CRM CONNECTOR · SETUP GUIDE

Connect HubSpot to Heimdell

Move a deal to **Awaiting verification** and Heimdell texts your customer a verification link, or rings them with an AI verification call. When they confirm, the result and the certificate ID appear on the deal in HubSpot. No code, no copying details between systems.

✓ Tested live on HubSpot

We ran this exact setup end to end on a real HubSpot account in October 2026: deal read from HubSpot, customer verified by text link, status and certificate written back to the deal. It works on **every HubSpot plan, including the free CRM**. No workflows or paid add-ons are needed.

How it works

	What happens
1	Your salesperson moves the deal to the **Awaiting verification** stage.
2	Within about a minute, the Heimdell connector picks the deal up and reads the customer and product details.
3	Heimdell texts the customer a secure link, or calls them with the AI verification assistant. They review the agreement and confirm (or decline).
4	Each step is written back to the deal: **PENDING**, then **OPENED**, then **COMPLETED**, with the certificate ID and time.

Before you start

- A HubSpot user who is a **Super admin** (or has **Developer tools access**), to create properties, a pipeline stage and a service key.
- The **account owner or an admin** of your Heimdell account, to create the API key and webhook.
- About 20 minutes. Heimdell finishes the connection on our side, usually the same working day.
- Customer details kept on the **contact** linked to the deal: first name, last name, mobile number and address.

Setup

Do these in order. Steps 1 and 2 are in your Heimdell dashboard; steps 3 to 5 are in HubSpot.

1 Create a Heimdell API key HEIMDELL DASHBOARD

1. Sign in at **telecomcompliance.uk** and open **Integrations › API Keys**.
2. Under **Create an API key**, name it **HubSpot**. Leave expiry blank unless your policy needs one.
3. Click **Create key**. The key (it starts `hvcs_live_`) is shown **once**. Copy it into your password manager straight away.

2 Point Heimdell's results at the connector HEIMDELL DASHBOARD

1. Open **Integrations › Webhooks**.
2. Set the endpoint URL to `https://connect.telecomcompliance.uk/heimdell/<your-name>`. We give you **<your-name>** when you ask us to set up the connector.
3. Click **Save endpoint**. Heimdell shows a **signing secret** (it starts `whsec_`) **once**. Copy it into your password manager.

3 Add the Heimdell fields to deals HUBSPOT

1. In HubSpot, click the **settings** (gear) icon, then **Data Management › Properties**.
2. Choose **Deal properties**, click **Create property**, and create the 8 properties below. Put them all in a new group called **Heimdell verification** and use field type **Single-line text**.
3. The **internal names must match exactly**. HubSpot fills the internal name from the label, so check it before saving.

Label (what your team sees)	Internal name
Heimdell verification status	`hvcs_verification_status`
Heimdell certificate ID	`hvcs_certificate_id`
Heimdell verified at	`hvcs_completed_at`
Heimdell sale ID	`hvcs_sale_id`
Heimdell verification session ID	`hvcs_verification_session_id`
Heimdell last event	`hvcs_last_event`
Heimdell last event ID	`hvcs_last_event_id`
Heimdell error	`hvcs_error`

Optional: choose text link or AI phone call per deal. Add one more property, **Heimdell verification method** (internal name `hvcs_method`), field type **Dropdown select**, with two options. Click the **</>** icon next to each option to set its internal value:

Option label	Internal value	Cost
Text link	`link`	1 credit
AI phone call	`phone_call`	5 credits

If a deal's method is left blank, your default (set in step 6) is used.

These hold references and statuses only. No bank details or verification links are ever written to HubSpot.

4 Add the “Awaiting verification” stage HUBSPOT

1. Go to **Settings** › **Data Management** › **Objects** › **Deals**, open the **Pipelines** tab and choose your sales pipeline.
2. Click **Add stage**, name it **Awaiting verification**, then drag it to sit **before Closed won**. Click **Save**.
3. In the same table, note the stage's **Stage ID** (a number such as `6190839022`). You'll send it to us in step 6.

You can use an existing stage instead. Just tell us its Stage ID.

5 Create a HubSpot service key HUBSPOT

1. In the left menu open **More** › **Development**, then **Keys** › **Service keys**, and click **Create service key**.
2. Name it **Heimdell connector**. Click **Add new scope** and tick exactly these three:

Scope	Why the connector needs it
`crm.objects.deals.read`	Find deals in the Awaiting verification stage and read the product and price
`crm.objects.deals.write`	Write the status, certificate ID and any error back to the deal
`crm.objects.contacts.read`	Read the customer's name, mobile and address from the linked contact

3. Click **Update**, then create the key. On the key's page click **Show**, then **Copy**. It starts `pat-`.

Nothing else is needed. The connector can't see emails, files, other objects or settings.

6 Send us the connection details YOU → HEIMDELL

Tell us you're ready through your Heimdell contact and we'll arrange a **secure way to pass the keys**. Never send keys by email, text or chat.

What	Where it came from
Heimdell API key (`hvcs_live_...`)	Step 1
Webhook signing secret (`whsec_...`)	Step 2
HubSpot service key (`pat-...`)	Step 5
Stage ID of Awaiting verification	Step 4
Your contract terms summary (e.g. “24 month minimum term”) and cancellation or cooling-off wording	Your sales terms. The customer reads these before confirming
Your default method: text link or AI phone call	Used when a deal's method is blank
Whether you collect Direct Debit details on the deal	Optional. If yes, we map the four bank fields too

We connect your account and confirm when it's live. Your keys are stored on our server in a locked-down file that only the connector can read, and never in our code or emails.

7 Run a test HUBSPOT

1. Make a test contact with **your own mobile number** and an address, and a deal for it with a name and an **Amount** (the monthly price).
2. Move the deal to **Awaiting verification**.
3. Within about a minute you get a text (or, with AI phone call, your phone rings). Open the link or take the call, and confirm.
4. Refresh the deal. Under **Heimdell verification** you should see status **COMPLETED**, a certificate ID and the time verified.

Daily use

- Make sure the deal is linked to a contact with **first name, last name, mobile and address**, and the deal has a **name** and **Amount**.
- If you added the method dropdown, pick **Text link** or **AI phone call** on the deal first (or leave it blank for your default).
- Move the deal to **Awaiting verification**. That's the only action your team takes.
- Each deal is verified **once**. A deal that already has a Heimdell sale ID is never sent again. For a new sale, create a new deal.
- The **Heimdell verification status** property is a normal HubSpot property, so you can filter, report and build views on it.

Status values

Status	Meaning
PENDING	The link has been sent, or the call is being placed.
OPENED	The customer has opened the link or answered the call.
COMPLETED	The customer confirmed. A certificate ID and time are recorded.
DECLINED	The customer said no, or flagged something wrong. Follow up before the order goes ahead.
EXPIRED	The link ran out before the customer finished. Create a new deal to send again.

If something goes wrong

If the connector can't start a verification, it writes the reason in the **Heimdell error** property on the deal and leaves the deal alone.

You see	What to do
`Missing in CRM: customer.phone` (or another field)	Add the missing detail to the contact or deal, then **clear the Heimdell error field**. The deal is picked up again within about 15 minutes.
Heimdell: out of credits	Top up credits in your Heimdell dashboard, then clear the Heimdell error field.
Heimdell rejected it (HTTP 400): ...	A detail is in the wrong format, usually the mobile number or price. The message names the field. Fix it, then clear the error.
Nothing happens after a few minutes	Check the deal is in the exact stage you gave us, is linked to a contact, and its Heimdell sale ID and error are empty. If so, contact us.

Switching it off

- To pause, stop moving deals into **Awaiting verification**. Nothing is sent otherwise.
- To disconnect, delete the **Heimdell connector** service key in HubSpot and revoke the **HubSpot** key in Heimdell (Integrations › API Keys). Either one stops the connection immediately.

On HubSpot Data Hub Professional? We can also start verifications instantly from a HubSpot workflow instead of the one-minute check. Ask us when you set up.

Need help? Contact us at **telecomcompliance.uk/contact**. Heimdell Verified Consent is provided by Heimdell Tech Ai, registered with the ICO (ZC079121).