Integration Setup: HubSpot

Integrations · https://coreel.ai/help/integration-setup-hubspot/

Connecting HubSpot to coReel lets you embed your video emails directly inside HubSpot's compose window, look up HubSpot contacts when sending, and (optionally) trigger HubSpot workflows when prospects watch your videos.

This article walks you through connecting HubSpot and using it from the coReel web app and the Chrome extension.

Before you start

- You'll need an active **HubSpot account** with admin access (or at least App Marketplace install permission).
- You'll need the **coReel Chrome extension** installed if you want to send from inside HubSpot's compose window. See Install the coReel Chrome Extension.
- 5 minutes.

Step 1 — Connect HubSpot

1. Sign in to coReel at app.coreel.ai.
2. Go to **Settings → Integrations**.
3. Find the **HubSpot** card.
4. Click **Connect HubSpot**.

You'll be redirected to HubSpot's authorization page.

Step 2 — Authorize coReel in HubSpot

1. Sign in to HubSpot if prompted.
2. Choose which **HubSpot account** to connect (if you have multiple).
3. Review the permissions coReel is requesting:
    - Read access to your CRM contacts (for recipient lookup)
    - Send emails through your HubSpot account
    - Workflow access (so automations can trigger on video events)
4. Click **Connect app**.

HubSpot will redirect you back to coReel.

Success Check: The HubSpot card in Settings → Integrations should now show **Connected** with the HubSpot portal name.

Step 3 — Test the connection in the web app

1. Click **+ New Video** in coReel and record a short test video.
2. On the send screen, choose **HubSpot** as the send provider.
3. In the recipient field, type a contact's name or email — HubSpot contacts will appear in the autocomplete.
4. Pick the contact and send.

Success Check: The recipient receives your video email. The email appears in HubSpot under the contact's **Activity** timeline as a sent email.

Using HubSpot through the Chrome extension

Once you've connected HubSpot in the web app, the Chrome extension automatically detects HubSpot's compose window and gives you a one-click way to embed a video.

1. Inside HubSpot, click **Email** to open a compose window (from a contact, deal, or company record).
2. You'll see the **coReel button** in the compose toolbar.

3. Click it.
4. Pick **Record New Video** or **Choose Existing**.
5. Record or pick your video, then click **Insert**.
6. A clickable video thumbnail is embedded directly into your HubSpot email.
7. Finish your message and click **Send**.

The email goes out through HubSpot's normal send pipeline and is tracked in HubSpot AND in coReel.

See Chrome Extension in Gmail, Outlook, and CRM Compose for general extension usage.

Triggering HubSpot workflows on video events

Like other CRMs, you can configure coReel to trigger HubSpot workflows on video activity:

- A video is sent
- A recipient watches your video
- A recipient clicks your CTA
- A recipient replies

To set up:

1. In coReel, go to **Settings → Automations**.
2. Pick **HubSpot** as the provider.
3. Map each video event to one or more HubSpot workflows by entering the workflow ID.
4. Save.

You can find a HubSpot workflow ID in the URL of the workflow in HubSpot — it's the numeric ID at the end.

Disconnecting HubSpot

1. Go to **Settings → Integrations**.
2. Find the HubSpot card.
3. Click **Disconnect**.

After disconnecting:

- The Chrome extension's HubSpot integration stops working
- Recipient lookup against HubSpot contacts stops working
- Future automations to HubSpot workflows won't fire

Past sends and past automations remain in HubSpot's records.

Troubleshooting

The coReel button doesn't appear in HubSpot's compose window. Make sure the Chrome extension is installed and enabled. Also verify in **Settings → Integrations** that HubSpot is connected. If both are true and the button still doesn't appear, see Troubleshooting Extension Not Injecting in Compose Windows.

HubSpot contacts don't show up in autocomplete. Disconnect and reconnect HubSpot. The OAuth token may not have CRM read scope. When reconnecting, make sure to accept all permissions.

Sends fail with "HubSpot rate limit exceeded." HubSpot's API has daily send caps depending on your plan. Wait an hour and try again, or upgrade your HubSpot plan if you're hitting limits regularly.

A workflow didn't trigger when expected.

- Verify the workflow ID in **Settings → Automations** matches the actual HubSpot workflow ID.
- Make sure the workflow is **published** (not draft) in HubSpot.
- Check HubSpot's workflow log for the contact in question — it'll tell you if the trigger fired but the workflow's own conditions blocked execution.

I see a 400 error during send. Usually a malformed request or missing required HubSpot property. Try sending to a different contact to isolate the issue. If it's reproducible across contacts, contact support.