

SETUP GUIDE

True Autograph *for HubSpot*

Send documents for signature from HubSpot contacts, companies, and deals. Every step lands on the record's timeline as it happens, and the signed PDF and the answers you choose come back to the record.

PLANS

Every plan, Starter included

SETUP TIME

About 10 minutes

UPDATED

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THE STEPS

1. Connect HubSpot from True Autograph
2. Add the card to your record pages
3. Choose which answers are saved to HubSpot fields (optional)

What you get

- A **True Autograph signatures** card on contacts, companies, and deals. Pick a template, enter the signers, and send. The first signer comes from the contact, or from a deal's first contact.
- Every request sent from the record, with each signer's status.
- Each step as a note on the record's timeline, in real time: sent, opened, each reminder, signed, declined (with the reason), voided, and expired.
- When everyone has signed, a "Signed" note with the signed PDF attached. The PDF is stored privately in your HubSpot files.
- Answers you choose saved to HubSpot properties, such as a policy number, a start date, or a checkbox the signer ticked.
- It works on every HubSpot plan, and on every True Autograph plan, Starter included. Nothing is installed or run inside HubSpot.

What you need

- A True Autograph workspace on any plan, and a True Autograph admin to connect HubSpot.
- A HubSpot user who can install apps in your HubSpot account, such as a super admin.
- Any HubSpot plan.

Setting it up

1 Connect HubSpot from True Autograph

1. Sign in to True Autograph as an admin and open **Settings**.
2. Under **Integrations**, find **HubSpot** and click **Connect HubSpot**.
3. HubSpot asks which account to use and shows what True Autograph can access. Choose your account and click **Connect app**.
4. You come back to True Autograph Settings, and the HubSpot card says **Connected to** your account.

True Autograph asks HubSpot for access to contacts, companies, and deals (to read the signer and write notes and answers), to files (to save the signed PDF), and to property definitions (to offer only fields that fit each answer).

Started from HubSpot instead, with an install link? After you approve in HubSpot, sign in to True Autograph and confirm which workspace the HubSpot account belongs to. The confirm screen names who approved the install. If you did not expect it, click Cancel.

One HubSpot account connects to one True Autograph workspace, and one workspace connects to one HubSpot account.

2 Add the card to your record pages

1. In HubSpot, open any contact.
2. Choose **Customize** for the record page, open the tab where you want the card, and add **True Autograph signatures** from the card library.
3. Save. Repeat for companies and deals.

3 Choose which answers are saved to HubSpot fields (optional)

Nothing is written to your properties unless you choose it. First, in HubSpot, create a property for each detail you want to keep, such as "Policy number" on deals. Then:

1. In True Autograph **Settings**, on the HubSpot card, click **Choose which answers are saved to HubSpot fields**.
2. Pick a template, then **Contacts**, **Companies**, or **Deals**.
3. For each answer, choose a HubSpot field, or leave it on **Not saved to HubSpot**. Only fields that can take that kind of answer are offered, and fields with matching names are suggested.
4. Click **Save**. Only admins can change these; everyone else can look.

Answer	Where it can go
Checkbox	A yes-or-no property, a text property, or a dropdown with Yes and No choices.
Date	A date property or a text property.
Name or title	A text property.
Text	Most property types. Numbers like "\$1,250.50" are saved as 1250.5, and a dropdown choice is matched by its label or value.

- Answers are saved to the record the request was sent from.
- A blank answer never clears a property.
- If HubSpot refuses one value, the others are still saved, and the "Signed" note lists what was not saved and why.

Using it

Sending for signature

On a contact, company, or deal, open the **True Autograph signatures** card and click **Send for signature**. Choose a template, enter each signer, fill in any details the template asks you for, and adjust delivery if you like: when it expires, whether reminders go out, how many, and how many days apart. Send.

The HubSpot user who sends is the sender, so they get the notices if a signer declines or the request expires. Signers get an email with a private link and never need a HubSpot or True Autograph account.

Following a request

The card lists every request sent from the record with each signer's status. The record's timeline gets a note for each step, dated when it happened, for example "Services Agreement was sent to Rose Gonzalez for signature." When everyone has signed, a "Signed" note carries the PDF.

Disconnecting

In True Autograph **Settings**, on the HubSpot card, click **Disconnect**. The app is removed from HubSpot and the card stops working there. Notes already saved stay on the records.

Troubleshooting

What you see	What to do
The card says "Connect True Autograph"	This HubSpot account is not connected to a workspace yet. A True Autograph admin connects it (step 1), then click "I have connected it" on the card.
Settings says HubSpot no longer accepts the connection	The app was removed in HubSpot, or its access was revoked. Click Connect HubSpot again. Nothing is lost: waiting steps are written once it is connected.
The fields screen says to connect HubSpot again	Your connection was made before field mapping existed and cannot read property definitions. Click Connect HubSpot again and approve.
A property is missing from the list	Only properties that can take that kind of answer are offered, and read-only or calculated properties never are. Check the property's type in HubSpot, or create a new one.
An answer was not saved	Open the "Signed" note on the record. It lists each answer that was not saved and why, for example "does not match any choice in this HubSpot field".
"Already connected to another workspace"	Each HubSpot account connects to one workspace. Disconnect it in the other workspace first.
A message about the monthly allowance when sending	The workspace has used its envelopes for the month. Requests sent from HubSpot count like any other.

The online version of this guide is at www.trueautograph.com/help/hubspot, with answers to common questions at www.trueautograph.com/help. Need a hand? Email brez@phlogistoncloud.com and we will set it up with you.