Setup guide - HubSpot

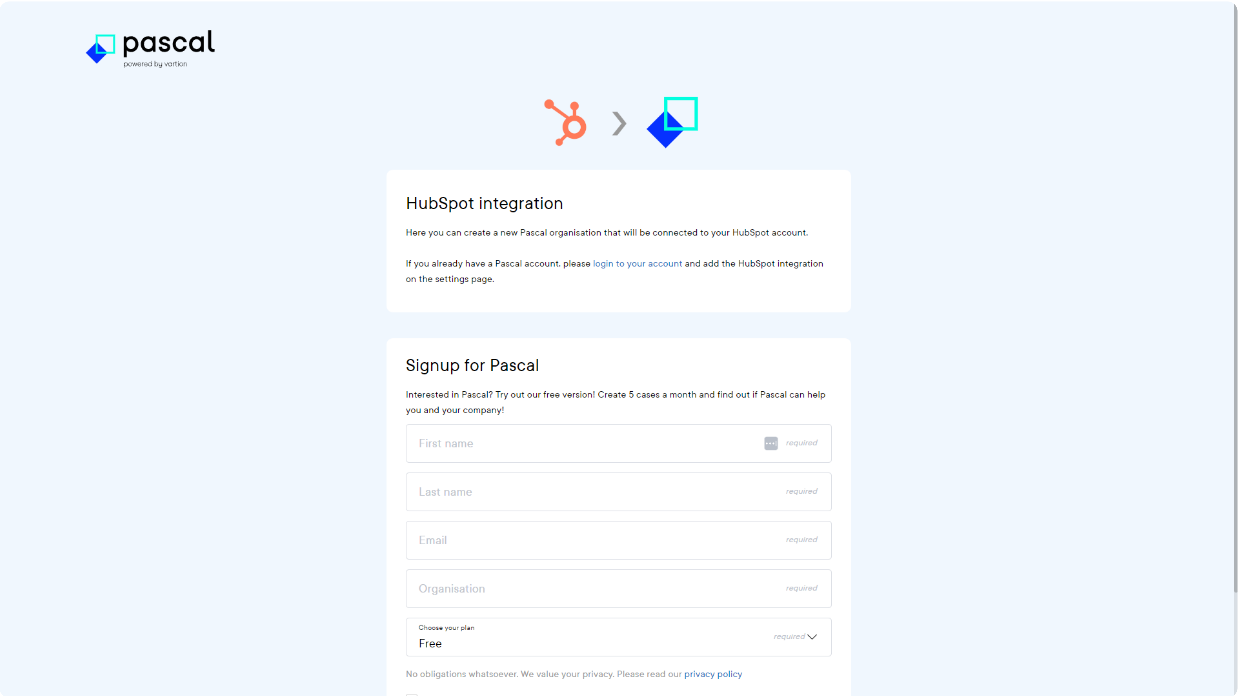
This documentation, including images, videos and text, is accurate as of Version 5.12 of Pascal.

We strive to keep our documentation up to date with each release to ensure it remains a reliable resource for our users. However, given the dynamic nature of our software development, there might be instances where changes introduced in subsequent versions are not immediately reflected in this documentation. We encourage users to refer to the latest release notes and to use the feedback mechanism for any discrepancies or requests for clarification.

How to install the Pascal app in HubSpot

If you already have a Pascal environment, you need to make the HubSpot and Pascal connection from within the Integration settings in Pascal.

1. **Go to the App Marketplace in HubSpot.**
2. **Search for Pascal in the search bar for apps.**
3. **Click on the Pascal app in the search results.**
4. **In the Pascal app marketplace page, click on the Install app button at the top right of the screen.**
5. **If your HubSpot account is connected to multiple HubSpot environments, you will need to select the environment you would like to connect the Pascal app to.**
6. **An overview is given of the app and the button Connect app at the bottom of the screen should be pressed to connect the app.**
7. **Now, a window will open where you can create a Pascal environment**



If you already have a Pascal account, you'll need to connect your HubSpot and Pascal environments from within the Integration settings in the Pascal application.

8 **In this Signup form for Pascal, some information needs to be provided to create the Pascal environment to connect to HubSpot. A first name and last name need to be provided, the email address you would like to use with your account and the name of the Pascal environment you would like to use. There is also an option to choose for a free or paid organisation.**

9 **Select the checkbox if you agree with the statement and click on the Create organisation button.**

10 **Your Pascal environment is now created and linked to your HubSpot environment.**

Add country property for contacts and companies

> *Result quality increases significantly when searching with a name and country. We highly recommend to add the country property for contacts and companies.*

1 **Go to the Contacts page in HubSpot.**

2. **Select the Create contact button.**
3. **Click on Edit this form in the top right corner.**
4. **Select Add properties in the left sidebar.**
5. **Open the section Contact information.**
6. **Select the checkbox Country/Region.**
7. **The new field shows up in the preview of the contact form on the right. To reorder the fields drag the Country/Region field up, and let go just below Last name. This is useful as you can then quickly fill in the contact's first name, last name and country when adding a contact to your HubSpot environment.**
8. **Optionally, you can make the field Country/Region required, so no one in your environment can forget to fill in this field. You can do this by selecting the * button while hovering over the field.**
9. **Click on the Save button in the top right corner.**

These steps can also be followed to add the country property to companies.

Enable notes for all users

When KYC checks are performed in HubSpot contacts or companies, notes of the results and a report about the check is added. It is useful to make sure that all users in HubSpot can see these results and the attached report.

Add or change the permission for users to view all notes in the HubSpot environment. If you are not sure how to do this, use the HubSpot documentation to achieve this.

> *If notes are not enabled for all users, users cannot see KYC check information in the notes from each other.*

Move KYC check card

To make sure the KYC check card is monitored and visible in the HubSpot contact or company page, the card can be moved from the bottom of the right sidebar, to higher in the right sidebar.

1. **Navigate to the Settings by selecting the cogwheel.**

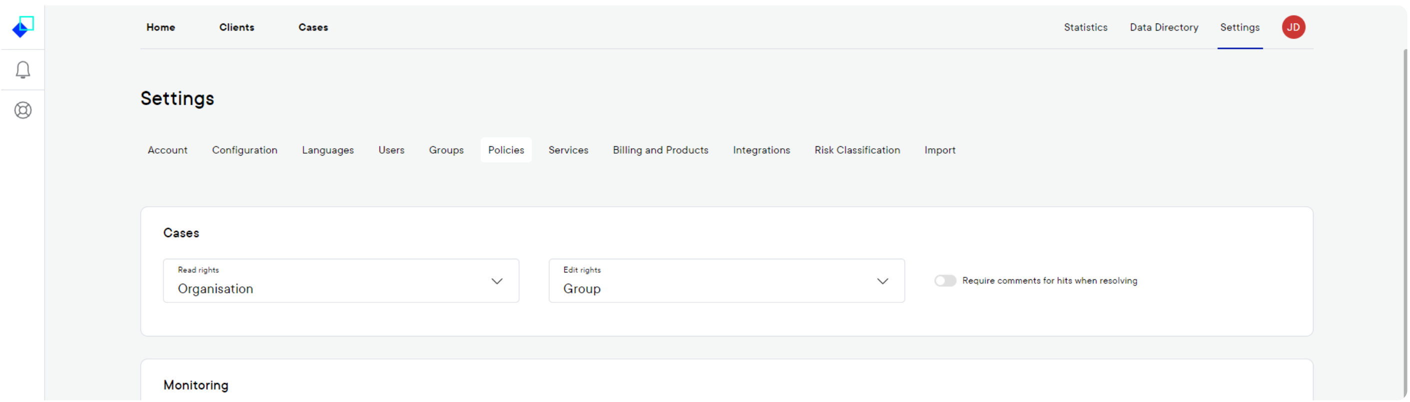
2. Click on the Objects section, and select Companies or Contacts, depending on which page you want to change.
3. Select in the top of the page, the Record customization tab.
4. Click on Customize the right sidebar and edit the Default view or the view of a specific team.
5. When editing a view, move the KYC check card to a higher position in the list.

Change this setting for both the Company and Contact pages.

View policy in Pascal

To make sure all users in HubSpot can see each other KYC checks and no duplicate checks are created, the view policy in Pascal should be changes so everyone can see all checks in the whole Pascal environment. To do this, follow the below steps:

1. Go to the Pascal website by going to [https://app.pascal.vartion.com/.](https://app.pascal.vartion.com/)
2. Login to the application and click on Settings in the top right corner.
3. Click on the Policies tab in the top of the screen.
4. In the Cases card, make sure the Read rights is set to Organisation.
5. If this isn't the case, change the Read rights to Organisation, scroll down to the bottom of the screen and select the Save button at the bottom.



Add KYC check properties to contact and company information

When you add the Pascal application to your HubSpot account, the KYC Risk and KYC Alerts properties are added to your system.

- **The KYC Risk property indicates the risk found in the KYC checks done on your contacts and companies. It can also be overwritten by you if you do not agree with the risk given tot he entity in Pascal.**
- **The KYC Alerts property indicates the found alerts during the screening or continuous monitoring. If this number is higher than 0, it indicates that there are new items which require attention to determine if it are matches or false positives.**

These properties can be added in general overviews to indicate details about the KYC checks.

In below steps will be explained how you can add these properties to the lists overviews of contacts and companies and how to add the property to a contact's page and company's page.

In the list overview of all your contacts and companies you can add the columns KYC Risk and KYC Alerts. To add these columns, follow the below steps:

1. **Click on the Contacts dropdown in the top left of the HubSpot window and click on Contacts or Comapnies.**
2. **Inside the table in the top right corner, select the Actions button.**
3. **Then choose for the Edit columns option.**
4. **Here, numerous properties can be added to the contacts table overview. Search for KYC Risk and KYC Alerts.**
5. **Check the checkbox to include the KYC Risk and KYC Alerts properties in your table overview.**
6. **If you prefer, you can alter the order of the columns on the right side of the window by dragging a property up or down.**
7. **Click on the Apply button when you are finished.**

Another option is to add the KYC Risk and KYC Alerts properties to the contact details and company details pages in the About this contact section. To do this, follow the below steps:

1. **Click on the Contacts dropdown in the top left of the HubSpot window and click on Contacts.**
2. **Inside the table, click on a contact to navigate to that contact's page.**
3. **On the contact's or company's page, click on the Actions button in the About this contact and About this company section on the left side. Click on the Customize properties button.**
4. **Select in the top of this new sidebar the option Add properties.**

5. **Search in the search bar for KYC Risk and KYC Alerts and check the checkbox next to those properties.**
6. **You can move the properties more to the top of the About this contact or About this company section by dragging them up.**
7. **Select the Save button when you are done editing the left sidebar.**

HubSpot tasks for KYC checks

Optionally a workflow can be set up to create KYC checks for contacts and companies meeting certain criteria. As an example, when a deal is added to a company a task can be created for the company owner to perform the KYC check.

To set this up, the below steps can be followed:

1. **Click on the Automations section of HubSpot and select the Workflows tab.**
2. **In the top right, click on Create workflow and select From scratch.**
3. **Select the workflow option Company based with the Blank workflow option and press Next.**
4. **Click on the button Set up triggers and set up to trigger if a deal is attached to the company.**
5. **Press Save when you have set up the trigger.**
6. **Select the plus icon below the trigger, to set up the action if the criteria of the trigger are met.**
7. **Create the action to create a task for the company owner to perform the KYC check.**

You can set up the same workflow for the contact attached to the company and deal.

HubSpot tasks for high KYC Risk

Optionally a workflow can be set up to create a task for a company or contact owner when the KYC Risk of the company or contact is High or Very High.

To set this up, the below steps can be followed:

1. **Click on the Automations section of HubSpot and select the Workflows tab.**
2. **In the top right, click on Create workflow and select From scratch.**
3. **Select the workflow option Company based with the Blank workflow option and press Next.**

4. Click on the button Set up triggers and set up the trigger if the KYC Risk property has a value of High or Very High.
5. Press Save when you have set up the trigger.
6. Select the plus icon below the trigger, to set up the action if the criteria of the trigger are met.
7. Create the action to create a task for the company owner to review the performed KYC check and take action.

You can set up the same workflow for the KYC Risk property in a contact.

HubSpot list for unscreened contacts or companies

Optionally, you can create a view which only includes contacts or companies which do not have a value in the KYC Risk or KYC Alerts property. This list can then be monitored to work though and create KYC checks for.

To set this up, the below steps can be followed:

1. Navigate to the Contacts or Companies page.
2. Click on the Add view option besides the already existing views and select the Create new option.
3. Give the view a name and choose who has access to the view.
4. In this new view, select the Advanced filters option and add the filter KYC Risk is Unknown. In addition, add the filter KYC Alerts is Unknown.
5. After all filters you would like to use are selected, close the filters section.
6. Press the Save button in the top right of the table, to save the selected Advanced filters for this view.

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