# Overview:

The Gist is an inbound marketing agency that helps isolved Network Partners grow their businesses. The Gist developed a custom integration between isolved and HubSpot that enables service bureaus to update their CRM automatically with accurate client data from isolved. This one-way sync loads data daily from isolved to HubSpot. isolved remains the primary source of truth. This integration solution is named ‘HubSolved’.

By default, HubSolved allows The Gist access to **all clients** in the partner’s isolved environment. The isolved data brought into HubSpot comes from clients, companies, contacts, and legal services. **Employee data is not included.** Prior to enabling the integration, the partner must complete the field mappings. Once active, every HubSpot user will have access to a control panel which allows them to edit mappings or add new mappings.

**Major Endpoints used are described below:**

|  |  |
| --- | --- |
| **API** | **Data** |
| /rest/api/token | access\_token, refresh\_token |
| /rest/api/clients | client\_id, client\_code, client\_name |
| /rest/api/clients/{clientId}/legals | legal\_name, legal\_id, legal\_code, legal\_address, federal\_ein, status, dba\_name, pay\_groups, pay\_frequency, input\_method, naics\_code, ee\_counts |
| /rest/api/system/accountStatuses | account\_status (dropdown values) |
| /rest/api/lookup/Frequencies | pay\_frequency (dropdown values) |
| /rest/api/clients/employeeCounts | Number of EEs by client per Status |
| /rest/api/clients/{clientId}/legals/{legalId}/employeeCounts | Number of EEs by legal company per Status |

# Fields Exchanged:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Isolved Field** | **Isolved Object** | **Property Type** | **Sync Direction** | **HubSpot Property (Field)** | **HubSpot Object** | **Property Type** |
| Client ID (can be shared between companies) | Company | Single-line text | 🡪 | Client ID | Company | Single-line text |
| Client Name | Company | Single-line text | 🡪 | Client Name | Company | Single-line text |
| Company ID  | Company | Single-line text | 🡪 | Company ID  | Company | Single-line text |
| Legal Name | Company | Single-line text | 🡪 | Legal Name  | Company | Single-line text |
| DBA Name | Company | Single-line text | 🡪 | DBA Name | Company | Single-line text |
| FEIN | Company | Single-line text | 🡪 | FEIN | Company | Single-line text |
| Pay Frequency | Company | Multiple checkboxes | 🡪 | Pay Frequency | Company | Multiple checkboxes |
| Input Method | Company | Multiple checkboxes | 🡪 | Input Method | Company | Drowpdown select |
| Company Status | Company | Single-line text | 🡪 | Account Status | Company | Drowpdown select |
| Termination Date | Company | Single-line text | 🡪 | Termination Date | Company | Date picker |
| Termination Reason | Company | Single-line text | 🡪 | Termination Reason | Company | Single-line text |
| Relationship Manager | Company | Single-line text | 🡪 | Account Owner | Company | HubSpot User |
| Payroll Processor | Company | Single-line text | 🡪 | Payroll Processor | Company | Single-line text |
| First Process Date | Company | Single-line text | 🡪 | 1st Check Processed Date | Company | Date picker |
| Last Process Date | Company | Single-line text | 🡪 | Last Process Date | Company | Date picker |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Isolved Field** | **Isolved Object** | **Property Type** | **Sync Direction** | **HubSpot Property (Field)** | **HubSpot Object** | **Property Type** |
| Gross Invoice Amount | Company | Single-line text | 🡪 | Gross Invoice Amount | Company | Number (Currency) |
| Total Employees by Status | Company | Single-line text | 🡪 | Employees | Company | Number |
| Primary Contact | Company | Single-line text | 🡪 | Primary Contact | Company | Single-line text |
| Primary Contact Email Address | Company | Single-line text | 🡪 | Primary Contact Email Address | Company | Single-line text |
| Primary Contact Phone Number | Company | Single-line text | 🡪 | Primary Contact Phone Number | Company | Single-line text |
| Legal Address Street 1 | Company | Single-line text | 🡪 | Legal Address | Company | Single-line text |
| Legal Address Street 2 | Company | Single-line text | 🡪 | Legal Address 2 | Company | Single-line text |
| Legal Address City | Company | Single-line text | 🡪 | City | Company | Single-line text |
| Legal Address State | Company | Single-line text | 🡪 | State | Company | Single-line text |
| Legal Address ZIP Code | Company | Single-line text | 🡪 | ZIP | Company | Single-line text |
| Tax Filing Service | Company | Single-line text | 🡪 | Tax Filing Service | Company | Single-line text |
| NAICS Code | Company | Single-line text | 🡪 | NAICS Code | Company | Single-line text |
| \*Contact Type-can be multiple roles | Contact | Multiple checkboxes | 🡪 | N/A? - Create or Override Associated Contact | Contact | Single-line text |
| Contact First Name | Contact | Single-line text | 🡪 | N/A? - Create or Override Associated Contact | Contact | Single-line text |
| Contact Last Name | Contact | Single-line text | 🡪 | N/A? - Create or Override Associated Contact | Contact | Single-line text |
| Contact Email Address | Contact | Single-line text | 🡪 | N/A? - Create or Override Associated Contact | Contact | Single-line text |
| Contact Job Title | Contact | Single-line text | 🡪 | N/A? - Create or Override Associated Contact | Contact | Single-line text |
| Contact Phone Number | Contact | Single-line text | 🡪 | N/A? - Create or Override Associated Contact | Contact | Single-line text |
| \*\*Billing items / products (each company provides list)  | Company / Legal Services | Multiple checkboxes | 🡪 | All Solutions | Company | Multiple checkboxes |

# Request and Approval Process

# Interested partners should submit an API integration request via the standard process.

The integration is provided by The Gist for a one-time implementation fee and a flat monthly fee. There are no isolved API fees for this integration.

# Client Level Integration Setup

# Since the API is configured to allow The Gist access to all clients, client integration setup is not required.

# The Gist HubSpot Setup

# See overview and instructions from The Gist here: (This is a temporary link to be updated after testing)

<https://doc.clickup.com/8554906/d/h/852cu-47968/d3024ad3ed91bee>