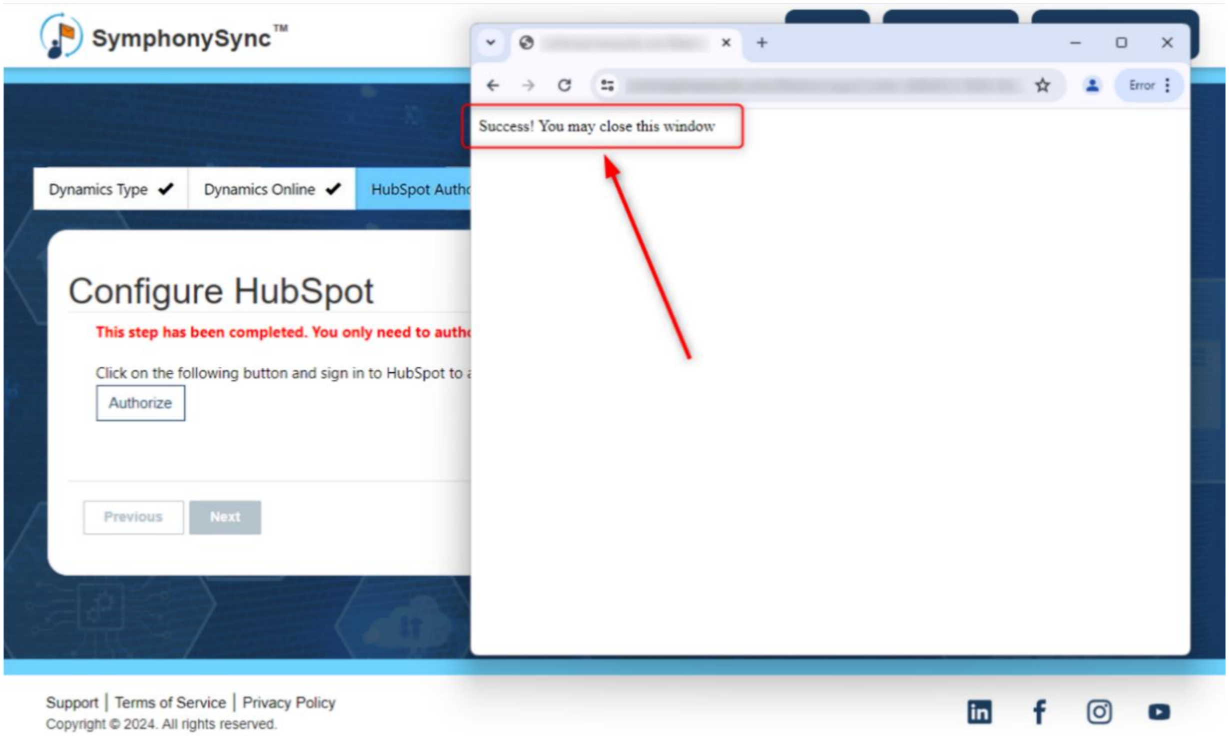
b. Choose the account you want to sync with SymphonySync™. Then click “Choose Account”.



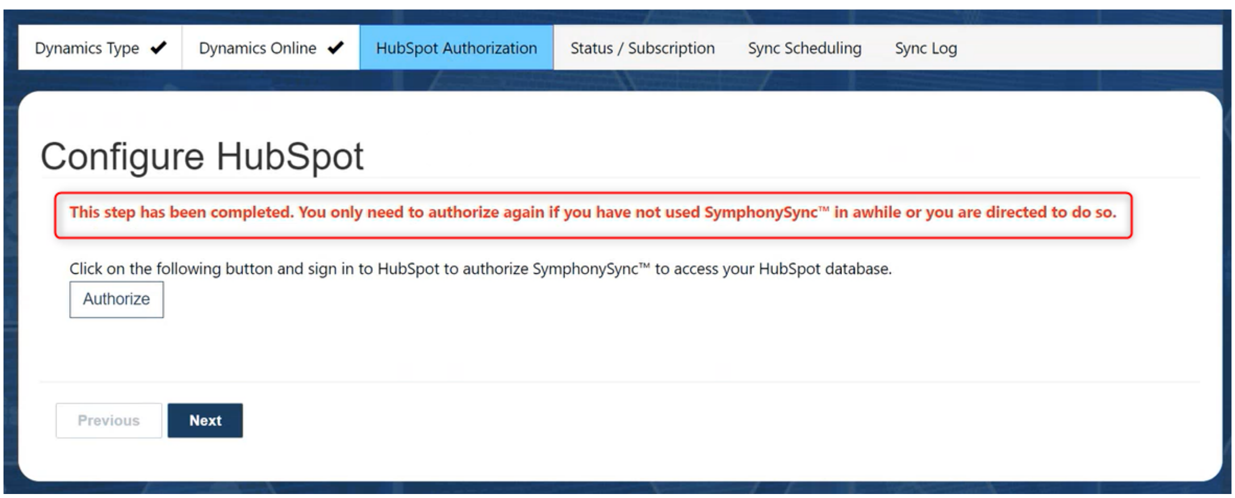
c. Review the requested access and click “Connect app” if you agree.



d. Once HubSpot connects to SymphonySync™, you will see the text "Success! You may close this window" in the top left corner of the window. You can close that tab and return to the SymphonySync™ portal.

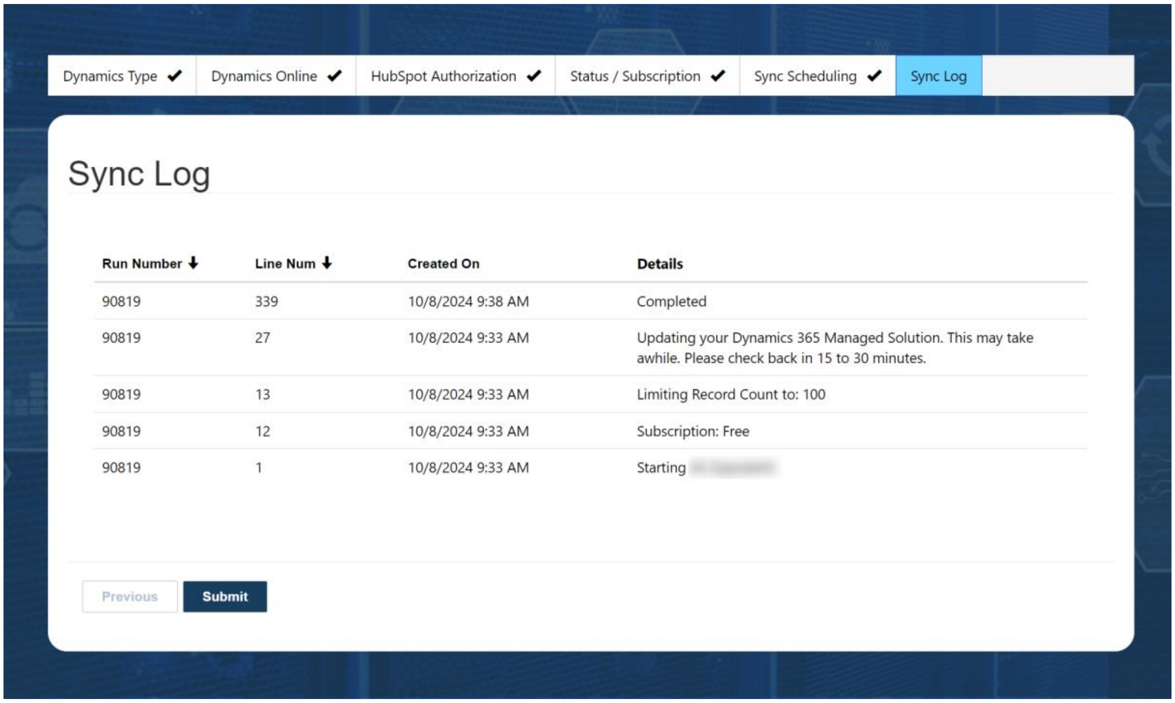


e. The red text below will appear on the HubSpot Authorization form to confirm that your HubSpot account is authorized.



f. **The authorization steps are now complete. It will take 10-15 minutes to establish the connection between Dynamics 365 and HubSpot. Field mappings will show once the process is complete.**

You can return to the profile page by clicking the "Home" tab or you can view your Status/Subscription, Sync Scheduling, and Sync Log by clicking the Next button. These tabs are detailed under Additional SymphonySync™ Sync Features, Steps 2-4. **Note: The Sync Log may be checked to see when the connection has been completed or for any issues that may prevent the setup from finishing**.



How to Sync Records

After the connection between Dynamics 365 and HubSpot is complete in the SymphonySync™ portal, the SymphonySync™ app is automatically created in your Dynamics 365 database. You should switch to the SymphonySync™ app to see the data you will be syncing. Click here to see how to access your SymphonySync™ app.

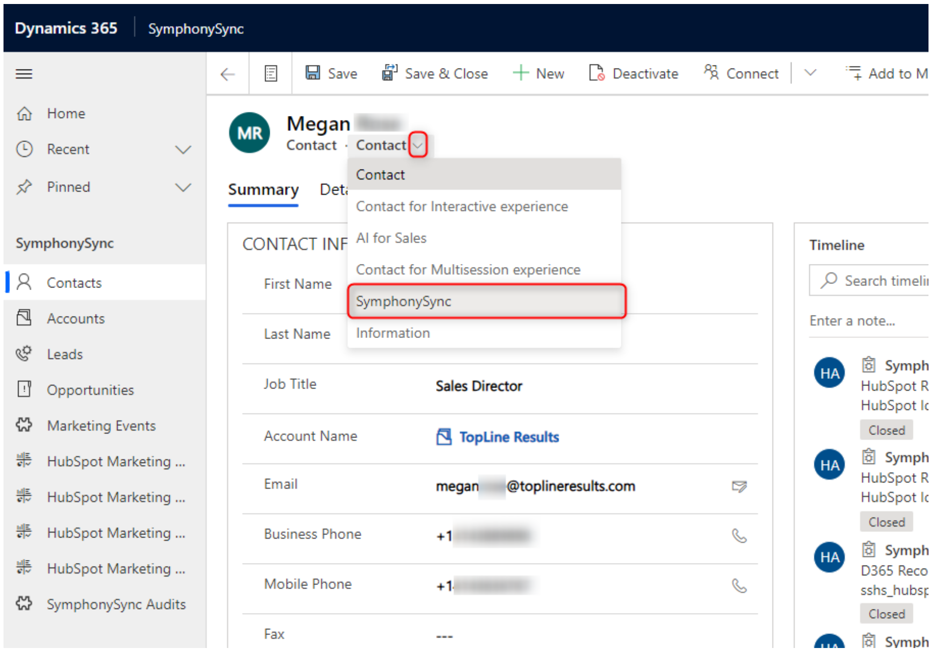
SymphonySync™ will not automatically start syncing records. You must select “Yes” on the “Sync to D365” property in HubSpot on the contact record **or** “Yes” on the “Sync to HubSpot” field **while in the SymphonySync™ app** in Dynamics 365 on the contact record to begin the sync process. (A workflow can be set up to automate this process. If you need assistance, contact us at symphonysync@toplineresults.com or call us at 800-880-1960.)

The Sync to D365 property and Sync to HubSpot field are automatically created by the SymphonySync™ integration.

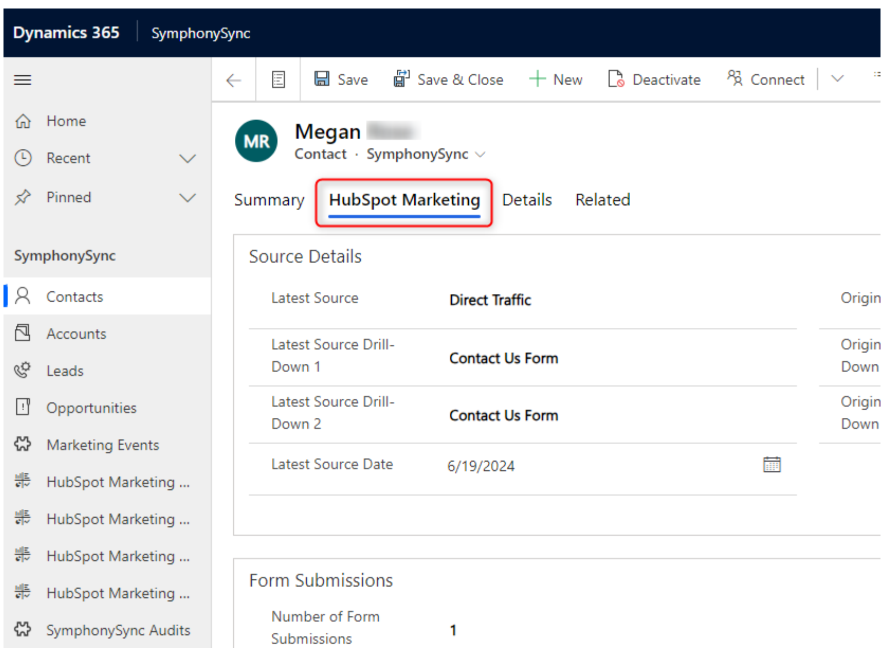
How to View the SymphonySync™ Form in Dynamics 365

When you first begin using the SymphonySync™ app in Dynamics 365, you need to switch to the SymphonySync™ form on a lead, contact, account, and opportunity record to see all the integrated HubSpot Marketing data.

On each record, click the caret dropdown of the forms and select SymphonySync™.

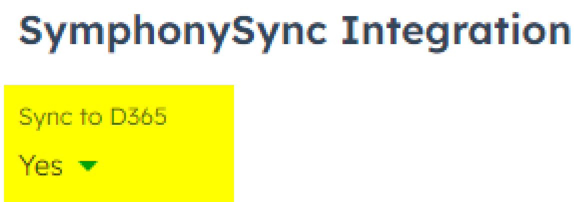


On the SymphonySync™ form, under the HubSpot Marketing tab is where you will find all the integrated HubSpot properties.



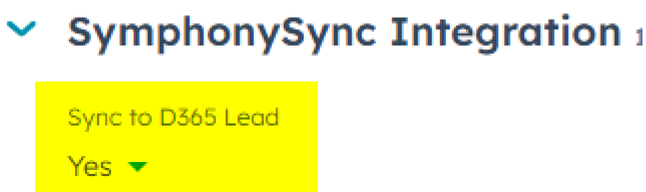
Records from HubSpot to Dynamics 365

To sync a **contact** or **company** record from HubSpot to Dynamics 365 contacts or accounts, the **Sync to D365** checkbox property must be set to “Yes" or "true.” This field can be set either manually or through a HubSpot automation. **Note: We recommend starting with a small data set of five records and increasing the data set as you check the field mappings.**



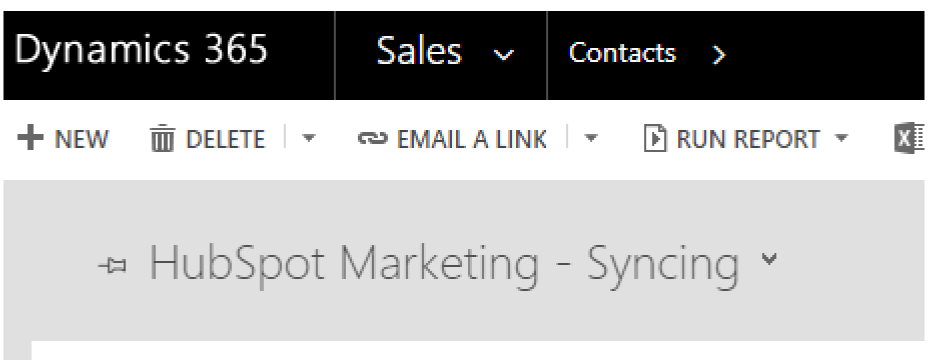
[Syncing from HubSpot Contact to Dynamics 365 Leads]

To sync a contact record from HubSpot to Dynamics 365 **leads**, the **Sync to D365 Lead** checkbox property must be set to “Yes" or "true.” Note that the sync step for HubSpot contacts to Dynamics lead must be enabled for the contacts to sync.

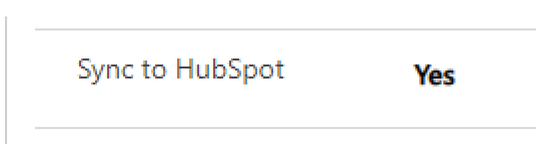


[Records from Dynamics 365 to HubSpot]

Syncing from Dynamics 365 to HubSpot is based on inclusion in the entity view. For each entity that syncs, there is a view “HubSpot Marketing - Syncing.”



Individual records are included in this view when the *Sync to HubSpot* field on the record is set to “Yes.”



Keep in mind that SymphonySync™ synchronizes the records that are in the view. The Sync to HubSpot field is simply used as filter criteria for the view.

Under Standard or Premium subscriptions, all records included in the view will sync. Under Free subscriptions, only a maximum of 100 records in the view will sync.

This field can be set either manually or through a Dynamics automation.

Remove or Pause a Record from a Sync Set

Records from HubSpot to Dynamics 365

To stop a HubSpot record from syncing with Dynamics 365, the **Sync to D365** *and/*or the **Sync to D365 Lead** property must be set to "No."

Note that if the *Sync to HubSpot* property is set to "Yes", on the matched record in Dynamics 365, changes will continue to sync from Dynamics 365 into HubSpot unless you set the *Sync to HubSpot* property in Dynamics 365 to "No".

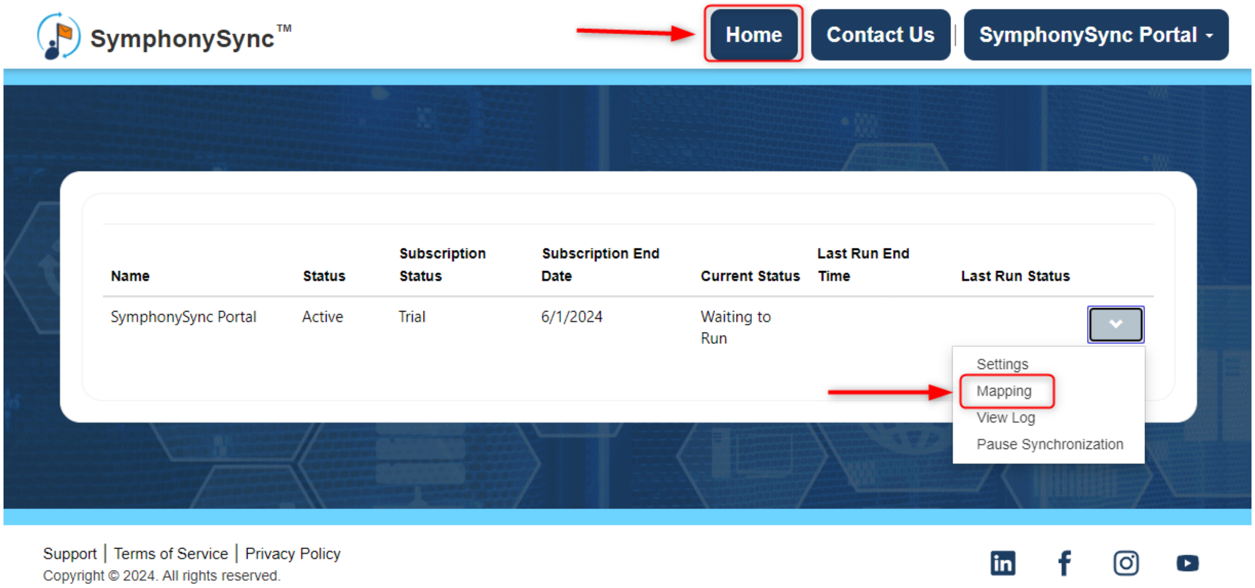
Records from Dynamics 365 to HubSpot

To stop a Dynamics 365 record from syncing with a HubSpot record, the **Sync to HubSpot** field must be set to "No."

Note that if the **Sync to Dynamics** property is set to "Yes" *or* "true" on the matched record in HubSpot, changes will continue to sync from HubSpot into Dynamics 365 unless the **Sync to D365** and/or **Sync to D365** Lead property in HubSpot is set to "No" or "false".

Sync Mappings

1. Click on the "Home" tab to return to your SymphonySync™ profile. Click the caret dropdown and select "Mapping."



2. Here, you can view your field mappings.

Note: You are automatically set to the Free version when setting up a new account. In the Free version, you cannot edit or add field mappings; you can only review them and are limited to syncing 100 records per sync step. With the Standard version, you cannot edit or add field mappings; you can only review them. However, with the Standard version, you can sync unlimited records. With the Premium version you can sync unlimited records and have the option for custom field mappings.

If you want to upgrade your plan, contact us at symphonysync@toplineresults.com or call us at 800-880-1960.

Below is a breakdown of the default field mappings.

HubSpot Contacts to Dynamics 365 Leads

Association Mappings

No associations are mapped for HubSpot contacts syncing to Dynamics 365 leads. For example, if a HubSpot contact is associated with a company record in HubSpot, the lead in Dynamics 365 is not associated with the account in Dynamics 365 that represents the HubSpot company the HubSpot contact is associated with. This is by design, as Dynamics 365 does not offer an account lookup for leads as an out-of-the-box feature. Association mappings for leads are available with our Premium subscription.

HubSpot	Dynamics 365
Became a Customer Date	Became a Customer Date
Became a Lead Date	Became a Lead Date
Became a Marketing Qualified Lead Date	Became a Marketing Qualified Lead Date

Became a Sales Qualified Lead Date	Became a Sales Qualified Lead Date
Became a Subscriber Date	Became a Subscriber Date
Became an Evangelist Date	Became an Evangelist Date
Became an Opportunity Date	Became an Opportunity Date
Became an Other Lifecycle Date	Became an Other Lifecycle Date
City	City
Company Name	Company Name
Contact owner	HubSpot Owner
Country/Region	Country/Region
Create Date	HubSpot Create Date
D365 Street Address 2	Street 2
Email	Email
First Conversion	First Conversion
First Conversion Date	First Conversion Date
First marketing email click date	First marketing email click date
First marketing email open date	First marketing email open date
First marketing email reply date	First marketing email reply date
First marketing email send date	First marketing email send date
First Name	First Name
First Page Seen	First Page Seen
First Referring Site	First Referring Site
First Touch Converting Campaign	First Touch Converting Campaign

HubSpot Score	HubSpot Score
Industry	HubSpot Industry
Job Title	Job Title
Last marketing email click date	Last marketing email click date
Last marketing email name	Last marketing email name
Last marketing email open date	Last marketing email open date
Last marketing email reply date	Last marketing email reply date
Last marketing email send date	Last marketing email send date
Last Name	Last Name
Last Page Seen	Last Page Seen
Last Referring Site	Last Referring Site
Last Touch Converting Campaign	Last Touch Converting Campaign
Latest Source	Latest Source
Latest Source Date	Latest Source Date
Latest Source Drill-Down 1	Latest Source Drill-Down 1
Latest Source Drill-Down 2	Latest Source Drill-Down 2
Lead Status	HubSpot Lead Status
Lifecycle Stage	Lifecycle Stage
Marketing contact status	Marketing contact status
Marketing emails bounced	Marketing emails bounced
Marketing emails clicked	Marketing emails clicked
Marketing emails delivered	Marketing emails delivered

Marketing emails opened	Marketing emails opened
Marketing emails replied	Marketing emails replied
Mobile Phone Number	Mobile Phone
Number of Form Submissions	Number of Form Submissions
Number of Pageviews	Number of Pageviews
Number of Sessions	Number of Sessions
Number of Unique Forms Submitted	Number of Unique Forms Submitted
Original Source	Original Source
Original Source Drill-Down 1	Original Source Drill-Down 1
Original Source Drill-Down 2	Original Source Drill-Down 2
Phone Number	Business Phone
Postal Code	ZIP/Postal Code
Recent Conversion	Recent Conversion
Recent Conversion Date	Recent Conversion Date
Record Source	Record Source
Record Source Detail 1	Record Source Detail 1
Record Source Detail 2	Record Source Detail 2
Record Source Detail 3	Record Source Detail 3
Salutation	Salutation
Sends Since Last Engagement	Sends Since Last Engagement
State/Region	State/Province
Street Address	Street 1

Time First Seen	Time First Seen
Time Last Seen	Time Last Seen
Time of First Session	Time of First Session
Time of Last Session	Time of Last Session
Unsubscribed from all email	Do not allow Bulk Emails
Website URL	Website

Dynamics 365 Leads to HubSpot Contacts

Association Mappings

No associations are mapped for Dynamics 365 leads syncing to HubSpot contacts. For example, if a Dynamics 365 lead is associated with an account record in Dynamics 365, the contact record in HubSpot is not associated with that company in HubSpot. This is by design, as Dynamics 365 does not offer an account lookup for leads as an out-of-the-box feature. Association mappings for leads are available with our Premium subscription.

Dynamics 365	HubSpot
Business Phone (telephone1)	Phone Number
City (address1_city)	City
Company Name	Company Name
Created On	D365 Lead Created On*
Email	Email
First Name	First Name
Industry	D365 Lead Industry*
Job Title	Job Title
Last Name	Last Name
Last CRM Sync Date	Last CRM Sync Date*

Lead Source	D365 Lead Source*
Mobile Phone Number	Mobile Phone Number
Owner	D365 Lead Owner* (name)
Rating	D365 Lead Rating*
Source Campaign	D365 Lead Source Campaign*
Status (statecode)	D365 Lead Record Status*
Status Reason (statuscode)	D365 Lead Status*
Sales Stage (salesstage)	D365 Lead Stage*
State/Province (address1_stateorprovince)	State/Region
Street 1 (address1_line1)	Street Address
Street 2 (address1_line2)	D365 Street Address 2*
Topic	D365 Lead Topic*
Website (websiteurl)	Website URL
ZIP/Postal Code (address1_postalcode)	Postal Code

(* Denotes custom property/field created by SymphonySync™.)

HubSpot Contacts to Dynamics 365 Contacts

Association Mappings

Contact/Company Association

How contact and company associations sync from HubSpot into Dynamics 365:

HubSpot contacts syncing to Dynamics 365 contacts will be associated with any HubSpot companies that are syncing to accounts in Dynamics 365 if the company in HubSpot is associated with the contact as the contacts' primary company.

Only one primary company association is synced for a contact.

HubSpot	Dynamics 365
City	Address 1: City

Company name	Account Name
Company owner	HubSpot Owner
Country/Region	Address 1: Country/Region
Create Date	HubSpot Create Date
Description	Description
First Conversion	First Conversion
First Conversion Date	First Conversion Date
First Touch Converting Campaign	First Touch Converting Campaign
Industry	HubSpot Industry
Latest Source	Latest Source
Latest Source Data 1	Latest Source Data 1
Latest Source Data 2	Latest source Data 2
Latest Source Timestamp	Latest Source Timestamp
Lifecycle Stage	Lifecycle Stage
Original Source	Original Source Type
Original Source Drill-Down 1	Original Source Drill-Down 1
Original Source Drill-Down 2	Original Source Drill-Down 2
Phone Number	Main Phone
Postal Code	Address 1: ZIP/Postal Code
Recent Conversion	Recent Conversion
Recent Conversion Date	Recent Conversion Date
Record Source	Record Source

Record Source Detail 1	Record Source Detail 1
Record Source Detail 2	Record Source Detail 2
Record Source Detail 3	Record Source Detail 3
State/Region	Address 1: State/Province
Street Address	Address 1: Street 1
Street Address 2	Address 1: Street 2
Website URL	Website

Dynamics 365 Contacts to HubSpot Contacts

Association Mappings

How contact and account associations sync from Dynamics 365 into HubSpot:

Dynamics 365 contacts syncing to HubSpot contacts that have an account listed in the company lookup field on the contact record will be associated with that company in HubSpot if that Dynamics 365 account record is also syncing to HubSpot companies. The company will be associated with the contact as the contact's primary company.

Dynamics 365	HubSpot
Address 1: City	City
Address 1: Country/Region	Country/Region
Address 1: State/Province	State/Region
Address 1: Street 1	Street Address
Address 1: Street 2	D365 Street Address 2*
Address 1: ZIP/Postal Code	Postal Code
Business Phone	Phone Number
Created On	D365 Created On*

Email	Email
First Name	First Name
Job Title	Job Title
Last Name	Last Name
Mobile Phone	Mobile Phone Number
Owner	D365 Owner Name*
Salutation	Salutation
Status	D365 Contact Record Status*
Website	Website URL

(* Denotes custom property/field created by SymphonySync™.)

How contact and opportunity associations sync from Dynamics 365 into HubSpot:

Please see the section for Dynamics 365 Opportunities to HubSpot Deals to review how contacts are associated with deals in HubSpot.

HubSpot Companies to Dynamics 365 Accounts

No association mappings are included in this step. To review how associations between contacts and companies are synced to Dynamics 365, please review HubSpot Contacts to Dynamics 365 Contacts.

HubSpot	Dynamics 365
City	Address 1: City (address1_city)
Company Name	Account Name (name)
Company Owner (User)	HubSpot Owner* (email address of the owner)
Country/Region	Address 1: Country/Region (address1_country)
Create Date	HubSpot Create Date*
Description	Description
Industry	HubSpot Industry *

Latest Source	Latest Source*
Latest Source Data 1	Latest Source Data 1*
Latest Source Data 2	Latest Source Data 2*
Latest Source Timestamp	Latest Source Timestamp*
Lifecycle Stage	Lifecycle Stage*
Original Source	Original Source Type*
Original Source Drill-Down 1	Original Source Drill-Down 1*
Original Source Drill-Down 2	Original Source Drill-Down 2*
Phone Number	Main Phone (telephone1)
Postal Code	Address 1: ZIP/Postal Code
Record Source	Record Source*
Record Source Detail 1	Record Source Detail 1*
Record Source Detail 2	Record Source Detail 2*
Record Source Detail 3	Record Source Detail 3*
State/Region	Address 1: State/Province (address1_stateorprovince)
Street Address	Address 1: Street 1 (address1_line1)
Street Address 2	Address 1: Street 2 (address1_line2)
Website URL	Website

(* Denotes custom property/field created by SymphonySync™.)

Dynamics 365 Accounts to HubSpot Companies

No association mappings are included in this step. To review how associations between contacts and companies are synced to Dynamics 365, please review Dynamics 365 Contacts to HubSpot Contacts.

Dynamics 365	HubSpot

Account Name	Company name
Address 1: City	City
Address 1: Country/Region	Country/Region
Address 1: State/Province	State/Region
Address 1: Street 1	Street Address
Address 1: Street 2	Street Address 2
Address 1: ZIP/Postal Code	Postal Code
Created On	D365 Created On*
Description	Description
Industry	D365 Industry*
Main Phone	Phone Number
Owner	D365 Owner Name*
Status	D365 Account Record Status*
Website	Website URL

(* Denotes custom property/field created by SymphonySync™.)

Dynamics 365 Opportunity to HubSpot Deals

Association Mappings

How opportunity and contact associations sync from Dynamics 365 into HubSpot:

Dynamics 365 opportunities syncing to HubSpot deals that have a contact listed in the primary contact lookup field on that opportunity record will be associated with that contact in HubSpot if that contact record is syncing to HubSpot contacts.

Deal/Company Association

How opportunity and account associations sync from Dynamics 365 into HubSpot:

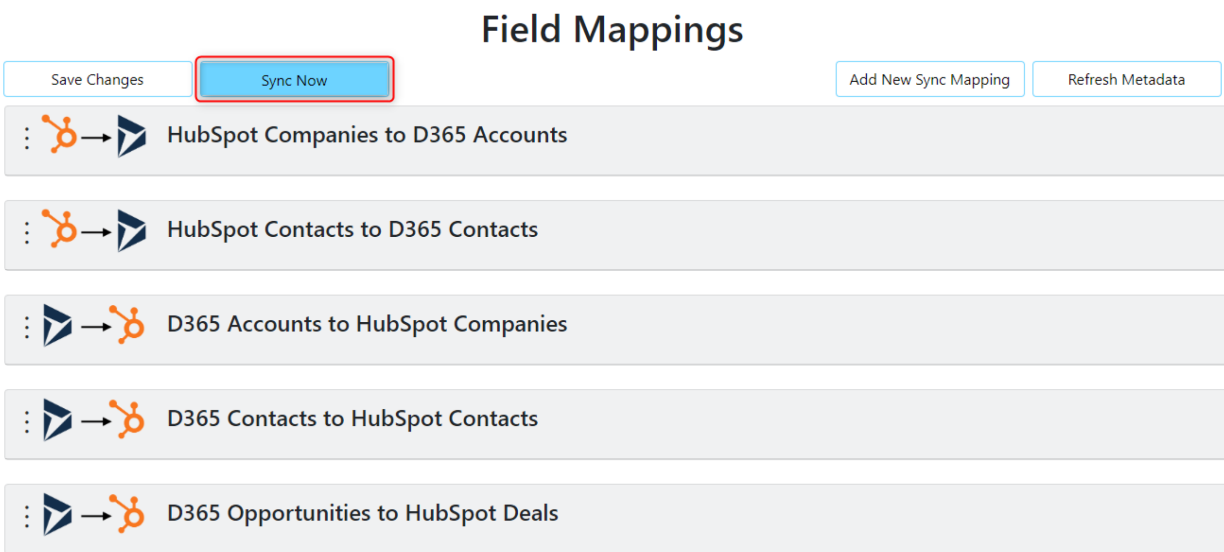
Dynamics 365 opportunities syncing to HubSpot deals that have an account listed in the primary account lookup field on that opportunity record will be associated with that company in HubSpot if that account record is syncing to HubSpot companies.

Dynamics 365	HubSpot
Account	D365 Account Name*
Actual Close Date	Close Date
Actual Revenue	Amount
Contact	D365 Contact Name*
Created On	D365 Created On*
Description	Deal Description
Est. close date	D365 Estimated Close Date*
Est. revenue	D365 Estimated Revenue*
Owner	D365 Owner Name*
Source Campaign	D365 Source Campaign*
Status	D365 Opportunity Record Status*
Status Reason	Deal Stage
Status Reason	D365 Status Reason*
Topic	Deal Name

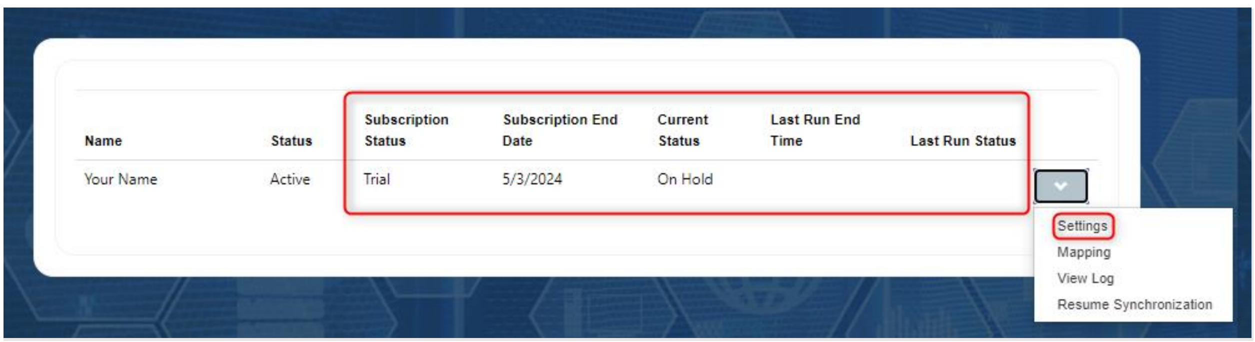
(* Denotes custom property/field created by SymphonySync™.)

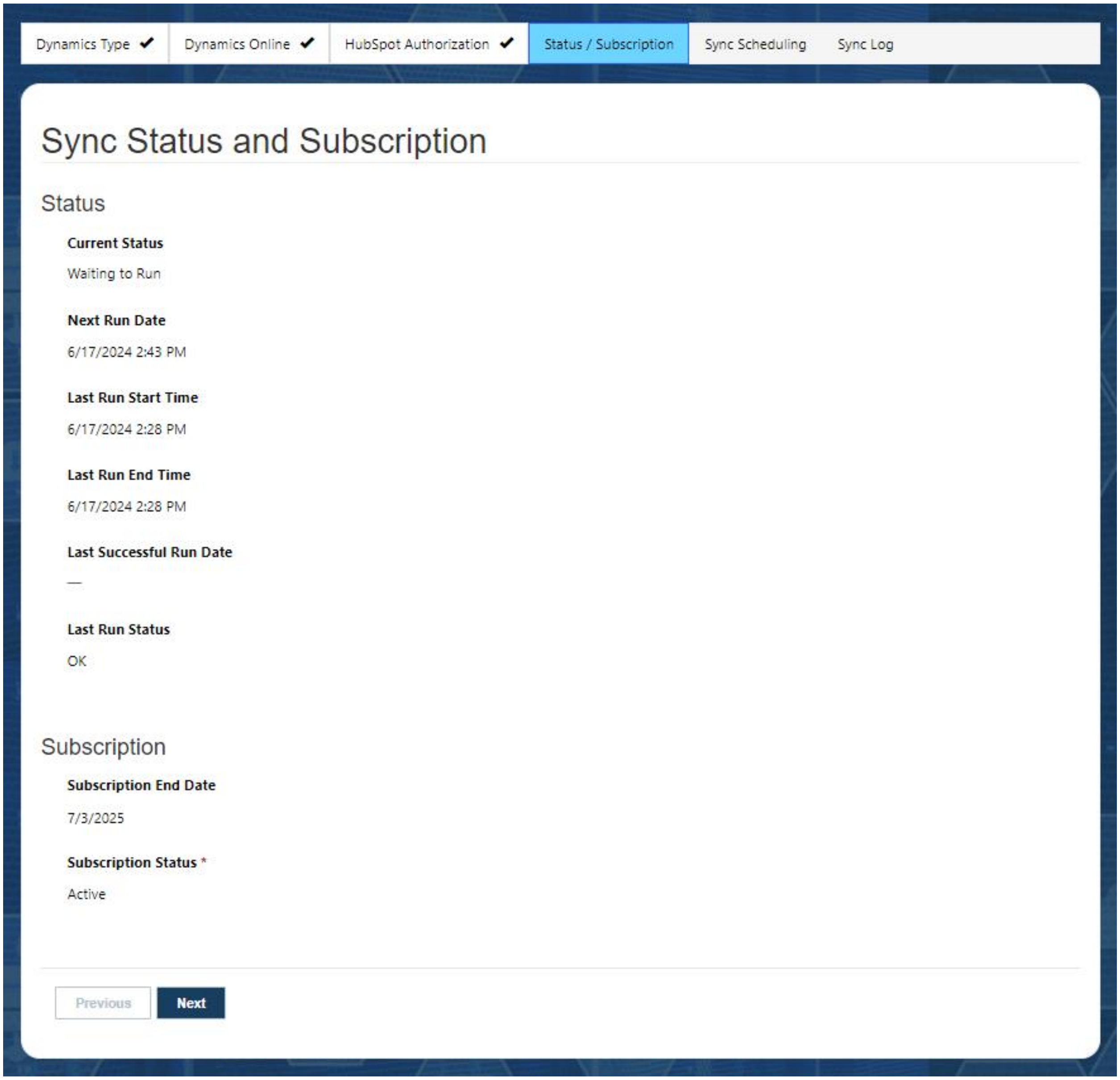
Additional SymphonySync™ Sync Features

1. You can initiate a Sync in real-time by clicking "Sync Now" in the Field Mappings section. Otherwise, your sync will run based on your Sync Scheduling time. (See Step 3.)

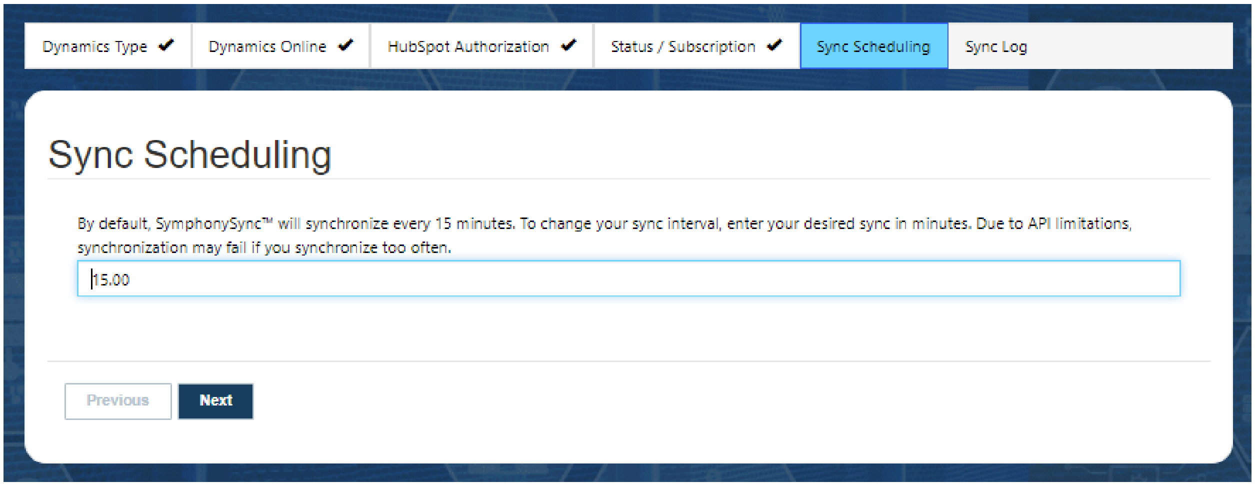


2. You can view your Sync and Subscription status on your profile page or under the “Settings” tab on the 3rd form.

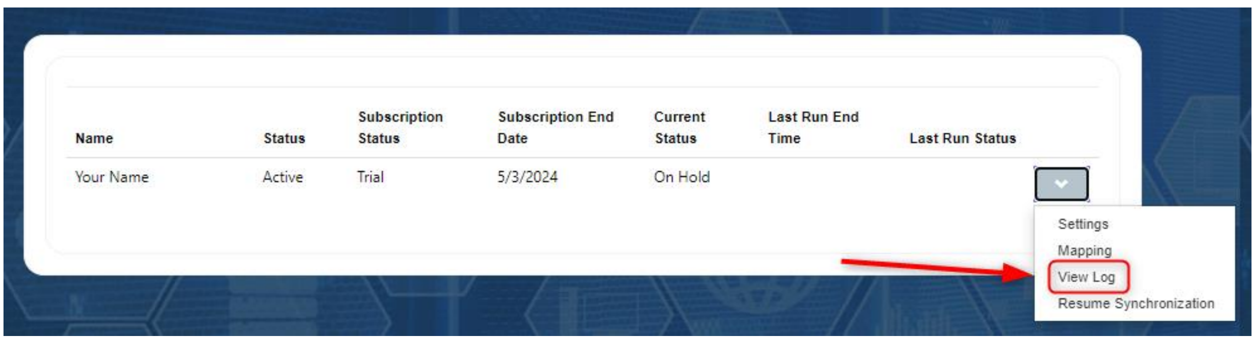


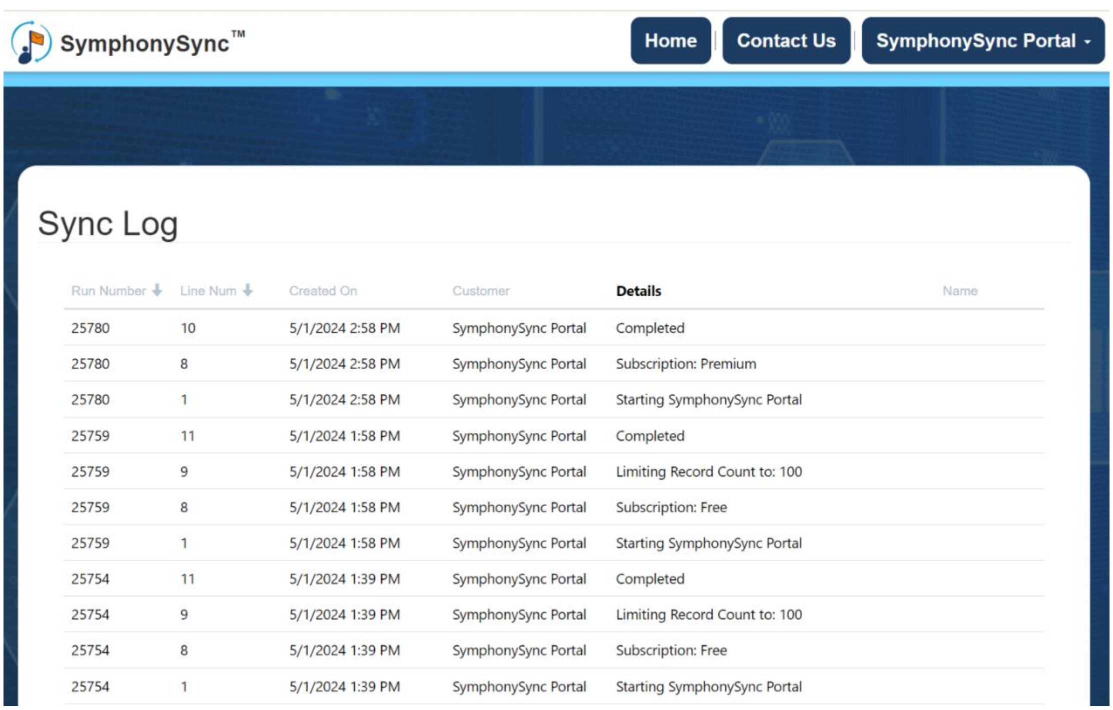


3. Under the "Settings" tab, you can update the Sync Scheduling. The sync interval cannot be less than 15 minutes. (If you have questions regarding your sync interval, contact us at symphonysync@toplineresults.com or call us at 800-880-1960.)



4. By clicking the "View Log" in the caret dropdown or under the "Settings" tab, you can view your Sync Log.



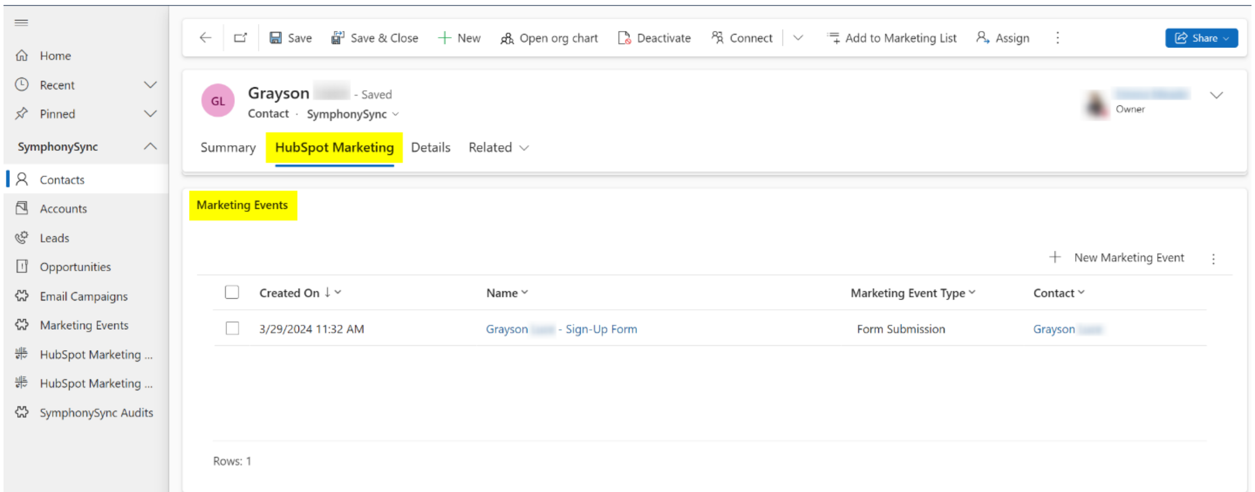


Sync Log

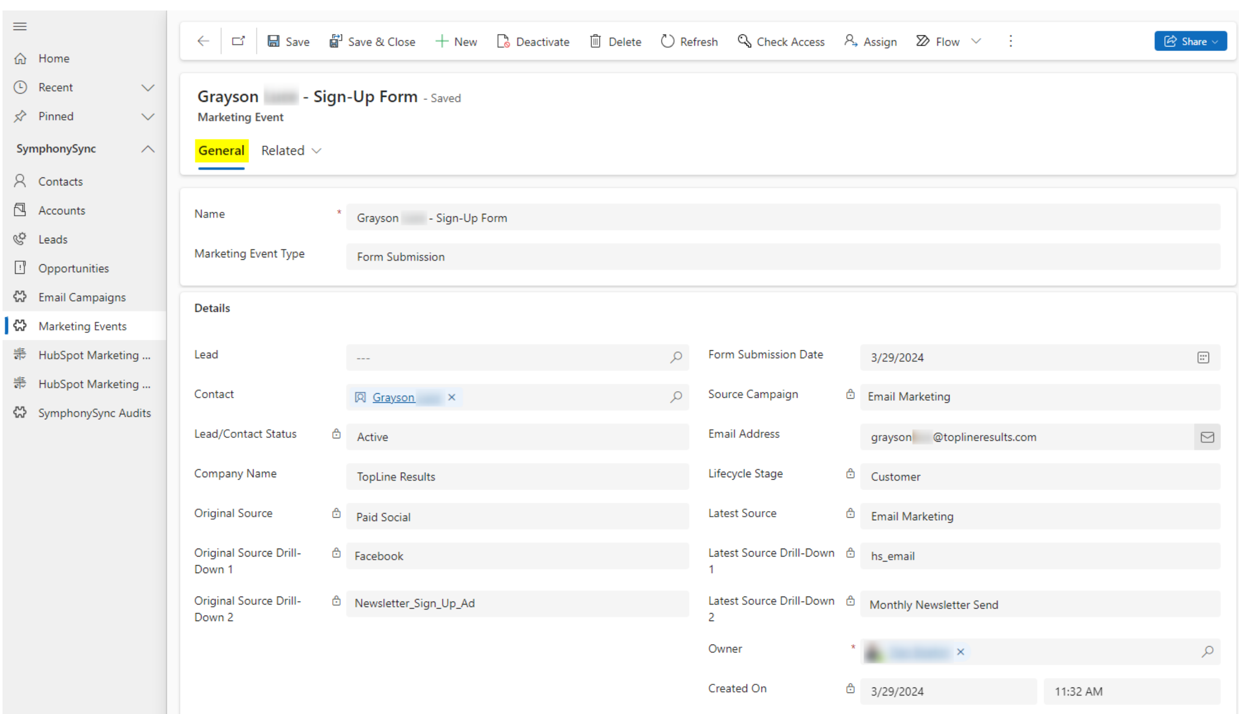
Run Number	Line Num	Created On	Customer	Details	Name
25780	10	5/1/2024 2:58 PM	SymphonySync Portal	Completed	
25780	8	5/1/2024 2:58 PM	SymphonySync Portal	Subscription: Premium	
25780	1	5/1/2024 2:58 PM	SymphonySync Portal	Starting SymphonySync Portal	
25759	11	5/1/2024 1:58 PM	SymphonySync Portal	Completed	
25759	9	5/1/2024 1:58 PM	SymphonySync Portal	Limiting Record Count to: 100	
25759	8	5/1/2024 1:58 PM	SymphonySync Portal	Subscription: Free	
25759	1	5/1/2024 1:58 PM	SymphonySync Portal	Starting SymphonySync Portal	
25754	11	5/1/2024 1:39 PM	SymphonySync Portal	Completed	
25754	9	5/1/2024 1:39 PM	SymphonySync Portal	Limiting Record Count to: 100	
25754	8	5/1/2024 1:39 PM	SymphonySync Portal	Subscription: Free	
25754	1	5/1/2024 1:39 PM	SymphonySync Portal	Starting SymphonySync Portal	

HubSpot Form Submissions to Dynamics 365 Marketing Events

For contacts syncing from HubSpot to Dynamics 365, a record of the form submissions made on a HubSpot form is created in Dynamics 365 and linked to the lead or contact record in Dynamics 365. These records can be viewed under the Marketing Events sub grid on the lead/contact form.



By clicking on the name of the marketing event form, you can view all the details regarding which HubSpot form was submitted, the date it was created, and all the source details including where the lead/contact came from originally and most recently.



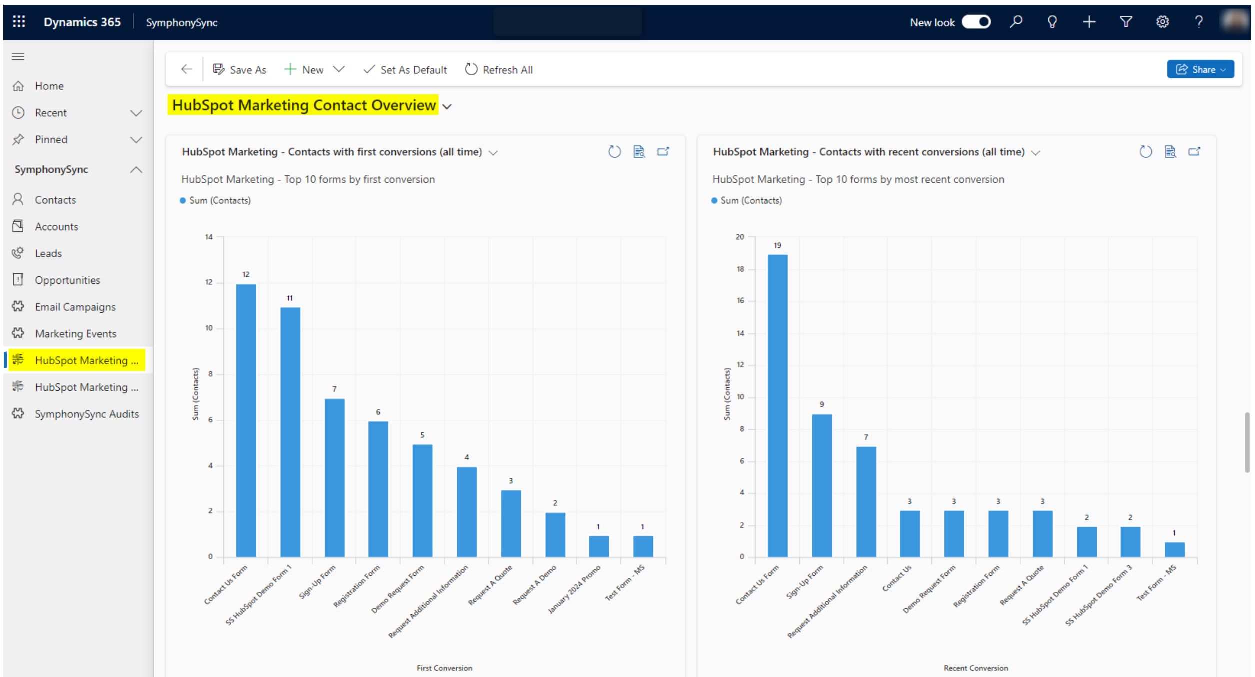
SymphonySync™ Dashboards

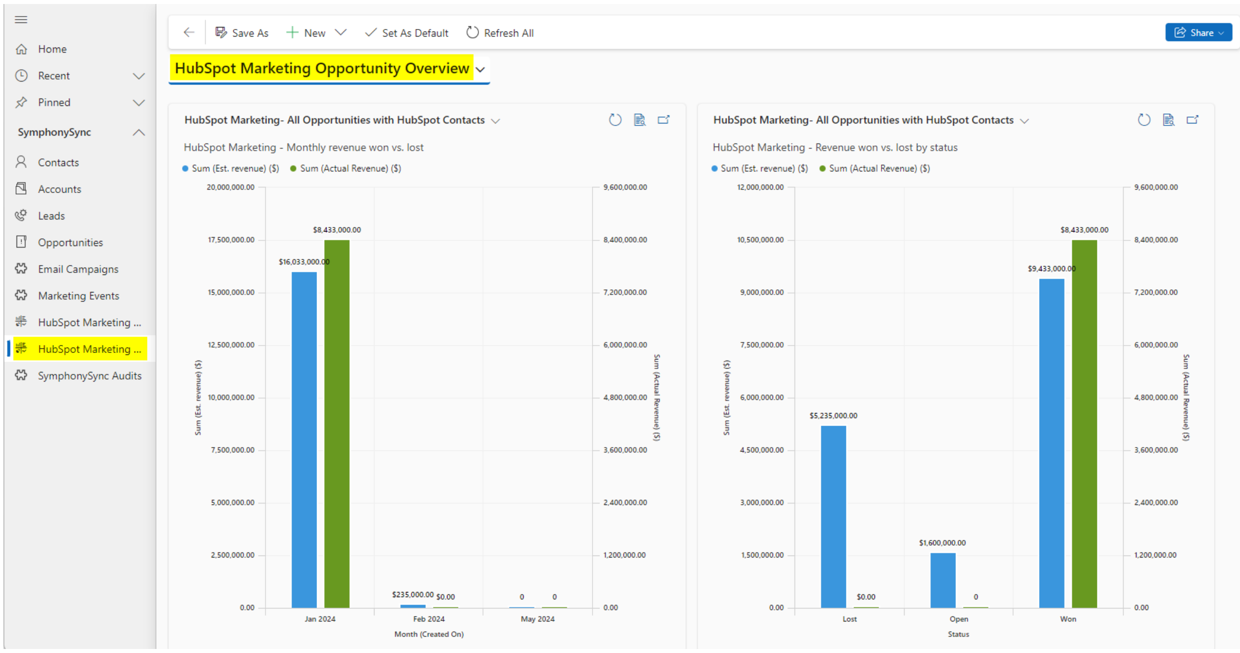
All subscription plans include standard dashboards. The HubSpot Marketing Contact Overview dashboard provides actionable lists based on contact interactions and charts highlighting interaction trends. The HubSpot Marketing Opportunity Overview dashboard provides metrics for Opportunities associated with your HubSpot Contacts. Premium subscriptions may request up to five additional custom dashboards.

Note: You must be in the SymphonySync™ app to view the dashboards. Click here to see how to access your SymphonySync™ app.

You will find your SymphonySync™ dashboards on the left side panel while in the SymphonySync™ app in Dynamics 365.

Dynamics 365 Online View of SymphonySync™ Dashboards:



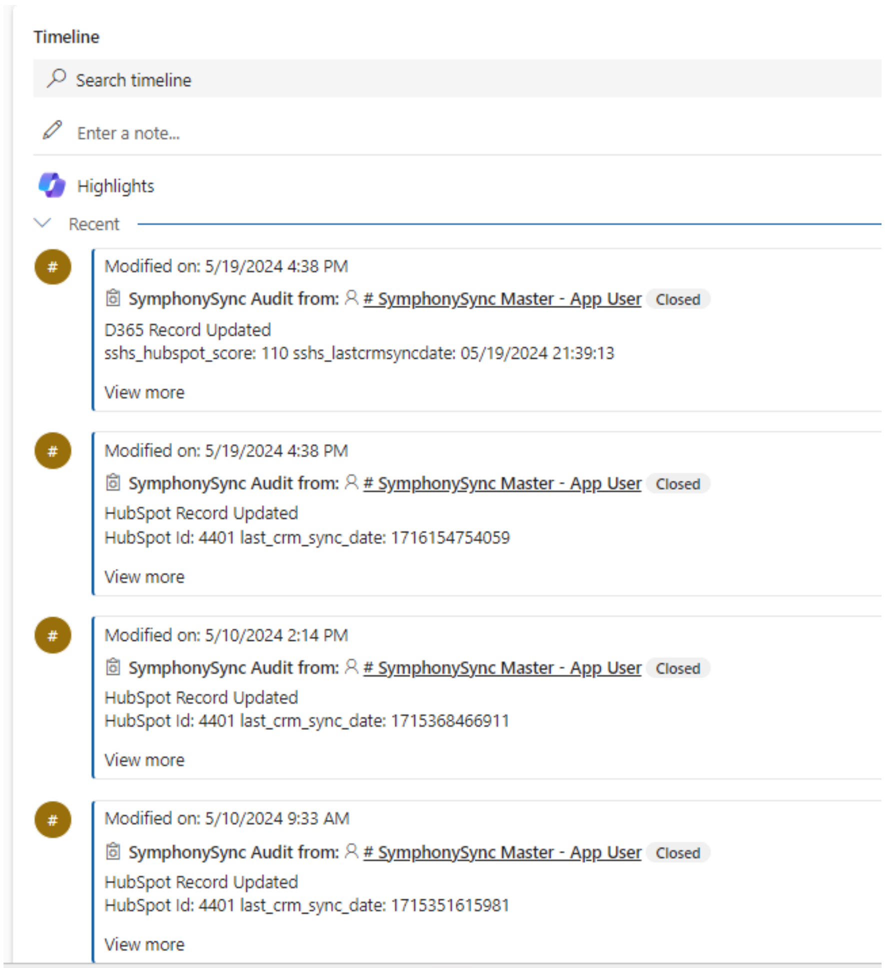


Note: If you are using Dynamics 365 On-Premise, HubSpot Marketing Contact metrics are broken down into three dashboards.

SymphonySync™ Audit Records

SymphonySync™ tracks changes made to individual records in Dynamics 365 and HubSpot in the activity timeline in Dynamics 365. SymphonySync™ audit records may be used to verify sync activities, including what fields and properties were updated for specific records. Additionally, they can be used for general troubleshooting purposes. To review changes made for a specific record, look for the activity timeline.

Note: You must be in the SymphonySync™ app to view the SymphonySync™ activity timeline. Click here to see how to access your SymphonySync™ app.

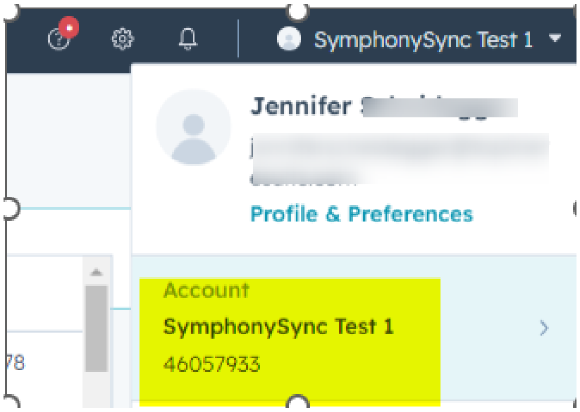


Post Sign Up Configuration

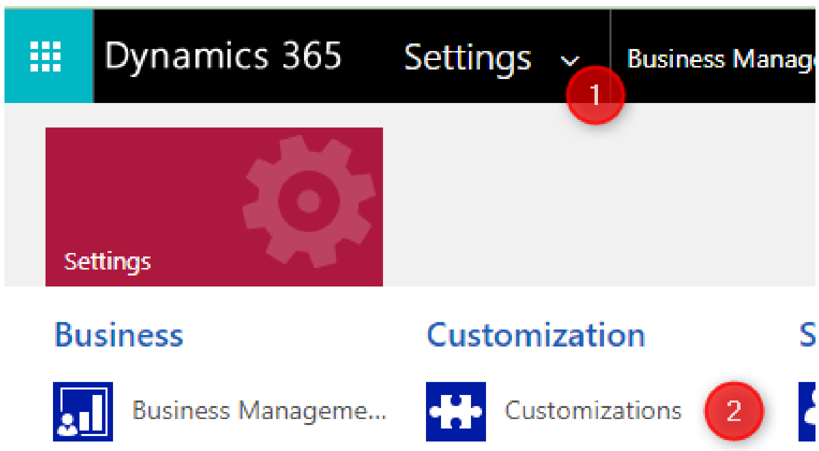
How to Add Your HubSpot Account ID for the Contact Timeline View in Dynamics 365

The Hubspot timeline appears on contact records in Dynamics 365. When SymphonySync™ is installed, the timeline should automatically update to connect to your HubSpot account. **Generally, no action should be needed for the HubSpot timeline to work, and the below steps are not necessary.** If the HubSpot timeline is not working as expected, these are instructions to update the HubSpot ID for the timeline.

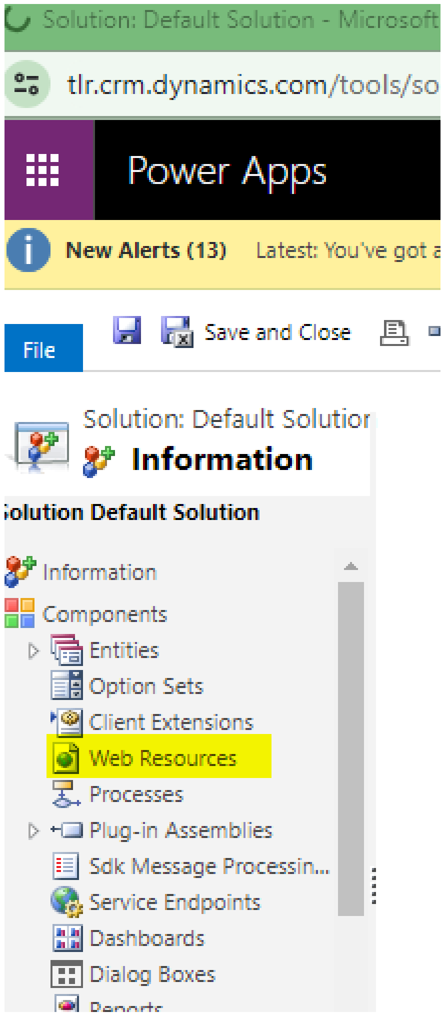
1. Identify your HubSpot Account ID. Once logged in to your HubSpot Account, click on your account name in the top right corner. The account number is underneath the Account Name.



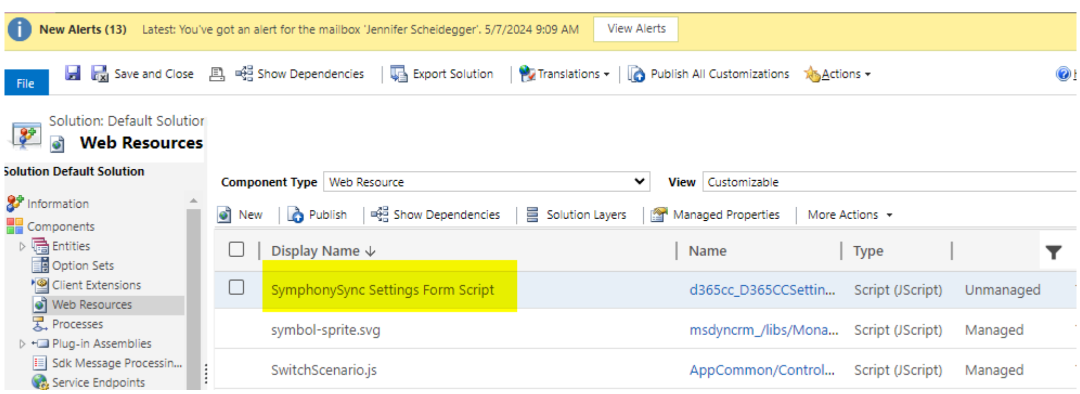
2. In Dynamics 365, navigate to Customizations.



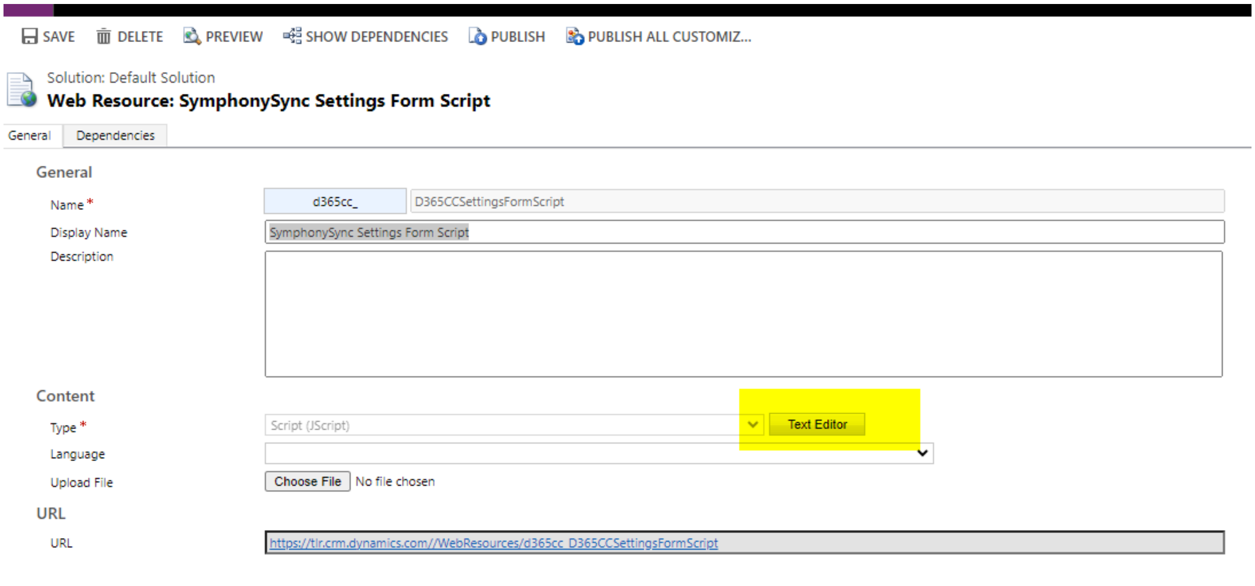
3. Click "Customize the system."
4. Open Web Resources.



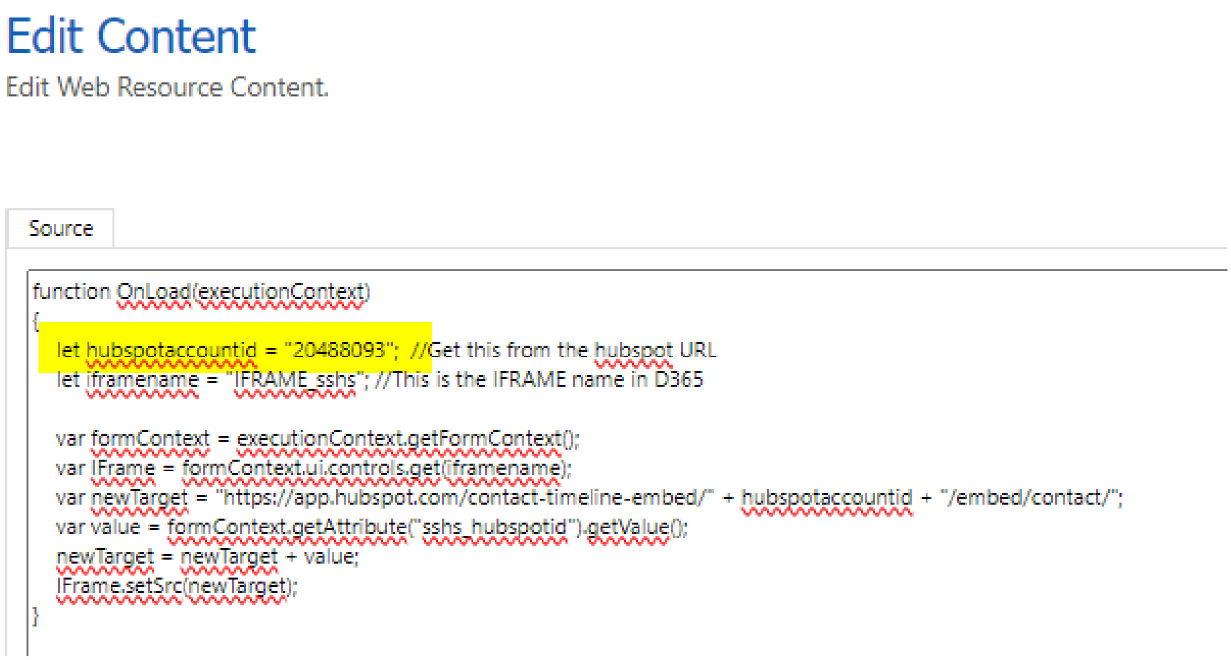
5. Find SymphonySync Settings Form Script and open it.



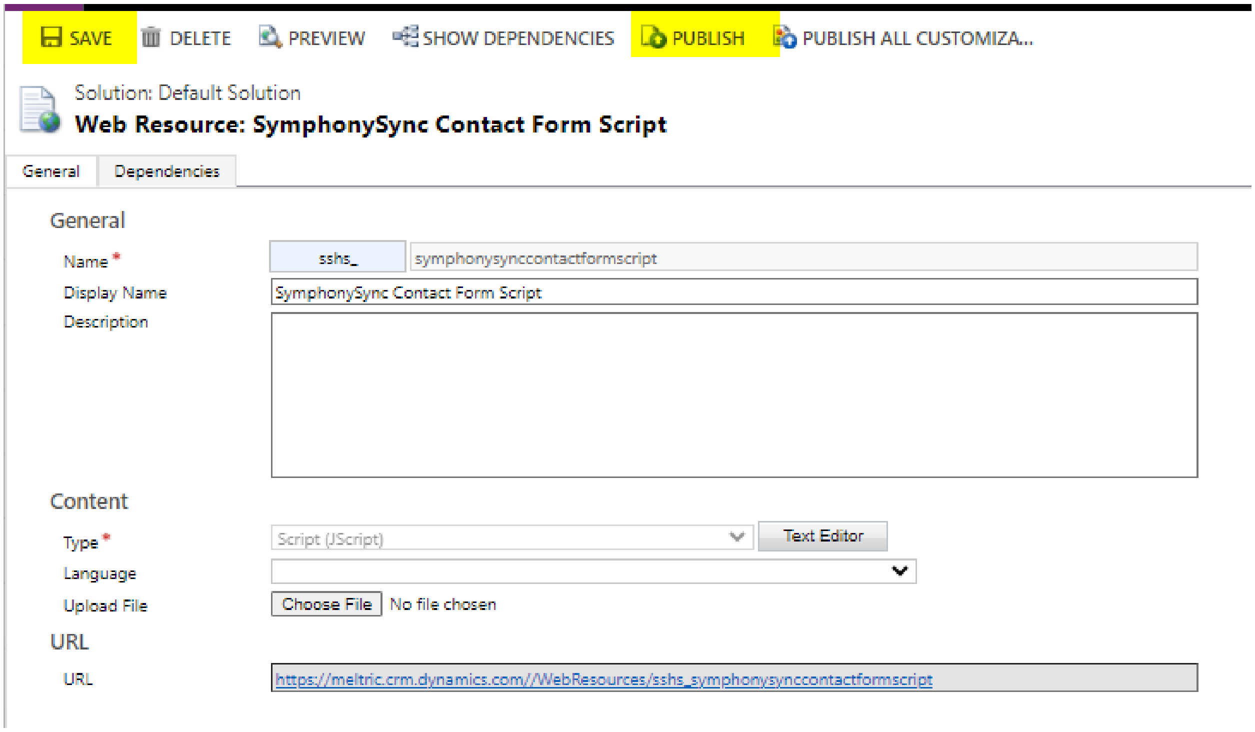
6. Click to open the text editor.



7. Find the line with let hubspotaccountid =

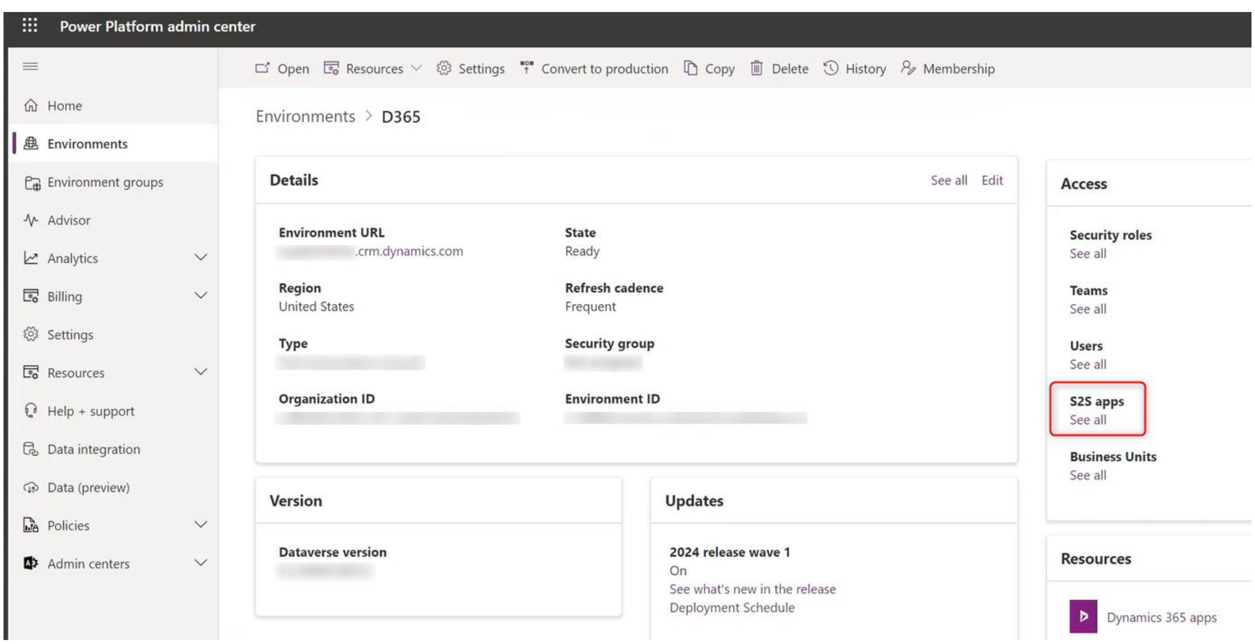


8. Enter your HubSpot account Id between the quotations.
9. Click “Ok” to close the editor.
10. Click “Save.” Then Click “Publish.”

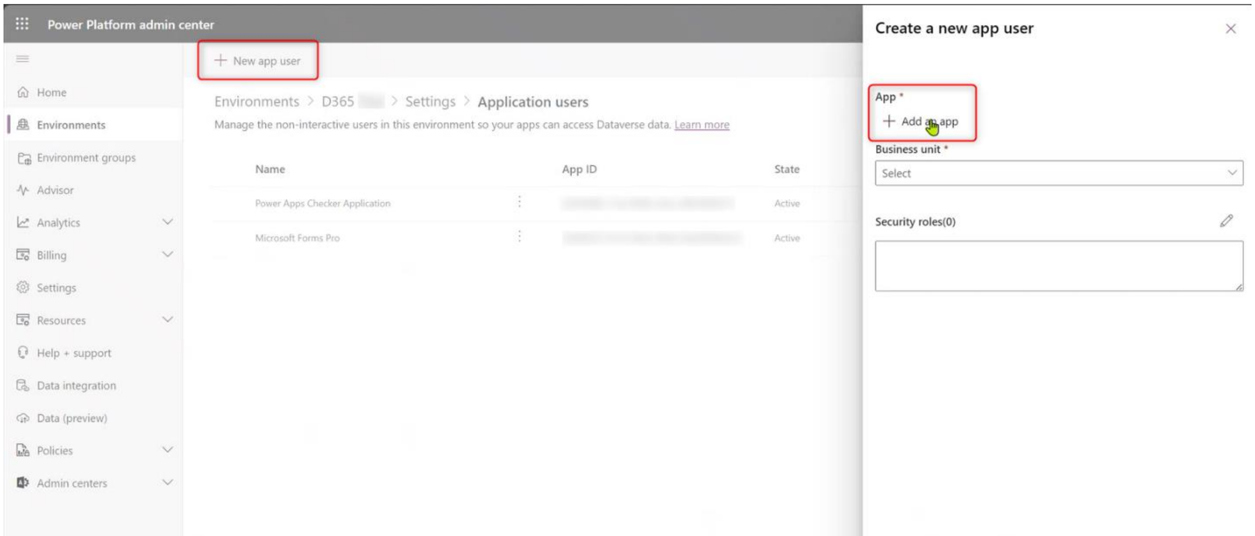


How to Add the SymphonySync™ App User and Security Role to your Dynamics 365 Database when using Dynamics 365 Online

1. Go to https://admin.powerplatform.microsoft.com and log in using your Dynamics 365 account. **Note: This must be performed by a Dynamics Administrator user.**
2. On the Environments tab, and under the Access section, click on "See all" under S2S apps.

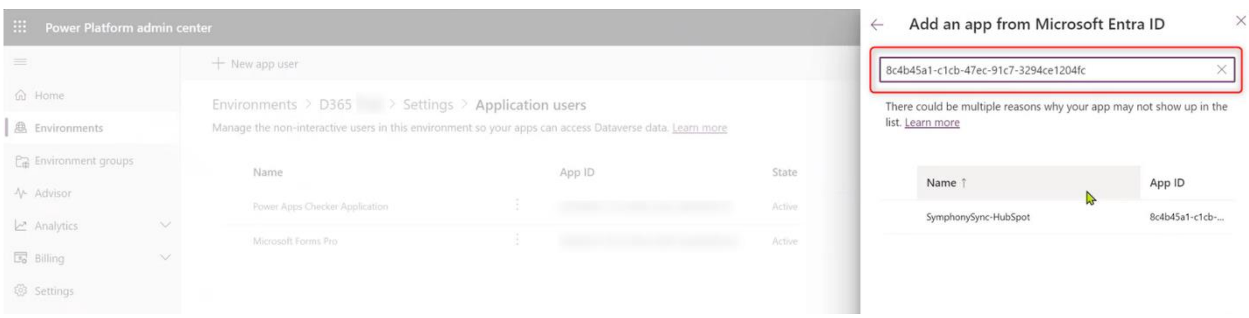


3. Click on “+ New app user” in the top left corner, then select “+ Add an app” in the pop-up menu.

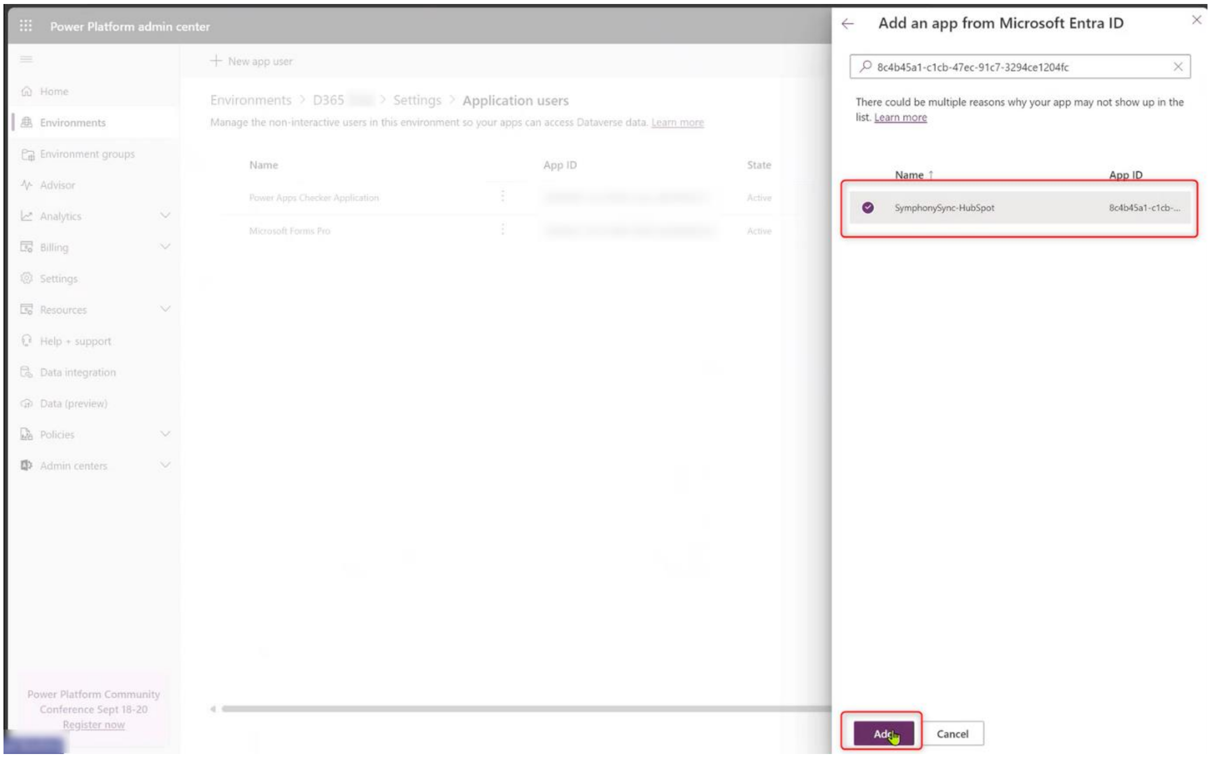


4. Copy and paste the following Client ID into the search bar. (**Note:** Make sure there are no leading or trailing spaces.)

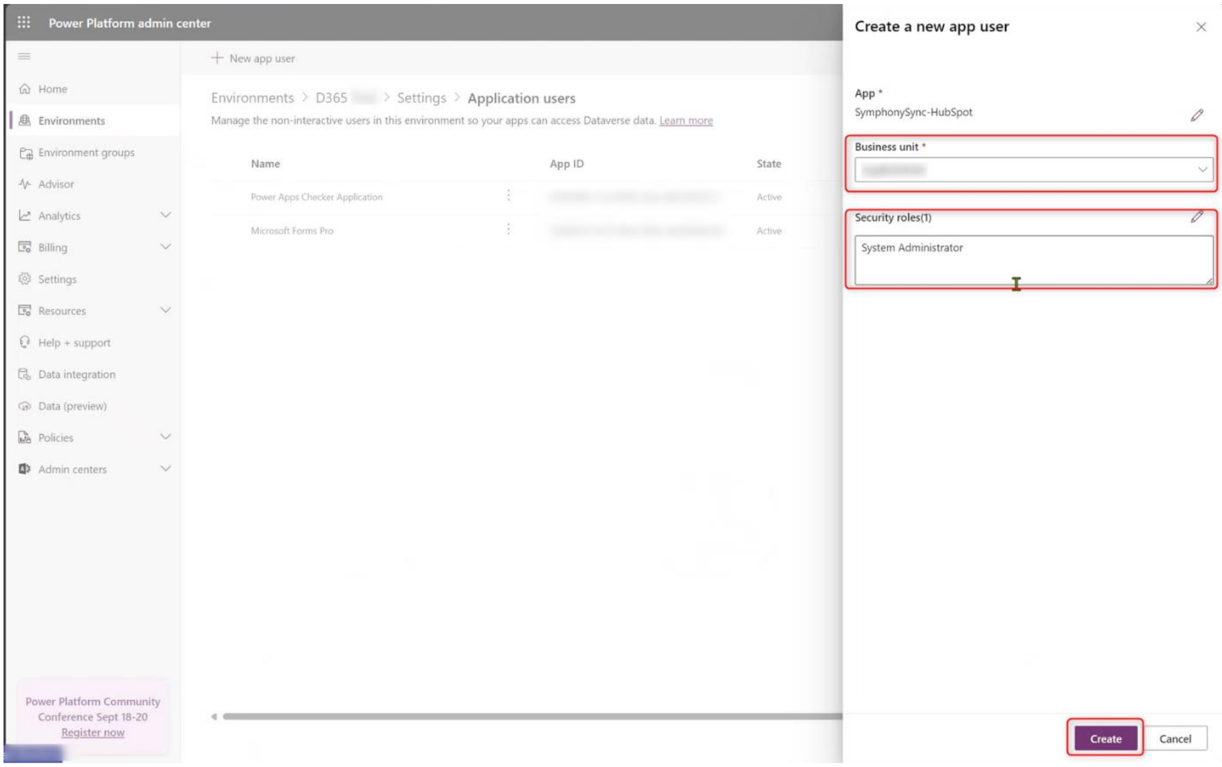
   8c4b45a1-c1cb-47ec-91c7-3294ce1204fc



5. Select the “SymphonySync-HubSpot” app that comes up and click “Add”.



6. Select your root business unit and assign the System Administrator security role. Then click "Create".
   Note: The System Administrator role may be changed after the initial configuration of SymphonySync™ has completed. You may contact us for more information about the minimum permissions required for this user.

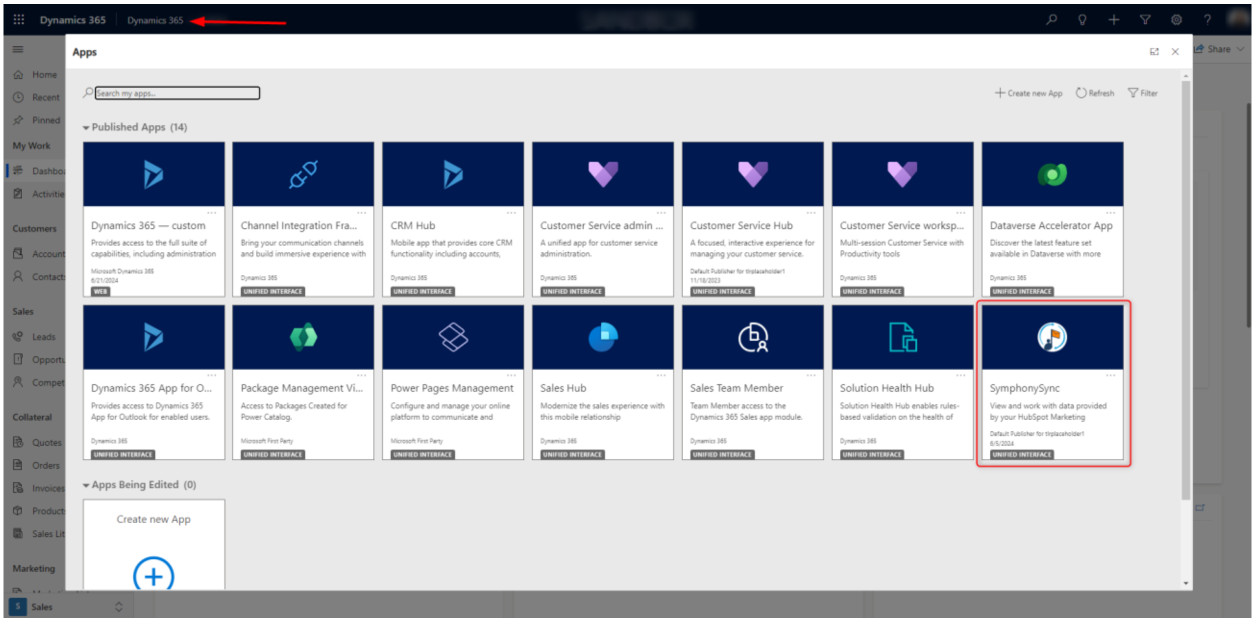


7. Once this step is complete, in the SymphonySync™ portal, on the Dynamics Online form, you can click "Next" to proceed. Then continue to Step 5 under Setting up SymphonySync™.

How to Access the SymphonySync™ App in Dynamics 365

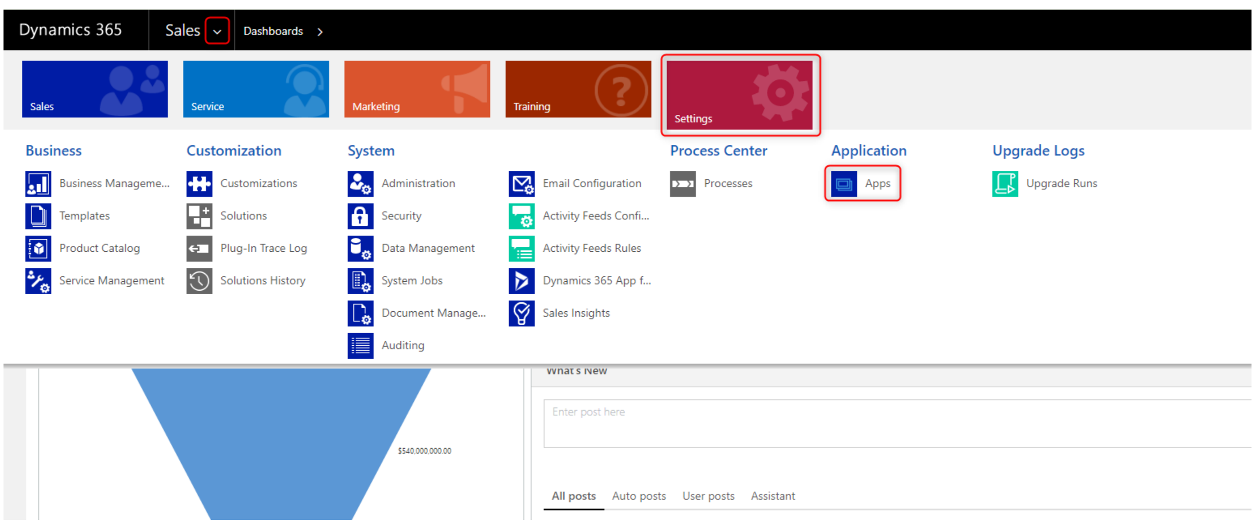
Online

In the top left corner, click on the current app you have open. In the image below it is showing "Dynamics 365". Your apps window should open. Find and click on the SymphonySync™ app.

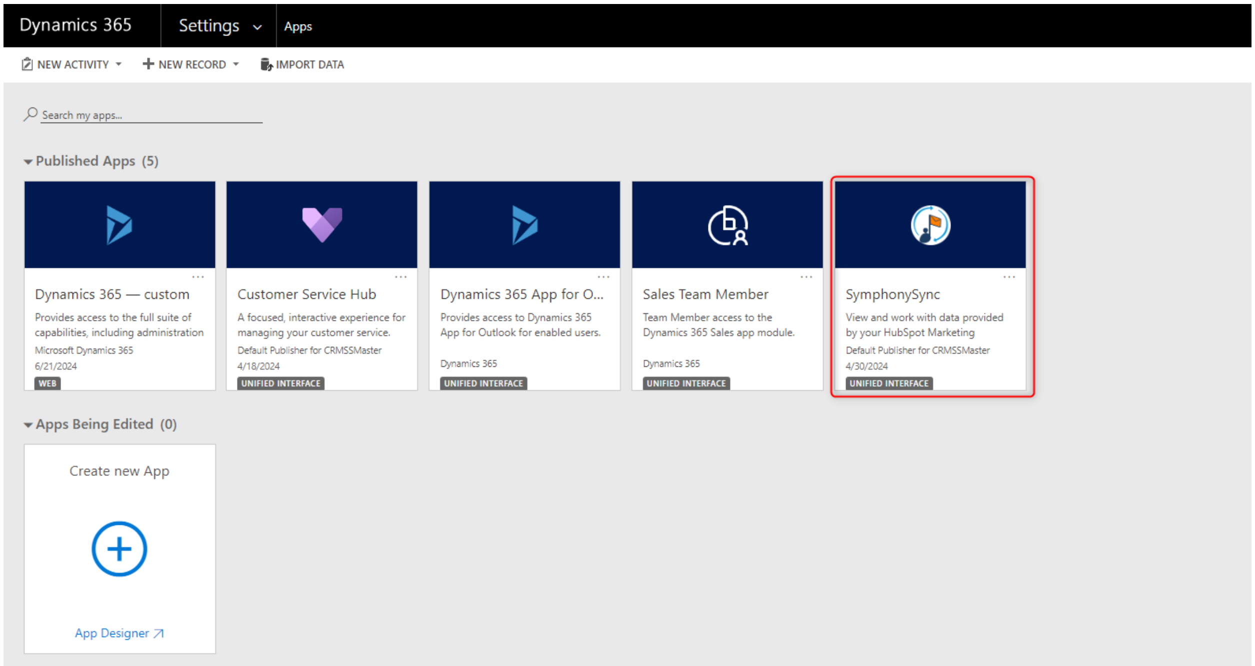


On-Premise

In your Dynamics 365 account, click on the caret dropdown next to Dynamics 365 in the top left corner. Click on Settings. Then, click on Apps.

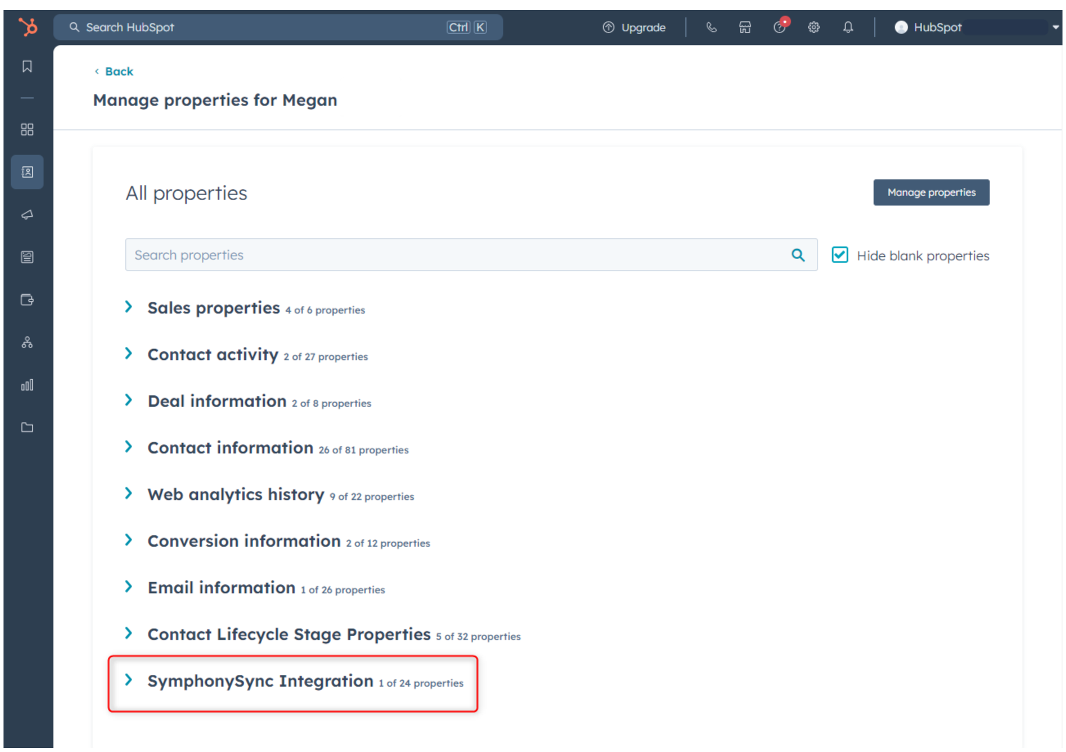


Find and click on the SymphonySync™ app.



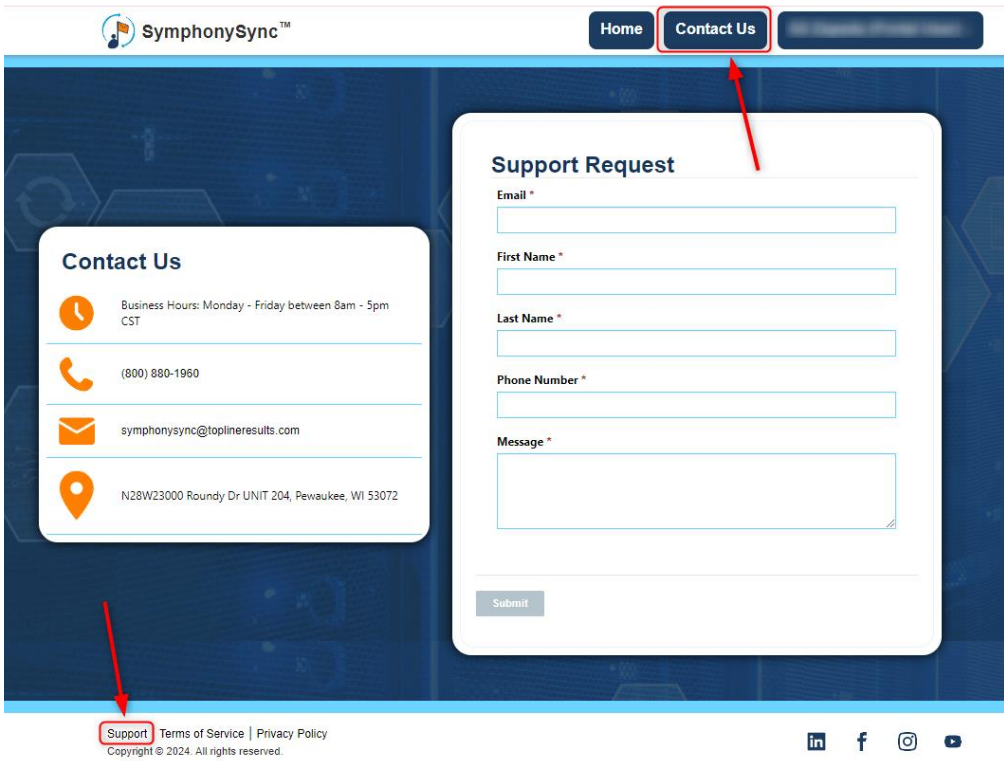
Where to Find the SymphonySync™ Integration Properties in HubSpot

To see all the SymphonySync™ integrated fields from Dynamics 365 on a lead, contact, company, or deal record in HubSpot, click on View all Properties on the record, then click the SymphonySync Integration dropdown.



Need Help or Want to Upgrade?

Click the “Contact Us” tab in the header or the “Support” tab in the footer to submit a support request. If you want to upgrade, you must contact us directly by phone at 800-880-1960 or email us at symphonysync@toplineresults.com.



Thank you for using SymphonySync™ for HubSpot offered by TopLine Results Corporation!

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