

Creating a Setup Guide for the HubSpot App Marketplace

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Overview

A publicly available setup guide (also referred to as "setup documentation" and "supporting documentation") is required to be [listed](#) or [certified](#) in the HubSpot App Marketplace. Setup guides help prospects and customers learn how to install, configure, use, and disconnect and/or uninstall your app/integration.

Use [this template](#) to create a setup guide which meets *both* listing and certification requirements.

For reference, the setup guide requirements are copied below:

Listing ([see full requirements](#)):

A link to a publicly available (no sign-in, no paywall) Setup Documentation specific to your HubSpot integration.

- Your Setup Guide cannot simply be your homepage or a general knowledge base.
- Instead, it must contain the steps to install and configure the integration.
- For an example, check out the [OrgChartHub setup guide](#).

Certification ([see full requirements](#)):

Supporting documentation for your app must:

- Exist on a live, publicly accessible URL (i.e. no paywalls or login required) and adhere to current accessibility, privacy, and GDPR standards.
- Be up-to-date and consistent with the current version of your app.

- Clearly describe:
 - What your app does.
 - How to install your app and connect a HubSpot account with screenshots of each step, including the scope approval screen.
 - How to configure your app once it is installed.
 - How to use your app, including both manual and automated interactions.
 - How to disconnect HubSpot from your app.
 - How to uninstall your app from a HubSpot account.
 - How disconnecting and uninstalling might affect users' HubSpot accounts and data.
- Include images. Any images containing screenshots of the HubSpot UI should be up-to-date and consistent with our design system.
 - Videos are also recommended, but not required. Videos should be updated regularly and reflect the current version of your app.

Template/Example

Setup Guide for {{ App Name }}

The {{ App Name }} integrates {{ Platform Name }} leads and accounts with HubSpot contacts and companies, enabling users to:

- {{ Describe a use case }}
- {{ Describe another use case }}

Install:

{{ Describe instructions to install your app and connect a HubSpot account with visual aids for each step. For example: }}

1. Log into {{ Platform Name }}
2. Navigate to **Settings > Integrations**
3. Locate the {{ App Name }} card

{{ Screenshot }}

4. Click **Install**

5. Select your HubSpot account (portal)



Connecting {{ App Name }} to HubSpot

{{ App Name }} by [example.com](#)

Choose an account ×

NAME	DETAILS
<input type="radio"/> Acme Development	acme.com 345678
<input type="radio"/> Acme Staging	acme.com 234567
<input checked="" type="radio"/> Acme Production	acme.com 123456


Choose Account< Prev 1 Next >

6. Click **Choose Account**


7. Review the requested scopes on this screen. {{ App Name }} requests access to read and write to contacts and companies and read and edit contact and company properties



Connecting {{ App Name }} to HubSpot

{{ App Name }} by [example.com](#) 

This app is requesting access to your HubSpot account. Continue connecting if you agree.

✓ 


Manage and view your CRM data

View properties and other details about companies.
Create, delete, or make changes to companies.

View properties and other details about contacts.
Create, delete, or make changes to contacts.

View details about property settings for companies.
Create, delete, or make changes to property settings for companies.

View details about property settings for contacts.
Create, delete, or make changes to property settings for contacts.

 **Basic OAuth functionality**

The basic scope required for OAuth.

Connect app

Cancel

8. Click **Connect app**

9. You will be redirected to the {{ Platform Name }} "Integrations" page and new configuration options will appear. See the next section

Configure:

{{ Describe instructions to configure your app's connection to HubSpot with visual aids for each step. For example: }}

In your {{ Platform Name }} account > Settings > Integrations > {{ App Name }}:

1. Toggle "Sync direction" to either **One-way** ({{ App Name }} will only update HubSpot) or **Two-way** ({{ App Name }} will keep {{ Platform Name }} and HubSpot in sync)

{{ Screenshot }}

2. Map your {{ Platform Name }} lead and account fields to HubSpot default and custom contact and company properties

{{ Screenshot }}

3. When ready, toggle "Sync" from "OFF" to **ON**

{{ Screenshot }}

4. Select either **Sync existing records** or **Sync only new records**

{{ Screenshot }}

5. Click **Done**

Use:

{{ Describe how to perform basic manual and/or automated actions with your app with relevant visual aids. For example: }}

{{ App Name }} automatically keeps your {{ Platform Name }} leads and accounts synced with your HubSpot contacts and companies according to your configured settings (see "Configure" section above). Syncs run at least every 5 minutes. No manual actions are required.

Disconnect:

{{ Describe instructions to disconnect a HubSpot account from your app with visual aids for each step. Also, describe how disconnecting affects users' HubSpot accounts and data, if at all. For example: }}

Note: If you disconnect your HubSpot account from {{ App Name }}, {{ Platform Name }} lead and account data will no longer sync to HubSpot contacts and companies (and vice versa). Existing data will remain on your HubSpot records.

1. Log into {{ Platform Name }}

2. Navigate to **Settings > Integrations**

3. Locate the {{ App Name }} card

{{ Screenshot }}

4. Click **Disconnect**

{{ Screenshot }}

5. Click **Yes, I am sure**

Uninstall:

{{ Describe instructions to uninstall your app from within a HubSpot account. You may simply link and refer to [this HubSpot Knowledge Base article](#). For example: }}

To uninstall {{ App Name }} from your HubSpot account, follow the instructions in [this HubSpot Knowledge Base article](#).

FAQs

Can I use a format that differs from [this template](#)?

Yes. The template above is a guideline of best practices. If you follow it, your setup guide will have a very strong probability of meeting HubSpot's requirements for both listing and certification. However, every setup guide/setup documentation/supporting documentation must include instructions to install and configure the app. Instructions to use and disconnect/uninstall the app are recommended for listing but only required for certification.

Can instructions to install, configure, use, disconnect, and uninstall my app/integration be published on separate pages?

Yes, but all pages or articles must still be publicly available and hyperlinked to the main "Setup documentation URL" included on your App Marketplace listing.