Liza

HubSpot integration

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1 Installation and configuration

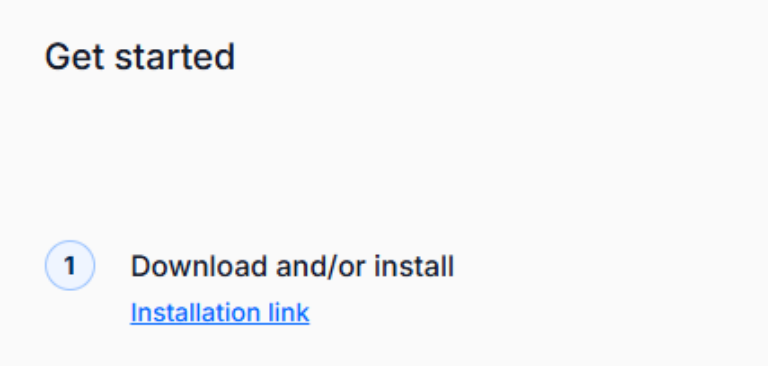
To install and use the Liza app you need at least 1 paid licence from HubSpot.

1.1 Download the Liza app

You must be logged into HubSpot.

Go to Liza through the following link and follow the instructions to install the Liza app in HubSpot:

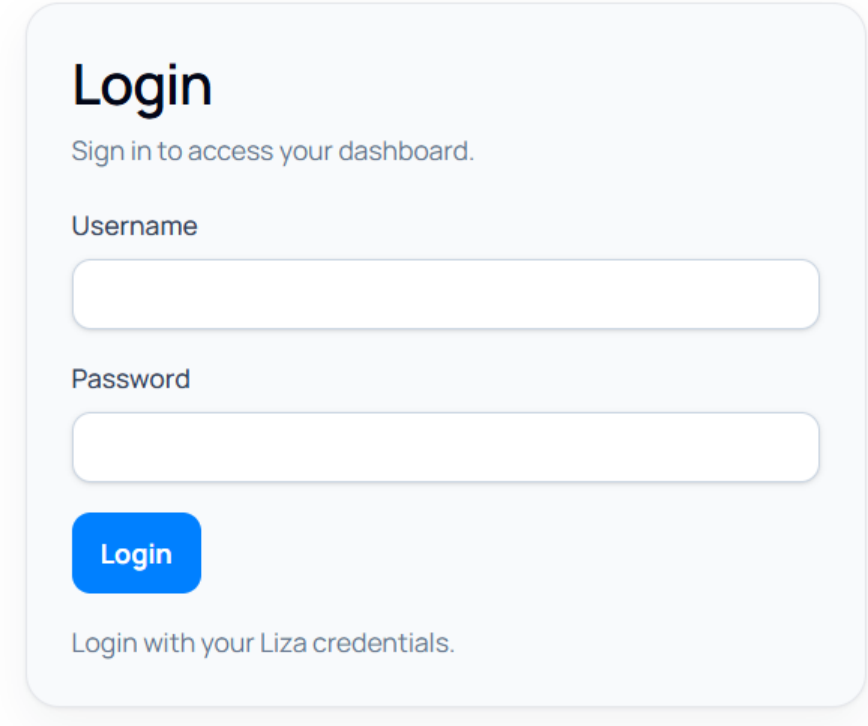
https://www.liza.nl/nl/integrations/515/hub-spot



Click on the Installation link:

➔ https://hubspot.liza.nl/login

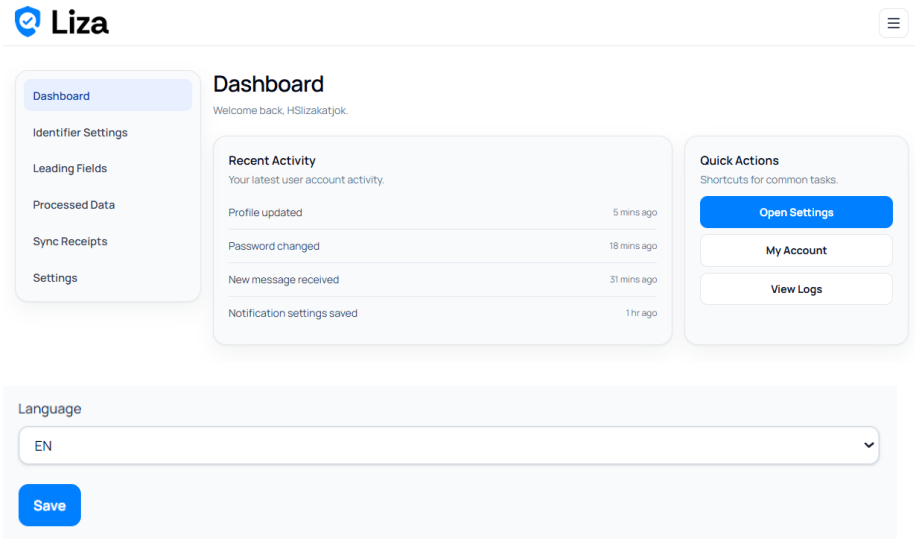
Enter your Liza login and password.
Click **Login** to go to the next step.



1.2 Configuration of the Liza app

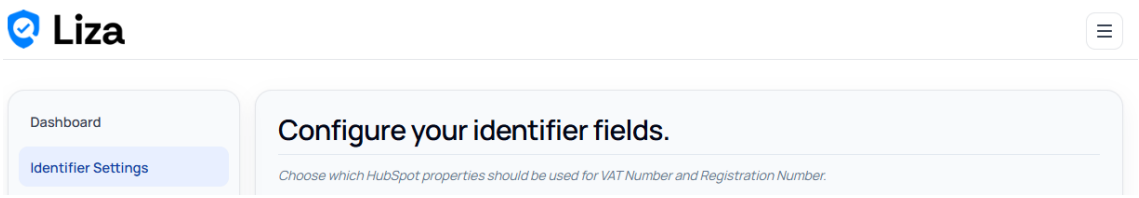
1.2.1 Settings

Click **Open Settings**, select the language in which you want to receive the Liza data in HubSpot and click **Save**.



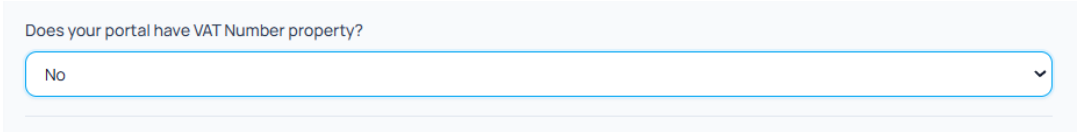
1.2.2 Setting up a 'VAT number' field

Liza uses a VAT number or a registration number property to identify companies in HubSpot. Indicate whether your portal already has one via **Identifier Settings**.



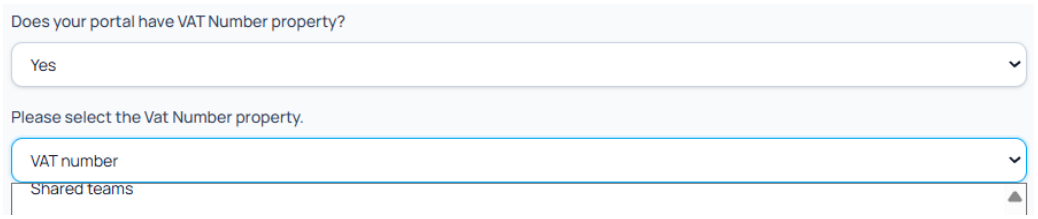
No – your portal does not have a VAT number property yet

Select 'No' and Liza automatically creates a new VAT number property and stores the VAT numbers retrieved through Liza in it.



Yes – your portal already has a VAT number property

Select 'Yes' and choose your existing VAT number property from the list and save. Liza stores the VAT numbers retrieved through Liza in this property.



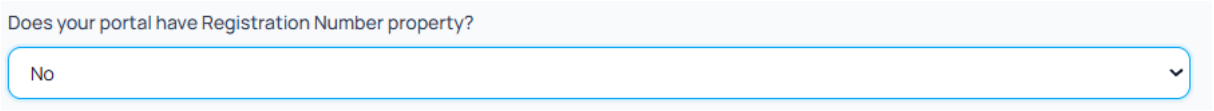
Requirement: your VAT number property must have the group 'Company information'.

1.2.3 Setting up a 'Registration number' field

Indicate whether your portal already has a registration number property.

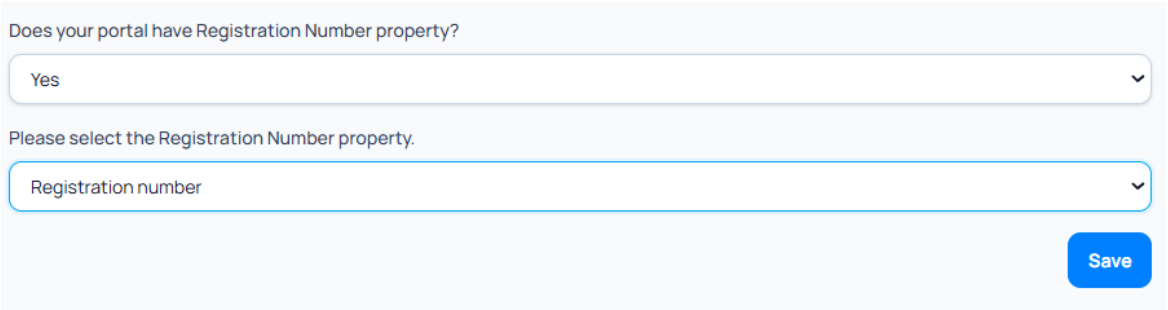
No – your portal does not have a Registration number property yet

Select 'No' and Liza automatically creates a new registration number property and stores the registration numbers retrieved through Liza in it.



Yes – your portal already has a Registration number property

Select 'Yes' and choose your existing registration number property from the list and save. Liza uses this property to search for companies by registration number and stores the registration numbers retrieved through Liza in it.

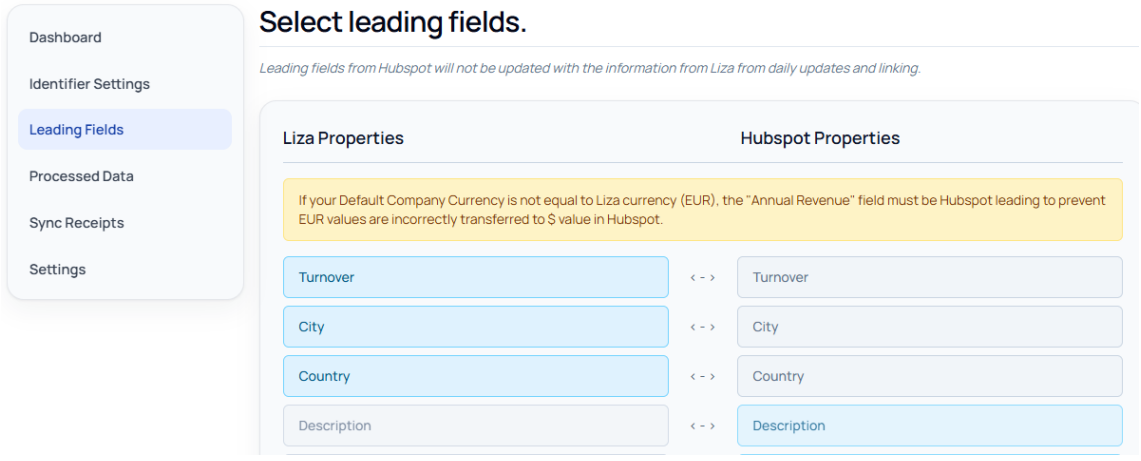


Requirement: the Registration number property must have the property group 'Company information'.

1.2.4 Select leading fields

Liza has already set some fields as default. We recommend using the Liza properties format so that your companies are enriched with Liza data.

! Pay attention:
If your Default Company Currency is not equal to Liza currency (EUR), the 'Annual Revenue' field must be HubSpot leading to prevent EUR amounts from being stored as USD values in HubSpot.

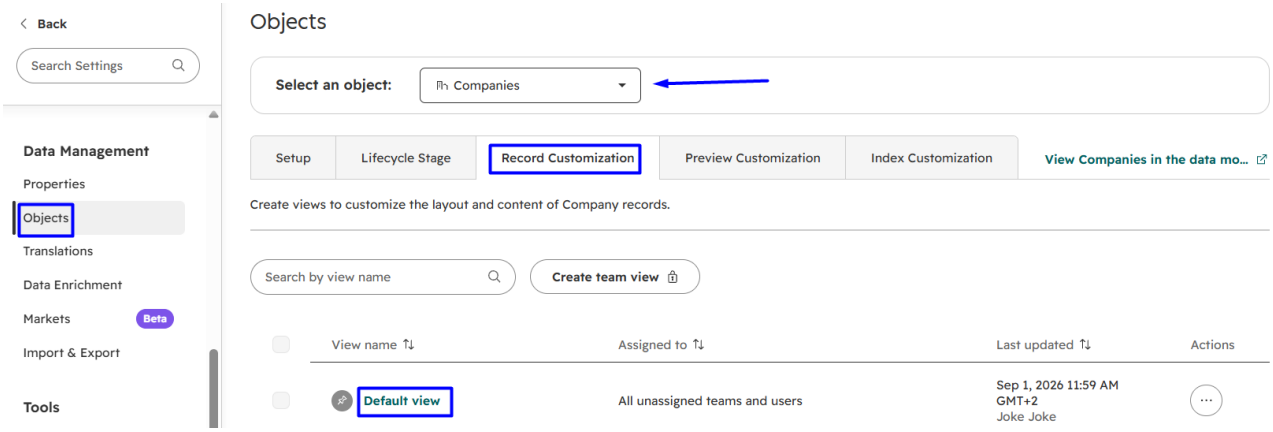


Click **Save** at the bottom of the list.

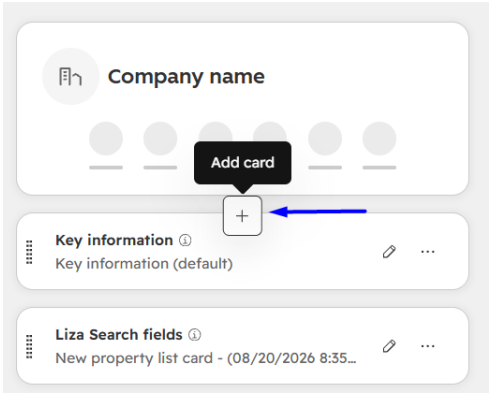
2 User manual

2.1 Liza card

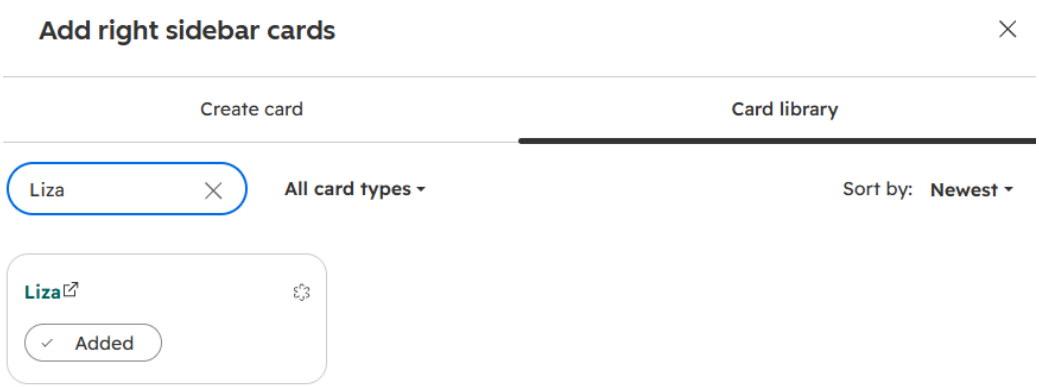
To set up the Liza card in your HubSpot portal, go to **Settings > Data Management > Objects > Companies > Record customization > Default view**.



Add the Liza card in the right sidebar.



Select the Liza card from the Card library.



Click 'Save and exit'.

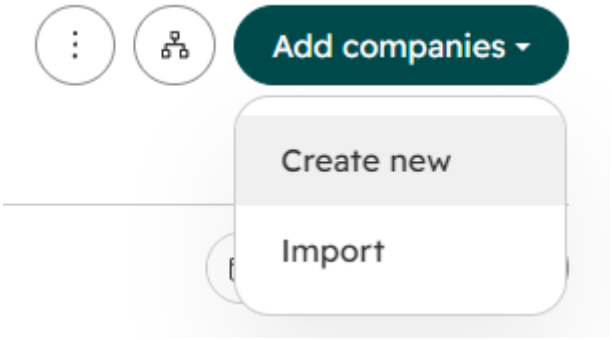


The Liza card is now available in the right sidebar of the company record.

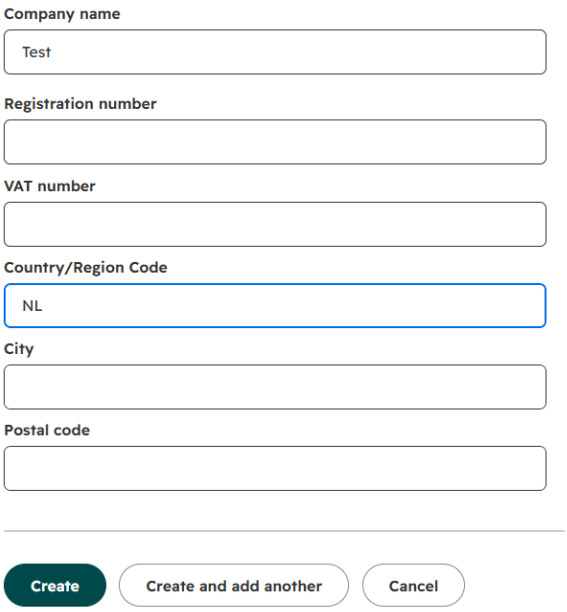
2.2 Create and update companies

You can create and update companies from the Netherlands. To include Belgium, Luxembourg or France, extend your subscription with one or more of these countries.

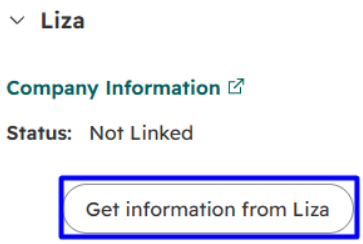
Go to **Companies** in HubSpot and click on **Add companies > Create new**.



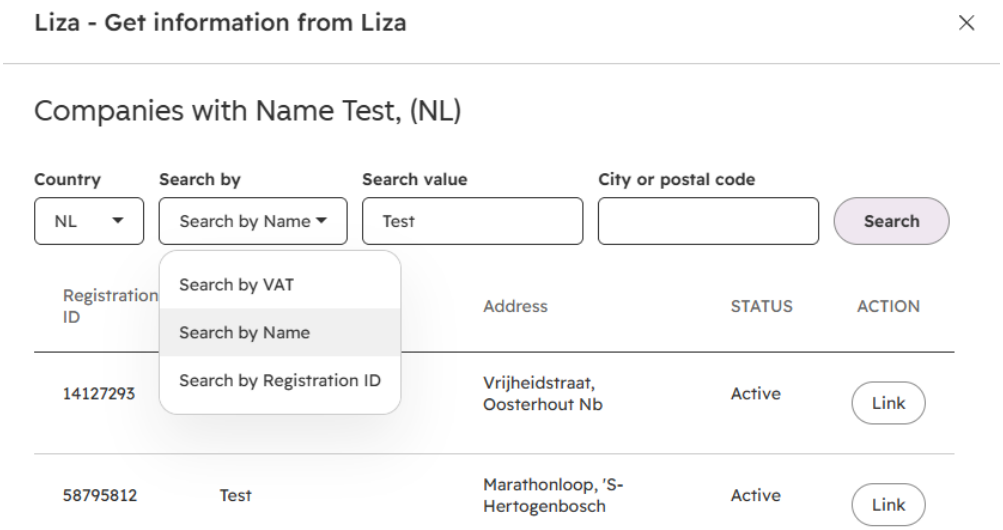
Enter the company name, registration number or VAT number, and enter the country code (NL, BE, LU or FR) in the Country/Region Code field. Then click **Create**.



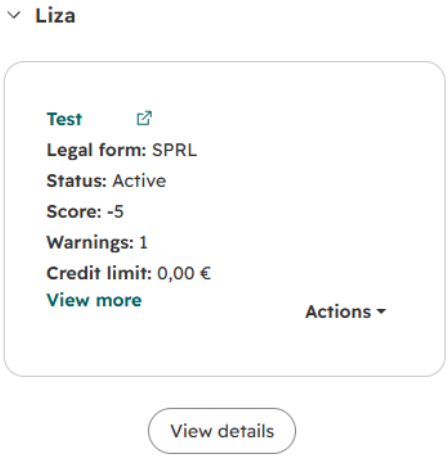
Open the new company record and click **Get information from Liza**.



Liza searches for the company based on the details you entered. If needed, adjust the search by country, name, VAT number or registration number. Select the right company in the results and click **Link**.



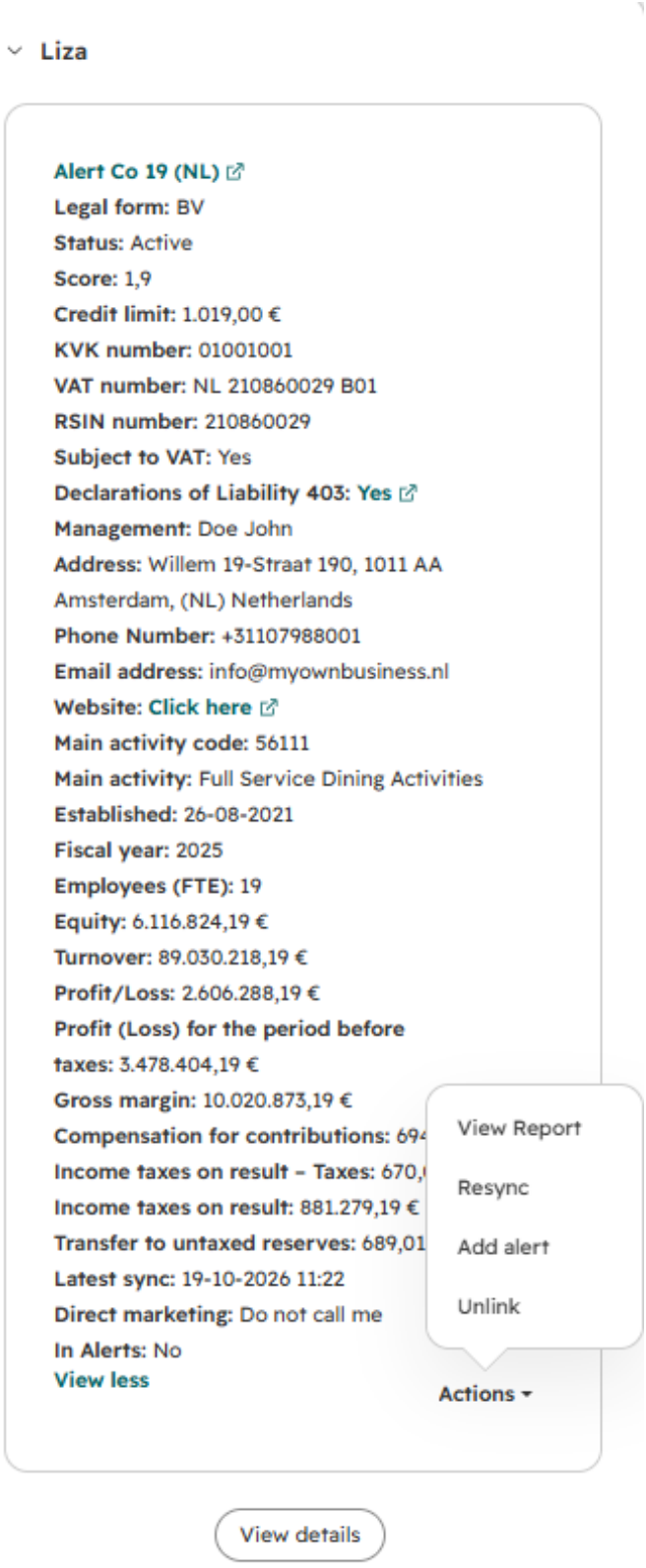
The Liza information now appears on the Liza card. If it doesn't appear immediately, refresh the page.



Click **View more** to see the full Liza card.

Tip: you can enrich existing company records the same way. Open the record and click **Get information from Liza**.

2.3 Action buttons





Click the icon next to the company name to open the company's page on the Liza platform.

Possible actions:

- **View report:** open the full company report
- **Resync:** refresh the data. The 'latest sync' date and time will be updated.
- **Add alert:** add this company to the Alerts Service to be monitored (see 2.4 Liza Alert Service)
- **Unlink:** clear the data on the Liza card, for example when you linked the wrong company.

By clicking **View details** under the Liza card you get a visual of the health barometer, credit limit and more details about the warnings, activities and management information.



2.4 Liza Alert Service

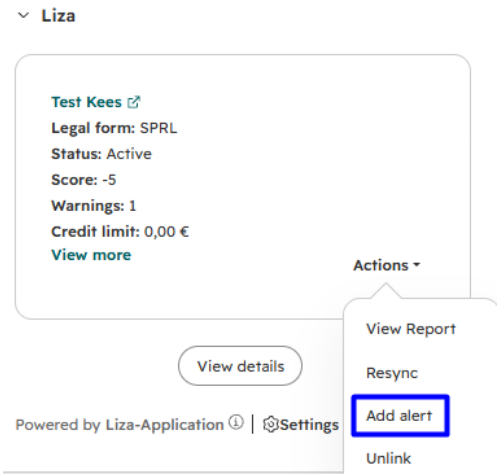
With the **Liza Alert Service**, you can monitor your companies. The Liza data gets updated automatically. This way your customer and prospect records are always up to date. You won't miss changes such as a new address, a status update, a change in health score or credit limit, or an important financial warning.

Liza Alerts Service must be included in your Liza subscription.

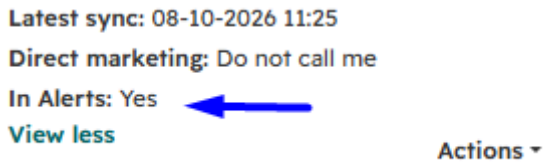
! Please note: when you use Data Enrichment in HubSpot, the Liza Alerts Service will not work for companies with a foreign address.

2.4.1 Add a company to the Alert Service

Add a single company to the Alert Service via **Add alert** in the Liza card.



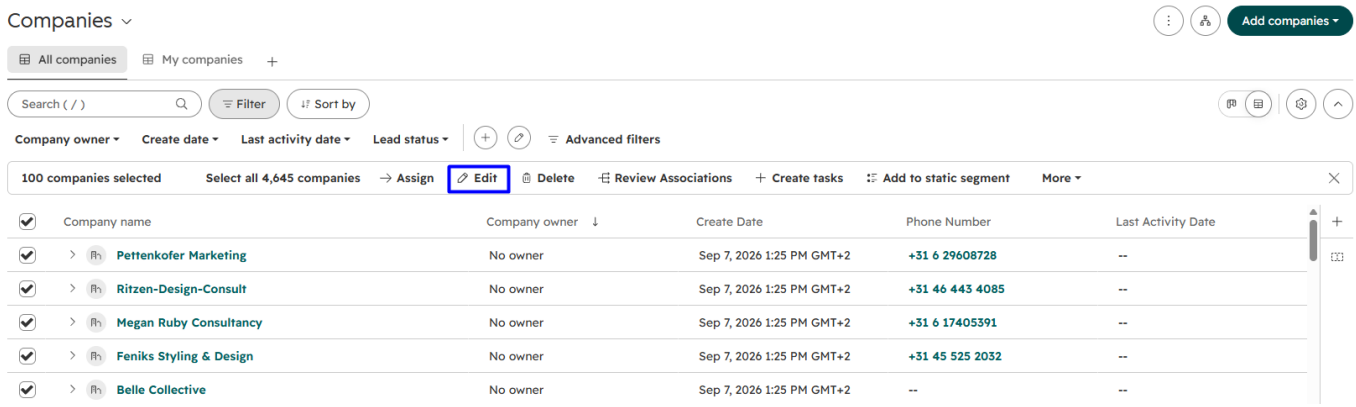
When a company is added to the Alert Service, this is indicated in the Liza card.



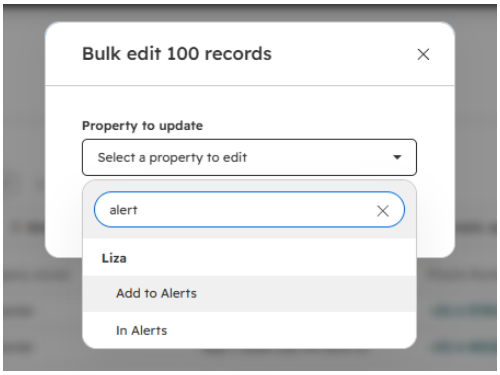
2.4.2 Add list of companies to the Alert Service

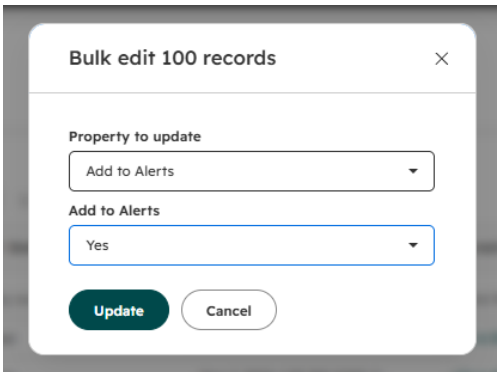
You can also add a list of companies to the Alert Service.
Up to 5000 companies can be added at a time.

Go to the **Companies overview** and select the companies you would like to add to the Alert Service.

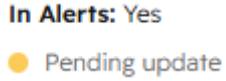


Click **Edit**, search for **Add to Alerts >** set the value to **Yes** and click **Update.**





The selected companies are added to the Alert Service. If a company record has not yet been enriched with Liza data, the status is set to ‘Pending update’.

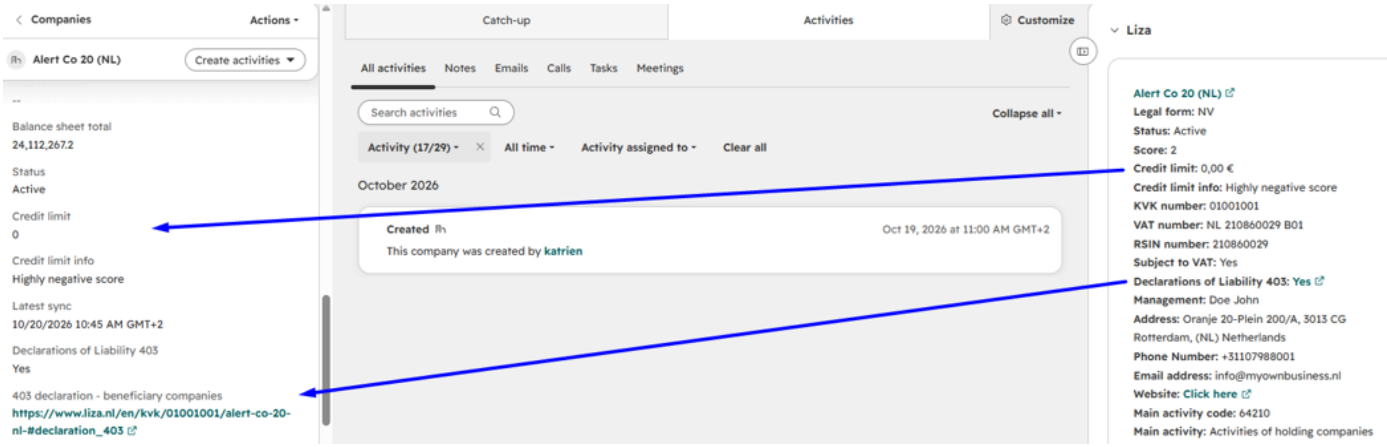


These companies will automatically receive the Liza card. No further action is required. Depending on the size of the list, it may take some time before all companies have been added to and updated in the Alert Service.

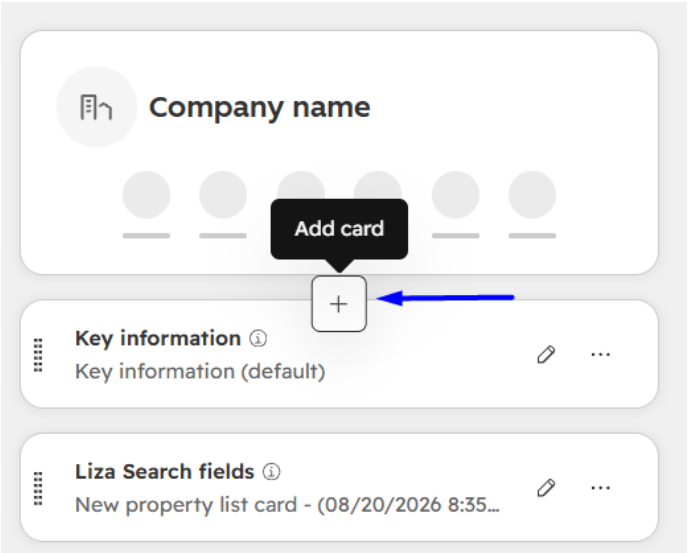
3 Display Liza data

3.1 Company record

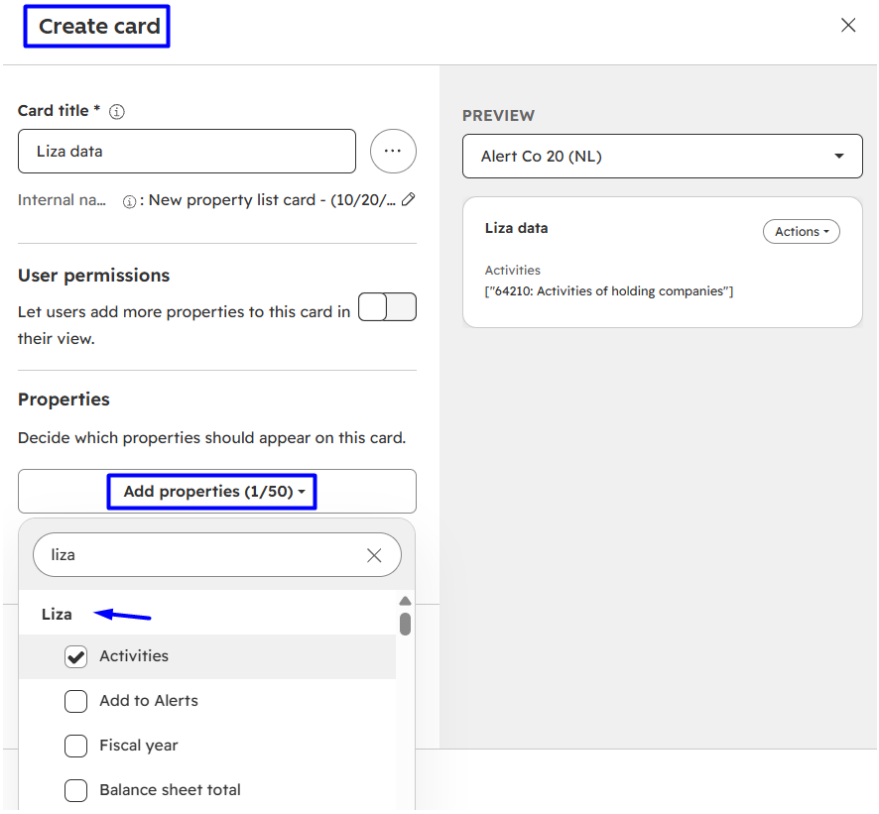
Liza data is stored in company properties in HubSpot. You can display these properties on the company record and use them throughout HubSpot, for example to create lists or filter views.



To display Liza data on the company record, go to **Settings > Data Management > Objects > Companies > Record customization > Default view > Add card** in the left sidebar **> Create card**.



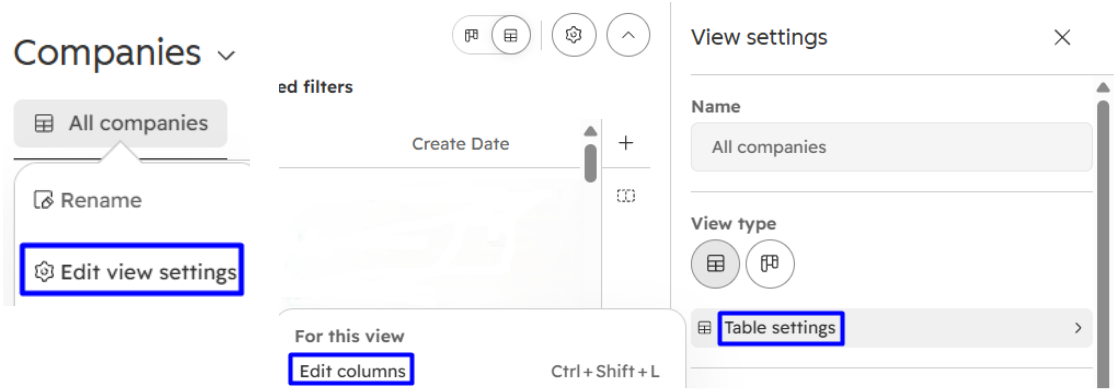
Give the card a title, for example Liza data. Select the Liza fields you want to display on the company record, then click **Save** and **Save and exit**. The selected Liza fields now appear in the left sidebar of the company record.



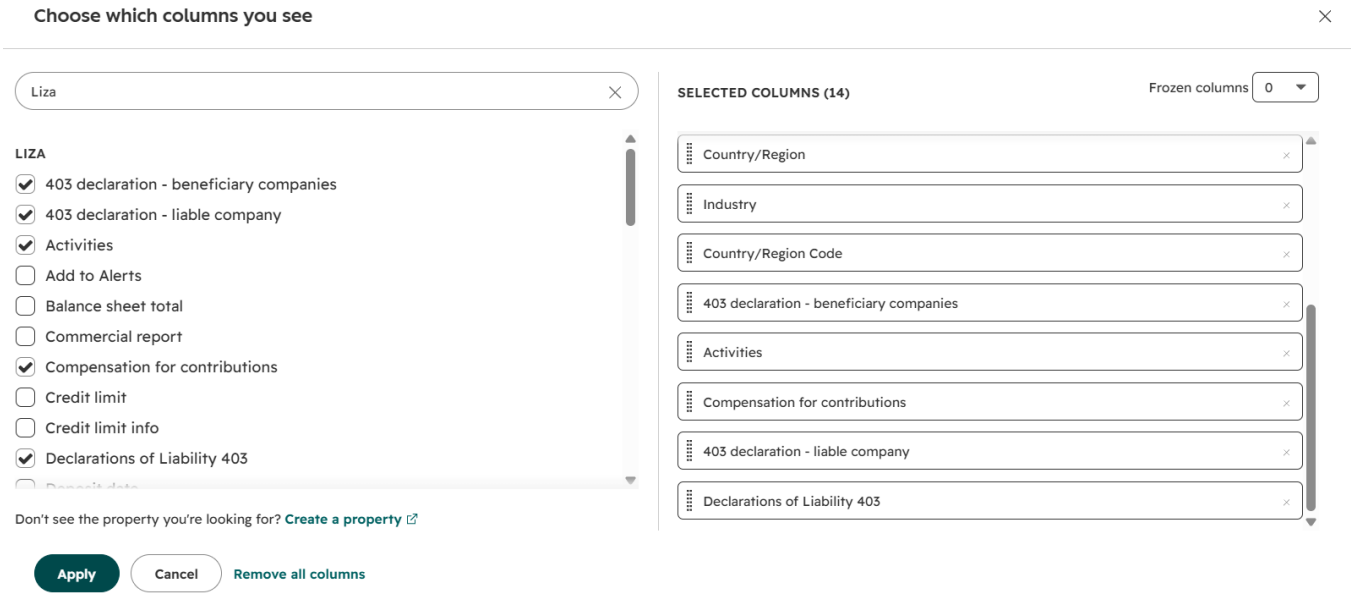
3.2 Companies overview

Add Liza fields as columns in the Companies overview to see Liza data for all your companies at a glance. You can also sort the overview on these columns, for example by score or credit limit.

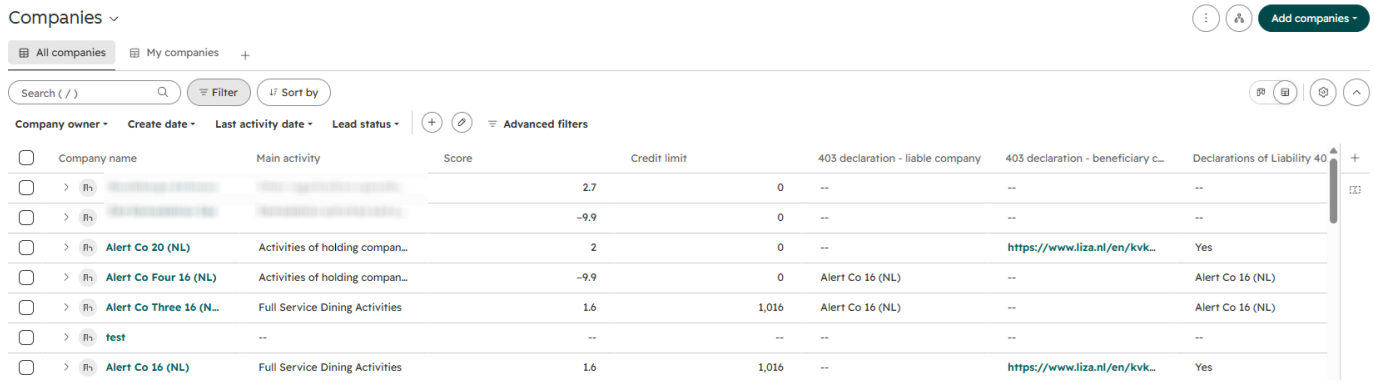
Go to **Edit view settings > Table settings > Edit columns**.



Select the Liza fields you want to display and click **Apply**.



The selected Liza fields now appear as columns in the Companies overview.



4 Available Liza data

The following Liza fields can be added to HubSpot. Which fields are filled depends on your subscription and on the country of the company.

- Preferred languages
- VAT number
- Subject to VAT
- Company name
- Legal form
- Address
- Status
    - Established
    - End date
- Score (health barometer)
- Credit limit
- Credit limit info
- Warnings
- Current management
- Financial statement data:
    - Financial year
    - Employees (FTE)
    - Equity
    - Gross margin
    - Profit/loss
    - Turnover
    - Profit/loss for the period before taxes
    - Taxes (Belgium only)
    - Income taxes on result
    - Transfer to untaxed reserves (Belgium only)
    - Compensation for contributions - Taxes (Belgium only)
    - Balance sheet total
- Telephone number
- Direct marketing
- Email address
- Website
- Main activity and main activity code
- Activities and activity codes
- Declaration of liability (403) (Netherlands only)
- Detail URL
- Report URL
- KYC report