Installing Sequence Generator
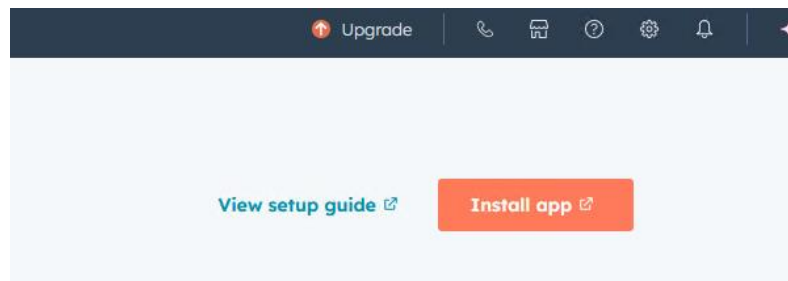
1. Click the Install Link from the App Marketplace or click here:

2. Select the HubSpot Account where you want it installed and click the button "Choose Account":

3. Click the button "Connect App":

Customizable Sequence Number
by **unlimitedtechsolutions.com** ⧉

This app is requesting access to your HubSpot account. Continue connecting if you agree.

⌄ 👤 **Manage and view your CRM data**

View details about property settings for appointments.

View details about property settings for companies.

View details about property settings for contacts.

View details about property settings for courses.

View details about deals.

View details about property settings for invoices.

View details about property settings for listings.

View details about property settings for orders.

⚙ **Basic HubSpot account information**

This includes the account's primary domain and email addresses of HubSpot users interacting with features of this app, including app cards.

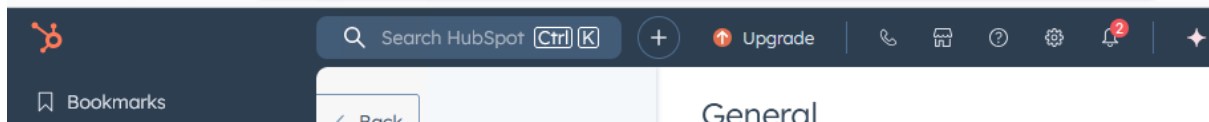◆ **Tickets**

View, create, delete, or make changes to tickets.

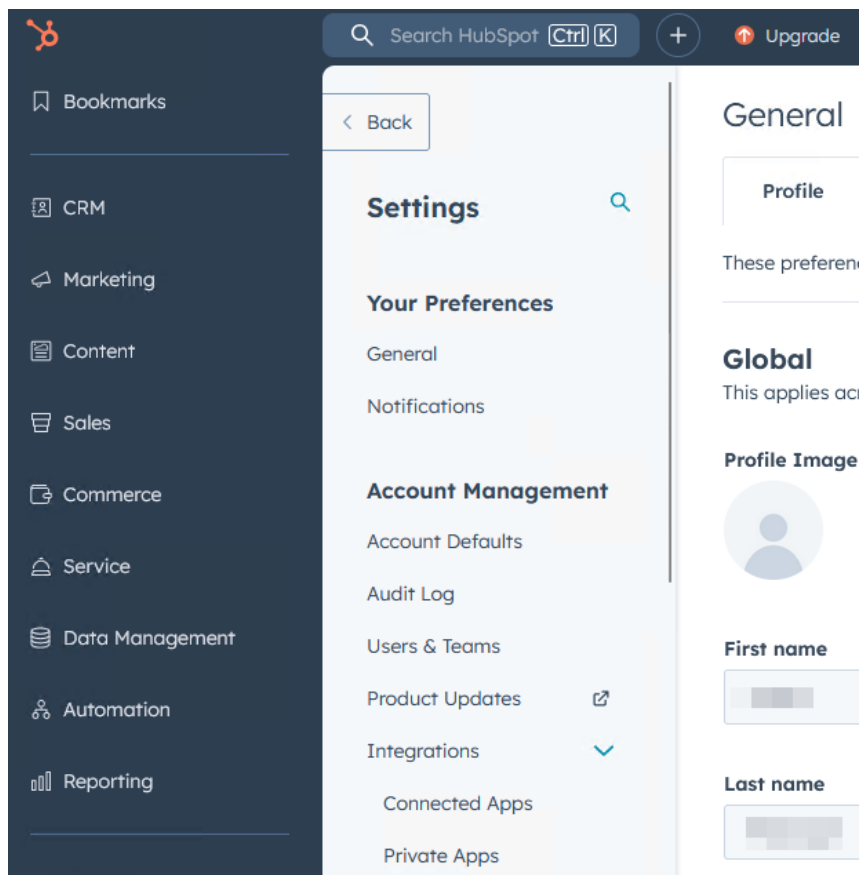[**Connect app**] [Cancel]

The application is installed. Now, let us configure it by specifying which fields should be updated on the objects.
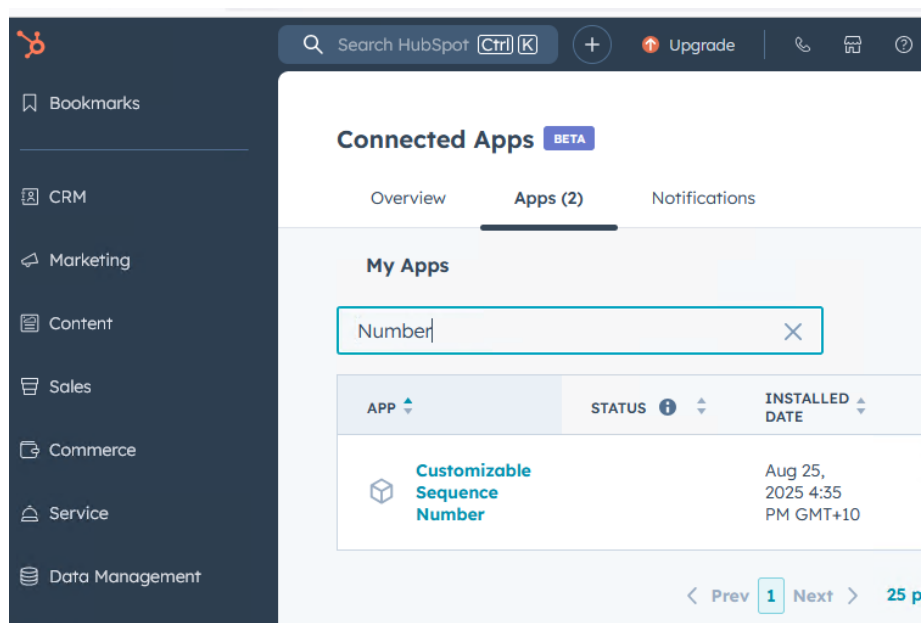
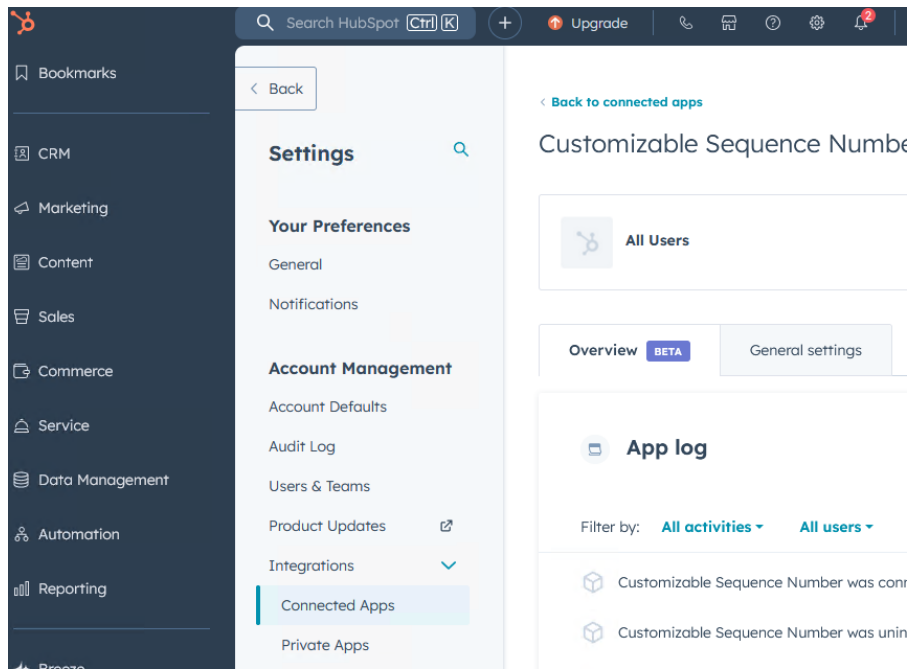4. Open HubSpot and go to the settings page by clicking the [⚙] button:
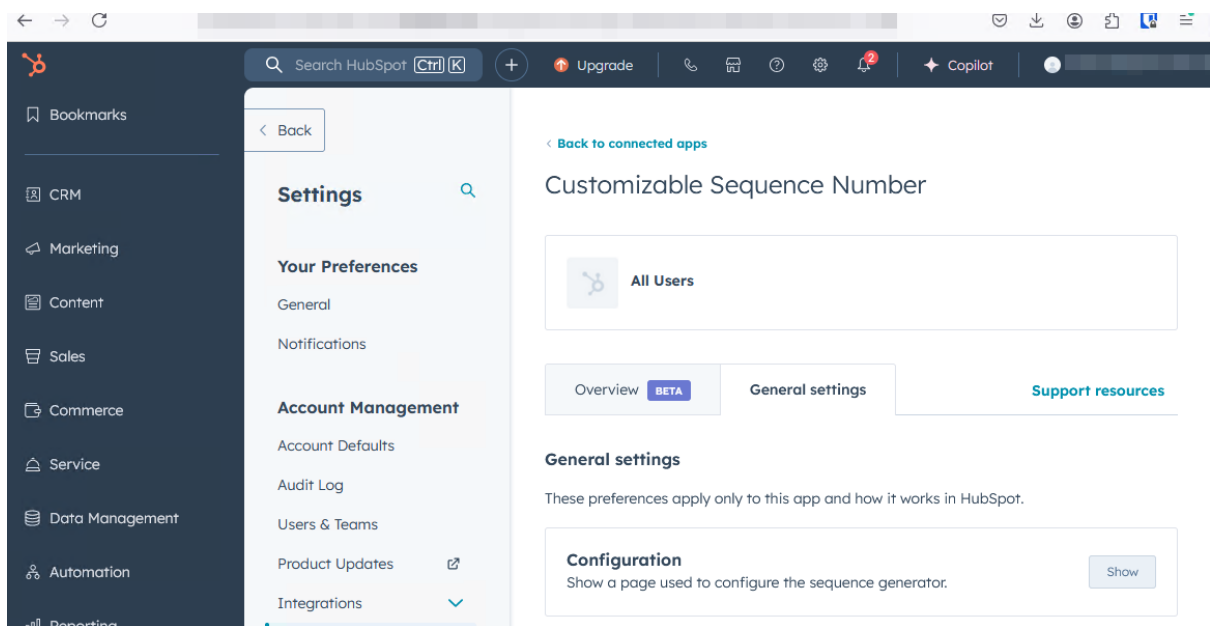

5. Click "Connected Apps":

6. Click on "Customizable Sequence Number" from the list (or Actions | Go To Settings from the button on the same line):

7. Click "General Settings":

8. Click the "Show" button on the Configuration Line:

TODO (Once Config UI Works)

Click Add New Row button

Number increment Settings

Configure your HubSpot entities with custom numbering and formatting options.

Entity Configuration List

Select Entity	Property	Start Number	Prefix	Postfix	
Contact		1001	HS-	-2024	
Companies		5001	COMP-	Postfix	🗑
Deals		2001	DEAL-	-Q1	🗑

+ Add New Row

✓ Save Configuration

This configuration will be applied to your HubSpot entities

Select Deals from the list

Choose the field you want to update with the sequence number.

Make sure the sequence generation is enabled.

Click Save Configuration.

Follow the steps to connect the app again. This is needed because more object permissions are required as a result of the Configuration just updated.

To test, create a new Deal and within a minute, the field selected earlier will be populated with a new sequence number. If it is not populated, try the troubleshooting guide at this link.