

ARISSA.

SETUP & INSTALLATION GUIDE

Connect Your HubSpot in Under a Minute

A step-by-step guide to installing the Arissa Portal Audit, authorizing securely, and running your first CRM health audit.

PRODUCT

Portal Audit System

CONNECTION

OAuth 2.0 · Read-Only

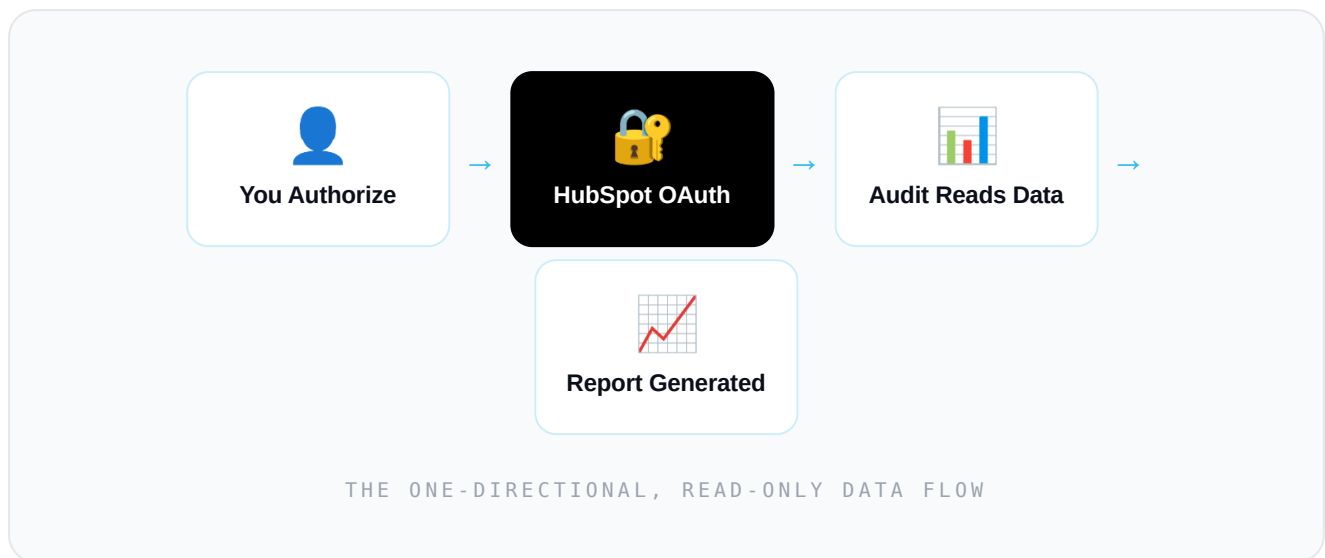
SETUP TIME

~60 Seconds

BEFORE YOU START

How the Connection Works

Arissa Portal Audit connects to your HubSpot account using OAuth 2.0 — the same secure standard HubSpot uses for all marketplace apps. Data flows one direction only: from HubSpot to the audit. Nothing is ever written back.



Read-only means read-only. The app requests only "read" permissions. It cannot create, edit, or delete any contact, company, deal, or setting in your HubSpot portal — by design.

What You'll Need

- ✓ A **HubSpot account** with login access (any tier — Free, Starter, Professional, or Enterprise).
- ✓ Permission to **install/connect apps** in your HubSpot portal (Super Admin or app-install permission).
- ✓ A modern browser — **Chrome, Safari, Firefox, or Edge**.
- ✓ CRM data in your portal (contacts, companies, deals) so all audit sections populate.

INSTALLATION

Step-by-Step Setup

Follow these five steps to connect and run your first audit. The whole process takes about a minute.

1

Open the Audit Tool

Navigate to the audit URL in your browser, or click **Connect app** from the HubSpot Marketplace listing. You'll land on the Arissa welcome screen.

2

Click "Launch My Free Audit"

The primary button starts the secure connection. You'll be redirected to the official HubSpot authorization page — confirm you've landed on HubSpot's own secure sign-in before continuing.

3

Choose Your Account & Authorize

If you manage multiple HubSpot portals, select the one you want to audit. Review the read-only permissions, then click **Connect app** to grant access.

● HubSpot secure authorization

Arissa Portal Audit is requesting access

- ✓ Read contacts, companies, deals
- ✓ Read tickets, lists, tasks, settings

Cancel

Connect app

HubSpot's Authorization Screen — Click "Connect App"

4

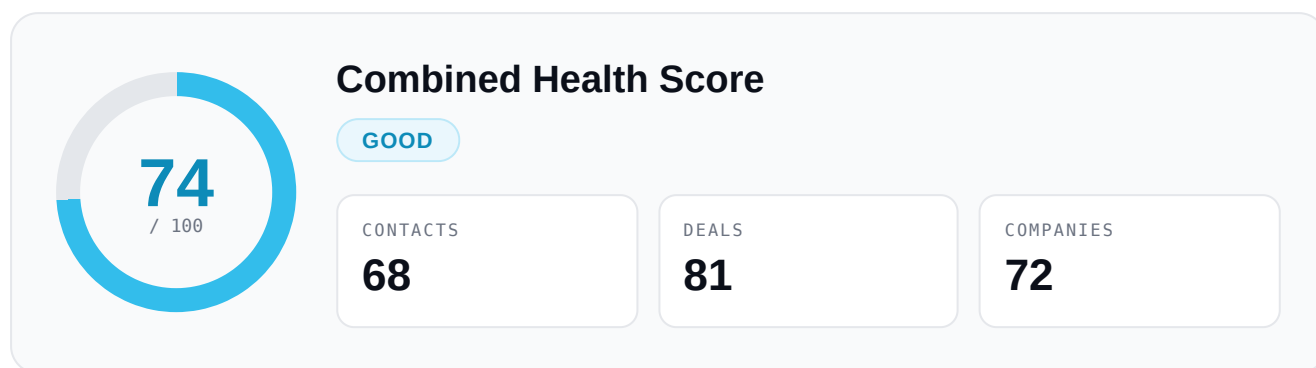
Wait for the Audit to Run

After authorizing, you're redirected back automatically. A progress screen shows live status as the tool analyzes each area — contacts, deals, pipelines, and more. This typically takes 15–60 seconds.

5

Review Your Dashboard

Your audit dashboard loads with a combined **health score** and section cards. Use the left sidebar to explore any of the 12 detailed sections.



Your Audit Dashboard With Combined Health Score And Section Breakdown



Instant navigation. Once loaded, clicking between sections is instant — results are cached for your session. Click **Refresh HubSpot Data** any time to pull fresh data.

USING YOUR RESULTS

Reading the Audit

Every metric is tagged with a severity level so you know what to prioritize. Here's what each badge means.

- **OK** — No issues found, or a healthy state. Nothing to do here.
- **Info** — An informational count or breakdown, with no inherent problem.
- **Warning** — A minor issue affecting a small share of records (under 5%).
- **High** — A significant issue affecting 5% or more of records. Prioritize these.

Export & Share



Download a PDF Report. Click **Download PDF Report** in the sidebar. A print-ready version opens covering all sections — use your browser's print dialog to save it as a PDF for your team or leadership.



Some sections depend on your plan. Workflows require Marketing Hub Professional or Enterprise; Forms require Marketing Hub. If your subscription doesn't include them, those sections show an informational note instead of data — this is expected.

Re-Running & Disconnecting

Run a fresh audit any time with **Refresh HubSpot Data**. To disconnect, click **Disconnect** in the sidebar, or remove the app from your HubSpot connected-apps settings at any time.

HELP

Troubleshooting & FAQ

Common questions and quick fixes.

Troubleshooting

 **"Couldn't complete the connection" / invalid redirect URL** — The redirect URL in the app must exactly match (including `https://`). Ensure you're visiting the secure (HTTPS) address.

 **A section shows "Not Available"** — Your HubSpot subscription tier doesn't include that feature (e.g., Workflows). This is expected, not an error.

 **The audit is slow or times out** — Very large portals take longer. If your portal is extremely large, you'll be guided to book an enterprise audit with our team.

Frequently Asked Questions

Will this change my HubSpot data?

No. The audit is strictly read-only and never modifies anything.

How often should I run an audit?

Monthly is a good cadence. Re-run after any major data import or cleanup to measure improvement.

Is my data stored anywhere?

Only the aggregated audit summary (scores and counts) is retained for history. Your raw CRM records are never stored.

Can I disconnect later?

Yes — any time, from the app sidebar or your HubSpot connected-apps settings.



Need help interpreting your results? Book a strategy call with our RevOps team at arissainternational.com for hands-on guidance or an enterprise-scale audit.