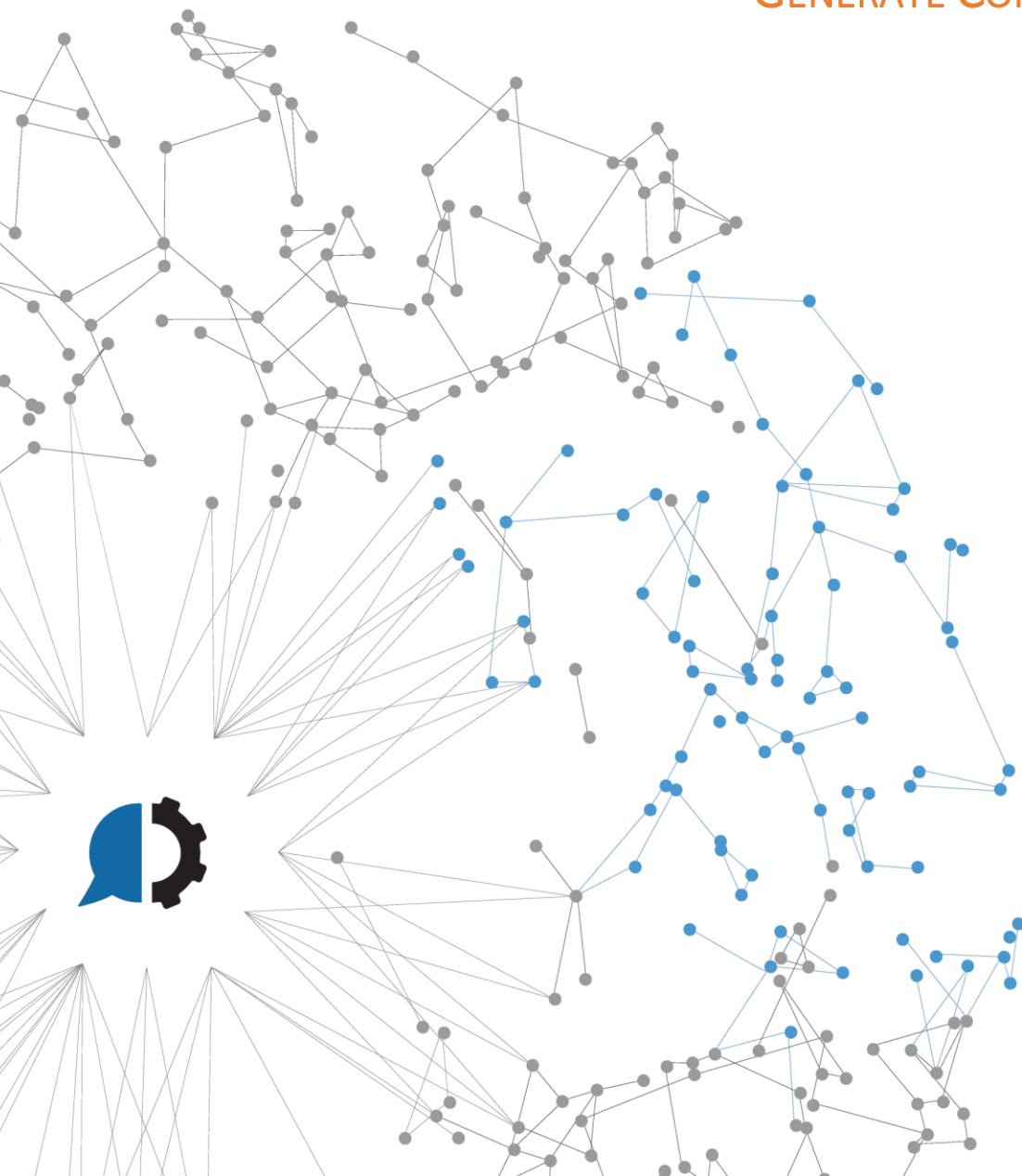




# HUBSPOT BOT

## GENERATE CONNECTION TOKEN





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## OVERVIEW

This how to guide introduces the *HubSpot Bot - Generate Connection Token*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. Automate can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are reports generation, file movement, data import and export, and scheduling batch processing.

**HubSpot Bot - Generate Connection Token** is based in the HubSpot REST API. It generates an OAuth2 access token requesting it to the <https://api.hubapi.com/oauth/v1/token>. It uses a “grant\_type” parameter with “authorization\_code” type for first-time token generation. Once the Token is generated within the first execution of the bot, it will use a “grant\_type” with “refresh\_token” in order to refresh the token in next executions. Remember that the HubSpot token expired every 6 hours by default.

Check carefully the [PREREQUISITES](#) and the [HOW TO EXECUTE THE HUBSPOT BOT - GENERATE CONNECTION TOKEN](#) sections to get detailed information.

This bot can be used to generate a token on a daily basis and make any HubSpot bot work with it.



## PREREQUISITES

- **Automate:** The HubSpot bot depends on Automate software in order to work. The minimal supported versions are:
  - [Automate Ultimate 11.2](#)
  - [Automate Plus 11.2](#)
  - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our HubSpot bot task
- **HubSpot:** Our minimal requirements are
  - **HubSpot REST API Enabled:** It is enabled by default.
  - **HubSpot REST API – Connected App Created and OAuth Enabled and configured:** You can check the HubSpot documentation on how to create a connected application in this [link](#) and the procedure on how to configure the OAuth in this [link](#).

Once you create and configure your connected app, it will be shown in HubSpot as shown in next picture (App Name in this example is “Automate Connected”):

The screenshot shows the HubSpot user interface. At the top is a dark navigation bar with the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right of this bar are icons for search, app marketplace, settings, notifications, and a user profile. Below the navigation bar is the 'Settings' page. On the left is a sidebar menu with categories like Account defaults, Contacts & companies, Conversations, Cookie policy, Domains & URLs, Import & export, Integrations, API key, and Connected apps. The 'Connected apps' section is active and highlighted. The main content area is titled 'Connected apps' and features a search bar with the placeholder text 'Search for an app'. To the right of the search bar is a red button labeled 'Visit App Marketplace'. Below the search bar, there is a list of connected apps. One app is visible: 'Automate Connected', which has a cube icon and a 'More' button with a dropdown arrow.



During the configuration of the connected application by following the step by step list provided in the link before, you will get the next information that will be used to configure this bot:

## Auth settings

These settings determine how your app connects to HubSpot and what data it has permission to access.

### Recommended: Subscribe to contact privacy deletion events

It looks like your app requires a scope related to contact records. There may be times when you need to delete contact data in your system to follow privacy laws and regulations. It's recommended that you listen for this event in HubSpot so you can take proper action in response.

[Read the webhook docs](#)

[Subscribe to this event](#)

#### App ID

This is your app's unique ID. You'll need it to make certain API calls.

215252

Copy

#### Client ID

This ID is unique to your app and is used for initiating OAuth.

6961f56b-4fca-47b5-a8fa-9d60363d16e9

Copy

#### Client secret

Used to establish and refresh OAuth authentication.

\*\*\*\*\*

[Show](#) | [Copy](#)

#### OAuth URL

A user will need this URL to connect your app. The URL is based on your app's client credentials, default redirect URL, and scopes configuration.

[Learn more about OAuth](#)

[https://app.hubspot.com/oauth/authorize?](https://app.hubspot.com/oauth/authorize?client_id=) `client_id` &

`redirect_uri=http://localhost&scope=contacts%20repo`

[Copy full URL](#)

#### Redirect URL

http://

Note that by executing one of the steps you or your HubSpot administrator will be able to obtain the **Authorization Code** that will be used for getting the token in first bot execution (Step 2: HubSpot prompts user for consent).



- **HubSpot connected application Scopes:** It is important that the necessary scopes are selected when configuring the connect application. This will permit or not the execution of the necessary APIs when executing the other Automate HubSpot bots. This is basically how you configure the security access to the APIs. For example, you can configure selecting the next ones:

**Scopes**

contacts X

reports X

business-intelligence X

oauth X

tickets X

▼

REQUIRED PERMISSIONS	DETAILS
<div>Contacts</div> <div>contacts</div>	This includes prospects and lists.
<div>Reports</div> <div>reports</div>	This includes sources, page performance, keywords, assists, competitors, and events.
<div>Read from Business Intelligence API</div> <div>business-intelligence</div>	This includes endpoints that sit on top of sources and email.
<div>Basic OAuth functionality</div> <div>oauth</div>	The basic scope required for OAuth.
<div>Tickets</div> <div>tickets</div>	This includes access to tickets.

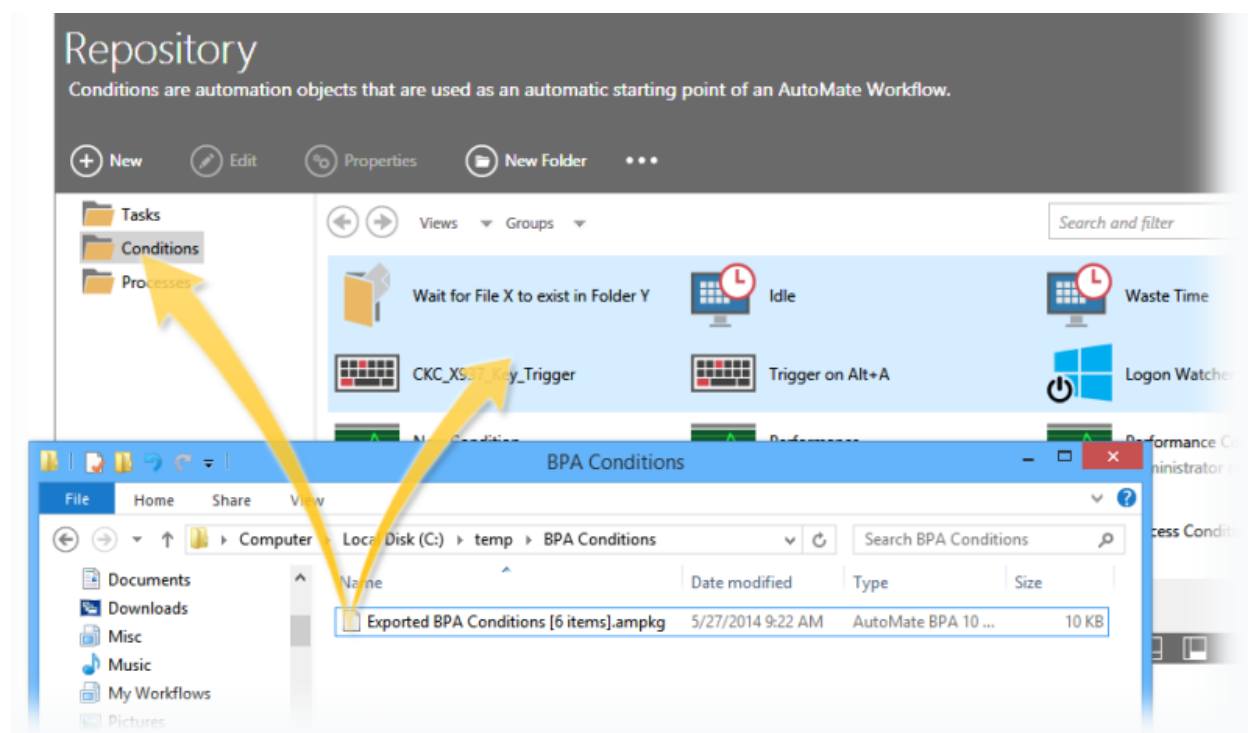


## HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Server Management Console](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [SMC](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.



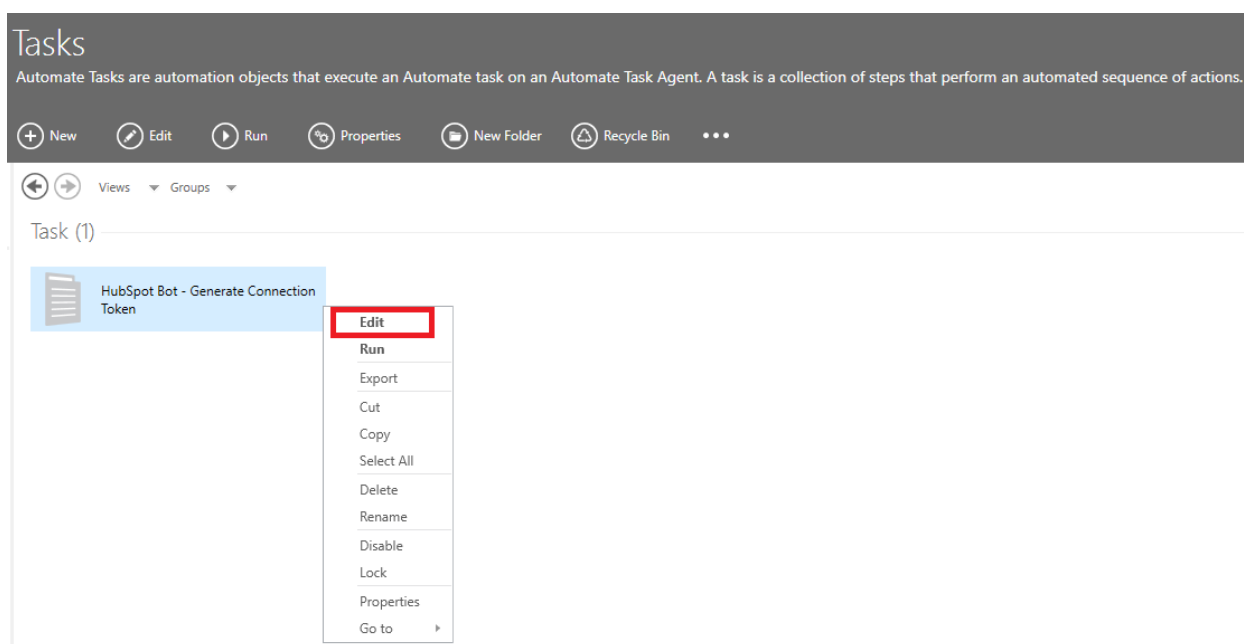


## HOW TO EXECUTE THE HUBSPOT BOT - GENERATE CONNECTION TOKEN

If this is the first time running this task, we will need to set some parameters

Open the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



From [step 2](#) edit the next variables according to you desired output:

- **var\_HubSpotTokenURL**: The URL used to request a HubSpot Token generation. It is set to the default URL provide by HubSpot: **https://api.hubapi.com/oauth/v1/token**
- **var\_HubSpotAuthCode**: This is the Authorization Code gotten during “**Step 2: HubSpot prompts user for consent**” of the step by step [procedure](#) provided by HubSpot.
- **var\_HubSpotRedirectUrl**: The URL for user’s redirection. Check the HubSpot information. By default, it is set to: **http://localhost**
- **var\_HubSpotClient\_Id**: This **ID** is unique to your app and is used for initiating OAuth.
- **var\_HubSpotClientSecret**: This will be the **Client Secret** generated with the *HubSpot connected App* that you created. Used to establish and refresh OAuth authentication





- **var\_HubSpotFileTokenOutput:** This will be the path and filename in which you want the bot to create the txt file with the token and token refresh string generated. Default: **C:\Automate\HubSpotToken.txt**

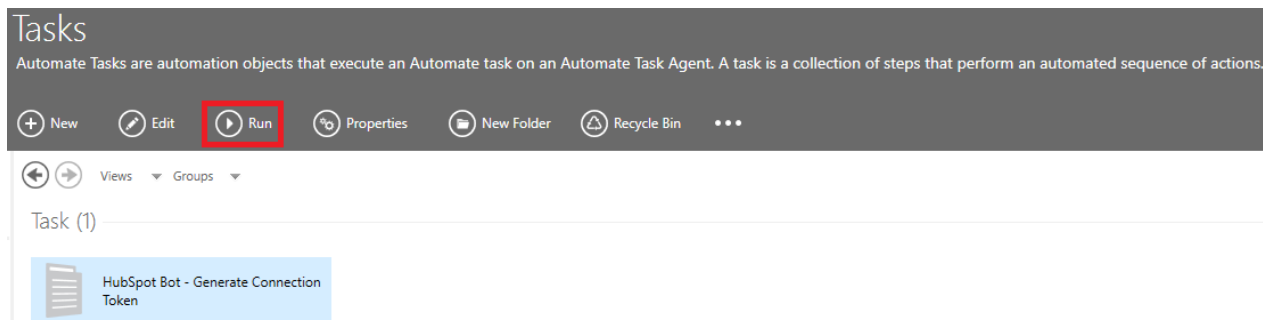
Here is an example of the content of the text file generated:

```
*HubSpotToken.txt - Notepad
File Edit Format View Help
access_token:CJjTq8yRLhIDhQEBGOjawnMgtLryBCjUkQ0yGQB3Tp1ctf6--AzTAL2v1N15coxVq2Z7BjM6FQBKQkEAAyA_
refresh_token:36c94979-8f92-492a-93f5
```

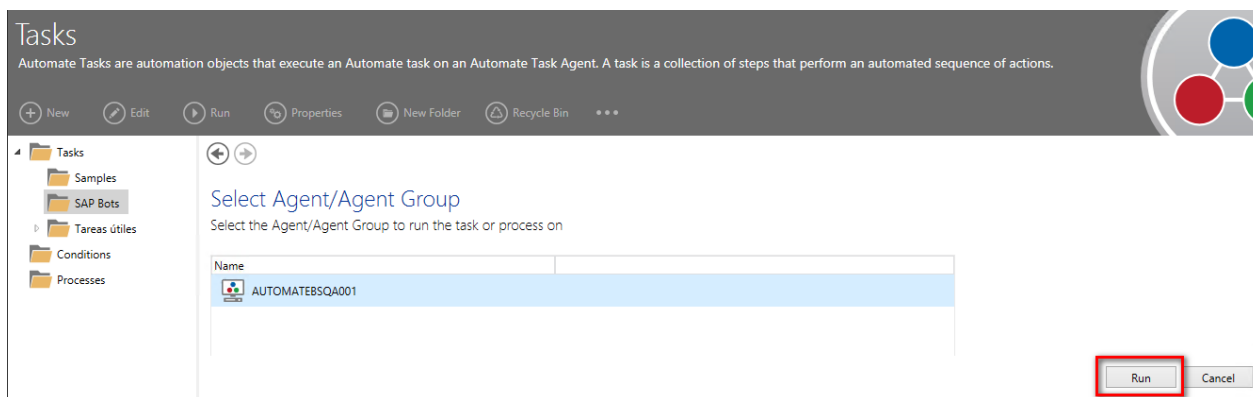
**IMPORTANT:** If the **Authorization Code** is changed, you need to delete this file before first bot execution.

Save and close the task

Select the task and click on **Run**



Select your **Agent** and click on **Run** again





## APPENDIX A - TROUBLESHOOTING

- Logs: Each iteration of our BOT creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *HubSpot Bot - Generate Connection Token*.



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