



HubSpot CRM Software Sign-Up

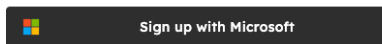
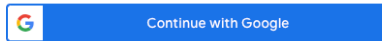
1. Click on the link below to navigate to HubSpot

[Get started with HubSpot](#)

2. Enter a valid email address to establish your account

Create your free account

100% free. No credit card needed.



Or

Email address

Verify email >

We're committed to your privacy. HubSpot uses the information you provide to us to contact you about our relevant content, products, and services. You may unsubscribe from these communications at any time. For more information, check out our [Privacy Policy](#)

3. Enter the verification code that was sent to your email



Check your email

Please enter the verification code we sent to:
abcpt@mystems4pt.com

Verification code

Next >

Didn't get the email? [Resend or edit your email address](#)

4. Enter the first and last name you would like to utilize for your account

What is your name?

First name

Last name

Next >

5. The screens that follow will ask for your industry, job role, company's name, how many people work at your company, company website, etc. S4PT cannot advise on these selections, and you should answer accordingly.

6. Select "US" for where you would like your data to be hosted

Where would you like your data to be hosted?

> More about how your data is hosted

Based on your location, we recommend US



US



EU

Create Account >

By creating an account you are agreeing to the [HubSpot Customer Terms of Service](#).

7. Make an appropriate selection on the next screen

Which of these sounds most like you?

This will help us to give you the best start.

I have never used a CRM before

I'm new to HubSpot, but I have used a CRM before

I know my way around HubSpot pretty well



Your **CRM** is the **central place** for all your marketing, sales, and service information.

8. Choose “Customer Service” to set up first

What do you want to set up first?

Pick your top priority need and we'll set you up to achieve it quickly. Don't worry, you'll always have access to everything here.

Sales

Drive and manage sales by connecting with the right leads and closing more deals

Marketing

Attract new customers and promote your business online

Customer Service

Prioritize your customer experience and give better service

Website (CMS)

Manage your website and grow your audience with content

Get started >

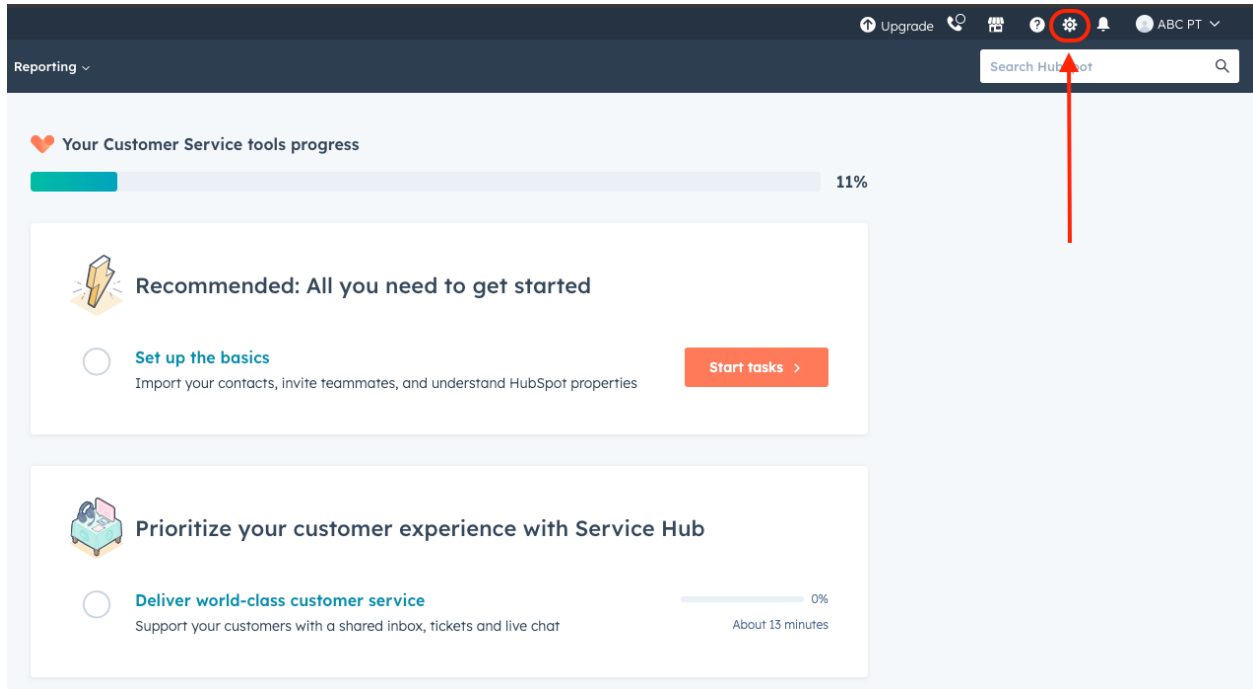


Not sure where to begin?

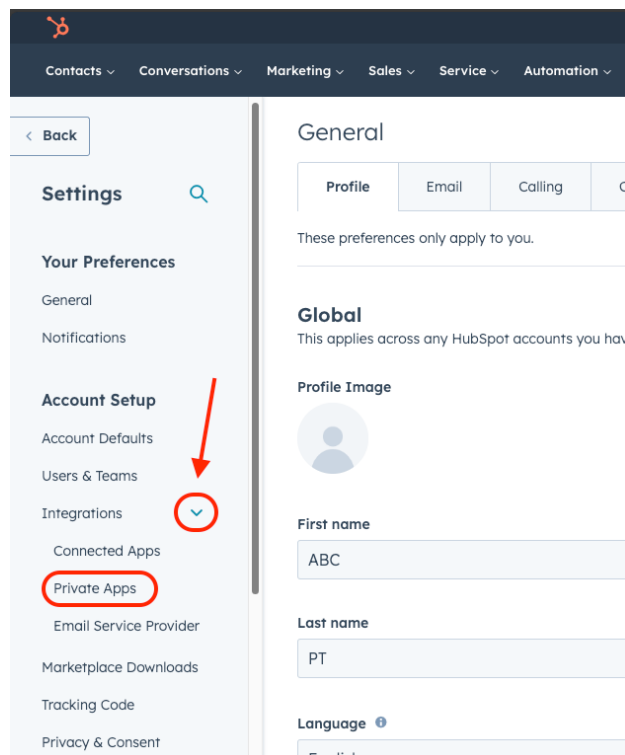
Start with a 3 minute interactive demo, and see how your new CRM will help you do all this and more.

[Start interactive demo](#)

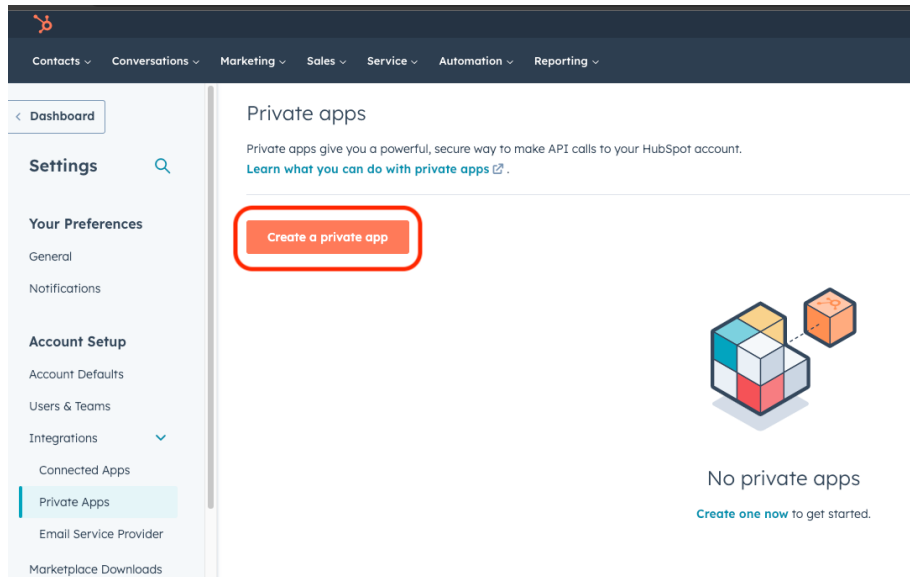
9. On the next screen, navigate to Settings



10. Under Account Setup click the dropdown arrow next to Integrations and choose "Private Apps"

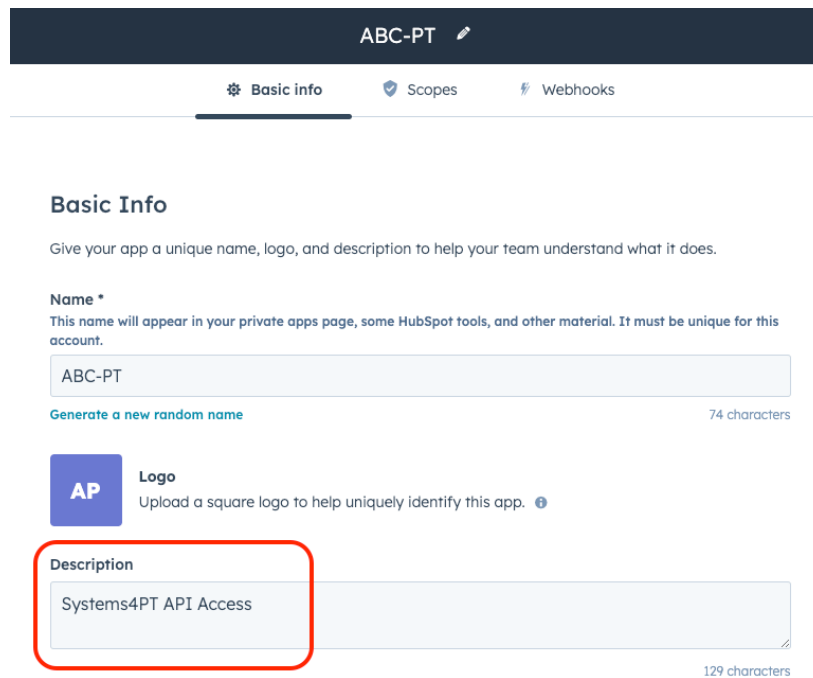


11. Select “Create a private app”

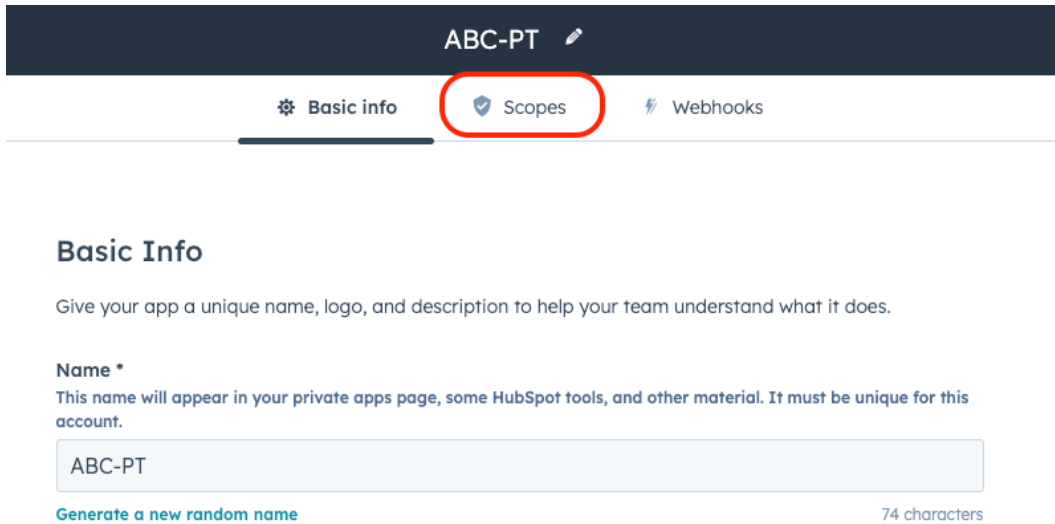


12. Enter Name and Description

- Description should reflect “Systems4PT API Access”



13. Click on the “Scopes” tab at the top of your screen



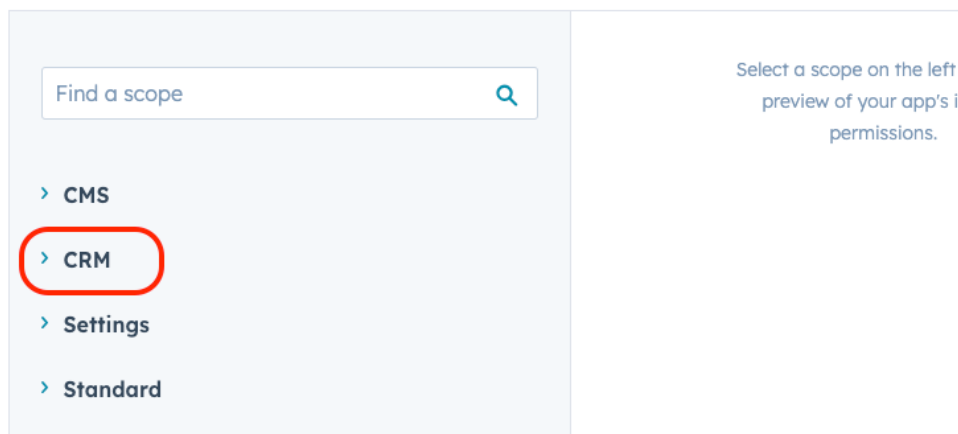
14. Select “CRM”

Scopes


Scopes determine what your app can access and do in HubSpot. It's strongly encouraged to require as few scopes as possible to maintain your app's functionality.




Selected scopes


No scopes



15. Make the following selections under the “CRM” tab

ABC PT 

 Basic info  **Scopes**  Webhooks

Find a scope 


> CMS

< **CRM**

	Read	Write
crm.lists	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.compani...	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.objects.custom	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.deals	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.feedbac...	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.goals	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.line_it...	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.marketi...	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.owners	<input type="checkbox"/>	<input type="checkbox"/>
crm.objects.quotes	<input type="checkbox"/>	<input type="checkbox"/>
crm.schemas.compani...	<input type="checkbox"/>	<input type="checkbox"/>
crm.schemas.contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
crm.schemas.custom	<input type="checkbox"/>	<input type="checkbox"/>
crm.schemas.deals	<input type="checkbox"/>	<input type="checkbox"/>
crm.schemas.line_it...	<input type="checkbox"/>	<input type="checkbox"/>
crm.schemas.quotes	<input type="checkbox"/>	<input type="checkbox"/>

> Settings


> Standard

<  **Manage and view your CRM data**

View details about contact lists.
Create, delete, or make changes to conti

View properties and other details about
Create, delete, or make changes to conti

View details about property settings for
Create, delete, or make changes to prop
contacts.

 **Create or modify all your CRM data
bulk imports**

This app can import records into your CRM
creating new records or modifying any of y
records for all CRM data types (contacts, c
deals, tickets, etc.). This doesn't include arc
deleting any data.


16. Select “Standard”

Scopes


Scopes determine what your app can access and do in HubSpot. It's strongly encouraged to require as few scopes as possible for your app's functionality.

Selected scopes

crm.lists.read crm.objects.contacts.read crm.objects.contacts.write crm.lists.write
crm.schemas.contacts.read crm.import crm.schemas.contacts.write




- > CMS
- > CRM
- > Settings
- > **Standard**

 **Manage and view your CRM data**

View details about contact lists.
Create, delete, or make changes to contact lists.

View properties and other details about contact lists.
Create, delete, or make changes to contact lists.

View details about property settings for contact lists.
Create, delete, or make changes to property settings for contact lists.

 **Create or modify all your CRM data bulk imports**

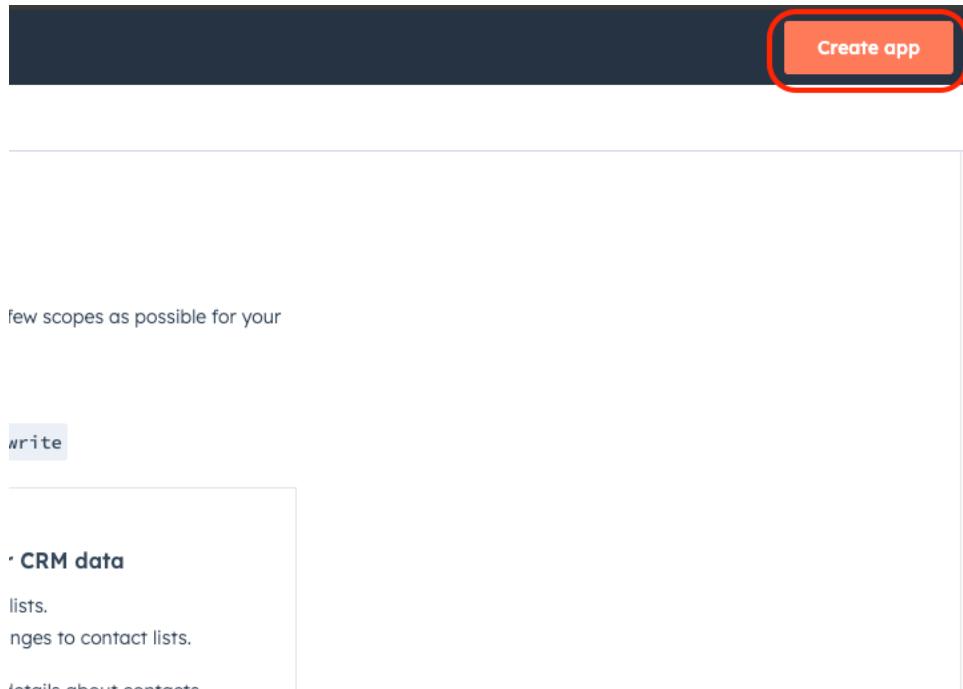
This app can import records into your CRM, creating new records or modifying any of existing records.

17. Make the following selections under the “Standard” tab

The screenshot shows the 'ABC PT' application settings page. At the top, there is a dark blue header with 'ABC PT' and an edit icon. Below the header, there are three tabs: 'Basic info', 'Scopes', and 'Webhooks'. The 'Scopes' tab is selected and highlighted. Under the 'Scopes' tab, there is a section titled 'Standard' with a dropdown arrow. To the right of this section is a column labeled 'Request'. Below these are several rows of permissions, each with a checkbox. The 'crm.import' permission has its checkbox checked, while all other checkboxes are unchecked.

Permission	Request
account-info.security.read	<input type="checkbox"/>
accounting	<input type="checkbox"/>
actions	<input type="checkbox"/>
analytics.behavioral_event...	<input type="checkbox"/>
automation	<input type="checkbox"/>
behavioral_events.event_de...	<input type="checkbox"/>
business_units_view.read	<input type="checkbox"/>
business-intelligence	<input type="checkbox"/>
collector.graphql_query.ex...	<input type="checkbox"/>
collector.graphql_schema.r...	<input type="checkbox"/>
communication_preferences...	<input type="checkbox"/>
communication_preferences...	<input type="checkbox"/>
communication_preferences...	<input type="checkbox"/>
content	<input type="checkbox"/>
conversations.read	<input type="checkbox"/>
conversations.visitor_iden...	<input type="checkbox"/>
conversations.write	<input type="checkbox"/>
crm.export	<input type="checkbox"/>
crm.import	<input checked="" type="checkbox"/>
ctas.read	<input type="checkbox"/>
e-commerce	<input type="checkbox"/>
external_integrations.form...	<input type="checkbox"/>
files	<input type="checkbox"/>
files.ui_hidden.read	<input type="checkbox"/>
forms	<input type="checkbox"/>
forms-uploaded-files	<input type="checkbox"/>
hubdh	<input type="checkbox"/>

18. Select “Create app” in the upper right-hand corner



19. Select “Continue creating”

