# Before you start (permissions & checks)

- **Make sure you can install apps.** In HubSpot, you must be a **Super Admin** *or* have the **App Marketplace Access** permission to install marketplace apps. If you don't have this, use **Request to install** on the app's listing to email your admin.

- **Turn off ad blockers** temporarily if the marketplace pages or consent dialogs don't load properly.

- **Confirm you're in the right HubSpot account (portal).** You'll be asked to pick the account during install. You can always switch accounts at the top-right of HubSpot before you begin. During installation you'll also see an account-selection screen.
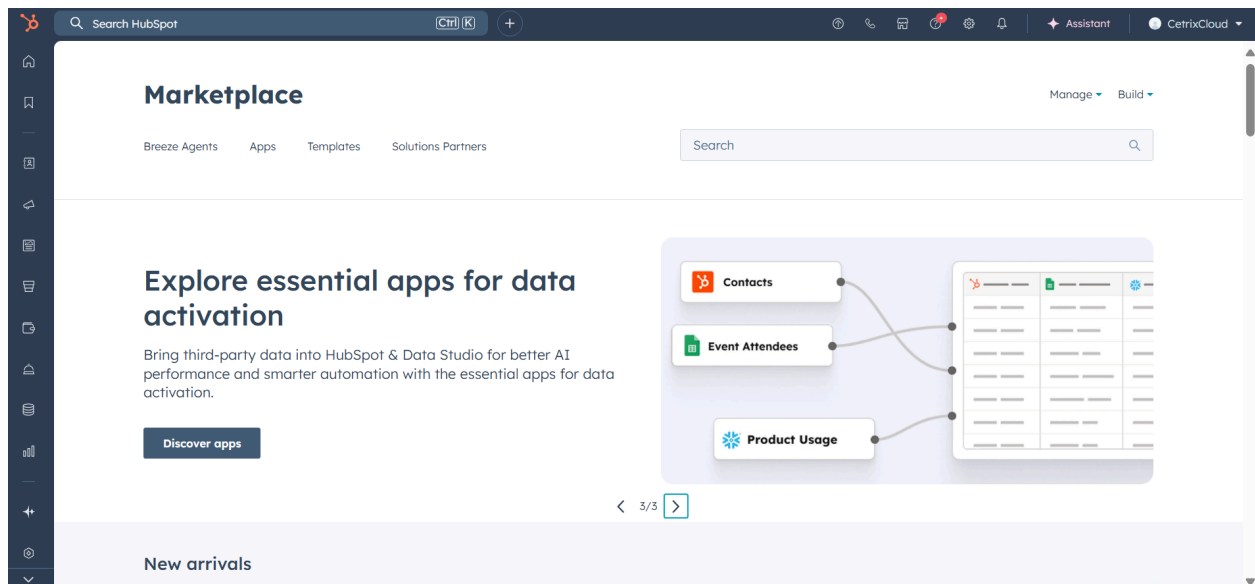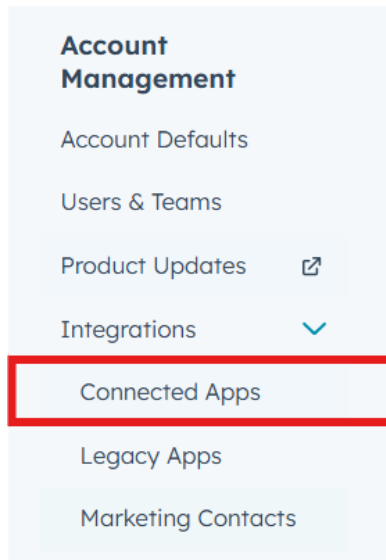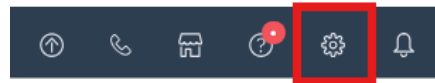
# Quick install

1. In HubSpot, click the **marketplace** icon (top navigation) → **HubSpot Marketplace**. Search for **Retell AI Voice Agent SYNC** and select it. Click **Install**. If **Install** is greyed out, it's already installed in your account.

2. If you have multiple HubSpot accounts, **choose the correct account** for the connection.

3. Review the **permissions (scopes)** HubSpot shows and click **Grant access** to continue.

4. You'll be redirected to a **secure** page to finalize setup. (HubSpot sends a one-time code; Our app exchanges it for secure tokens.)

5. Verify the connection in HubSpot: **Settings** → **Integrations** → **Connected Apps** (you can manage, reconnect, or uninstall here).

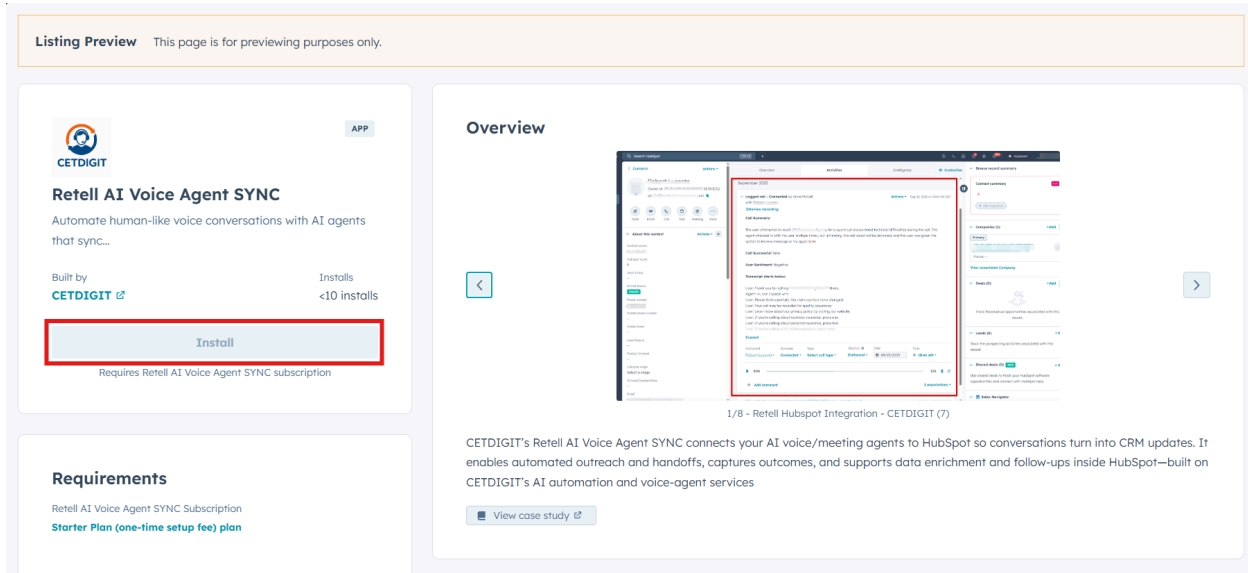# Step-by-step walkthrough (what you'll see)

## 1) Find the app

- In your HubSpot account, click the **marketplace** icon → **HubSpot Marketplace**. Search for **Retell AI Voice Agent SYNC** and select it.

## 2) Start the install

- Click **Install** on the listing page. If it's greyed out, the app is already installed in your account.



## 3) Pick your HubSpot account

- If you manage more than one HubSpot account, HubSpot will prompt you to **select the account** where you want our app to connect.

## 4) Review permissions (scopes)

- HubSpot shows the **scopes** (specific data/feature permissions) our app needs. Click **Grant access** to continue. Scopes control what the app can access—nothing more.

## 5) Authorize & finish

- After you grant access, HubSpot **redirects you back to our app** to finish setup (e.g., selecting options or enabling features). Behind the scenes, HubSpot sends a **temporary code** to our app, which is exchanged for secure tokens to keep the connection active. Access tokens are **short-lived**; when they expire our app uses a **refresh token** to get a new one automatically—your password is never shared.

## 6) Confirm it worked

- In HubSpot, go to **Settings → Integrations → Connected Apps**. You should see **Retell AI Voice Agent SYNC** there; from this page you can open settings, **Reconnect**, or **Uninstall** if needed.

## 7) Meet CETDIGIT

CETDIGIT will schedule a meeting to get more details about the requirements to complete the installation.

# Managing, uninstalling, or reinstalling

- **Manage / reconnect: Settings → Integrations → Connected Apps → Actions** on our app.

- **Uninstall: Actions → Uninstall**, then type **"uninstall"** to confirm. You can re-install any time via the Marketplace. (Note: uninstalling stops the integration; whether data is removed depends on each app's design, so check the listing or our support notes.)

# Troubleshooting (common issues & quick fixes)

**I can't click "Install," or it's greyed out.**
The app is already installed in this portal, or you don't have permission. Check **Connected Apps** to confirm, or ask a Super Admin to install—or use **Request to install** from the listing.

**"You don't have permission to install apps."**
Only **Super Admins** or users with **App Marketplace Access** can install public apps. Ask your admin for this permission or use **Request to install** on the listing to email them.

**"Authorization failed" or "Insufficient scopes."**
This usually means the portal doesn't have access to one of the requested tools/scopes, or scopes changed. Check the **Requirements** section on the listing and try again (or contact us to review scopes). HubSpot shows an error when required scopes aren't available or included.

**Stuck on a blank page or consent dialog won't open.**
Disable ad-blockers and retry. If you manage corporate browsers, allow HubSpot domains and our app's domain.

**Retell AI Voice Agent SYNC**

**I installed to the wrong HubSpot account.**
Go to **Settings → Integrations → Connected Apps → Actions → Uninstall**, then repeat the install while selecting the correct portal.

**The app doesn't appear under Connected Apps after I clicked grant.**
The OAuth flow might not have completed (e.g., the final redirect didn't finish). Run the install again and finish authorization on our page. (HubSpot only shows an app as "Connected" once the initial access & refresh tokens are created.)

**"Token expired" errors later on.**
HubSpot access tokens are intentionally short-lived. Our app refreshes them automatically; if you still see errors, open the app from **Connected Apps** and click **Reconnect** (or reinstall).

# Helpful tips

- **Use "Request to install"** if you don't have access—HubSpot emails the admin with the exact app and required permissions.

- **Review the listing's Setup guide** for app-specific steps or post-install configuration you might want to enable.

- **Know who can install.** Since late 2023, HubSpot requires **App Marketplace Access** (or Super Admin) for first-time installs of public apps.

- **Need help?** On the listing's **Support** tab you'll find how to contact the app provider's support team.

## What happens with security during install

When you click **Install** and **Grant access**, you're authorizing our app via **OAuth 2.0**—the industry standard. HubSpot never shares your password with us. Instead, HubSpot sends a one-time **authorization code** back to our app; we exchange that code for secure tokens to make approved API calls. Those tokens are **limited to the scopes** you approved and can be refreshed when they expire. ([HubSpot Developers](#))

## You're all set

Once you've completed the steps above, **Retell AI Voice Agent SYNC** will be connected to your chosen HubSpot account. If you run into anything else, share the exact message you see and where it appears (HubSpot vs. the Retell page), and we'll point you straight to the next click.