



Zapier Set-Up Guide

Here are the steps to automate Giftbit and HubSpot with a simple Zapier connection.

Before you start

You will need to have the following ready:

- ▶ HubSpot account
- ▶ Giftbit account
- ▶ Zapier installed in your HubSpot Marketplace
- ▶ A ready Template in your Giftbit account.
[Learn how to create a template here](#)



Log in to the three apps.



Important note on testing:

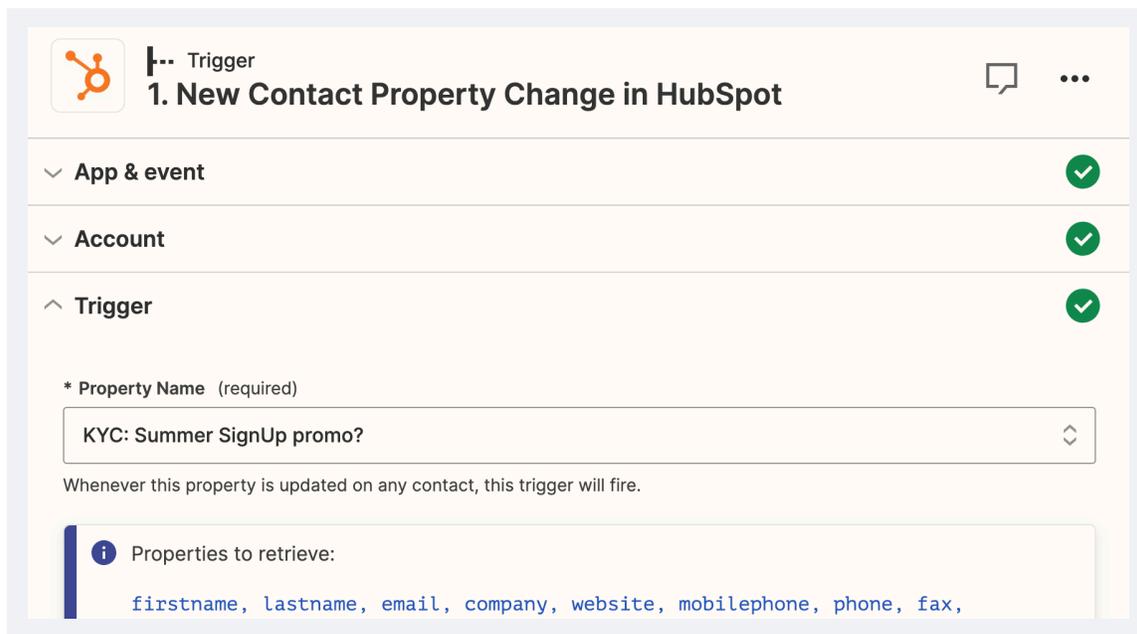
You can test the integration of your Zap whether you have a Giftbit balance or not.

If you have a balance, keep in mind that testing the Zap will result in an actual reward being sent, which will decrease your balance. This is useful for testing the complete flow, but refrain from claiming the reward. Our team can cancel it and restore your balance.

If you don't have a balance, the order will be put on hold. Once you're done testing, inform our support team, and we'll cancel the order.

1. Set the trigger

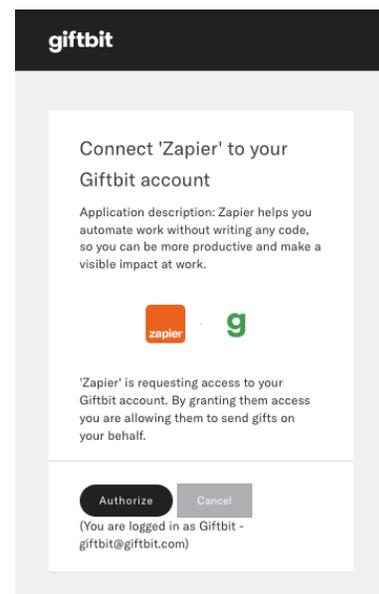
- **Log in** to Zapier and click on the 'Make a Zap' button to create your automation
- **Search** for 'HubSpot' in the search bar and select it as the trigger app
- **Choose** the trigger event 'New Contact Property Change in HubSpot' to trigger the Zap when you update a new property in HubSpot
- **Connect** your HubSpot account by following the prompts and select the appropriate HubSpot account to test the trigger
- **Select** the HubSpot property that you want to use to trigger the Zap



The screenshot shows the Zapier configuration page for a trigger. At the top, it says "Trigger" and "1. New Contact Property Change in HubSpot". Below this, there are three sections: "App & event", "Account", and "Trigger", each with a green checkmark indicating it is successfully configured. Under the "Trigger" section, there is a dropdown menu for "Property Name" with the selected value "KYC: Summer SignUp promo?". Below the dropdown, it says "Whenever this property is updated on any contact, this trigger will fire." At the bottom, there is a section for "Properties to retrieve:" with a list of properties: "firstname, lastname, email, company, website, mobilephone, phone, fax,".

2. Set the action

- **Search** for 'Giftbit'.
- **Select** the action event 'Send Reward' to automate the reward fulfillment process.
- **Connect** your Giftbit account by following the prompts and choose the reward you want to send.
- **Map** the data from HubSpot to Giftbit to ensure that the right reward goes to the right person. Match the HubSpot fields (e.g., Name, Email, etc.) with the corresponding Giftbit fields to personalize the reward.



The screenshot shows the Giftbit authorization screen. At the top, it says "giftbit". Below this, it says "Connect 'Zapier' to your Giftbit account". Underneath, there is an "Application description: Zapier helps you automate work without writing any code, so you can be more productive and make a visible impact at work." Below the description, there are logos for Zapier and Giftbit. Below the logos, it says "'Zapier' is requesting access to your Giftbit account. By granting them access you are allowing them to send gifts on your behalf." At the bottom, there are two buttons: "Authorize" and "Cancel". Below the buttons, it says "(You are logged in as Giftbit - giftbit@giftbit.com)".



Note: Set a "Reward Limit" if you want to limit to one per person.

Contact First Name

1. Contact information: First Name: Andrew

Reward Limit

By email address and template

Reward Limit Custom

Search...

By email address and template

3. Test & activate

- **Test** your Zap to check if the automation works correctly. Zapier will show you the results in real-time.
- Once you're satisfied with the test, **activate** your Zap, and it's ready to work its magic!



That's it!!

You've successfully created a zap that connects HubSpot and Giftbit to automate reward fulfillment for your campaign. Now, sit back, relax, and let the automation do the hard work for you.



We're here to help

Visit the help center at help.giftbit.com

Email support@giftbit.com

Call toll-free **1-877-554-2186**