



***The Stripe + HubSpot
Connection You've Been
Waiting For***

Intro.

To expand HubSpot's CRM capabilities, HubSpot forged a partnership with Stripe and announced HubSpot payments in late 2021. The initiative was to create a no-code solution to enable credit card and bank transfers with the integration of Stripe & HubSpot.

Prior to 2020, many of HubSpot's service-oriented small-and medium-sized business users – hadn't set up mechanisms for digital commerce. Invoices would be taken care of through separate accounting departments. Few had the opportunity to code their own integrations with companies such as Stripe or Paypal.

HubSpot Payments aims to streamline the B2B buying experience, which historically happens across multiple disconnected tools. The advantage behind HubSpot Payments was to minimize tech frustration, maximize sales opportunities and minimize room for human error that's expected when handling data.

In 2022, A8 Labs released Zaybra into the app marketplace, which will function as A8 Lab's signature Stripe & HubSpot integration tool. The app is expected to take the advantages introduced by HubSpot Payments a step further.

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Getting Started With Zaybra

Why Integrate Stripe & HubSpot with Zaybra

Zaybra carries familiar functionalities associated with HubSpot Payments. In essence, Zaybra creates a seamless experience for working with both Stripe & HubSpot to minimize back and forth between these two platforms. Modifying the records of a customer's quotes, transactions or subscriptions will update as live changes made in both platforms simultaneously. This minimizes wasted time and human errors case by case.

As a feature unique to Zaybra, users have the ability to view and create aggregated reporting on all transactions & subscriptions to help you keep track of your changing overall MRR or MRR per customer . If you are familiar with HubSpot Payment's subscription cards, you will notice the same functionality within Zaybra, except each subscription card displays customer-specific MRR as well as a drop-down menu allowing you to create Stripe Payment links or recurring subscriptions.

HubSpot Payments requires a handful of manual steps in order to get your Stripe data transferred smoothly. With Zaybra, there are only three easy steps to take that require no-code and no developer.

Setting Up Zaybra

Zaybra automatically syncs your Stripe Customers with your HubSpot Contacts during the first initial sync.

During the sync, Zaybra will rely on email addresses collected by your Stripe to match to corresponding contacts within HubSpot. If no matching contact is found, then Zaybra will automatically create that contact within HubSpot.

All transaction and subscription history will be transferred into HubSpot.

Steps

01.



Step One

Install Zaybra

02.



Step Two

*Connect Stripe Account
to A8 Labs Admin Portal*

03.



Step Three

*Map HubSpot Products
to The Matching Stripe
Products*

Zaybra Overview

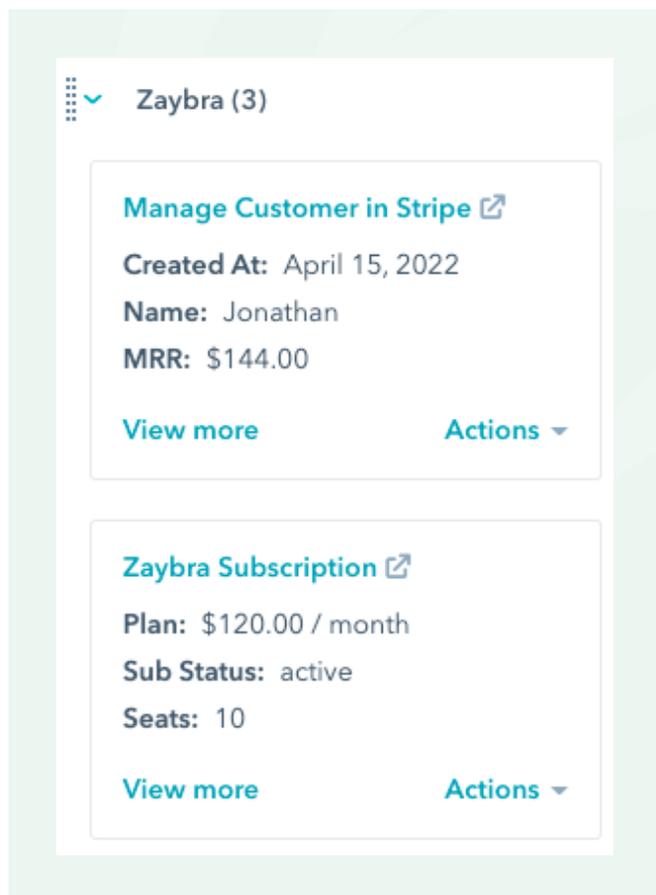
View & Manage Stripe Data in HubSpot

With Zaybra, you can give your service team the capability to update Stripe subscriptions directly within your HubSpot CRM. In an example scenario, where a customer requests for additional seats to be added to a subscription plan, a service representative can add those additional seats via Zaybra.

By centralizing data within HubSpot, you can easily build more accurate reports such as MRR, daily transactions, weekly transactions, in the HubSpot dashboard.

Customer Card

You can see a customer's overall MRR as well as MRR for each of their subscriptions separately or combined.



The screenshot displays a Zaybra interface with a header 'Zaybra (3)' and a dropdown arrow. Below the header are two main sections:

- Manage Customer in Stripe** (with an external link icon):
 - Created At: April 15, 2022
 - Name: Jonathan
 - MRR: \$144.00
 - Buttons: View more, Actions
- Zaybra Subscription** (with an external link icon):
 - Plan: \$120.00 / month
 - Sub Status: active
 - Seats: 10
 - Buttons: View more, Actions

Transactions vs. Payment Links

You can directly create a payment link or transaction without leaving the customer's profile in HubSpot. Saves time and prevents human error. Rather than having to find and update customers separately in Stripe and then later in Hubspot, it's all done combined.

Zaybra connects HubSpot and Stripe, allowing you to create Stripe transactions or payment links directly within a contact's profile in HubSpot!

- **Stripe Transaction:** Creating this allows you to immediately create a transaction using the customers card information within HubSpot. This is ideal if you are taking payment over the phone.
- **Stripe Payment Link:** Creating this generates a link with the products you choose for the customer to pay online. This is great for quickly creating payment links you can email to customers!

How to Create a Stripe Transaction



Step One

Navigate to the HubSpot contact you are to creating a transaction for.



Step Two

In the Zaybra Subscription card on the right side, click *Actions* on the top card then *Create Stripe Transaction*.



Step Three

This will open up a window that allows you to choose the products and enter in the debit/credit card information for the customer.



Step Four

After you have verified all the information is correct, hit *Create* and this will create the transaction within Stripe.

Once the transaction has been processed you will see a message either confirming the transaction was successful or if there is an error.

If you receive a “Unable to save transaction” message this can mean:

1. There was an error in the payment method
2. The product is an “archived” product/price
3. The products have a mixed billing cycle (Stripe does not allow different billing cycle on the same subscription)



NOTE: These are the most common reasons you will receive an error message. If you have confirmed the options above are not causing the error message, you may need to refer to Stripe documentation for troubleshooting.

How to Create a Stripe Payment Link



Step One

Navigate to the HubSpot contact you are creating a transaction for.



Step Two

In the Zaybra Subscription card on the right side, click *Actions* on the top card then *Create Stripe Payment Link*.



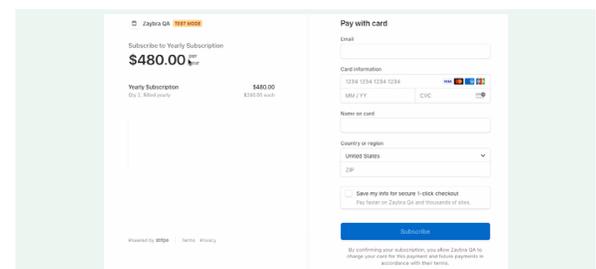
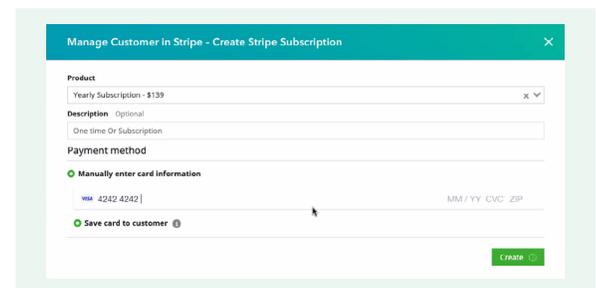
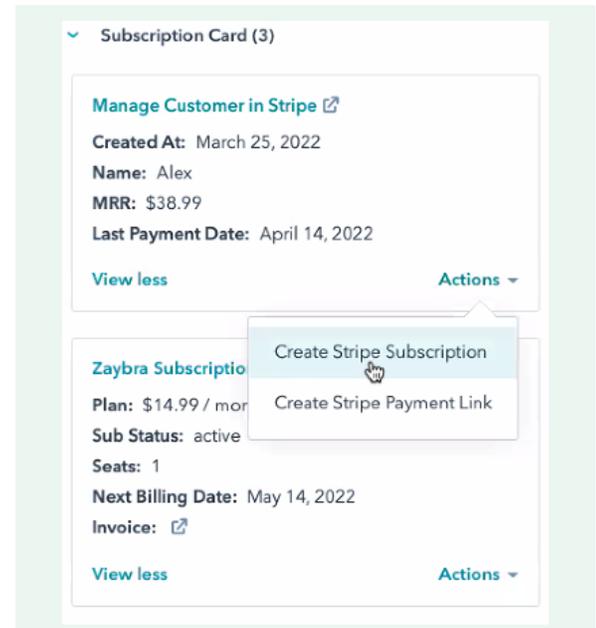
Step Three

This will open up a window that allows you to choose the products and quantity. You can add products and select the quantity by clicking *Add Product*.



Step Four

After you have verified all the product information is correct, hit *Generate Link* and this will create the Stripe Payment Link. **You will need to copy this link before closing out the window otherwise the link will be lost.**



NOTE: This payment link is not customer specific so if the customer uses a different email the Subscription and Payment transaction will be recorded to the customer associated with the email address that was used.

Update a Stripe Subscription

Zaybra allows you to update Stripe Subscriptions directly on a contact's profile within HubSpot!

Updating a subscription adds the product(s) to the customer's subscription or changes the quantity of a product on the subscription. Currently, you cannot completely remove products from a subscription via Zaybra.

When applying updates you have three options for charging the customer:

- 1 None: This automatically adds prorations to the next invoice.
- 2 Always Invoice: This will calculate the proration and then immediately generate an invoice after making the switch.
- 3 Create Prorations

Editing a Subscription

01.  **Step One**
In HubSpot, navigate to the *Contacts Profile* you wish to edit the subscription for.
02.  **Step Two**
In the *Zaybra Subscriptions* card select *Actions* on the subscription you would like to edit.
03.  **Step Three**
This will bring up a window that allows you to add products and increase/decrease the quantity of products. You can also choose to prorate or invoice the changes.
04.  **Step Four**
Once you have verified all the product information is correct, click *Update* and you will see a message either confirming the transaction was successful or if there is an error.

If you receive an “Unable to save transaction” message this can mean:

- There was an error in the payment method
- The product is an “archived” product/price
- The products have a mixed billing cycle (Stripe does not allow different billing cycle on the same subscription)



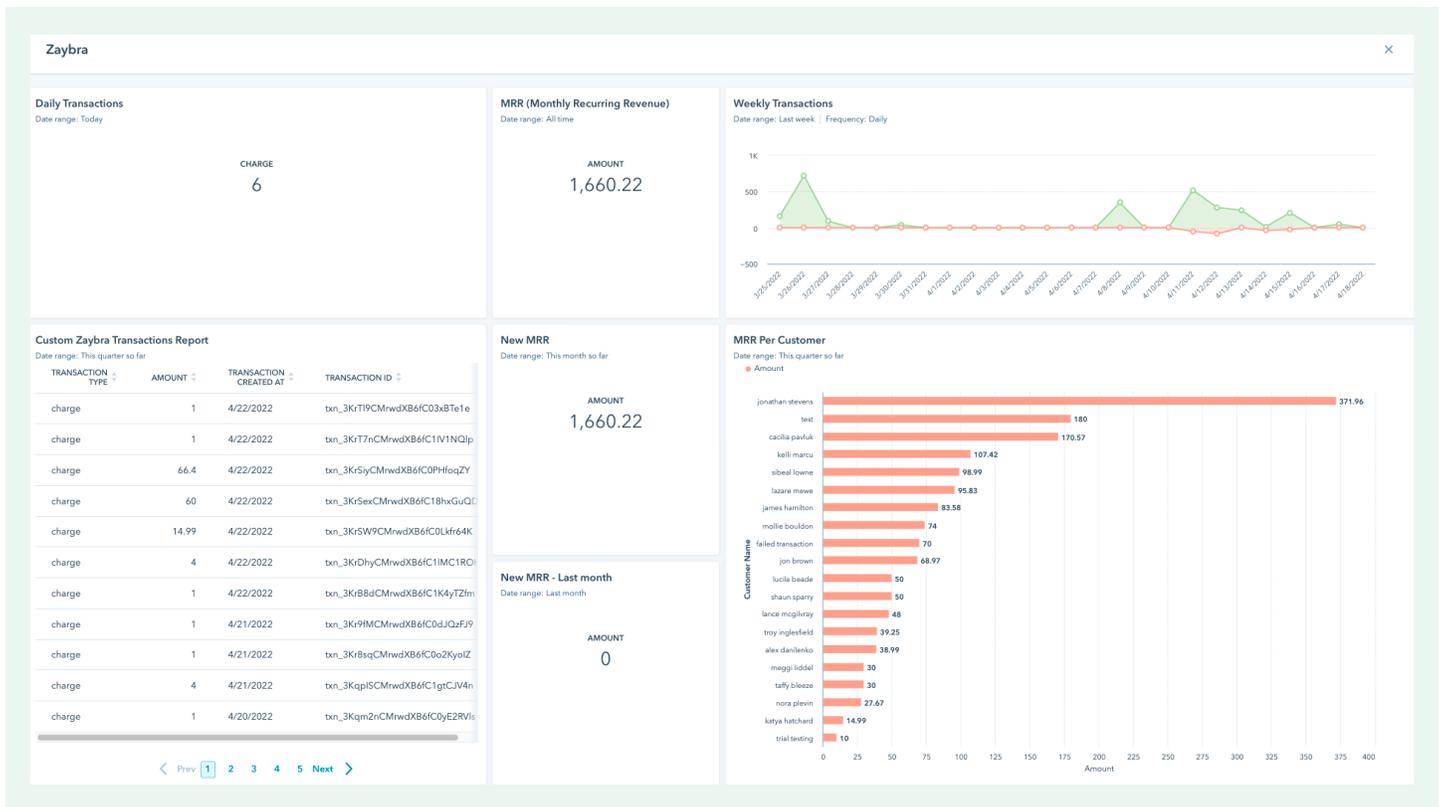
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Tracking & Reporting

Reporting is always a huge need when it comes to subscription and revenue management. With Zaybra bringing all of the Stripe data directly into your HubSpot instance, you're able to create lots of different reports and dashboards based on your business needs.

Here are a few examples:

- MRR by Customer
- Total New Subscriptions This Month
- Monthly Churn
- Total MRR
- Total Amount of Refunds
- Subscriptions by Product



Get In Touch

We hope that you've learned a few ways you can use Zaybra to enhance your organization's HubSpot & Stripe integration experience. A8 Labs combines our HubSpot expertise with our best in class platform development chops to build applications that extend what HubSpot is capable of.

A8 Labs gives special thanks to Stripe for this fantastic partnership. We're confident that our combined efforts in bringing Zaybra to life will offer nothing but breakthroughs in the way organizations aim to optimize their acquisition efforts moving forward.



Should you see something applicable to your goals and need a resource to help, you can find us at aptitude8.com. **Please feel free to contact us.**