

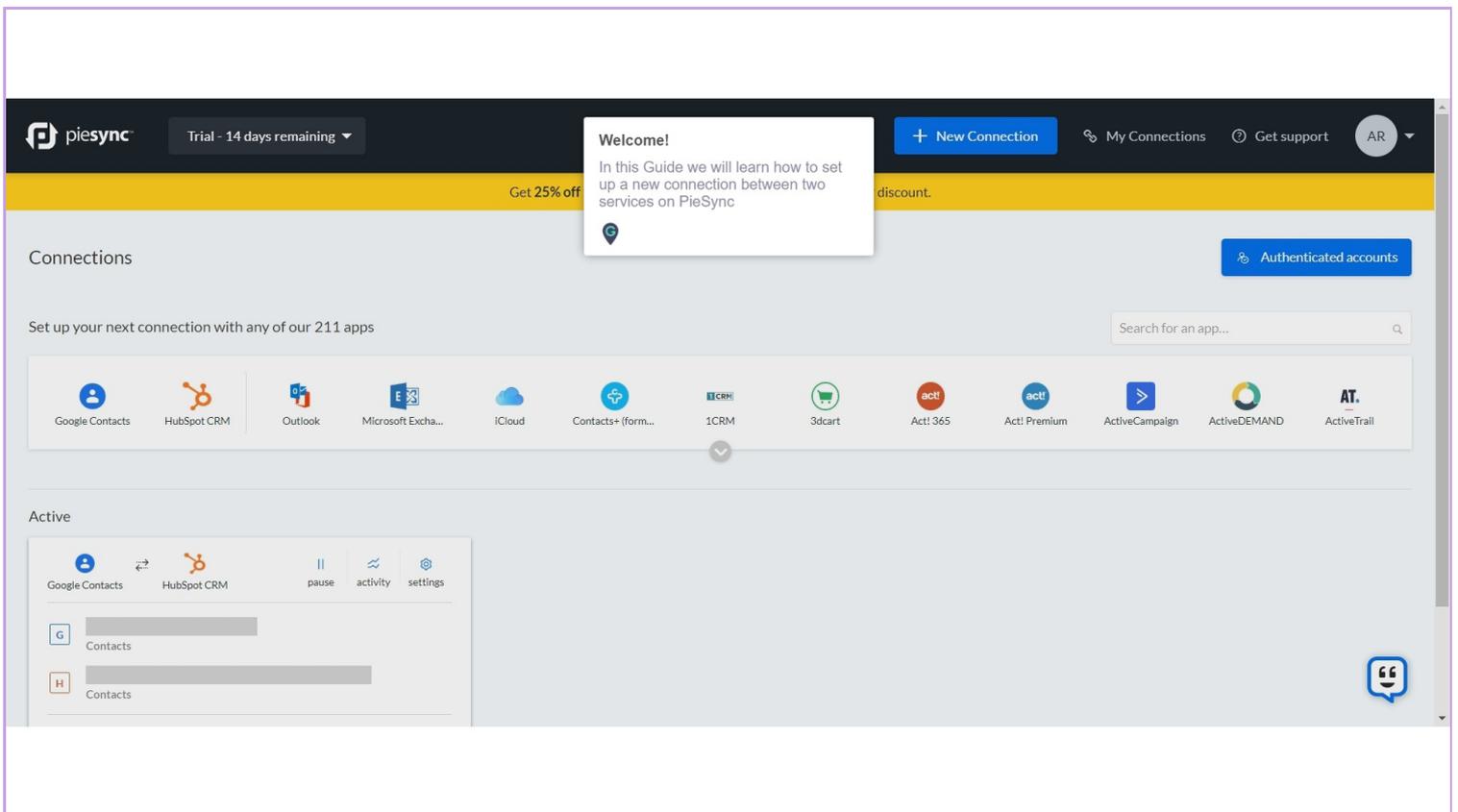


How to set up a new connection between two services on PieSync

Step: 01

Welcome!

In this Guide we will learn how to set up a new connection between two services on PieSync



Step: 02

Click on "New Connection"

The screenshot displays the Piesync web application interface. At the top, there is a dark navigation bar with the Piesync logo on the left, a 'Trial - 14 days remaining' indicator, a '+ New Connection' button, and a user profile icon labeled 'AR'. A yellow banner below the navigation bar contains the text 'Get 25% off when you upgrade using your HubSpot Customer discount.' A callout box points to the '+ New Connection' button with the text 'Click on "New Connection"'. The main content area is titled 'Connections' and includes a sub-header 'Set up your next connection with any of our 211 apps' and a search bar. Below this is a horizontal scrollable list of application icons, including Google Contacts, HubSpot CRM, Outlook, Microsoft Exchange, iCloud, Contacts+ (form...), 1CRM, 3dcart, Act! 365, Act! Premium, ActiveCampaign, ActiveDEMAND, and ActiveTrail. A 'Authenticated accounts' button is located in the top right of the main content area. Below the 'Connections' section is an 'Active' section showing a detailed view of the Google Contacts and HubSpot CRM connection. This view includes icons for 'pause', 'activity', and 'settings', and lists two 'Contacts' entries with their respective icons (G and H). A 'Running' status indicator and a 'pending' label are also visible. A chat bubble icon is located in the bottom right corner of the main content area.

Step: 03

Select two services you want to connect

Click on each, one by one

The screenshot shows the Piesync web interface. At the top, there is a dark navigation bar with the Piesync logo, a trial status indicator ('Trial - 14 days remaining'), and a '+ New Connection' button. A white tooltip is positioned over the 'New Connection' button, containing the text: 'Select two services you want to connect' and 'Click on each, one by one'. Below the navigation bar is a yellow banner with a 'Get 25%' discount offer. A progress bar below the banner shows four steps: '1 Choose your apps', '2 Authorize your apps', '3 Choose your contact type', and '4 Configure your connection'. The main content area is titled 'Start by choosing the first service you want to connect.' and features a search bar with the placeholder text 'Type to search for a service...'. Below the search bar is a grid of 30 service icons, each with its name underneath. The services listed are: Google Contacts, Outlook, Microsoft Exchange, iCloud, Contacts+ (formerly FullContact), 1CRM, 3dcart, Act! 365, Act! Premium, ActiveCampaign, ActiveDEMAND, ActiveTrail, Acumatica CRM, Agendor, Agile CRM, Aircall, AllClients, amoCRM, Apollo, Apptivo, APROPLAN, AT&T Office@Hand, Autoklose, Autopilot, AWeber, Benchmark, bexio, BigCommerce, BigContacts, Bitrix24 CRM, BombBomb, Bookeo, and BoomTown. A chat icon is located in the bottom right corner of the grid.

Step: 04

Authorize both accounts one by one to create your sync

The screenshot displays the Piesync web application interface during the authorization process. At the top, a dark navigation bar contains the Piesync logo, a trial status indicator ("Trial - 14 days remaining"), a "+ New Connection" button, and links for "My Connections", "Get support", and a user profile icon labeled "AR". A yellow banner below the navigation bar offers a "Get 25% off" discount. A white tooltip box is positioned over the navigation bar with the text "Authorize both accounts one by one to create your sync".

Below the navigation bar, a light blue progress bar shows four steps: "1 Choose your apps", "2 Authorize your apps", "3 Choose your contact type", and "4 Configure your connection". The main content area features two columns for account selection. The left column is for "Google Contacts" and the right column is for "HubSpot CRM". Each column has a blue button labeled "Choose an existing account..." and a link below it that says "or add a new account...".

Centered below these columns is the instruction: "Authorize both accounts to create your sync!" followed by the explanatory text: "We need permission to access your Google Contacts and HubSpot CRM accounts, this is necessary to keep your accounts in sync." At the bottom left, the copyright notice "© 2020 PieSync NV" is visible, and at the bottom right, there is a chat support icon.

Step: 05

Click on "Configure the sync between Google Contacts and HubSpot CRM"

The screenshot displays the Piesync web interface. At the top, there is a dark navigation bar with the Piesync logo, a trial status indicator ("Trial - 14 days remaining"), a "New Connection" button, and links for "My Connections", "Get support", and a user profile. Below this is a yellow banner with a promotional message: "Get 25% off when you upgrade using your HubSpot Customer discount." A light blue breadcrumb trail shows the current step: "1 Choose your apps > 2 Authorize your apps > 3 Choose your contact type > 4 Configure your connection". The main content area features two columns for "Google Contacts" and "HubSpot CRM", each with a grey bar and the text "or add a new account...". A blue-bordered box highlights the text "Configure the sync between Google Contacts and HubSpot CRM" in the center. A callout box on the right points to this text with the instruction: "Click on 'Configure the sync between Google Contacts and HubSpot CRM'". The footer includes the copyright notice "© 2020 PieSync NV" and a chat icon.

Step: 06

Set up "Connection Rules"

The screenshot displays the Piesync web interface for configuring connection rules between Google Contacts and HubSpot CRM. The top navigation bar includes the Piesync logo, a trial status indicator, and buttons for '+ New Connection', 'My Connections', 'Get support', and a user profile icon. The main content area is titled 'Connection Rules' and features two rule configurations. Each rule consists of an 'IF' condition and a 'THEN' action. The first rule is: 'IF a contact is in Google Contacts - add filter ... THEN sync it two-way between Google Contacts and HubSpot CRM - add action ...'. The second rule is: 'IF a contact is in HubSpot CRM - add filter ... THEN sync it two-way between Google Contacts and HubSpot CRM - add action ...'. A callout box with a location pin icon points to the 'Set up "Connection Rules"' text. Below the rules, there is an 'Add another rule...' button and a 'Refresh rules' button. At the bottom, the 'Connection Settings' section includes an 'Avoid duplicates' option with a dropdown menu set to 'When we initially match up contacts and a field's value is different'.

Step: 07

Update "Connection Settings"

The screenshot shows the PieSync web interface. At the top, there is a navigation bar with the PieSync logo, a trial status indicator ('Trial - 14 days remaining'), a '+ New Connection' button, and links for 'My Connections', 'Get support', and a user profile 'AR'. Below the navigation bar, there is a filter bar with 'and', 'add Label', 'Coworkers', and 'add action ...'. A dialog box titled 'Update "Connection Settings"' is open, showing a location pin icon. Below the dialog, the 'Connection Settings' section is visible, containing several configuration options:

- Avoid duplicates**
 - Only sync contacts that have an email address
Mandatory setting to avoid duplicates as PieSync matches contacts based on their email address(es).
- Additional Options**
 - Sync contacts to the main Contacts folder in Google Contacts
Required if you want contacts to be displayed in your phone's address book
- When we initially match up contacts and a field's value is different**
 - Use the value from Google Contacts
 - Use the value from HubSpot CRM

This is relevant for matching contacts that sit in your apps prior to syncing - where PieSync needs to know which information to keep moving forward. In a 2-way sync, regardless of which app is selected here, updates to contacts will always sync to the other side.

The 'Field Mappings' section is partially visible at the bottom, showing a 'Default field mapping (12 fields)' with a 'Prefix' field and a 'Salutation' field.

Step: 08

Edit "Field Mappings"

The screenshot displays the 'Edit Field Mappings' configuration page. At the top, there is a navigation bar with a '+ New Connection' button, 'My Connections', 'Get support', and a user profile icon labeled 'AR'. Below the navigation bar, the page title 'Field Mappings' is visible. The main content area is titled 'Default field mapping (12 fields)' and contains a table of mappings. Each row represents a mapping between a source field (with a person icon) and a target field (with a link icon). To the right of each target field is a green toggle switch labeled 'ON'. A chat bubble icon is located at the bottom right of the table.

Source Field	Target Field	Status
Prefix	Salutation	ON
First Name	First Name	ON
Last Name	Last Name	ON
Company	Company Name	ON
Job Title	Job Title	ON
Notes	Message	ON
Emails	Primary Email	ON
Phones	Phone	ON
Phones (mobile)	Mobile Phone	ON

Step: 09

Click on "Start Syncing Now!"

The screenshot shows the Piesync web interface. At the top, there is a dark navigation bar with the Piesync logo, a trial status indicator ('Trial - 14 days remaining'), and buttons for '+ New Connection', 'My Connections', 'Get support', and a user profile icon labeled 'AR'. Below the navigation bar, a table displays field mappings for various categories. Each row includes a category name, a bidirectional sync icon, a field name, a sync icon, and a toggle switch. The categories and their corresponding fields are: Emails (Primary Email), Phones (Phone), Phones (mobile) (Mobile Phone), Phones (fax) (Fax), Websites (Website), and Addresses (Address). All toggle switches are currently turned 'ON'. Below the table, there are links for 'Add field mapping' and 'Refresh field list'. A 'Delete connection' button is also visible. At the bottom of the interface, there is a footer with copyright information and a support link. A callout box in the bottom right corner contains the text 'Click on "Start Syncing Now!"' and a blue button labeled 'Start Syncing Now!' with a right-pointing arrow. A chat icon is also present in the bottom right corner.

Category	Field	Status
Emails	Primary Email	ON
Phones	Phone	ON
Phones (mobile)	Mobile Phone	ON
Phones (fax)	Fax	ON
Websites	Website	ON
Addresses	Address	ON

Step: 10

Read the terms and click on "Start Syncing!"

The screenshot shows the PieSync web interface. On the left, there is a list of data types to sync: Emails, Phones, Phones (mobile), Phones (fax), Websites, and Addresses. Each item has a bidirectional arrow icon. The main area is a modal dialog titled "Start your sync". The dialog contains the following text:

Start your sync

If you already use a built-in or third party integration between these two apps, please disable it before continuing. Otherwise, contacts could be duplicated!

It's also important that you remove duplicates before proceeding with the synchronization. This will prevent duplicates from being synced from one system to the other.

Please note that once a sync is running, PieSync will not delete contacts for you.

[Here are 5 quick steps to prep your data.](#)

At the bottom of the dialog are two buttons: "Cancel" and "Start Syncing!".

Below the dialog, there is a "Delete connection" button and a "Refresh field list" button. At the bottom right, there are two buttons: "Save For Later" and "Start Syncing Now!".

At the bottom left, there is a copyright notice: "© 2020 PieSync NV".

Step: 11

Synchronization is active now!

The screenshot displays the Piesync web application interface. At the top left, the Piesync logo is visible next to a trial status indicator: "Trial - 14 days remaining". A central notification box states "Synchronization is active now!". To the right of the notification are buttons for "+ New Connection", "My Connections", "Get support", and a user profile icon labeled "AR".

Below the navigation bar is a progress indicator consisting of a horizontal line with 20 blue dots. A "New: Health!" message follows, stating: "Monitor the sync activity of all your contacts, including error messages where relevant. Check out the beta now!".

Three summary cards are shown below the message:

- failing to sync**: 0 items (indicated by a red 'x' icon).
- excluded**: 1 item (indicated by a grey circle icon), with a "view list" link.
- duplicates**: 0 items (indicated by a grey circle icon).

The "Activity" section features a search bar and a list of sync events:

- Now**: ✔ Synchronization is active
- 0h ago**: 🔄 212 updates to contactus@printland.in, admission@mitcom.edu.in, noreply_feedback@redbus.in and others

At the bottom left, the copyright notice "© 2020 PieSync NV" is displayed. At the bottom right, there is a chat bubble icon.

Thank You!

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