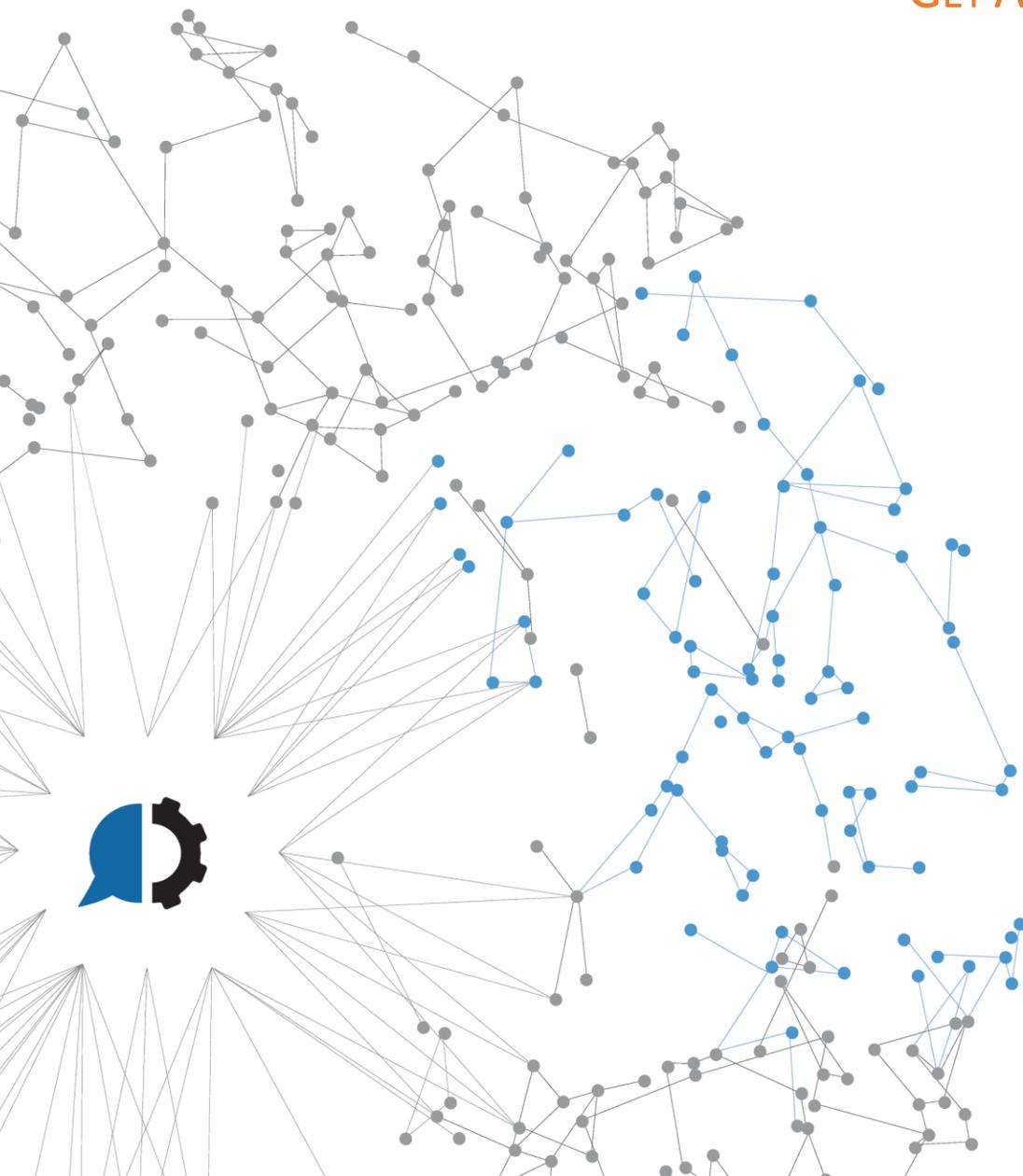




helpsystems

HUBSPOT BOT

GET ANALYTICS TOTALS





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OVERVIEW

This how to guide introduces the *HubSpot Bot - Get Analytics Totals*. 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 - Get Analytics Totals is based in the HubSpot REST API, specifically the [Analytics API](#). This bot requests the total analytics values from a specific number of periods (day, week, and month), summarizes them, and **dynamically** stores the results in an output Excel file (The number of variables or columns is relative to the HubSpot data). Carefully check the [PREREQUISITES](#) and the [HOW TO EXECUTE THE HUBSPOT BOT - GET ANALYTICS TOTALS](#) sections to get detailed information.

A [HUBSPOT BOT - GENERATE CONNECTION TOKEN](#) is also available that will provide you an easy way to create—when necessary—a token for this bot to work. Remember that the token by default expires every 6 hours.



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 Token generated:** You can check the HubSpot documentation on how to create a connected application in this [link](#) and the procedure for how to configure the OAuth in this [link](#). Within this procedure you will be able to obtain the connection token that's needed for this bot to operate. Remember that the token by default expires every 6 hours.
 - **HubSpot connected application Scopes:** It is important that the necessary scopes are selected when configuring the connect application. This will permit the execution of the ***analytics API*** from this Automate HubSpot bot.



Scopes i

reports X	business-intelligence X	oauth X	▼
REQUIRED PERMISSIONS	DETAILS		
Reports reports	This includes sources, page performance, keywords, assists, competitors, and events.		
Read from Business Intelligence API business-intelligence	This includes endpoints that sit on top of sources and email.		
Basic OAuth functionality oauth	The basic scope required for OAuth.		

- Automate constants to be create to set the HubSpot connection values:
 - `const_HubSpotURL`: HubSpot URL for connection. Example: ***https://api.hubapi.com***
 - `const_HubSpotToken`: HubSpot token to execute the connection/request with. It can be set to the token value or the path in which the .txt file with the token inside is located. Example: `C:\Automate\HubSpotToken.txt`

In the case of using a .txt file, the token must have the next format/structure:

access_token:TokenString

Example:

```
*HubSpotToken.txt - Notepad
File Edit Format View Help
access_token:CJjTq8yRLhIDhQEBGOjawnMgtLryBCjUkQ0yGQB3Tp1ctf6--AzTAL2v1N15cd
```

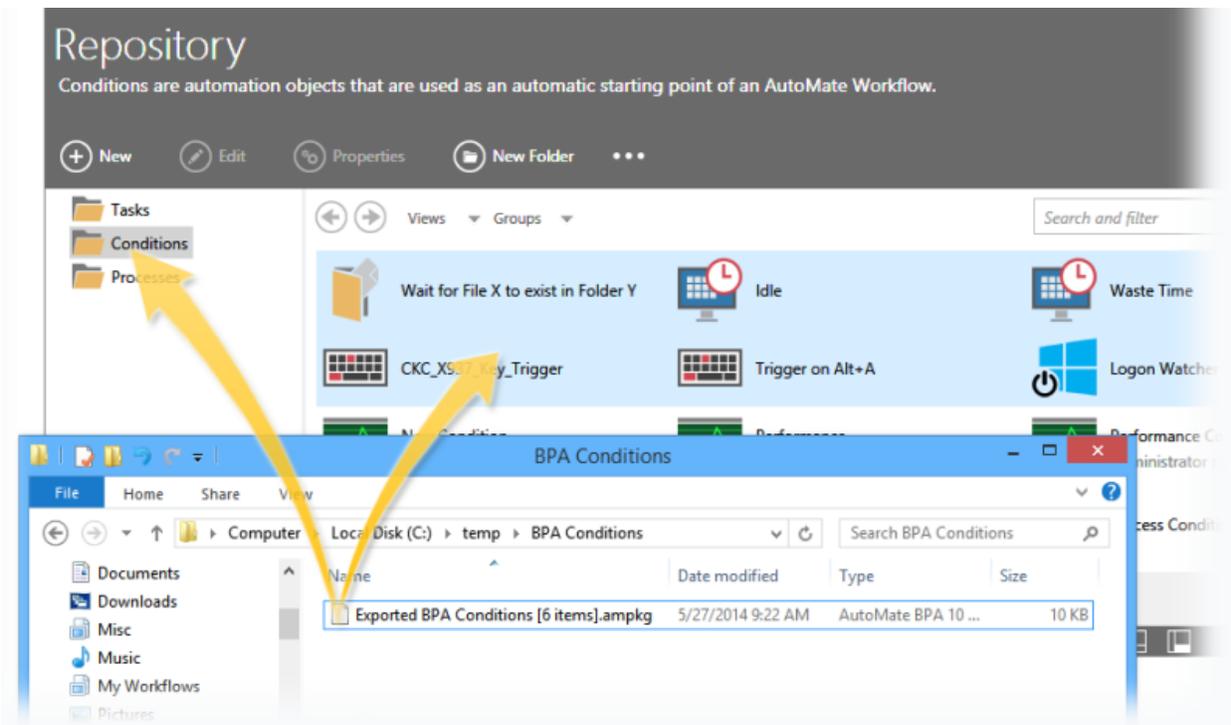


HOW TO IMPORT AN AUTOMATE TASK

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.



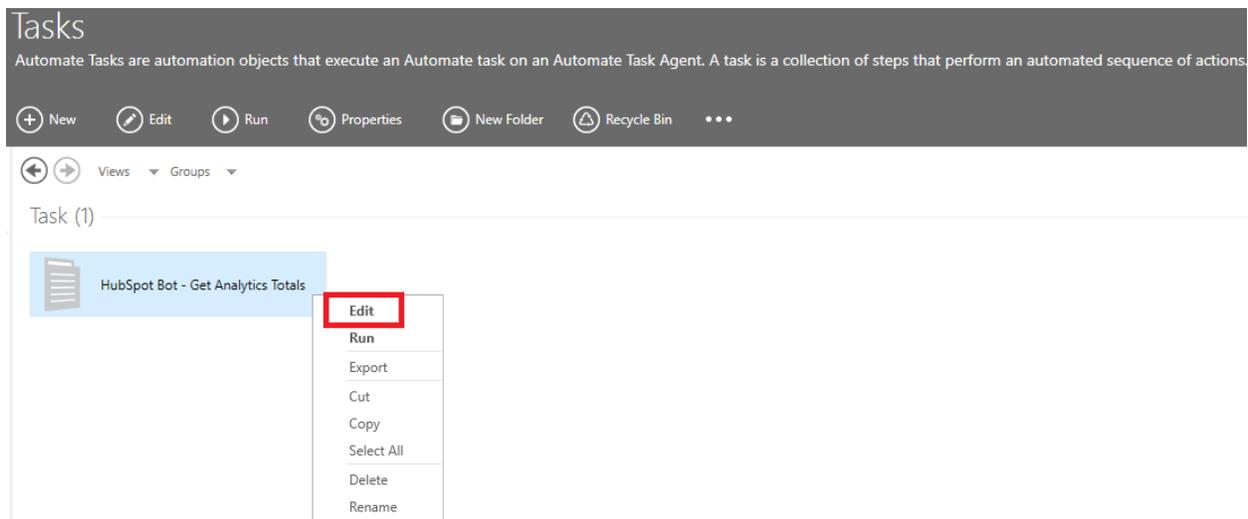


HOW TO EXECUTE THE HUBSPOT BOT - GET ANALYTICS TOTALS

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 4](#) edit the next variables according to your desired output:

- [var_SummarizeAnalytics](#): Represents the Grouped by in order to request a summarized value. It can be set to: Monthly, Weekly or Daily.
- [var_IntervalCountBefore](#): Represents the number of intervals to be gotten according to the value set in the [var_SummarizeAnalytics](#) (Months, weeks or days).

With the combination of the values set in the variables, you can get various behaviors related to the data that will be gotten. The Bot internally calculates the Start Date and End Date for the request. Some examples:

- Summarizing by **Monthly** and setting the interval count to 2 will get the data from last 62 days. The output excel will have 2 rows as result.
- Summarizing by **Weekly** and setting the interval count to 4 will get the data from last 28 days. The output excel will have 4 rows as result.
- Summarizing by **Daily** and setting the interval count to 7 will get the data from last 7 days. The output excel will have 7 rows as result.

[Save and close](#) the task



Select the task and click on [Run](#)

The screenshot shows the 'Tasks' interface. At the top, there is a header with the title 'Tasks' and a description: 'Automate Tasks are automation objects that execute an Automate task on an Automate Task Agent. A task is a collection of steps that perform an automated sequence of actions.' Below the header is a toolbar with icons for 'New', 'Edit', 'Run', 'Properties', 'New Folder', and 'Recycle Bin'. The 'Run' icon is highlighted with a red box. Below the toolbar, there are navigation arrows and dropdown menus for 'Views' and 'Groups'. The main area shows a list of tasks under the heading 'Task (1)'. A single task is listed: 'HubSpot Bot - Get Analytics Totals', which is highlighted in blue.

Select your [Agent](#) and click on [Run](#) again

The screenshot shows the 'Tasks' interface with a dialog box open. The dialog box is titled 'Select Agent/Agent Group' and contains the text 'Select the Agent/Agent Group to run the task or process on'. Below this text is a table with a 'Name' column. The table has one row with the name 'AUTOMATEBSQA001'. The 'Run' button in the bottom right corner of the dialog box is highlighted with a red box.

Name
AUTOMATEBSQA001



APPENDIX A – HUBSPOT ANALYTICS TOTALS EXCEL OUTPUT EXAMPLE AND EXPLANATION

Output Excel file with results when set to summarize Monthly and interval count to 1:

HubSpotAnalyticsTotal_03262020_045209.xlsx

A	B	C	D	E	F	G	H
AutoMate Bot - HubSpot Analytics Totals Report - Data from last 1 Month(s) and Monthly summarized.							
First day of Period (Day, Week or Month)	newVisitorSessionRate	contacts	leadsPerView	leads	pageviewsMinusExits	visitors	visits
3/1/20	0.9545454545454546	2	0.0625	2	32	21	22

File naming pattern:

HubSpotAnalyticsTotal	Base Name
03262020	Represents the date of execution (ddMMyyyy)
045209	Represents the execution hour (Hmss)

The output file will be created in the task folder: C:\AutoMate\Tasks\<<TASK NAME>>.

Note: The title, the columns headers and values are dynamically written, depending on the configuration parameter set in the bot configuration and the data that is gotten from HubSpot.

In this example:

The title was set to: *AutoMate Bot - HubSpot Analytics Totals Report - Data from last 1 Month(s) and Monthly summarized.*

The first column represents the date of the "**First day of Period (Day, Week or Month)**"

The number of columns will depend on the quantity of the variables present in your HubSpot analytics environment. In this case we got: **newVisitorSessionRate, contacts, leadsPerView, leads, pageviewsMinusExits, visitors, visits, pageviewsPerSession, sessionToContactRate, standardViews, rawViews, returningVisits and contactsPerPageview.**



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 - Get Analytics Totals*.



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About HelpSystems

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