

Qoos and HubSpot Integration Setup Guide


Introduction: Qoos.ai is a platform designed to enhance sales performance by delivering on-demand micro coaching directly within HubSpot. It transforms sales training content into practical, bite-sized actions that are integrated into the user's workflow.

This document includes the following:

1. [Steps for the Hubspot admin user to install the Qoos application and configure the integrated Qoos tab in Deals](#)
2. [Steps for sales team members to follow to access the integrated Qoos tab in Deals](#)

Qoos Set Up in Hubspot

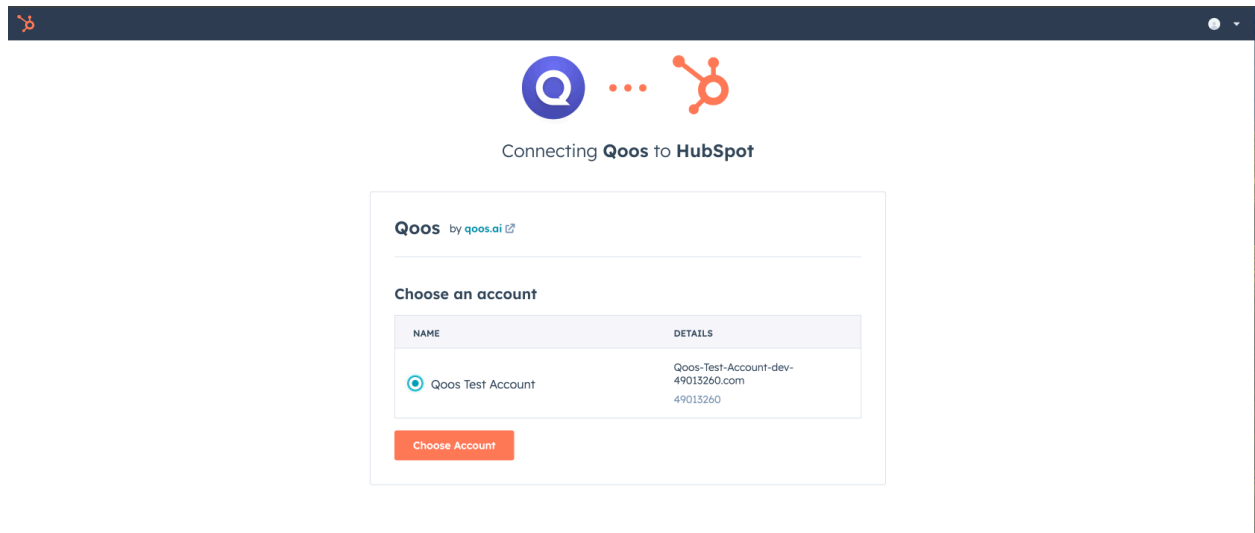
Follow these steps to set up the Qoos application for your HubSpot account.

Step 1: Find the Qoos application in the Hubspot Marketplace. The Hubspot Marketplace can be found on the top navigation menu in Hubspot. It can be identified by the  icon.

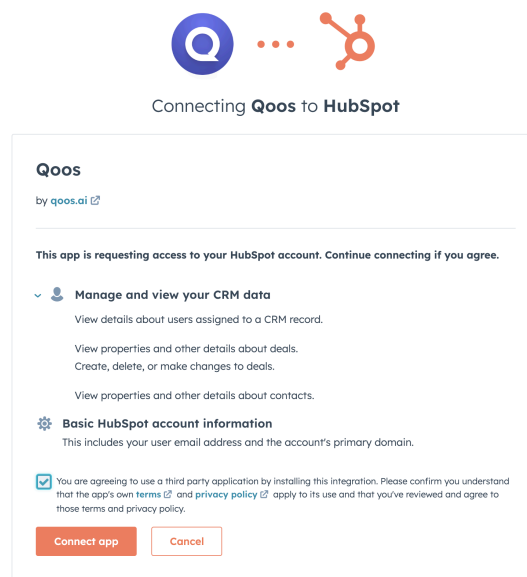
Step 2: Install the Qoos Application. Click on the Install option.

PS: You have to be an admin user in Hubspot to install the application

Step 3: Connect Qoos to your Hubspot account. Choose the HubSpot account you want to integrate with Qoos. This step establishes the connection between Qoos and your selected HubSpot account, enabling seamless data synchronisation and functionality. Ensure you select the correct account if you manage multiple HubSpot accounts to integrate the right one with Qoos.



Step 4: Review and Agree to the Application's Terms and Privacy Policy. Ticking the checkbox in the screenshot below will enable the **Connect app** option. Click this option to proceed with the connection.



This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

Step 5: Choose your Qoos Plan. Choose the plan that best aligns with your business needs by clicking the **"Let's Go"** button beneath your preferred option. You can choose to pay Monthly or Annually. Explore these options by toggling between the 2 options in the screenshot below.

The screenshot shows the Qoos website's pricing section. At the top, there's a navigation bar with 'Qoos' on the left and 'Solutions', 'Pricing', 'About', and a 'Schedule Demo' button on the right. The main heading is 'Choose your plan and get started with Qoos', followed by the subtext 'Your sales team will love you for helping them hit quota'. Below this is a toggle for 'Monthly' (selected) and 'Annually'. Three plan cards are displayed: 1. '1-5 seats' for \$75/user, 'Per month, billed monthly', 'For Small Teams', with a green 'Let's Go' button. 2. 'Most popular 6-20 seats' for \$65/user, 'Per month, billed monthly', 'For Medium Enterprise', with a purple 'Let's Go' button. 3. '> 20 seats' for \$55/user, 'Per month, billed monthly', 'For Large Organisations', with an orange 'Let's Go' button.


| Plan | Seats | Price /user | Billing | Target Audience | Button Color |
|--------------|------------|-------------|---------------------------|-------------------------|--------------|
| 1-5 seats | 1-5 seats | \$75 /user | Per month, billed monthly | For Small Teams | Green |
| Most popular | 6-20 seats | \$65 /user | Per month, billed monthly | For Medium Enterprise | Purple |
| > 20 seats | > 20 seats | \$55 /user | Per month, billed monthly | For Large Organisations | Orange |

Step 6: Finalise Payment and Begin Your Journey. Fill in the required fields on the payment screen, then click the Pay Now & Get Started button to complete your purchase and begin using Qoos.

Step 7: Invite your team members to Qoos. You can now invite all the users who you have signed up for by adding their valid email addresses to the **'Invite Your Team Members'** screen.

Team members can be assigned as either Admin users or Standard users. Admin users have the authority to add other team members to the account, within the limit of the number of users included in your subscription.

Clicking on Send Invites and Continue will trigger off an email to the team members you added.




Success!
Thank you for your payment.

Invite Your Team Members

Add your team members to get started with Qoos

| | | |
|-----------------------------------|---------|---|
| shameelahassim+test2000@gmail.com | Admin | × |
| shameelahassim+test1999@gmail.com | Admin | × |
| shameelahassim+test1998@gmail.com | Standar | × |

 3/20 available seats

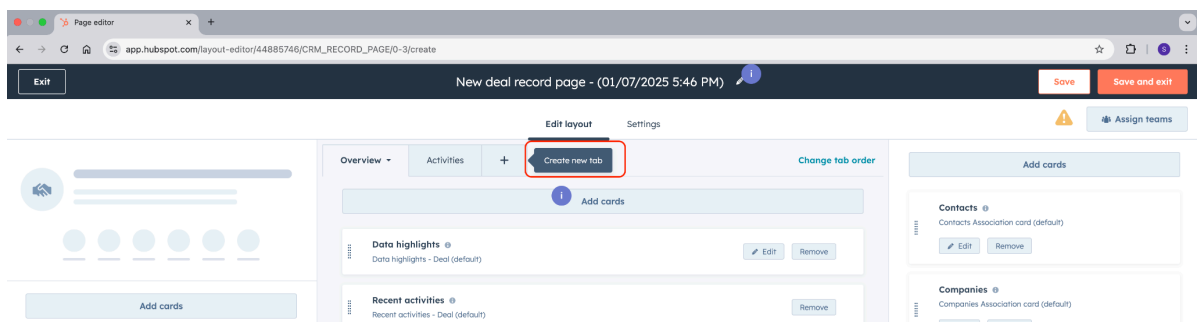
Send Invites & Continue

[Skip for now](#)

Step 8: Create the Qoos tab in Hubspot. You will now be taken to Hubspot to set up the Qoos tab.

Follow the steps below to add the tab (with the associated cards) to Hubspot.

1. Now click on the Create New Tab option (+) to add the Qoos tab to the deal



2. Name the tab **Qoos** and click on Done

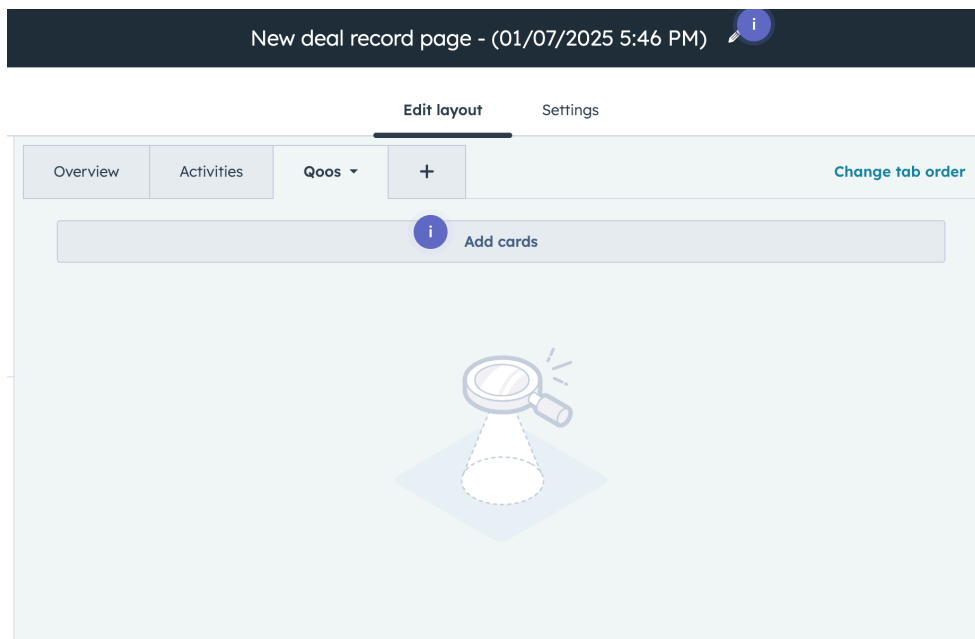
Create tab

Choose a name for your tab.

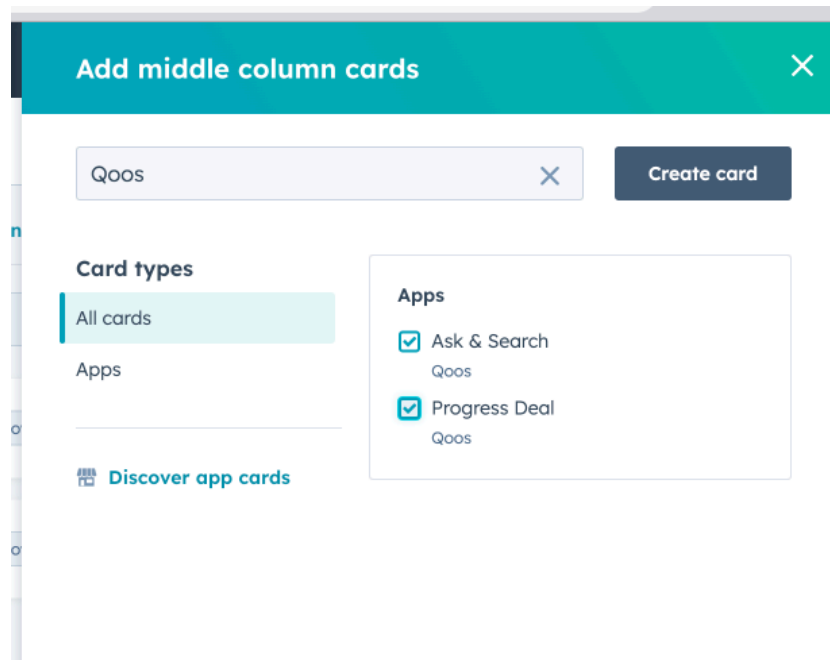
Qoos

DoneCancel

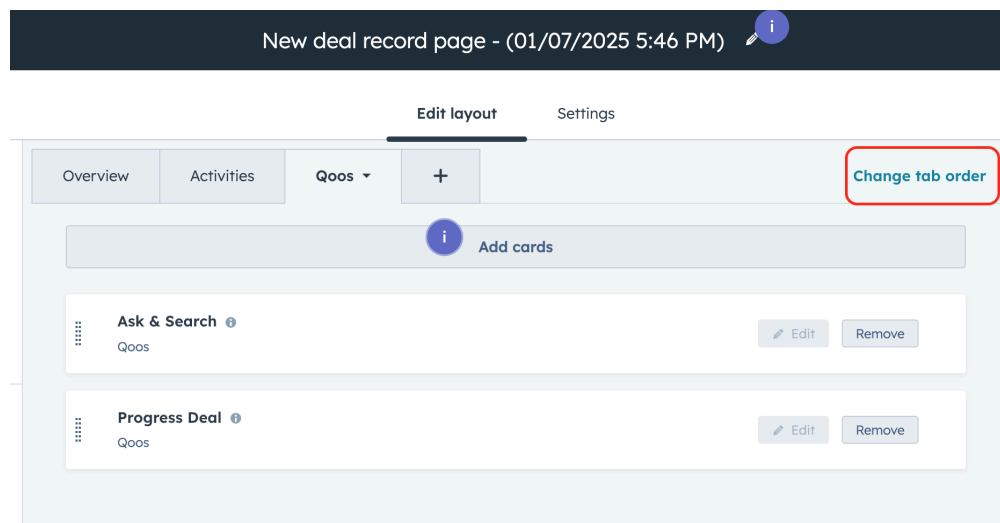
- Click on the Add cards option on the newly created Qoos tab.



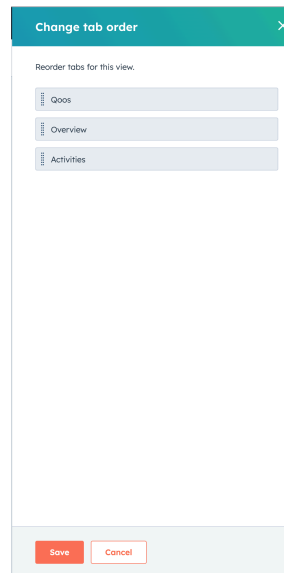
- Search for Qoos in the search field and Select the **Ask & Search** and **Progress Deal** cards.



5. Now close the Window and click on the Change tab order option on the right of the middle window

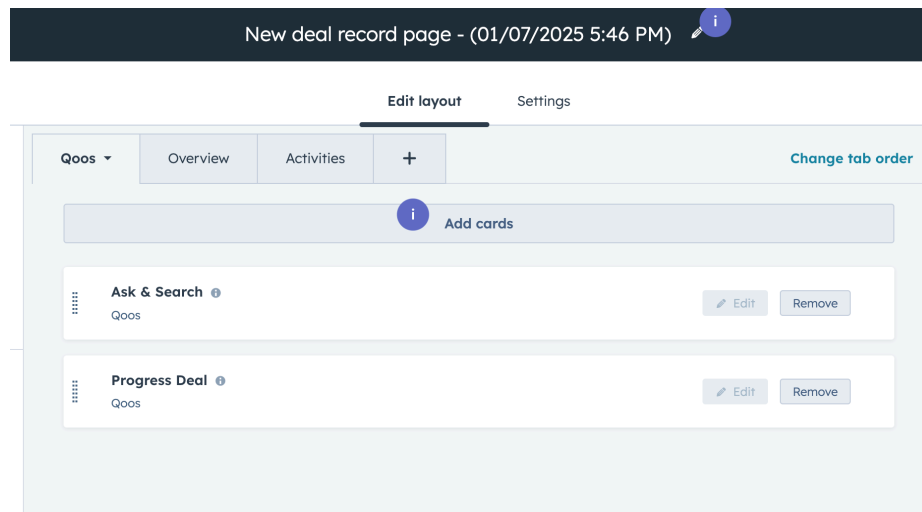


6. Click and Drag the Qoos bar to the top as per the screenshot below:



7. Remember to Save.

8. The Qoos tab will now appear as the first tab.

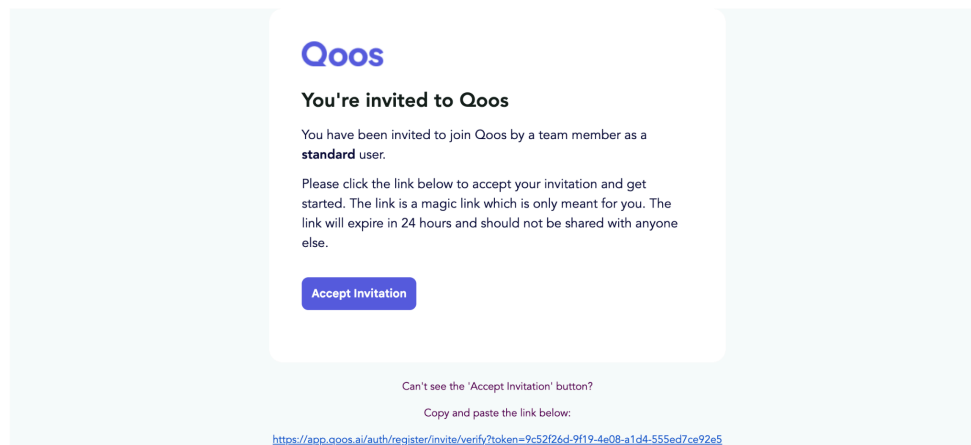


That's it! You've successfully set up Qoos in Hubspot. Once your team members have accepted their invitations, they will see the Qoos tab on their deals in Hubspot.

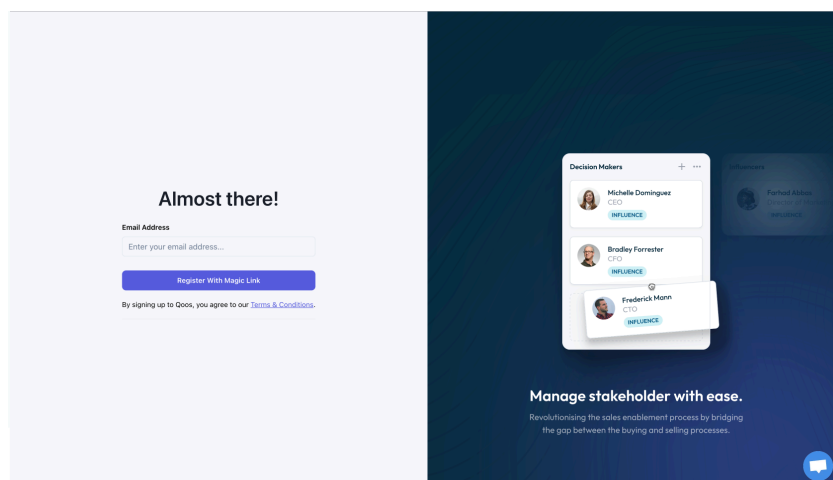
How team members can access Qoos in Deals

Team members will be invited to Qoos by the admin user

Step 1: Accept the Invitation to Qoos. You will receive an email from Qoos with an invitation link to Qoos, as per the screenshot below. Click on the Accept Invitation button:



Step 2: Register on Qoos. Fill in your email address and click on the **Register With Magic Link** button shown in the screenshot below.

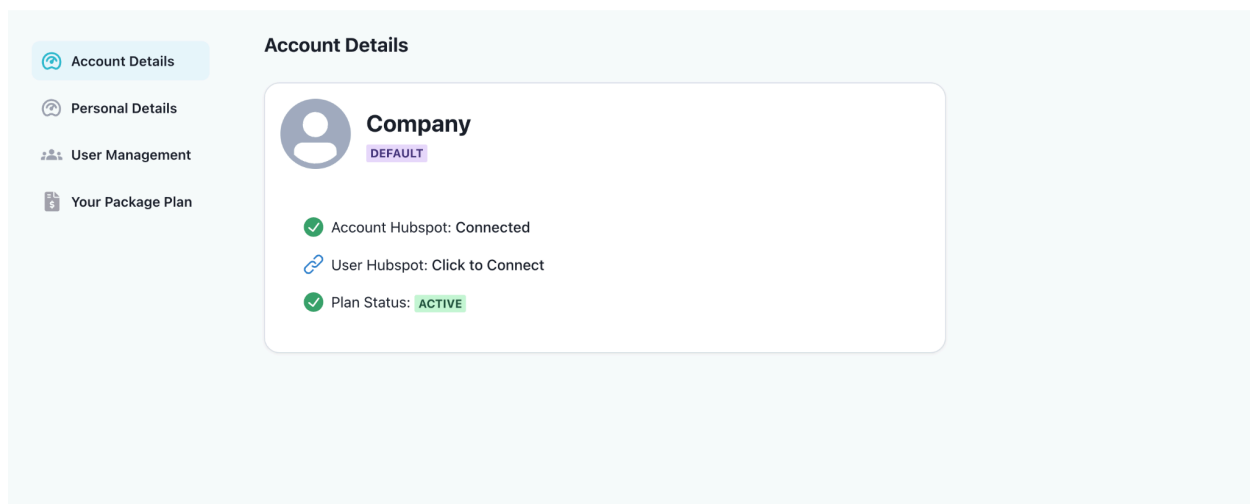


Important: Clicking this link will open a new tab in your browser with instructions to check your email. Keep this tab open and follow the instructions in your email to proceed.

Step3: Check your email to complete your Qoos access in Hubspot. You will receive an email from 'Login'. This email will include a link to securely log into your Hubspot account, with your integrated Qoos account.

Step 4: Gain access to your Qoos account! You will be redirected to the Qoos Application. Immediately begin the linking process by clicking **"Click to Connect"**

Qoos



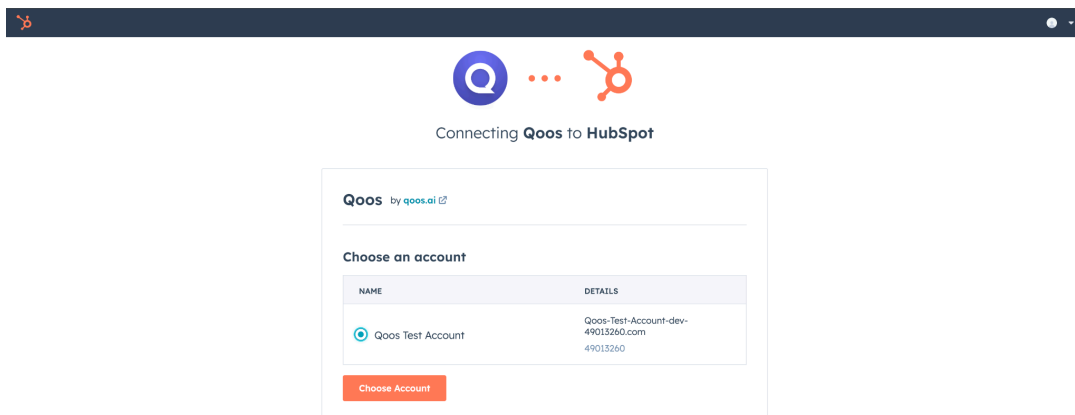
Account Details

- Account Details
- Personal Details
- User Management
- Your Package Plan

Company
DEFAULT

- ✓ Account Hubspot: Connected
- 🔗 User Hubspot: Click to Connect
- ✓ Plan Status: **ACTIVE**

Step 5: Link your Qoos account to your Hubspot account. You will be asked to log into Hubspot (if not already logged in). You will then be asked to choose your Hubspot account that has been associated with your Qoos account by your administrator. This will activate the Choose Account button.



Connecting Qoos to HubSpot

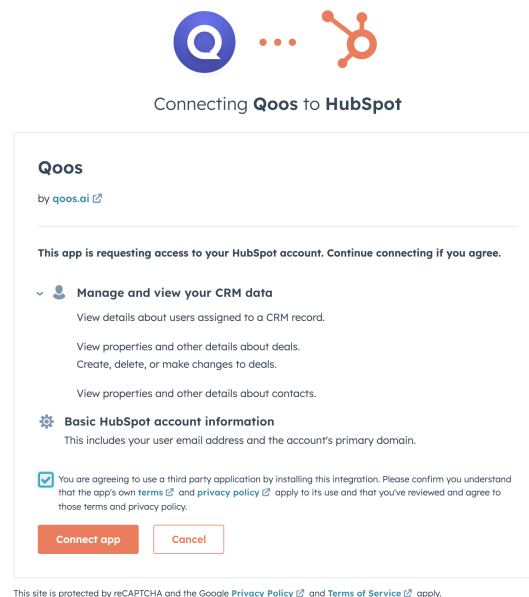
Qoos by qoos.ai

Choose an account

| NAME | DETAILS |
|-------------------|--|
| Qoos Test Account | Qoos-Test-Account-dev-49013260.com 49013260 |

Choose Account

Step 6: Review and Agree to the Application's Terms and Privacy Policy. Ticking the checkbox in the screenshot below will enable the **Connect app** option. Click this option to proceed with the connection.



Step 7: Go to Hubspot Click on the Continue to Hubspot button on the success screen. That's it! "You're now ready to use Qoos in HubSpot!"

