CRM Integration

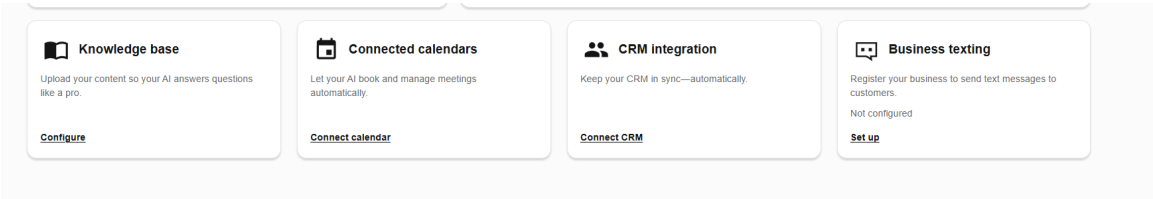
Automatically sync caller data and call activity to HubSpot.

Connecting Your CRM

Business Assistant can automatically update your CRM with contact information and call activity captured during each AI-handled call. This eliminates manual data entry and keeps your customer records up to date without any extra effort from your team.

Currently supported: HubSpot

To connect HubSpot, click Connect CRM on the AI receptionist dashboard, select HubSpot, and follow the OAuth authorization flow to grant Business Assistant access to your HubSpot account. Once connected, the CRM tile on the dashboard will show a connected status.



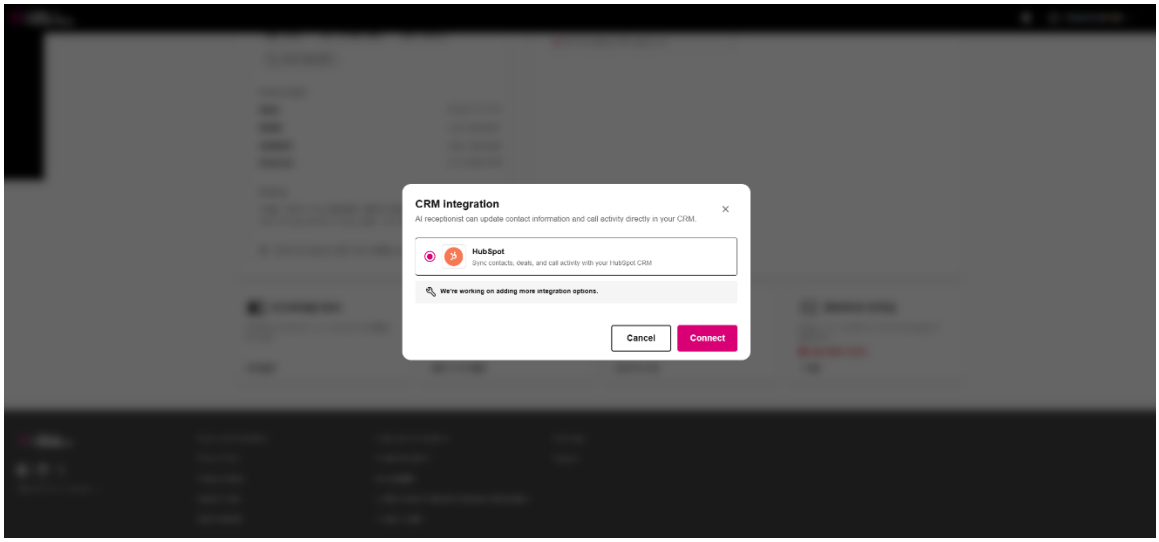


Figure 29: The CRM integration dialog. Select HubSpot and click "Continue" to begin the authorization flow. A note indicates more integrations are coming.

WHAT GETS SYNCED

After each call, Business Assistant can create or update a HubSpot contact record using the caller's phone number, and log a call activity record with the date, time, duration, and topic. No manual entry required.