



Setup Guide and Integration Info

1. Connect Waiver Master with HubSpot

- Create a Waiver Master (WM) account
- Upload your document(s) to Waiver Master and wait until processed and account is activated (1-3 business days average)
- Link your HubSpot Account to Waiver Master account:
 - Log into WM control panel
 - Click “Account”
 - Click “Connect HubSpot Account” and follow the prompts to authorize
 - Upon returning back to WM, confirm that account is linked

WAIVER MASTER



DOCS & FORMS



SUBMISSIONS

HubSpot

Waiver Master automatically creates a contact and uploads a PDF of the submission to your HubSpot account.

[Connect HubSpot Account](#)

Please note that there is a \$20 surcharge per month per integrated HubSpot account/portal.

2: Default Integration: Profile

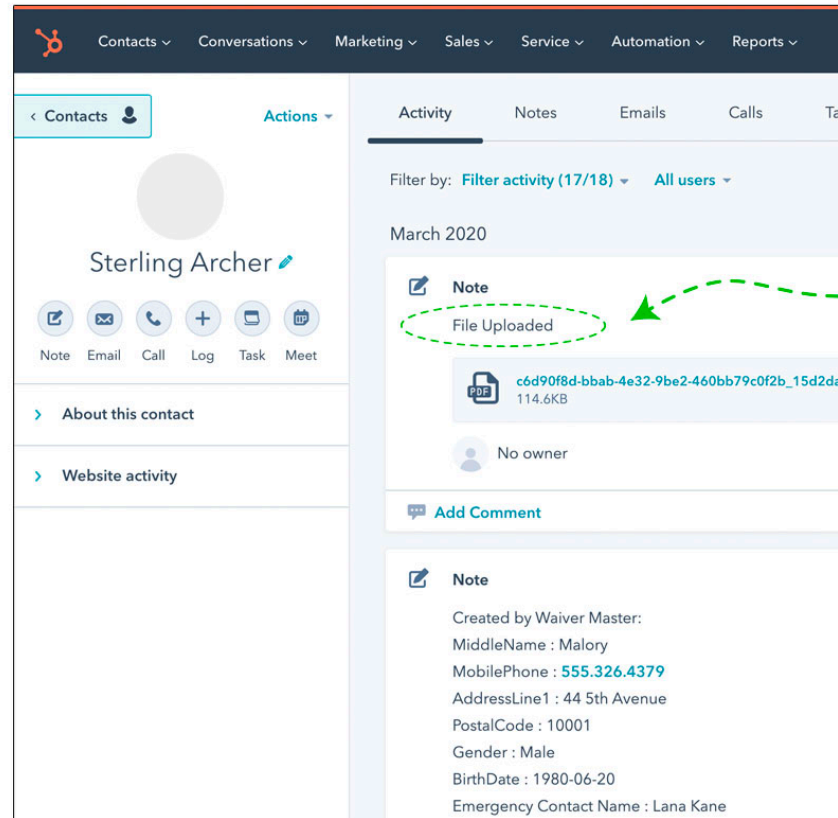
- By default, when a user submits a document on WM, a contact will be created in Hubspot
- If you have multiple documents/forms, you may specify which documents need to create a profile in HubSpot. (Submit a support ticket)

The image displays two screenshots from the HubSpot CRM interface. The left screenshot shows the contact profile for 'Sterling Archer'. The 'Activity' tab is active, showing a note titled 'File Uploaded' with a PDF document attached. The document name is 'c6d90f8d-bbab-4e32-9be2-460bb79c0f2b_15d2dad' and its size is 114.6KB. Below the note, there is a section for 'Add Comment' and another note titled 'Created by Waiver Master:' containing contact details: MiddleName: Malory, MobilePhone: 555.326.4379, AddressLine1: 44 5th Avenue, PostalCode: 10001, Gender: Male, BirthDate: 1980-06-20, and Emergency Contact Name: Lana Kane. The right screenshot shows a 'Waiver and Release' form. The form includes a 'First Name' field with 'Sterling', a 'Last Name' field with 'Archer', and a 'Date of Birth' field with '06/20/19'. The 'Email' field contains 'sterling.archer@gmail.com' and the 'Primary Phone (DIGITS only)' field contains '555.326.4379'. The 'Address' section includes '44 5th ave', 'New York', 'NY', and '10001'. There are also checkboxes for 'How did you hear about us' with options for Facebook, Google, Flyer, and Instagram. A red warning message at the bottom states: 'Please check any conditions that you have or have had'. A dashed green arrow points from the 'File Uploaded' note in the left screenshot to the waiver form in the right screenshot, indicating the integration.

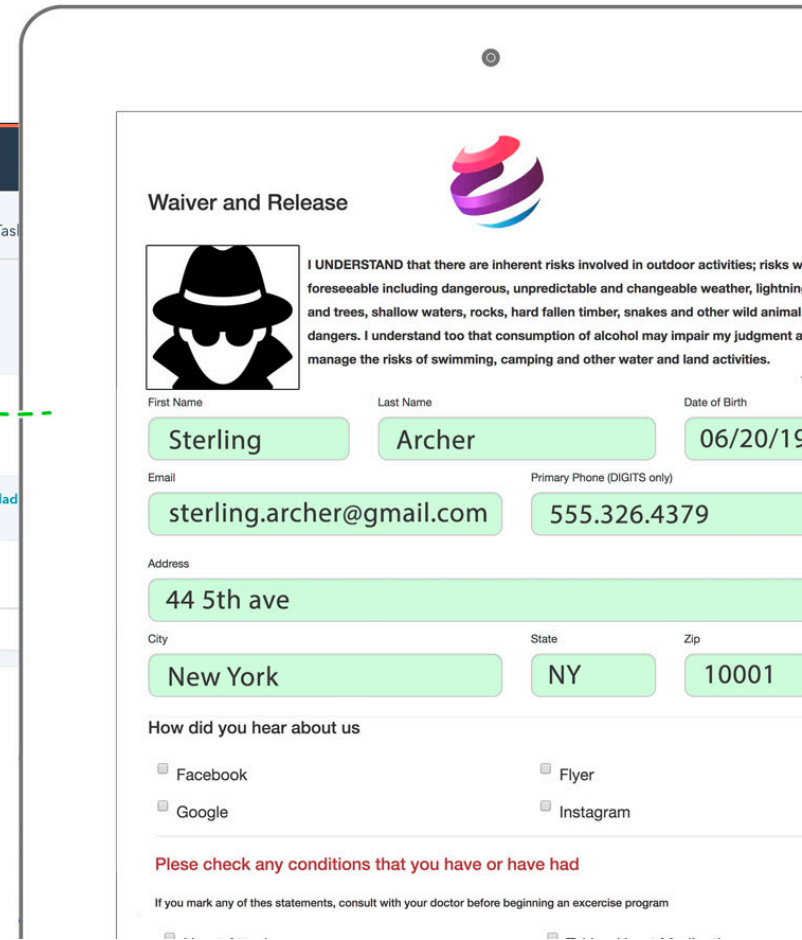
2: Default Integration: PDF

- Waiver Master can upload a PDF of the submission and attach it to the contact created in Step 1. Submit a support ticket to enable this integration (per-document)

Note that HubSpot does not recommend adding any files with sensitive information.



The screenshot shows the HubSpot CRM interface for a contact named Sterling Archer. The contact's profile is visible on the left, including their name and various action buttons (Note, Email, Call, Log, Task, Meet). The main activity feed on the right shows a 'Note' titled 'File Uploaded' which is circled in green. Below this note, a PDF file is listed with the name 'c6d90f8d-bbab-4e32-9be2-460bb79c0f2b_15d2dad' and a size of 114.6KB. A green dashed arrow points from the 'File Uploaded' note to the PDF file. Below the PDF, there is an 'Add Comment' button and another 'Note' section containing contact details such as 'Created by Waiver Master', 'MiddleName : Malory', 'MobilePhone : 555.326.4379', 'AddressLine1 : 44 5th Avenue', 'PostalCode : 10001', 'Gender : Male', 'BirthDate : 1980-06-20', and 'Emergency Contact Name : Lana Kane'.



The screenshot shows a 'Waiver and Release' form for Sterling Archer. The form includes a header with the company logo and a disclaimer: 'I UNDERSTAND that there are inherent risks involved in outdoor activities; risks w... foreseeable including dangerous, unpredictable and changeable weather, lightning... and trees, shallow waters, rocks, hard fallen timber, snakes and other wild animal... dangers. I understand too that consumption of alcohol may impair my judgment a... manage the risks of swimming, camping and other water and land activities.' The form fields are filled with the following information: First Name: Sterling, Last Name: Archer, Date of Birth: 06/20/19... Email: sterling.archer@gmail.com, Primary Phone (DIGITS only): 555.326.4379, Address: 44 5th ave, City: New York, State: NY, Zip: 10001. Below the form, there are checkboxes for 'How did you hear about us' with options: Facebook, Google, Flyer, and Instagram. At the bottom, there is a red warning: 'Please check any conditions that you have or have had' and a note: 'If you mark any of these statements, consult with your doctor before beginning an exercise program'.