Loanleaf

Loanleaf leads, straight into HubSpot

Set up once and every lead bought on the Loanleaf platform arrives in HubSpot as a contact, within seconds. Works on every HubSpot plan, including free.

RECOMMENDED · ABOUT 5 MINUTES

Connect HubSpot

Loanleaf sends each lead you buy into a HubSpot form in your account. HubSpot then creates the contact, or updates it if the email address is already in your CRM. No Zapier and no paid HubSpot plan needed.

1. Create the form in HubSpot

1. In HubSpot, go to **Marketing → Forms** and click **Create form**. Choose an **embedded** form and name it something like **Loanleaf leads**.
2. Make sure the form has these six fields (drag in any that are missing):

Form field	What Loanleaf puts in it
Email	The business owner's email address
First name / Last name	Their name
Phone number	Their mobile, e.g. +447700900123
Company name	The business, e.g. Acme Trading Ltd
Message	Everything else they told us (see page 3)

3. Click **Publish**. The form never needs to go on a website.
4. Open the form's **Share** or **Embed** option and copy the **embed code**. Copying the link from your browser's address bar while editing the form also works.

2. Connect it on Loanleaf

1. Sign in at **platform.loanleaf.co** and go to **Auto-buy → Delivery**.
2. Turn on **Send to HubSpot** and paste the embed code (or link) into the box.
3. Click **Save settings**, then **Send a test lead to HubSpot**.
4. In HubSpot, open **CRM → Contacts**. A contact called **Sam Sample** should appear within a minute. Delete it once you've checked.

> **That's it.** From now on, every lead you buy, by hand or with auto-buy, becomes a HubSpot contact the moment it's bought.

What arrives in HubSpot

The contact gets the name, email, phone and company. Everything else is in the contact's **Message** property and on the form submission, like this:

```
Loanleaf lead: #1042
Loan amount: £100,000
Purpose: Cash flow
Needed: Within 2 weeks
Business type: Limited company
Company number: 12345678
Annual revenue: £500k to £1m
Trading for: 2 to 5 years
Homeowner or tenant: Homeowner
Missed payments / CCJs: No
Existing finance: No
Quality score: 85
Credits used: 120
```

Make HubSpot act on it (optional)

If your HubSpot plan includes workflows, create a workflow with the trigger **Form submission → Loanleaf leads**. Useful actions:

- **Create deal** in your sales pipeline, e.g. stage "New lead"
- **Create task** for the owner: "Call within the hour"
- **Rotate contact owner** across your team
- **Send internal notification** by email or the HubSpot app

On plans without workflows, the form's own **notification email** setting (in the form's options) can alert your team to each new lead.

Lead emails for the whole team

Separately from HubSpot, each lead is emailed in full the moment it's bought. Under **Auto-buy → Delivery → Email each lead**, add up to **10 email addresses**, for example each adviser or a shared sales inbox. Replying to a lead email goes straight to the business owner.

> **Please don't use HubSpot's BCC or forwarding address here.** Lead emails are sent by Loanleaf, so HubSpot would file them under Loanleaf rather than the business. Use **Send to HubSpot** above for contacts.

Troubleshooting

What you see	What to do
"Paste the HubSpot form's embed code or its editor link"	The box needs the full embed code, or the link from the form editor. It must contain your HubSpot account ID and the form ID.
"Form … can't be found"	The form was deleted or isn't published. Publish it, copy the embed code again and save.
Test works but some details are missing	Add the missing fields to the form (Email, First name, Last name, Phone number, Company name, Message) and publish again.
No contact appears	Check **Marketing → Forms → Loanleaf leads → Submissions**. If the submission is there, the contact was merged into an existing one with the same email.

Prefer Zapier?

Zapier works too. Create a Zap with **Webhooks by Zapier → Catch Hook**, paste the hook link under **Auto-buy → Delivery → Send to CRM webhooks**, then add **HubSpot → Create or Update Contact** and **Create Deal**. Add a filter so only `event = lead.purchased` continues, which skips test leads.

Good to know

- Only leads you buy are sent. Leads you're browsing on Opportunities never leave Loanleaf.
- HubSpot, CRM webhooks and email all work together. Use any combination.
- Each lead is sold to one partner only.

> **Need a hand?** Email **hello@loanleaf.co** and we'll help you get connected.