



# HubSpot and iSAMS Sync

A guide for education providers



Helping education organisations grow



## Our background

HubGem is a specialist marketing and CRM agency dedicated to helping education and non-profit organisations grow.

**We are proud to be a Diamond HubSpot Solutions Partner,** with expertise in implementing inbound marketing methods to recruit new supporters. At HubGem we are a passionate team helping a variety of education clients, from all over the world, to grow better using HubSpot CRM.

**We are delighted to have partnered with Cursor to deliver the world's first integration between HubSpot and iSAMS.**

Cursor helps organisations connect with students, members and employees at scale through bespoke website, software and app development. They design, build and manage systems that serve the complex needs of many individual users while keeping personal data safe and secure.

We can help you implement HubSpot for success.



# Why work with HubGem?

We are HubSpot and inbound marketing specialists with years of experience across the education and non-profit sectors.



Our experience in:

- private and international schools
- further and higher education institutions
- online training providers
- membership organisations
- fundraising organisations
- non-profits and charities

... and more

...means we are uniquely placed to help you streamline processes, structure your data effectively, increase the impact of your communications and help you to configure HubSpot for long-term success.

We know that non-profit and education organisations have bespoke data needs, and unique requirements from the software they use. We also know that HubSpot is customisable, easy-to-use and hugely effective in these sectors. We help organisations in these sectors to ensure an efficient implementation that accommodates their unique data model effectively.

We are Diamond-tiered HubSpot partners (putting us in the top 3% of partners globally), experienced in helping a wide range of organisations implement HubSpot CRM and align their teams.

We work closely with HubSpot to make sure that the organisations we work with get the best possible experience.

We are trusted by education and non-profit organisations across the globe with 100% 5-star ratings from our customers. We are a small but passionate team of specialist consultants and HubSpot experts, and we pride ourselves on the relationships and trust we build with our clients. Many of our clients choose to continue working with us for months and even years post their HubSpot implementation for ongoing guidance on strategy and technical support.



## What is the HubSpot iSAMS Sync?

We work with dozens of schools who use HubSpot to deliver personalised and highly streamlined marketing and admissions journeys. Schools that are passionate about making their customer journeys as impactful as possible are excited by the wide range of communication, automation, and reporting functions that HubSpot offers.

iSAMS is the student management system of choice for thousands of independent schools around the world, it is used for the day-to-day running of the schools and covers everything from timetabling to behaviour management.

For schools using both systems, simple data flow between HubSpot and iSAMS is essential. Our Sync is the world's first integration between HubSpot and iSAMS. It makes data transfer simple and immediate, limiting the number of manual tasks for busy admissions teams and reducing friction at the very end of the admissions journey.

The Sync connects both systems using an API (Application Programming Interface), this allows data to flow between connected systems.

## Who is the Sync designed for?

Our Sync is designed for schools who are using HubSpot for all (or some) of their admissions journey and who need to transfer that data across to iSAMS at a defined point in the journey. We will share more information on 'when' and 'how' a little later in this document.



# What are the benefits of the iSAMS Sync?

Over the past few years, every school we speak to has one question for us:

**"Can we use HubSpot alongside our MIS system?"**

We hear you! Effective data handling, improved communication, and removing manual tasks - that's what we are all about.

- Save hours of manual data-entry time with automatic data transfer of new starter data (pupils and parents) from HubSpot into iSAMS
- Maintain accuracy across HubSpot and iSAMS - removing manual data entry, removes human error and typos
- Deliver a best-in-class service to your customers - the data will be in the right place at the right time, meaning effective communication throughout the admissions journey.
- Improve reporting across the admissions journey, calculate important metrics such as conversion rates and ROI for your marketing campaigns by understanding which pupils actually proceeded to enrolment.
- The flexibility of our Sync configuration means that you can choose how you want it to work, where you want the data to go and when.
- Enjoy peace of mind - our Sync is built by experienced developers working alongside our HubSpot for schools specialists - with years of iSAMS and real-world experience of working in schools.
- Be one of the first schools in the world using this highly anticipated integration!



## Is our HubSpot/iSAMS set-up compatible?

To benefit from this integration your HubSpot account will need to be approved by a HubGem consultant - if it needs some additional configuration we can help you with this. Prior to progressing with the integration we would assign you a dedicated HubGem consultant who would guide you through every step of the set-up.

**Please note that if you are not working with HubGem to set up your HubSpot account (onboarding), or are not currently on a monthly support plan with HubGem, then we will need to quote you for initial support hours to configure your account for you so that it is compatible and can be signed off for development. This is an essential pre-requisite for accessing this integration.**

If you have not yet signed up to HubSpot but would like to, you can attend a demo or book a call with us (note that it takes a minimum of 3 months to set up HubSpot for school marketing and admissions teams).

For the Sync to be configured for your account you must be storing parents as 'contacts' and children as 'deals' in HubSpot, and the records must be associated with each other for this integration to work. You must be using a minimum of Marketing Hub and Sales Hub Professional HubSpot subscriptions.

In addition to the HubSpot requirements, we also need you to confirm that you have the iSAMS API add-on which is required for this integration. Most schools already have this, if not then it can be added at any time - please discuss pricing with iSAMS directly.



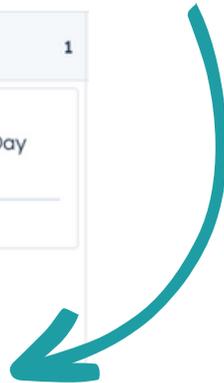
# How does the Sync work?

Our integration is designed to pull data about pupils and parents from HubSpot into iSAMS at a point that you define within your admissions journey.

## What triggers the Sync?

The Sync is triggered by moving a child (deal) into a designated 'deal stage'. We would recommend that you manually move child records into this stage when you are happy for them to sync, this can be done individually by dragging and dropping the deal card into the 'Move to iSAMS' stage, or in bulk (for example at key intake periods within your academic calendar) by checking the checkboxes in list view and bulk editing the 'deal stage' property.

OFFERED PLACE	4	DEFERRED	2	ACCEPTED PLACE	0	MOVE TO ISAMS	1
<b>Jono Stones deal 3</b> No activity for a year ! No activity scheduled		<b>Leo Monet</b> Application Information: Boarding - International Student Visa Visit Information: Open Event AM Note 2 months ago ! No activity scheduled				<b>Charlie Brown</b> Application Information: Day Student 	
<b>Stewie Griffin</b> AM Note 5 months ago ! No activity scheduled		<b>Lisa Simpson - 2022 entry</b> Application Information: Boarding - UK Flexi MS HS Task 25 days ago ! No activity scheduled					
<b>Leliana Flay</b> Application Information: Boarding - UK Full SF No activity for a year ! No activity scheduled							
<b>Bob Price - 2022/23</b> AM Email a year ago ! No activity scheduled							



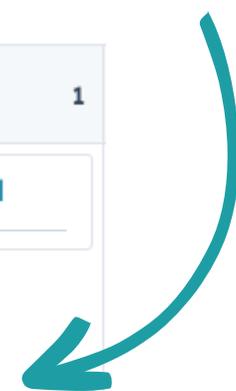


### How do I know if the Sync has been successful?

Once the data has synced, the child (deal) record would automatically be moved to a dedicated 'Sync Success' deal stage to show that it has synced successfully and the child's record is now in iSAMS, or on the rare occasion that there is an error with the sync it would automatically move the child (deal) to a dedicated 'Sync Error' deal stage and email your account administrator and our team with details of the error.

What would trigger a Sync Error? In the unlikely event of an error, it would most-likely be due to a change your team have made to a property/field in HubSpot or iSAMS that means that values (for examples in a dropdown field) no longer match. If there was anything wrong with the integration itself, our developers would be made aware and be able to fix this part of the hosting and support agreement.

MOVE TO ISAMS	1	SYNC SUCCESS	1	SYNC ERROR	1
<b>Charlie Brown</b> Application Information: Day Student  AT LT TT		<b>Lisa Simpson - 2022 entry</b> Application Information: Boarding - UK Flexi  MS HS		<b>Scooby Doo - Senior School</b>	





## **Where does the data sync to in iSAMS?**

We have two versions of our popular integration, we can discuss the different configurations with you to make sure you choose the right one for your needs:

### Sync to the Admissions module

In this configuration the data would sync from contacts (parents) and deals (children) in HubSpot to Applicants with associated contacts in the admissions module in iSAMS. This configuration uses the 'Applicant' API endpoints. This version of the sync is ideal for schools who want to bring data across into iSAMS prior to enrolment, schools who want to issue invoices via iSAMS and plan or add additional data into iSAMS prior to a child's enrolment. The 'Applicant' version of the sync relies on the iSAMS Admissions Module - please check that your iSAMS subscription includes this.

### Sync to Student/Pupil Manager

In this configuration the data would sync from contacts (parents) and deals (children) in HubSpot to Current Students/Pupils with associated contacts in iSAMS. This configuration uses the 'Student' API endpoints. This version of the sync is ideal for schools who want to bring data across into iSAMS only at the point of the child enrolling at the school - keeping all of the journey prior to this stage in HubSpot and any other systems (for example external finance systems).

### Is the sync 2-way?

Take your communications to the next level with our exciting new product launching in 2024. Sync your student, parent, and alumni data from iSAMS into HubSpot.

Benefit from HubSpot's advanced communication, automation, and reporting tools and transform your engagement with your parent and alumni communities.

# What fields are supported by the Applicant Sync?

See below the full list of child-data fields supported by the Applicant Sync  
(Admissions configuration)



Admissions status	Ethnicity	Preferred name
Boarding status	Forename	Registered date
Date of birth	Full name	Religion
Enquiry date	Gender	Resident country
Enquiry reason	Initials	School code
Enquiry type/method	Label salutation	Surname
Enrolment offer type	Languages	Title
Enrolment school year group	Letter salutation	Custom fields
Enrolment school term	Middle names	
Enrolment school year	Nationalities	 Documents

# What fields are supported by the Student Manager Sync?



See below the full list of child-data fields supported by the Current Student/Pupil Sync (Student/Pupil Manager configuration)

Academic house	Forename	Nationalities
Birth county	Form group	Personal email address (child)
Birthplace	Full name	Preferred name
Boarding house	Gender	Religion
Boarding status	Initials	Resident country
Date of birth	Label salutation	Surname
Enrolment date	Languages	Title
Enrolment term	Letter salutation	Year group
Enrolment year	Middle names	Custom fields
Ethnicity	Mobile number	

# What Contact fields are supported by the Sync?



See below the full list of contact-data fields supported by both configurations of the sync:

Address line 1	Mobile number	Town
Address line 2	Parental responsibility	
Address line 3	Postcode	
Country	Profession	
County	Relationship to Student/Contact Type	
Email address*	Student home	
Emergency notes	Surname	
Forename	Telephone number	
Fax	Title	
Middle names		

\*required by HubSpot



## Does the Sync work with custom fields?

Yes! As long as the custom field is part of either the Admissions module (Applicant sync) or the Student Manager (Student/Pupil sync) we are able to build this into your integration.

Please note that the iSAMS API does not support custom fields for Parents/Contacts.

To set up custom fields, we just need the ID/reference of the custom field from iSAMS so the developers can identify the correct field to sync to.

## Does the Sync work with documents?

We are excited to share new functionality available now for our HubSpot to iSAMS Sync... by popular demand, we have introduced HubSpot to iSAMS document syncing to our admissions sync.

This new feature will offer admissions teams in schools the opportunity to capture key documents into HubSpot and transfer them seamlessly over to iSAMS alongside your wider admissions data.

## Is there anything that cannot be synced?

We are always looking for ways to improve our HubSpot iSAMS sync but as with any integration unfortunately we are limited by the endpoints that are accessible for the software we are integrating. There are a few types of data that we cannot currently sync as part of this integration, due to limitations with the iSAMS API endpoints, these include (but are not necessarily limited to):

- Notes
- Medical records
- 'Joint' contacts
- Custom contact fields
- Accessing other 'tables' of data in iSAMS such as schools, agents, SEN etc

Whilst some of these limitations may be frustrating we do have a number of workarounds that we can advise you on as part of the exploratory stage and the development process. We are working hard to bring new features to the integration as and when they are made possible by iSAMS making changes to their API endpoints. Note that we do not currently have a timeline for the introduction of new features and it is possible that these features will come at an additional cost.

## How long does it take to set up the Sync?

If you are working with us to deliver your HubSpot onboarding, then we will be setting up the iSAMS sync as part of your implementation, our onboarding plans typically run for 3 months.



If you completed onboarding with us in the past, or have never worked with us before, and are new to the integration then it will depend on exactly how your HubSpot account and iSAMS accounts are configured. In order for the sync to work, the fields we are mapping must match in terms of 'type' (eg dropdown field, text field, date field) and for any fields with defined values such as dropdown or multiple choice fields, the values within the fields must match across systems. This can be very simple, or it can be very complex - depending on dissimilar the fields and their values are. If everything matches perfectly, then once Cursor begin work on the sync set up, we would expect to go live within 28 days.

We would work with you to prepare your HubSpot account for the sync to ensure that your development time is used effectively once the developers start work.

## We have never worked with HubGem before, can we access the Sync?

In order to prepare your account for this sync, you will need to work with HubGem to ensure your HubSpot configuration is suitable for this development, if you are new to HubGem then this would most likely be offered as part of a monthly plan. The development team will only get started on a new configuration for a school once a HubSpot account has been approved by a HubGem consultant. This ensure the development is streamlined, avoids time being wasted at the development stage because of incompatibility issues, and ultimately enables us to get the sync live faster for you.

We are proud to have created this 'world first' integration between HubSpot and iSAMS and have overcome a number of hurdles over a number of years to get to where we are today, as well absorbing significant costs to bring this development to market.

It is for all of the above reasons, and to maintain commercial advantage in a global marketplace, that the iSAMS sync is only available to schools who are working with HubGem either for their HubSpot Onboarding or as part of a monthly support plan.



## How much does the Sync cost?

The pricing for this integration is made up of two parts:

- Initial set up/development cost (year 1 only) - £1,575 +VAT
- Annual hosting and support cost (from year 1 onwards) - £1,575+VAT per year

So, in year 1 you can expect to pay £3,150+VAT, and then from year 2 onwards, this will be £1,575+VAT. This is in addition to your HubSpot subscription and any onboarding or monthly support plans you may require with a HubGem consultant.

Pricing shown is correct for 2024. Note that pricing is subject to change, and that any additional features that may be developed in future may be charged as 'optional add-ons' at extra cost.

We will share our full terms of service with you prior to you agreeing to proceed with the sync.

## How long is the agreement and how do renewals work?

The minimum term of the agreement for this sync is 1 year. After this time the agreement will move to a 12 month rolling contract. After 11 months Cursor will issue an invoice and renew the service for another 12 months unless you give at least 30 days notice of cancellation ahead of the renewal date.

We reserve the right to apply an inflation based increase at the annual renewal date.

You can close the agreement at any time with 30 days notice. As licensing costs are paid annually in advance we cannot offer any refunds for unused months.



## Can you explain the costings and work involved?

Due to the highly-customisable nature of both HubSpot and iSAMS, every instance of this integration for a school is a bespoke web application that requires custom development by an experienced developer. This ensures that we can accommodate variations in property/field configurations, HubSpot pipelines, desired 'trigger' point within your admissions journey, and any custom fields you may have.

In addition to covering the cost of your bespoke configuration, we also have to cover significant fees imposed on us by iSAMS in order to be developer partners (and be able to access the API to enable integration) and also we have to pay iSAMS an annual fee per school to integrate.

We have worked hard to cover all of these costs, whilst also keeping this sync service as affordable as possible for schools.

If you are not able to afford this integration to streamline the data sync from HubSpot to iSAMS, we are happy to discuss your other options with regards to migrating data from HubSpot into iSAMS. The HubGem team are specialists in helping schools get the most out of HubSpot, and this includes migration of data.

HubSpot makes it very easy to export data into spreadsheets, however it should be noted that iSAMS charge a fee for them to import CSV files into their system. Other alternatives are likely to involve manual data entry.

We do advise schools that use iSAMS and who are budgeting for HubSpot for admissions, allocate budget for this integration to make data migration as streamlined as possible.



## What services will Cursor provide?

When you proceed with the sync set up, you will have a meeting with Cursor who will talk you through the contract which includes the technical specification and service specification. Your contract for this integration will be with Cursor who will provide the integration itself. This would be in addition to any agreements you have in place with HubGem relating to preparing for the sync or servicing your HubSpot account.

In addition to the integration, Cursor will provide the following services:

- Testing that the sync is working as expected and 'go live'
- Monitoring performance of the sync service to ensure it is available 24/7
- Providing technical support via email (UK office hours) for any issues relating to the sync service
- Act as an authorised data processor, complying with all relevant data protection legislation

The support supplied by Cursor relates solely to the operation of the sync service, if you need any assistance with anything relating to HubSpot then we can help. For any matters relating to iSAMS, you can contact your iSAMS account manager.

## Do you store our data?

Your data will remain hosted in HubSpot and also in iSAMS, the sync service will make a record of IDs of the fields which have been synced and a date/time stamp for debugging and monitoring purposes. No pupil or personal information is stored by the sync service.

Data travelling from HubSpot and iSAMS is securely encrypted.

## Where is the Sync hosted?

The Sync service is hosted by a leading cloud infrastructure provider (Digital Ocean) in an ISO 9001 certified secure UK data centre powered by 100% renewable energy

## What next? How do we get started?

We would be delighted to get started!

If you are already a HubGem customer, please reach out to your HubGem Consultant and let them know that you would like to proceed with the iSAMS Sync set up.

If you are new to HubGem, please speak to us by booking a call at: [hubgem.co.uk/isams-exploratory](https://hubgem.co.uk/isams-exploratory).

We will then advise on what we need to do in order to prepare your HubSpot account for the sync, we will then introduce you to the Cursor team to get to work on the contracts and access credentials.

## I have more questions, who can I speak to?

If you still have questions, we would like to invite you to arrange a call with one of our specialist consultants.

You can book this at: [hubgem.co.uk/isams-exploratory](https://hubgem.co.uk/isams-exploratory).