

# Hubspot CRM Sync

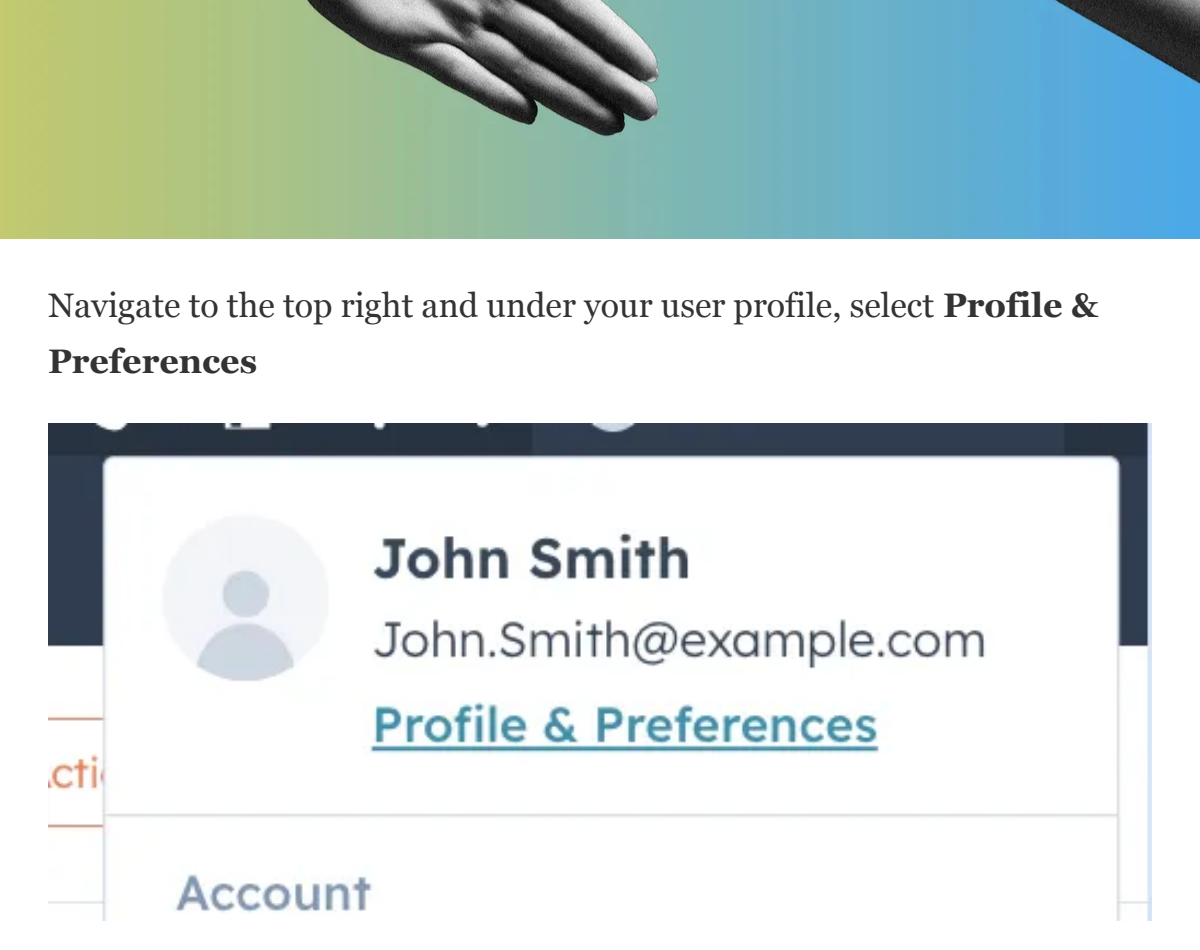
By Axios HQ Solutions • Nov 20, 2023

Smart Brevity® count: 2 mins...483 words

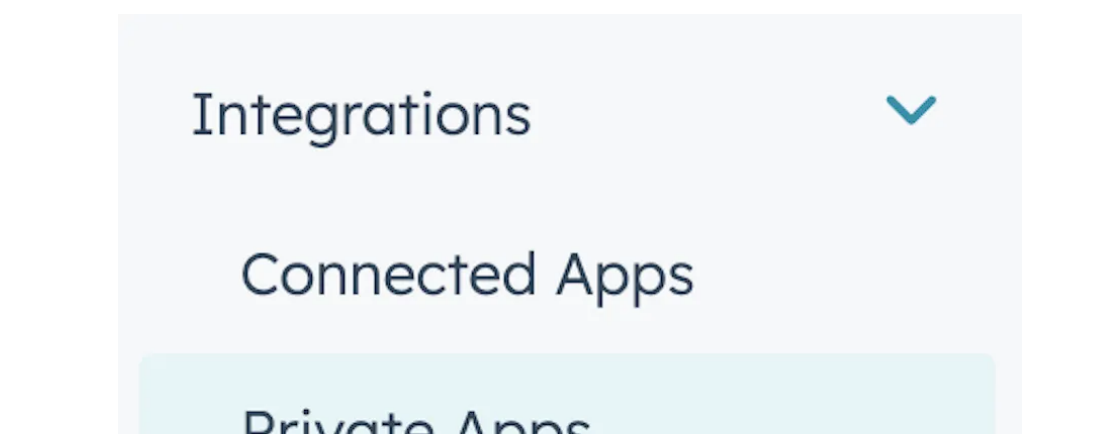
**What's new:** Axios HQ now supports syncing our users' CRM contacts to the platform in HQ!

**Currently,** Axios HQ supports Hubspot connections. Interested in a different CRM? Let us know!

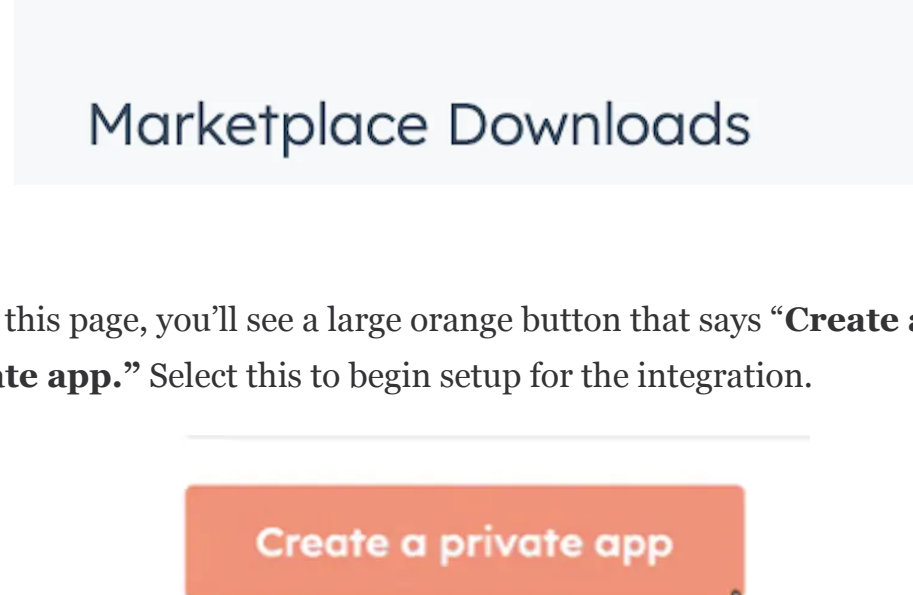
## 1. Create a private application in Hubspot



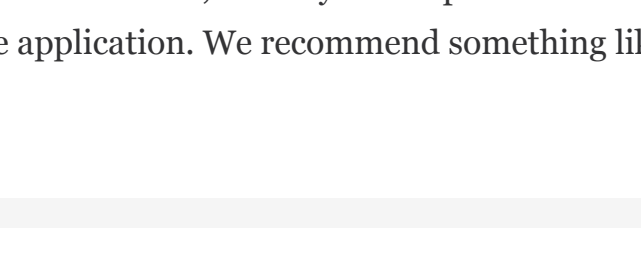
Navigate to the top right and under your user profile, select **Profile & Preferences**



This will take you to a **General** page. On the right hand side, select the **Integrations** dropdown. Expand the item, and select **Private Apps**.

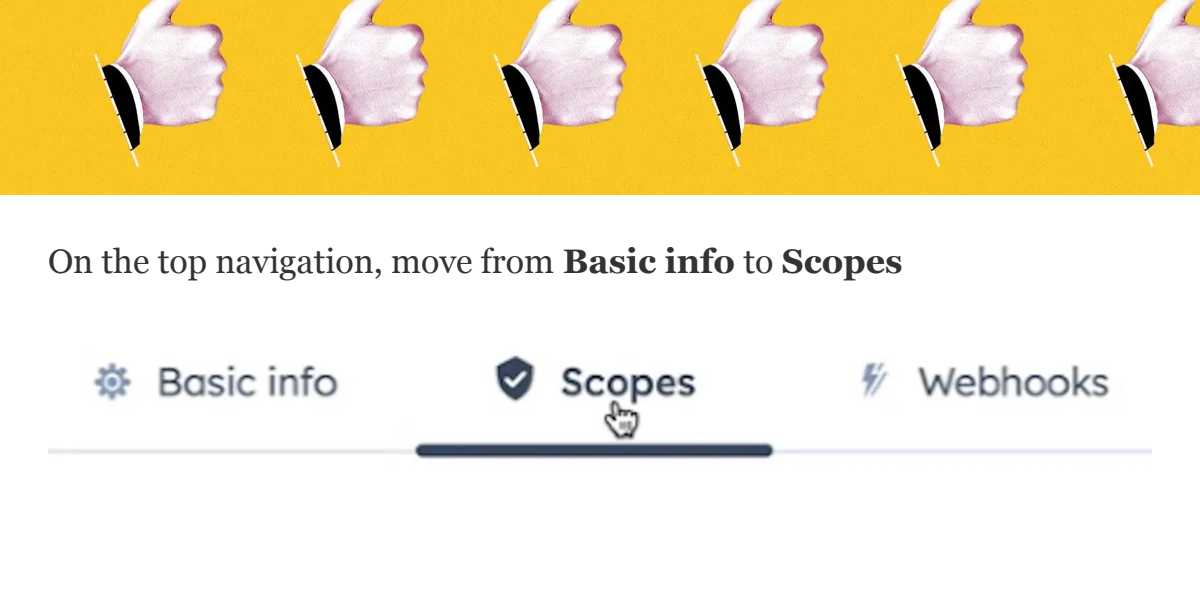


From this page, you'll see a large orange button that says **“Create a private app.”** Select this to begin setup for the integration.



You'll be asked for **Basic info**, where you can provide a name and description of the application. We recommend something like **“Axios HQ Sync.”**

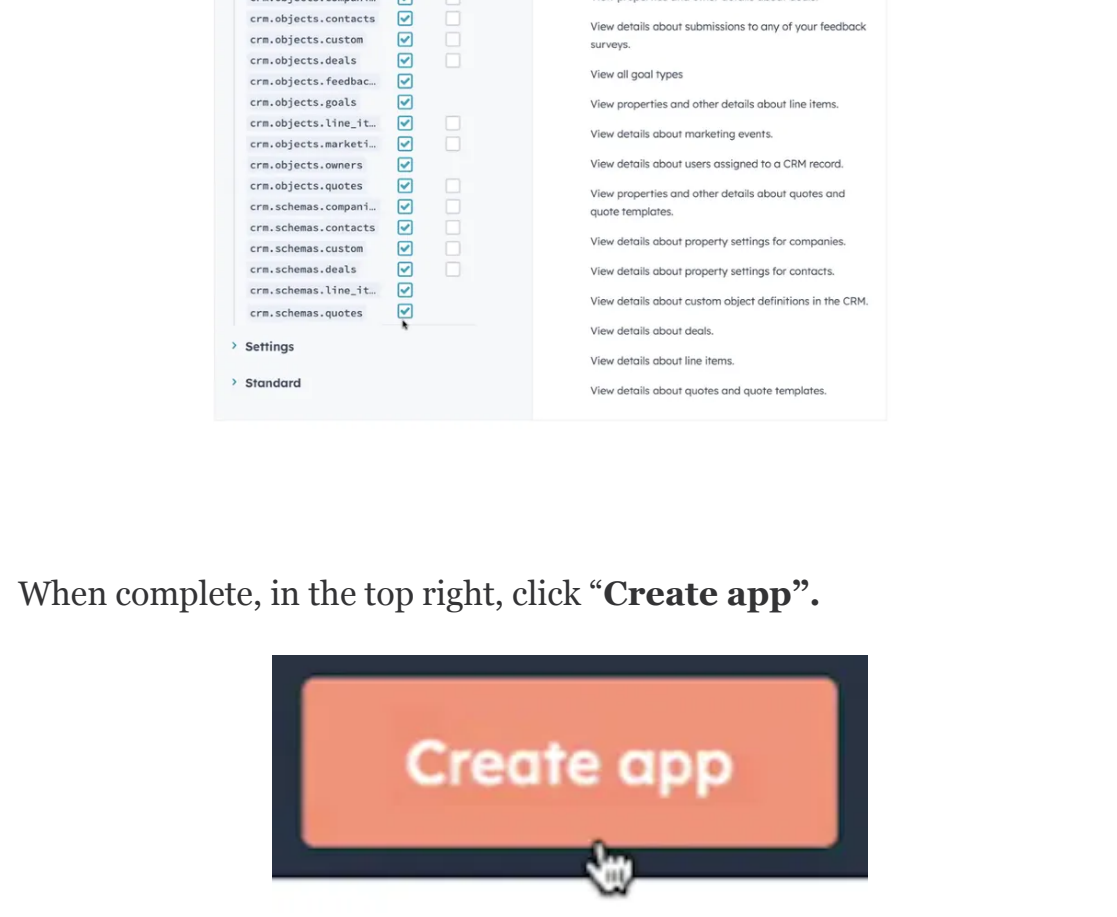
## 2. Provide permissions



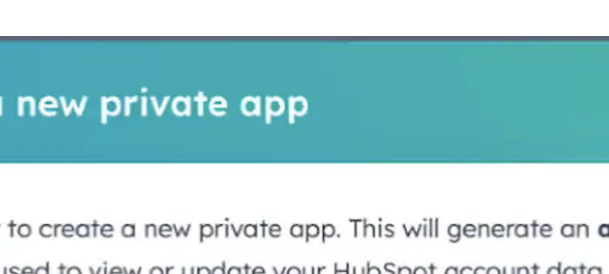
On the top navigation, move from **Basic info** to **Scopes**



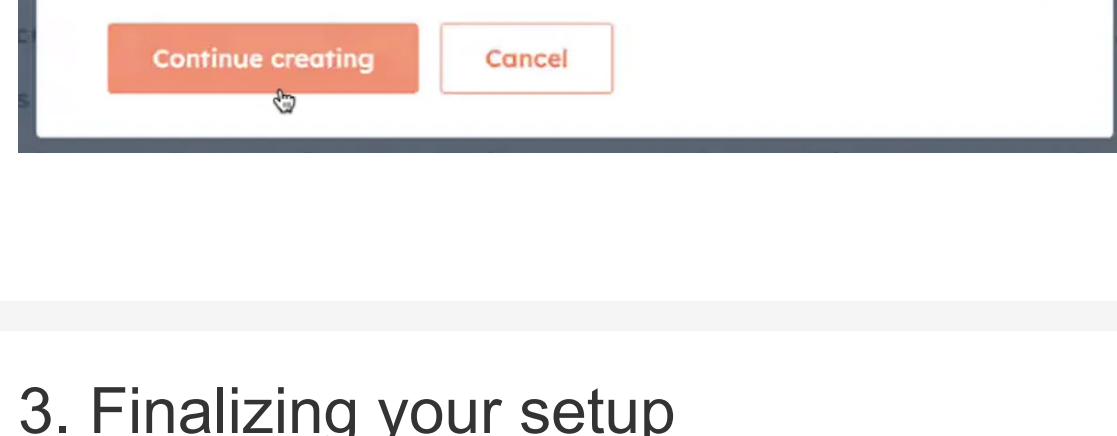
Expand the **CRM** dropdown and select all **Read** boxes allowing view permission on all available CRM data.



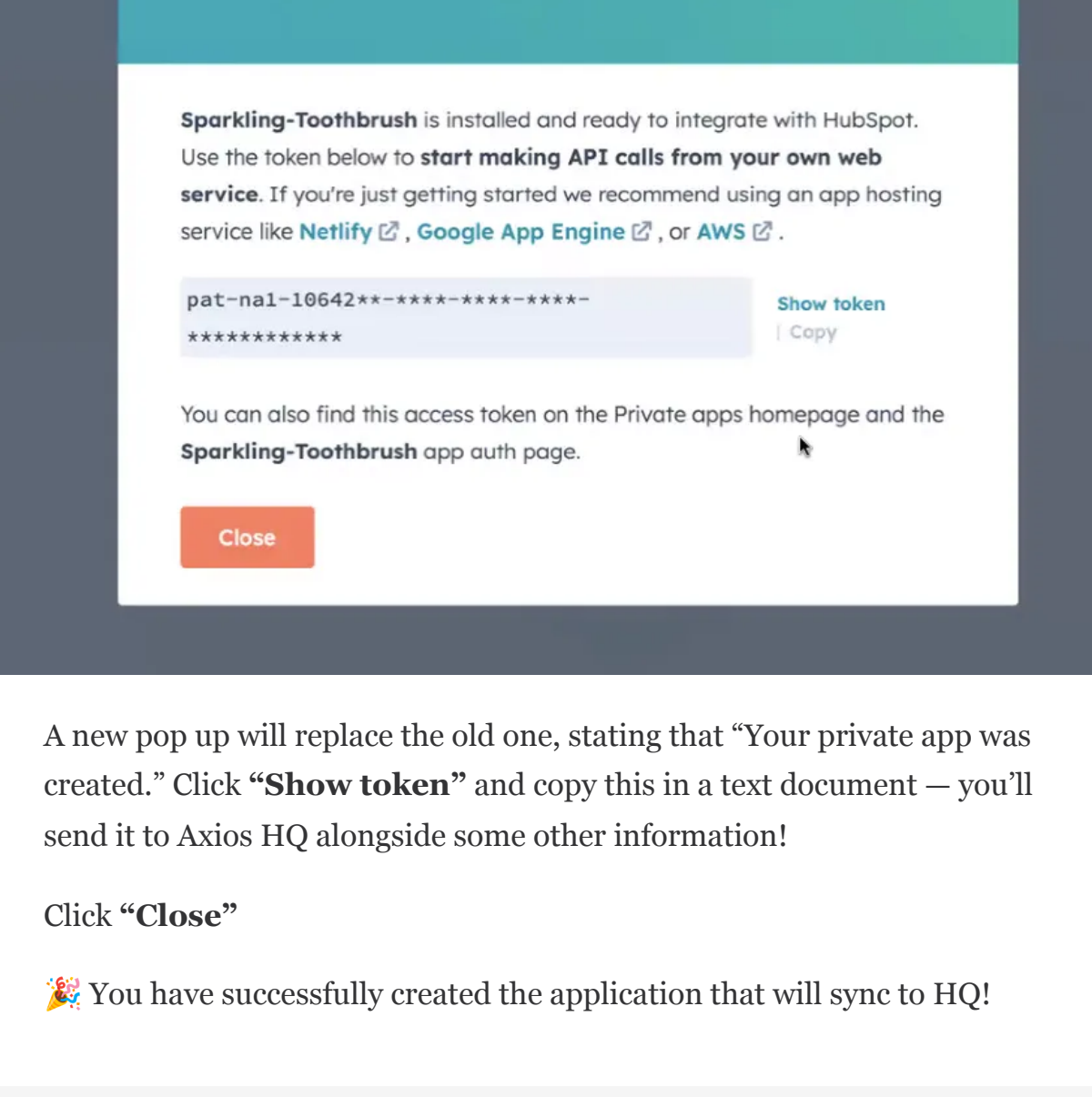
When complete, in the top right, click **“Create app.”**



A pop up will appear confirming the application creation. Click **“Continue creating.”**



## 3. Finalizing your setup

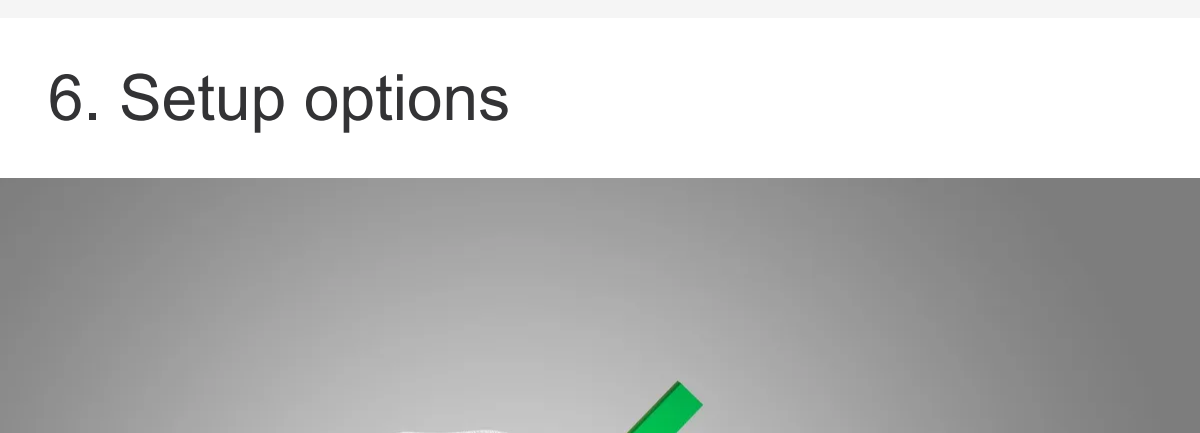


A new pop up will replace the old one, stating that **“Your private app was created.”** Click **“Show token”** and copy this in a text document – you'll send it to Axios HQ alongside some other information!

Click **“Close”**

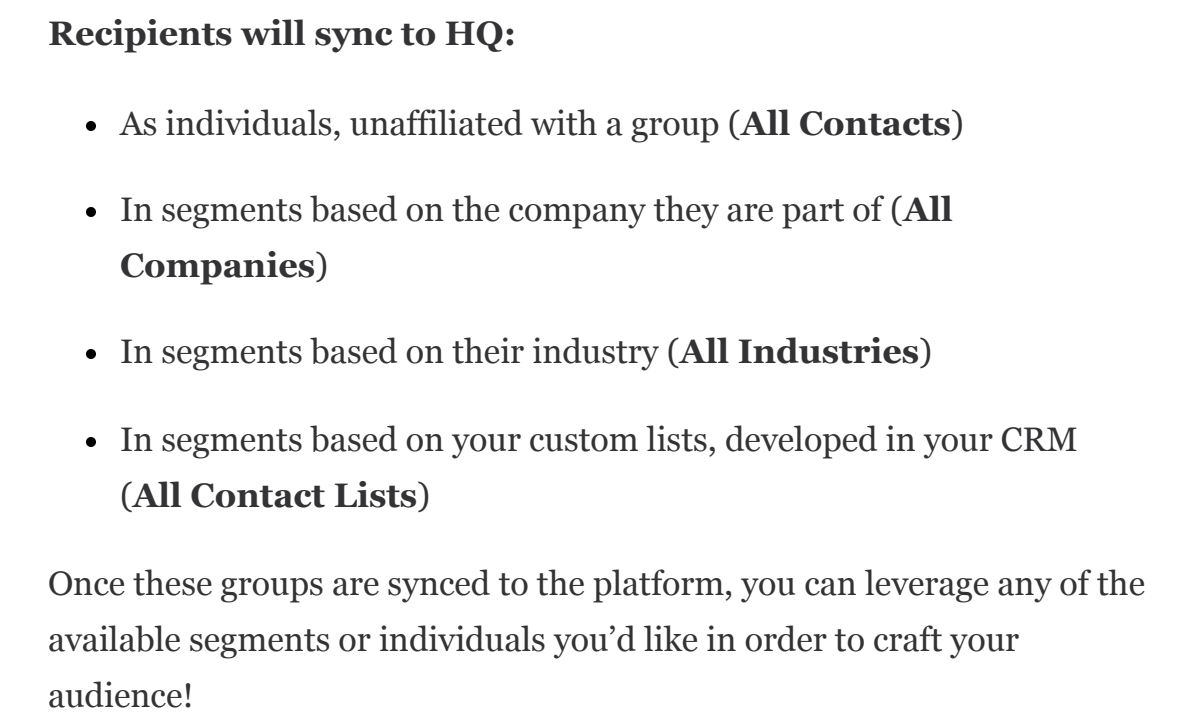
You have successfully created the application that will sync to HQ!

## 5. Sharing your token with HQ



**Send the token you copied** in the previous step over to HQ via this [secure ShareFile link for your CRM tokens](#). We recommend sending this as a .txt document.

## 6. Setup options



**Once connected to HubSpot**, Axios HQ can bring your recipients into the platform in one of the following configurations.

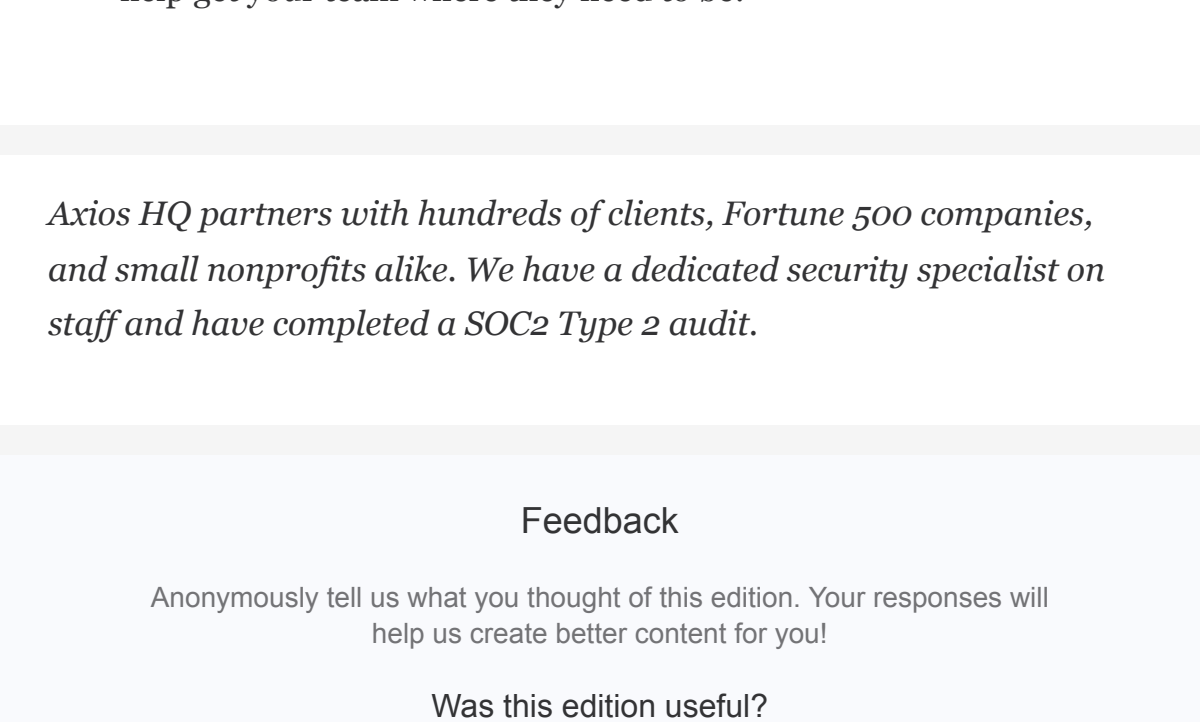
### Recipients will sync to HQ:

- As individuals, unaffiliated with a group (**All Contacts**)
- In segments based on the company they are part of (**All Companies**)
- In segments based on their industry (**All Industries**)
- In segments based on your custom lists, developed in your CRM (**All Contact Lists**)

Once these groups are synced to the platform, you can leverage any of the available segments or individuals you'd like in order to craft your audience!

**Let us know how you'd like to organize your contacts** and we'll be sure to set up your sync accordingly!

## ⚠️ Keep in mind



- **Your CRM recipients will update** once every 24 hours.
- **Permissions in the platform** are currently managed alongside our directory sync integration. Give HQ collaborators access to the CRM connection by giving them directory sync access when adding new collaborators for the first time.
- **Want to adjust existing permissions?** Reach out to your account manager, or contact us at [help@axioshq.com](mailto:help@axioshq.com) so we can help get your team where they need to be!

*Axios HQ partners with hundreds of clients, Fortune 500 companies, and small nonprofits alike. We have a dedicated security specialist on staff and have completed a SOC2 Type 2 audit.*

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It's called **Smart Brevity®**. Hundreds of orgs use it — in a tool called **Axios HQ** — to drive productivity with clearer workplace communications.