How to use the integration between Matchmaking and HubSpot CRM
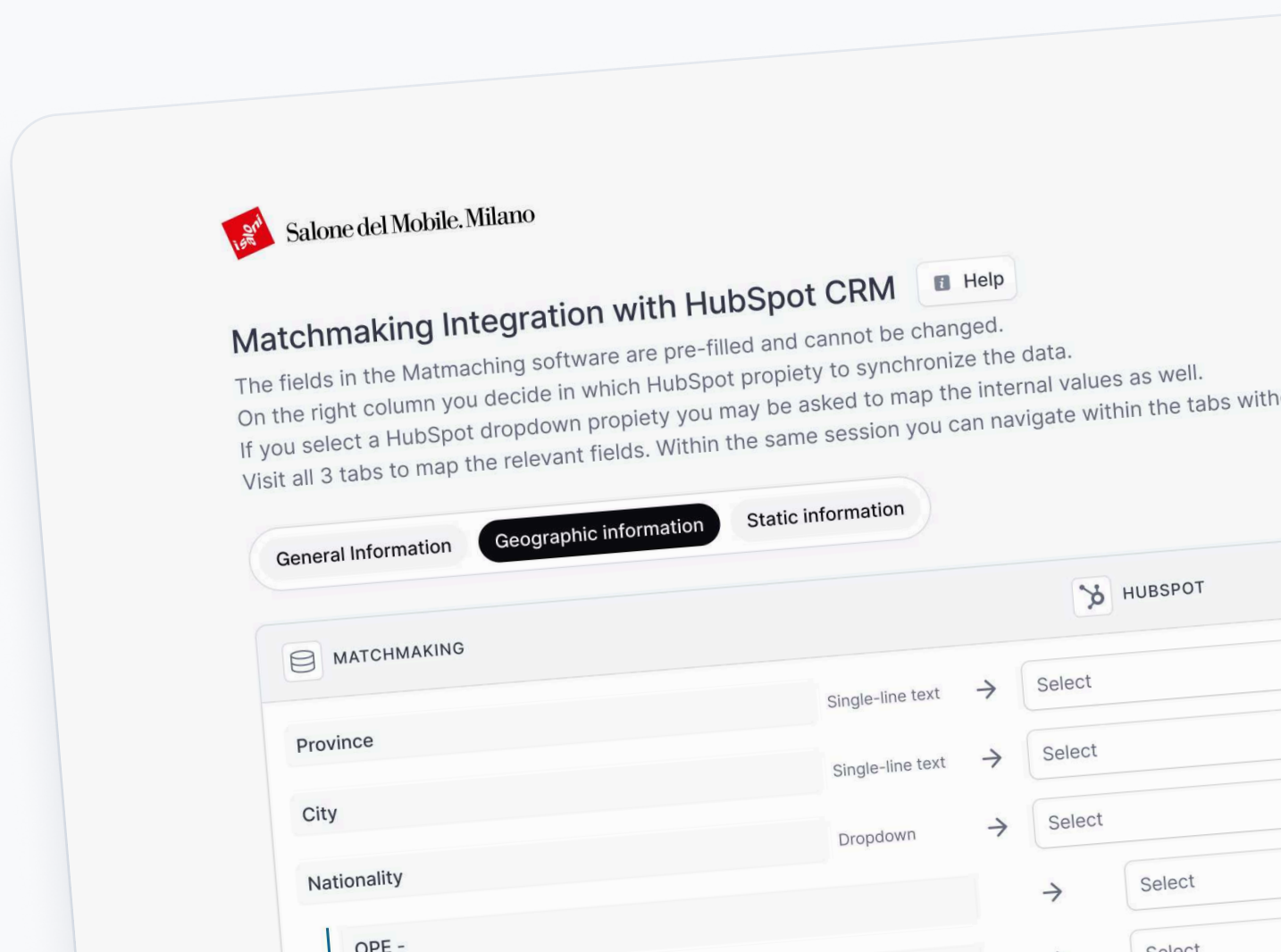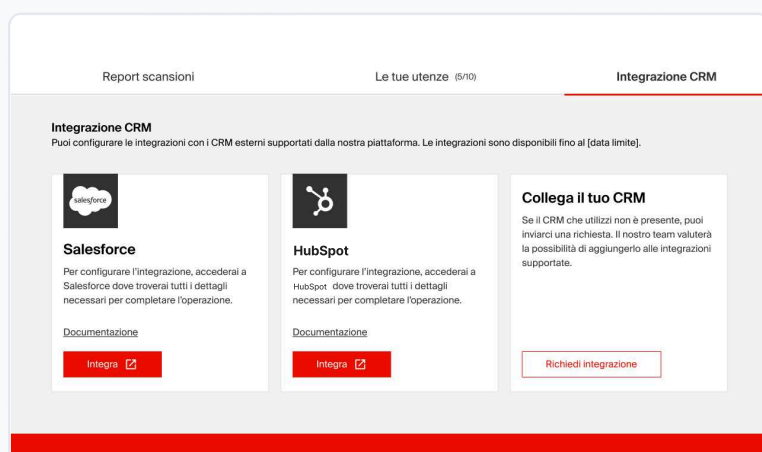
Need support?

🔲 Contact your HubSpot Partner

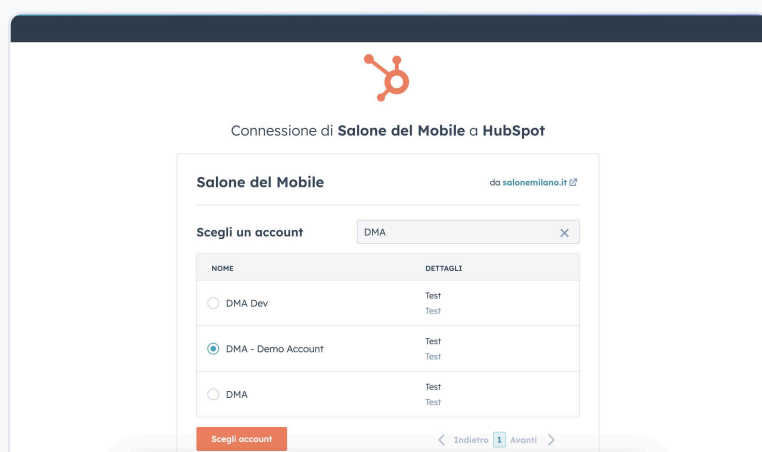Don't have a HubSpot Partner? <u>Contact DMA</u>

Access to the integration

To access the integration, follow these steps:

- Log in to the Salonemilano.it platform with exhibitor credentials, go to the Digital Services - Matchmaking - CRM integration section
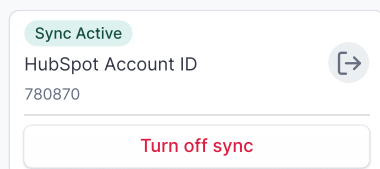- Click on the "integrate" button

After clicking the button, you will be redirected to the login page, where you need to enter your HubSpot account credentials and select the HubSpot account to which the data will be sent.

If the login is successful, you will be redirected to the web app, where you can configure the field mapping for synchronization.
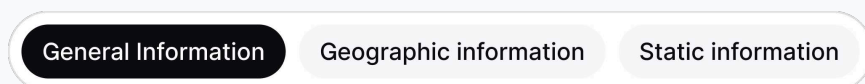
Interface Modules

HubSpot Account

> Sync Active
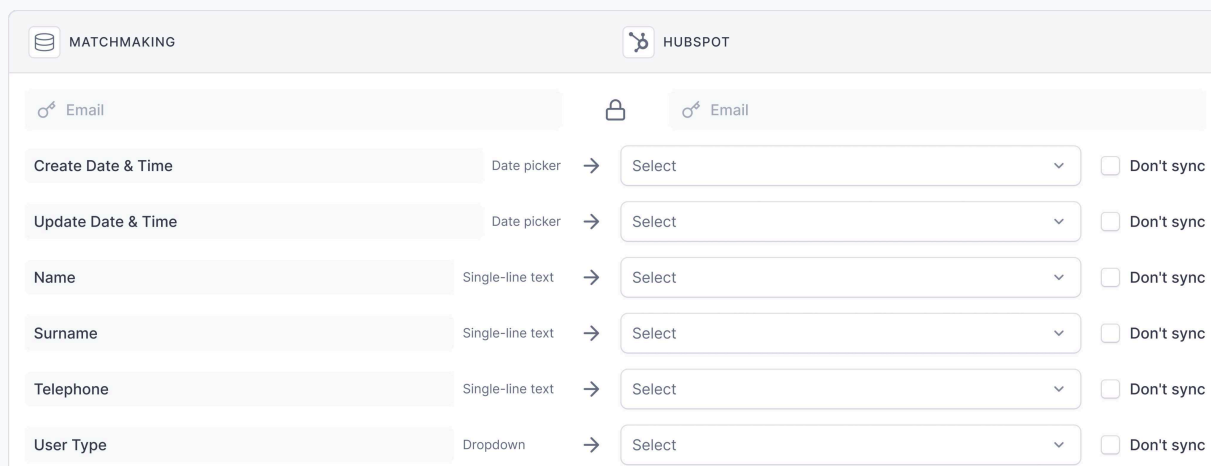> HubSpot Account ID
> 780870
>
> Turn off sync

The card in the top right corner shows the HubSpot account you are using for mapping. Clicking the icon allows you to log out without affecting the mapping. Clicking on "Turn off sync" will turn off synchronization.

Navigation Tab

| General Information | Geographic information | Static information |

This element allows you to switch between the three mapping tabs without losing any data.

Field Mapping

MATCHMAKING		HUBSPOT	
Email		Email	
Create Date & Time	Date picker →	Select	Don't sync
Update Date & Time	Date picker →	Select	Don't sync
Name	Single-line text →	Select	Don't sync
Surname	Single-line text →	Select	Don't sync
Telephone	Single-line text →	Select	Don't sync
User Type	Dropdown →	Select	Don't sync

The mapping is structured into two columns:

- **Matchmaking**: Displays all properties and profiling values from the Salone del Mobile app.
- **HubSpot**: Allows you to select the corresponding HubSpot property for synchronization. The platform automatically filters HubSpot properties to show only those compatible with the data type from Matchmaking.

Field Mapping - General Information

The first tab to be mapped is "**General Information**", which contains the contact's profile fields.

- Create Date Time
- Update Date Time
- Name
- Surname
- Email
- Telephone
- User Type
- Company Name
- Operator Type
- Operator Type Details
- Company Role
- Notes → By selecting the "**Send Notes to activity notes**" checkbox, any notes taken during the event will also be synchronized as activity notes under the contact's activities..

  (https://knowledge.hubspot.com/records/manually-log-activities-on-records)

Field Mapping - Geographic Information

The second tab to be mapped is "**Geographic Information**", which contains fields related to geographic interest.

- Nationality
- Province
- City

Field Mapping - Static Information

This final tab is optional. You can add static fields that will be imported into HubSpot*.

- Click "**Add field**" to include a new static field.

⊟ MATCHMAKING	⅄ HUBSPOT
┌─────────────┐ │ + Add field │ └─────────────┘	
ⓘ Enter fixed values that you want to synchronize within HubSpot. It is an optional category, you can also enter nothing	

- Enter the desired value in the Matchmaking field.
- Select the HubSpot property where you want to synchronize the entered value.

⊟ MATCHMAKING			⅄ HUBSPOT	
Write	Single-line text	→	Select ⌄	🗑
+ Add field				
ⓘ Enter fixed values that you want to synchronize within HubSpot. It is an optional category, you can also enter nothing				

Static fields are applied uniformly to all contacts synchronized during the event.
A common use case for this feature is storing the year of the trade show edition.
For example, enter "2025" in the Matchmaking field and map it to a single-line text property in HubSpot named "Year of Last Trade Show."

Completing the Mapping Configuration

After mapping all fields, follow these steps to save and activate the configuration:

- Click the "**Finish and Save Configuration**" button located in the "Static Information" tab.
- A success message will confirm that the configuration has been saved.
- You can modify the configuration at any time during the event if needed.

FAQ

What happens if I select the "Don't sync" option for a field?

If you select "Don't sync", the data in that field will not be synchronized between Matchmaking and HubSpot.

How do I map internal values, such as those in dropdowns?

When you select a corresponding HubSpot field for a dropdown, you will be prompted to match each Matchmaking value to its corresponding value in HubSpot.

Is it possible to sync only a subset of internal field values?

No, currently, synchronization applies to the entire field.

I can't find the HubSpot field I want to use for synchronization. What can I do?

Make sure the field exists in HubSpot and is configured with the correct data type. The software automatically filters compatible fields with Matchmaking. For example, a date field cannot be synchronized with a dropdown.

How are mandatory fields handled?

All fields are mandatory. If you do not want to map a field, select the "Don't sync" checkbox.

Can I modify the mapping later?

Yes, you can modify the mapping by accessing the software again. However, data that has already been synchronized will not be updated retroactively.

Is it possible to undo a synchronization?

No, once the data has been synchronized, the process cannot be undone. However, you can modify future synchronizations by adjusting the mapping settings or manually delete and edit the synchronized data directly in HubSpot if necessary.

FAQ

If I switch tabs, will the fields I mapped be lost?

No, switching tabs will not cause any data loss. The mapped fields are automatically saved as you navigate between tabs.

I accidentally closed the tab without saving. Did I lose the mapping?

Yes, if you closed the tab without saving, the mapping will be lost.

Can I configure the synchronization with multiple HubSpot accounts?

No, the synchronization can be configured with only one HubSpot account at a time. If you need to change the account, you must log out and connect a different HubSpot account.

How do I synchronize a HubSpot "Multiple Checkboxes" property?

Integration overwrites any information already present.
In case you want to work in addition (Append) we recommend saving the information in a new property and then running a Workflow that goes to update the desired one.

What permissions are required to configure the synchronization?

You must have Super Admin or Partner Admin permissions in HubSpot to configure the necessary fields and integrations.

I don't feel confident proceeding on my own. Do you offer consultancy services?

If you already have a HubSpot Partner contact them.

If you Don't have a HubSpot Partner, you can contact **DMA**, the Customer Experience Company that designed and developed the connector, for expert guidance.

DMA

Diamond HubSpot Partner

Over 300 successful Digital Transformation projects.

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Other notable clients include Amadori, Galbani Professionale, Ferretti Group, and Maticmind.

🔗 *https://dma.it/sdm*