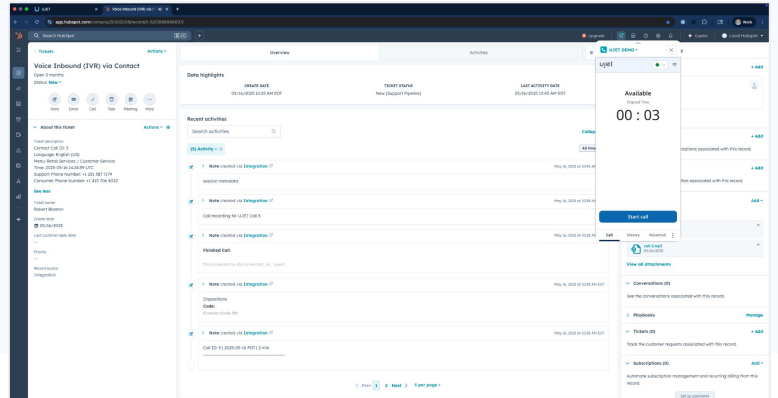


Integration Guide

UJET CCaaS & HubSpot CRM



Overview

This guide provides a comprehensive guide for system administrators to successfully integrate UJET CCaaS with HubSpot. It outlines the end-to-end setup process, from initial credential retrieval to configuring agent workflows and troubleshooting common issues. Specifically, this guide covers:

- **System Prerequisites:** The necessary account access and administrative permissions required in both UJET and HubSpot prior to starting the setup.
- **Credential Retrieval:** Step-by-step instructions for securely generating and locating your HubSpot Domain ID, Developer API Key, and OAuth Client Credentials via a Legacy App.
- **UJET Portal Configuration:** Detailed procedures for inputting your integration parameters and finalizing the secure OAuth connection within the UJET Admin Portal.
- **Multi-Tenant Setup:** Guidance on how to successfully connect and route multiple UJET tenants utilizing a single, shared HubSpot instance.
- **App Migration:** Best practices for transitioning from the legacy private UJET app to the new HubSpot Marketplace public app without interrupting active services.
- **CRM & Call Provider Configuration:** Instructions on dictating how UJET interacts with your CRM data (e.g., mapping interactions to Service Tickets or Sales Deals) and setting UJET as the default call provider natively within HubSpot.
- **Agent Authentication & Workflows:** API configuration steps for the Calling Window, alongside an operational overview of how the UJET call adapter handles inbound calls, outbound calls, and post-call disposition logging directly within the HubSpot UI.
- **Troubleshooting:** A quick-reference guide for resolving common implementation issues, such as unlinked credentials, missing caller options, and API rate limits.

Before You Start: Prerequisites

To integrate UJET with HubSpot, you need:

- A UJET tenant with **Admin** permissions.
- A **HubSpot** instance where you can:
 - Install and manage **Connected Apps**.
 - Configure **Calling** settings and choose the default call provider.
- A designated **HubSpot admin user** to:
 - Authorize the UJET app.
 - Serve as the **Default User** for CRM actions, if configured.

Step 1: Retrieve required information

To successfully set up and authorize the HubSpot integration, system administrators must gather specific authentication credentials. This section provides step-by-step instructions on how to locate and retrieve the following required data points:

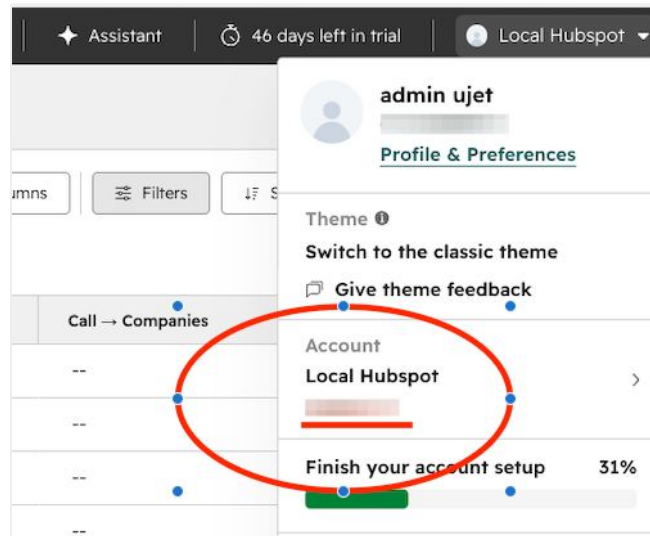
- **Domain ID**
- **Developer API Key**
- **OAuth Client Credentials**
 - App ID
 - OAuth Client ID
 - OAuth Client Secret

Domain ID

The HubSpot Domain ID is important because it uniquely identifies the customer's HubSpot account and is what allows UJET to establish the correct connection between a specific UJET tenant and the right HubSpot instance.

It's especially critical for multi-tenant support — since multiple UJET tenants can connect to the same HubSpot account.

1. In your HubSpot instance, select your **account name** in the top right-hand corner of the UI.
2. In the **Account** section of the drop-down menu, note the numeric **Domain ID**.



Developer API Key

To authenticate the integration with your HubSpot environment, system administrators must provision a Developer API Key. Follow the procedure below to generate and securely copy this credential.

1. In the primary left-hand navigation pane of your HubSpot portal, locate and click the **Development** icon (represented by the {} symbol).
2. Within the expanded Development sidebar, select the **Keys** dropdown to reveal the available authentication options.
3. From the dropdown list, choose **Developer API Key**.
4. If an API key has not been previously provisioned for the account, follow the on-screen prompt to generate a new key.
5. Under the **Active API Key** section, select **Show** to expose the alphanumeric string. Make sure to **Copy** to save the credentials to your system clipboard. Store this securely for the next step of the integration setup.

Important considerations

- **Privilege Scope:** This key grants programmatic access to modify HubSpot account configurations, manage associated applications, and configure webhook subscriptions.
- **Credential Protection:** Treat this API key as a highly privileged system credential. It must be stored securely and never committed to version control systems, embedded in client-side code, or transmitted via unencrypted channels.
- **Concurrency Limits:** HubSpot permits only one active Developer API Key per account at any given time. Be advised that rotating or regenerating this key will instantly invalidate the previous key, which may cause service disruptions for any existing integrations reliant upon it.

OAuth Client Credentials (via HubSpot Legacy App)

To obtain the App ID, Client ID, and Client Secret required for OAuth authentication, system administrators must provision a new Legacy Public App within the HubSpot development environment. Follow the procedure below to configure the app and retrieve the necessary credentials.

1. Navigate to the primary left-hand menu of your HubSpot instance, expand the **Development** section (represented by the {} symbol), and select **Legacy Apps**.
2. Select the **Create legacy app** button located in the upper right quadrant of the screen. When prompted to select the app type, choose **Public** (designated for multiple accounts).
3. You will be routed to the **App Info** tab. Provide a recognizable internal identifier in the **Public app name** field (e.g., "Integration_OAuth_Client").
4. **Configure Redirect URLs:** * Switch to the **Auth** tab located next to the **App Info** tab.
 - a. Scroll to the **Redirect URLs** section.
 - b. Input your designated callback URL into the text field (e.g., `https://[your-tenant-url]/v1/hubspot/oauth_callback`). This URI is critical for securely finalizing the OAuth handshake.
5. **Define API Scopes:**
 - a. Scroll down to the **Scopes** section.
Note: The oauth scope is universally required and enabled by default.
 - b. Select the **+ Add new scope** button.
 - c. Use the search bar to locate the specific permissions required for your integration:
 - i. `crm.objects.companies.read`
 - ii. `crm.objects.contacts.read`
 - iii. `crm.objects.contacts.write`
 - iv. `crm.objects.deals.read`
 - v. `crm.objects.deals.write`
 - vi. `crm.objects.owners.read`
 - vii. `crm.objects.users.read`
 - viii. `crm.objects.users.write`
 - ix. `crm.schemas.companies.read`
 - x. `crm.schemas.contacts.read`
 - xi. `crm.schemas.contacts.write`
 - xii. `crm.schemas.deals.read`
 - xiii. `crm.schemas.deals.write`
 - xiv. `files`
 - xv. `tickets`

OAuth Client Credentials (via HubSpot Legacy App)

- d. Check the box next to each of the required scopes.
 - e. Utilizing the dropdown menu next to the selected scope, change the requirement level to **Conditionally required** to prevent installation failures if a user lacks certain permissions.
 - f. Select **Update** to apply the scopes.
6. Upon successful creation, the **App credentials** section will populate at the top of the Auth tab.
 - a. **App ID**: Copy the numeric string provided.
 - b. **Client ID**: Copy the alphanumeric string provided.
 - c. **Client Secret**: Click **Show** to expose the sensitive string, then click **Copy** to save it to your clipboard.

Important Considerations

- **Redirect URI Whitelisting**: Ensure the Redirect URL exactly matches the callback URI configured in your integration platform. Any deviation will result in an OAuth mismatch error.
- **Scope Governance**: Only request the minimum necessary API scopes required for the integration to function (Principle of Least Privilege). Adding superfluous scopes increases security risks and may deter users from authorizing the application.
- **Secret Management**: The Client Secret must be treated as a highly sensitive password. Never expose this secret in client-side applications, public repositories, or unencrypted communications.

Step 2: Configuring the Integration in the UJET Portal

With the prerequisite credentials securely provisioned and retrieved, administrators can now establish the HubSpot environment within the UJET Portal. Follow the procedure outlined below to input your parameters and authenticate the system connection.

1. Navigate to **Settings > Developer Settings > CRM**.
2. Under **CRM provider**, select **HubSpot** (if not already selected).
3. Input the required information for:
 - a. **HubSpot Domain ID**
 - b. **App ID**
 - c. **Developer API Key**
 - d. **Authentication Credentials**
 - i. **OAuth Client ID**
 - ii. **OAuth Client Secret**.
4. Select **Save**.

Step 3: Linking OAuth Credentials and Finalizing the Integration

Once you have provisioned the necessary identifiers and secure credentials from HubSpot, you must input them into your integration platform to authorize the connection. Follow the procedure below to save your configuration and complete the OAuth handshake.

1. Once you have successfully saved your specific HubSpot data (HubSpot Domain ID, App ID, Developer API Key, Authentication Credentials/Client ID, and Client Secret) the system will automatically mask the sensitive credentials. The Developer API Key and OAuth Client Secret fields will no longer display the raw text; instead, they will show an "Update..." prompt indicating the values are securely stored.
2. Select the **Link Credentials** button located under the **Authentication Credentials** section to begin the OAuth flow.
3. A HubSpot authentication window will pop up. (If you are not currently logged into HubSpot in your browser, you will be prompted to do so. You must be logged in as the admin account you wish to link).
 - a. Review the list of available accounts and select the specific HubSpot tenant you wish to connect.
 - b. Select **Choose Account** and accept any permission prompts to authorize the application.
4. The pop-up window will automatically close. The integration panel should now display a green **Credentials Linked** badge, and the action button will change to Unlink Credentials.
5. Upon successful linking, a new **Default User** configuration section will appear. Review and toggle the checkbox options based on your data governance policies (e.g., determining if the Admin user should be used as the default fallback for unassigned record creations and updates).

Important consideration

- **Unlinking Credentials:** If you need to break the integration connection or troubleshoot an authentication failure, click the **Unlink Credentials** button. This action will immediately revoke the integration's access and purge the generated OAuth tokens from the system. You will need to repeat the linking process to restore connectivity.

Multi-Tenant Support

The UJET public app supports multiple UJET tenants connected to the same HubSpot instance. This means different teams or business units can each run their own UJET tenant while sharing one HubSpot account.



How it works for agents

When an agent opens the UJET call adapter widget in HubSpot, their HubSpot account will be synced with their UJET account. For multi-tenant cases, there is a drop-down at the top of the widget where agents can select which tenant to connect to.

Admin considerations

- Configure the HubSpot credentials separately in each UJET tenant's Developer Settings.
- Each tenant links independently to the same HubSpot account via the **Link Credentials** flow described above.

Migrating from the Private App

If you are currently using the UJET **private** HubSpot widget, follow these steps to transition to the new public app:

1. **Link your credentials** in the UJET Admin Portal.
2. During the transition, **both apps can run side by side** on the same HubSpot account — the private app remains functional while you migrate.
3. Migration is a **manual process**. Coordinate with your UJET representative to confirm when you can fully decommission the private app.

Configure CRM behavior

With HubSpot connected, configure how UJET interacts with your CRM data.

1. In **Settings > Developer Settings > CRM**, locate **CRM Record Type**.
2. Choose how UJET should create and associate records in HubSpot. Common options include:
3. **Service > Tickets** – recommended if you use HubSpot Service Hub for support.
4. **Sales > Deals** – if you track interactions primarily as opportunities.

Enable HubSpot as the Call Provider

In HubSpot:

1. In HubSpot, go to **Settings > General > Calling** (or your org's equivalent path for calling preferences).
2. Under **Make and receive calls**, select **UJET Call Widget**.
3. **Save**.

Verification:

1. Place a **test call or chat** to a UJET queue that will trigger CRM activity.
2. Answer the session as an agent in the UJET adapter.
3. Confirm that UJET:
 - a. Creates or associates a record in HubSpot (ticket, deal, etc., depending on your CRM Record Type).
 - b. Opens the correct HubSpot page for that record in the **same browser tab**.

If the record does not open, or opens in an unexpected view, check:

- That the UJET public app is installed in the correct HubSpot account.
- That **Link Credentials** shows a valid OAuth connection.
- Your **CRM Record Type** and any **CRM Ticket View** configuration (when applicable).

How the Call Adapter Works in HubSpot

Once installed and configured, the UJET call adapter integrates natively with HubSpot's calling experience:

Outbound calls

- When an agent clicks a phone number or the **Call** button on a HubSpot record, UJET will appear as a caller option.
- Selecting UJET will initiate the call through the UJET adapter.

Inbound calls

- When an agent receives an inbound call, the call notification (ringing) appears in HubSpot.
- The agent can answer the call directly from HubSpot.
- HubSpot will automatically **pop up the related ticket** in the background in a new tab.

After a call

- A call record is automatically created in HubSpot and linked to the customer.
- When the agent submits a **disposition code**, HubSpot will tag the call record with that code.

Widget display

The UJET call adapter will appear both as:

- A native widget embedded within HubSpot
- A separate browser window
- **Important:** This separate browser window must be kept open. If it is closed, every time a page is refreshed on HubSpot, the widget will also reload, which could cause interruptions to calls.

Troubleshooting

Issue	Resolution
" Credentials Not Linked " warning in Developer Settings	Click Link Credentials and complete the HubSpot OAuth flow.
Agent cannot see UJET as a caller option	Verify the public app is installed in HubSpot and credentials are linked in the UJET Admin Portal.
Call records or disposition codes not appearing in HubSpot	Check that the OAuth credentials are linked and the integration is active. Contact UJET support if the issue persists.
Rate limit errors from HubSpot	HubSpot allows 110 requests per 10 seconds per account. Reduce concurrent usage or contact HubSpot for further guidance.