

OPCO HubSpot App Installation Instructions

For: HubSpot Portal Administrators at Lyra OPCO organizations

Support: Email : datateam@lyratechgroup.com

What is the Lyra Integration app?

Lyra is rolling out a centralized sales analytics platform that connects your HubSpot portal to Lyra's data lake. This gives the Lyra analytics team a consolidated view of sales activity across all operating companies.

The **Lyra Integration** app is a HubSpot OAuth application that, once installed by your portal administrator, securely reads the following data from your HubSpot account. Data is synchronized daily, with real-time updates delivered via HubSpot webhooks:

Object	Data read
Contacts	Contact records and properties
Companies	Company records and properties
Deals	Deal records, stages, and properties
Leads	Lead records and properties
Tasks	Task records and properties
Owners	Deal and record owner details

No data is written back to your HubSpot portal. The integration is read-only.

Data is processed and stored in Lyra's secure AWS data lake (US East region). Access is restricted to authorized Lyra analytics users only.

Before you begin

You will need:

- **HubSpot portal administrator access** for your organization's HubSpot account
- Approximately **5 minutes** to complete the installation

If you're not sure whether you have administrator access, check with your internal HubSpot contact before proceeding.

Prerequisites (Data Structure Requirements)

To ensure your HubSpot data can be successfully ingested into the Lyra platform, your portal must meet **one of the following conditions**:

Option 1: Standard HubSpot configuration (recommended)

- Deals use a standard HubSpot **pipeline** with defined deal stages
- Contacts and companies use standard **lifecycle stage** fields
- No reliance on custom properties to represent pipeline stages or lifecycle progression

Option 2: Overlay aligned to standard structure

- An overlay is in place, but it **maps directly to a consistent pipeline and lifecycle model**
- The underlying data still resolves to a standard set of:
 - Deal stages (e.g. Discovery, Proposal, Closed Won/Lost)
 - Lifecycle stages (e.g. Lead, Opportunity, Customer)
- Standard HubSpot fields remain the source of truth for reporting

Important note

The Lyra data pipeline is designed as a **single, standardised ingestion model across all OpCos**.

If pipeline stages or lifecycle values are stored in custom properties or structured differently per OpCo, this requires custom configuration per instance. This introduces variability in reporting and limits the ability to scale and support the platform effectively.

For this reason, OpCos that do not meet one of the conditions above may need to align their configuration before onboarding.

If you are unsure whether your portal meets these requirements, please contact the Lyra team before proceeding with installation.

Installation steps

Step 1: Open the install link

Click the install button.

This link will take you directly to the HubSpot OAuth authorization screen for the Lyra Integration app.

Step 2: Log in to HubSpot

If you're not already logged in, HubSpot will prompt you to sign in with your HubSpot administrator credentials.

Important: You must log in with an account that has **Super Admin** or **App Marketplace** permissions on your HubSpot portal. If the account you log in with does not have sufficient permissions, the installation will fail.

Step 3: Select your portal

If your HubSpot account has access to more than one portal, you will be asked to select which one to connect. Select your company's portal. Do not select a test or sandbox portal.

Step 4: Review and approve the requested permissions

HubSpot will display the list of permissions the Lyra Integration app is requesting. These are:

- Read CRM contacts
- Read CRM companies
- Read CRM deals
- Read CRM leads
- Read CRM tasks
- Read CRM owners

These are **read-only** permissions. The app cannot create, update, or delete any records in your HubSpot portal.

Click "**Connect app**" to approve.

Step 5: Confirm the connection

After approving, HubSpot will redirect you to a confirmation page confirming that access has been granted to the Lyra Integration app.

To verify the installation was successful:

1. In HubSpot, go to **Settings → Integrations → Connected Apps**
2. You should see **Lyra Integration** listed as a connected app
3. The app can be viewed or disconnected from this screen at any time — you remain in full control

Please reply to the Lyra onboarding email to confirm you have completed the installation, so the Lyra team can verify the connection and confirm your portal is included in the first data run.

Troubleshooting

Issue	What to do
"You don't have permission to install apps"	You need Super Admin access on the portal. Ask your HubSpot admin to complete the installation, or have them grant you App Marketplace permissions.
The install link shows an error	The link may have expired or your portal may not yet be on the approved list. Reply to the onboarding email and the Lyra team will investigate.
The confirmation page did not load	Try the install link again. If the problem persists, contact datateam@lyratechgroup.com .

Questions?

If you have any questions about the installation or the Lyra Integration app, please contact:

datateam@lyratechgroup.com

Or reply directly to the onboarding email sent by the Lyra team.