

# HubSpot CRM + Profit4 OGL Integration

**A Complete Guide for  
UK Wholesalers, Distributors  
& Merchants**





# Introduction

UK wholesalers, distributors and merchants are under increasing pressure to digitise operations and deliver exceptional customer experiences. Companies that connect their front-office CRM with back-office ERP systems are seeing dramatic improvements in efficiency, customer retention and revenue growth.

This guide demonstrates how combining HubSpot CRM with Profit4 OGL ERP creates a powerful bidirectional integration that transforms how wholesale and distribution businesses manage their entire customer lifecycle – from initial lead capture through order fulfilment and beyond.

At Plus Your Business, we specialise in connecting HubSpot with industry-specific systems like Profit4. As a HubSpot Elite Partner with ISO 27001, ISO 9001 & ISO 42001 certifications, we bring the expertise needed to implement these integrations securely and effectively.





# Why CRM Matters for Wholesalers & Distributors

Customer relationship management provides wholesalers and distributors a centralised system to manage buyer interactions across sales, customer service and marketing. In an industry where margins are thin and competition is fierce, having a single source of truth for all customer information is the foundation of competitive advantage.

**21%**

of sales reps' time is spent researching incomplete data across disconnected systems

Source: Salesforce Research

## Challenges generic CRM solutions fail to address:



Data silos between sales, warehouse and accounts



Manual re-keying of orders consuming valuable time



No visibility of stock levels for the sales team



Inability to track customer journey end-to-end

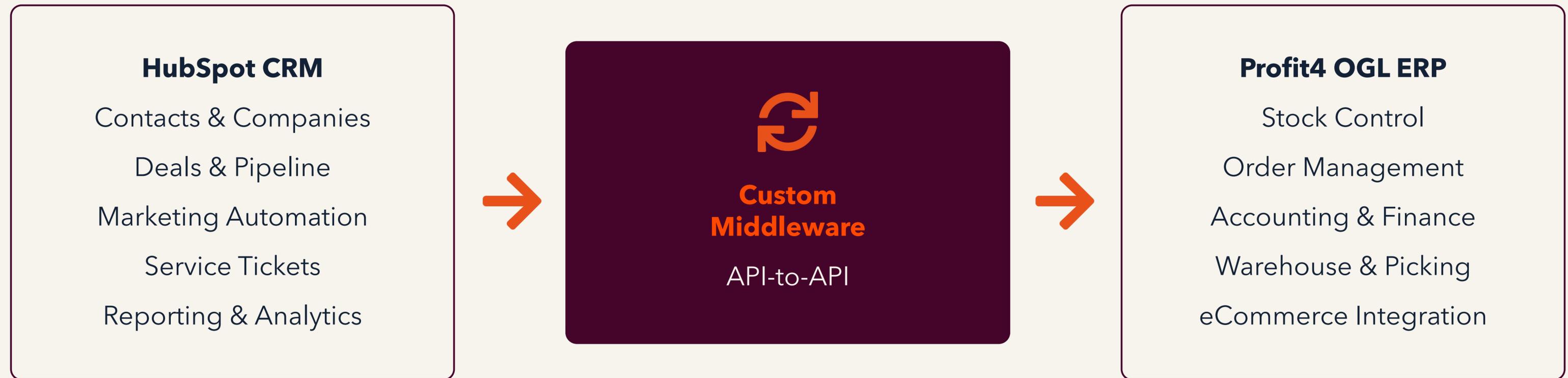


Difficulty attributing revenue to marketing sources



# The Integration: Bidirectional Data Sync

The true power of this solution lies in the seamless integration between HubSpot CRM and Profit4 OGL ERP. This bidirectional sync eliminates duplicate data entry, ensures consistency across systems, and enables end-to-end visibility from initial customer contact through order fulfilment and delivery.





# HubSpot to Profit4: Pushing Customer Data

## Contact & Company Sync

When a new customer is created or updated in HubSpot, the integration automatically syncs the contact and company information to Profit4. This ensures your accounts and warehouse teams always have the most current customer details – delivery addresses, credit terms and contact preferences – without manual re-entry.

## Order Creation from HubSpot

When a customer confirms a purchase, your team can trigger order creation directly from HubSpot:

1. Deal reaches 'Closed Won' in Sales Hub
2. Integration triggers order creation in Profit4
3. Stock is allocated and picking note generated
4. Team continues in HubSpot while fulfilment runs in Profit4

**Nearly 1 in 3 businesses ship late because they've sold a product that wasn't in stock. This integration gives sales real-time inventory visibility.**





# Profit4 OGL: Integration Capabilities

Profit4's open API (built with React and GraphQL) provides comprehensive functionality for seamless data exchange:



## Customer Data

Sync contacts, companies, credit terms and delivery addresses between systems



## Order Management

Create, track and update sales orders with real-time status synchronisation



## Stock & Inventory

Real-time stock levels, bin locations, optimum stock calculations and purchasing



## Finance & Accounting

Invoice data, payment status, credit control and profit & loss visibility



## Fulfilment & Shipping

Picking notes, dispatch status, courier integrations and delivery tracking



## Reporting & BI

Dashboards, sales performance, margin analysis and custom report generation



# Problems This Integration Solves

Based on research across the wholesale and distribution sector, these are the most common pain points that an ERP-CRM integration directly addresses:

- ✓ **Sales team can't see stock levels**  
Real-time inventory data flows from Profit4 into HubSpot deal records, so reps know availability before quoting.
- ✓ **Orders re-keyed manually into ERP**  
Closed deals in HubSpot automatically generate orders in Profit4, eliminating double-entry and human error.
- ✓ **No single customer view**  
Bidirectional sync creates one unified customer record across both systems – purchase history, communications, credit terms.
- ✓ **Can't attribute revenue to marketing**  
HubSpot tracks first touch to closed deal while Profit4 confirms actual revenue, giving true ROI per channel.
- ✓ **Credit control disconnected from sales**  
Credit status and payment history from Profit4 surfaces in HubSpot, so sales teams are aware of overdue accounts.
- ✓ **Slow response to customer enquiries**  
Order status, stock availability and delivery tracking all visible in HubSpot – no need to switch between systems.



# Reporting & Analytics

With all data flowing through HubSpot – from initial marketing touchpoint through order completion – you gain unprecedented visibility into your entire operation.

## Complete Customer Journey Tracking

-  **Marketing Attribution** – know whether customers came from paid, organic, referral or AI answer engines
-  **Sales Metrics** – track deals, communications, tasks and time-to-close by rep
-  **Operational Data** – view order info, revenue, costs and margins from Profit4
-  **Customer Lifetime Value** – total revenue by customer, segmented by source

## Revenue Attribution & ROI

Connect marketing spend directly to revenue outcomes. Track from initial click through to completed orders and collected revenue in Profit4.

## Commission & Performance Tracking

Track sales performance against targets, calculate commissions based on closed revenue, and structure bonus programmes – all from one system.



# Customer Portal: Self-Service Visibility

With all data centralised in HubSpot and updated in real-time from Profit4, you have the foundation to build customer-facing portals that deliver real-time visibility and reduce inbound support queries.

## Real-Time Order Tracking

- ✓ View current order status and expected delivery dates
- ✓ Track progression through picking, dispatch and delivery
- ✓ Access invoices and proof of delivery documents online
- ✓ Review complete order history and download documentation
- ✓ Request returns or raise queries via self-service forms



### Multi-Channel Notifications

Keep customers informed through their preferred channels. Proactive notifications via email, SMS, or WhatsApp ensure customers never have to wonder about order status – reducing inbound calls and building trust.



# Key Benefits

Wholesalers and distributors that embrace integrated technology stacks position themselves for sustainable growth. The combination of HubSpot CRM and Profit4 OGL ERP creates a unified platform that addresses the complete customer lifecycle.



## Increased Lead Conversion

Smart forms, chatbots and AI tools capture and qualify more prospects automatically



## Accelerated Sales Cycles

Email sequences, templates and automation enable faster, more consistent follow-up



## Operational Efficiency

Bidirectional sync eliminates duplicate data entry and manual re-keying of orders



## Enhanced Customer Experience

Real-time visibility and proactive communication build trust and loyalty



## Data-Driven Decisions

Complete attribution and ROI tracking from first click to collected revenue



## Scalable Foundation

System grows with your business without proportional increases in overhead



# Get in Touch

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