

Setup Guide for Deals - AutoAssign Company

Welcome to the AutoAssign Company setup guide! Follow these steps to integrate the app with HubSpot and start benefiting from seamless company assignment automation.

Step 1: Install the App

1. **Navigate to the HubSpot Marketplace:**
 - Go to the HubSpot App Marketplace.
 - Search for "AutoAssign Company."
2. **Install the App:**
 - Click on the "Install" button.
 - Follow the prompts to authorize the app to access your HubSpot account.

Step 2: Configure the App

1. **Access the App Settings:**
 - After installation, navigate to your HubSpot account settings.
 - Under the "Integrations" section, find "AutoAssign Company."
2. **Set Up Your Preferences:**
 - Configure the display settings for AutoAssign Company on deal records.

Step 3: Sync Your Deals

1. **Automatic Sync:**
 - AutoAssign Company will automatically sync with your existing deals and contacts.
 - Ensure that contact and company associations are correctly set up in your CRM.

Step 4: Using the App

Automatic Company Assignment:

1. Navigate to any deal record in HubSpot.
2. Assign a contact to the deal.
3. The associated company of the contact will be automatically assigned to the deal.

Step 5: Troubleshooting and Support

Common Issues:

1. If the automatic assignment is not working, ensure that the contact has an associated company.
2. Verify that the automation settings are correctly configured.

Support Resources: For further assistance, contact our support team at hirday@clearfundae.com.