Tutorial - Add File Attachments to HubSpot CRM Records

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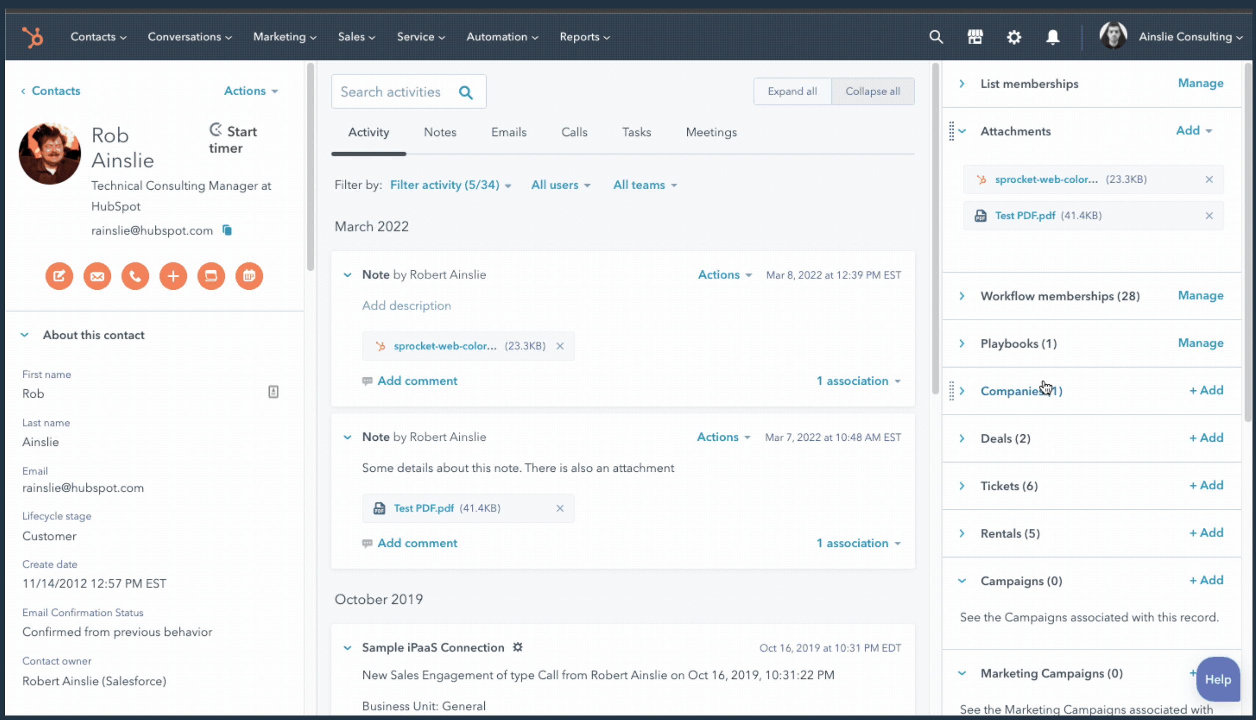
Outcome

Upload attachments to CRM records

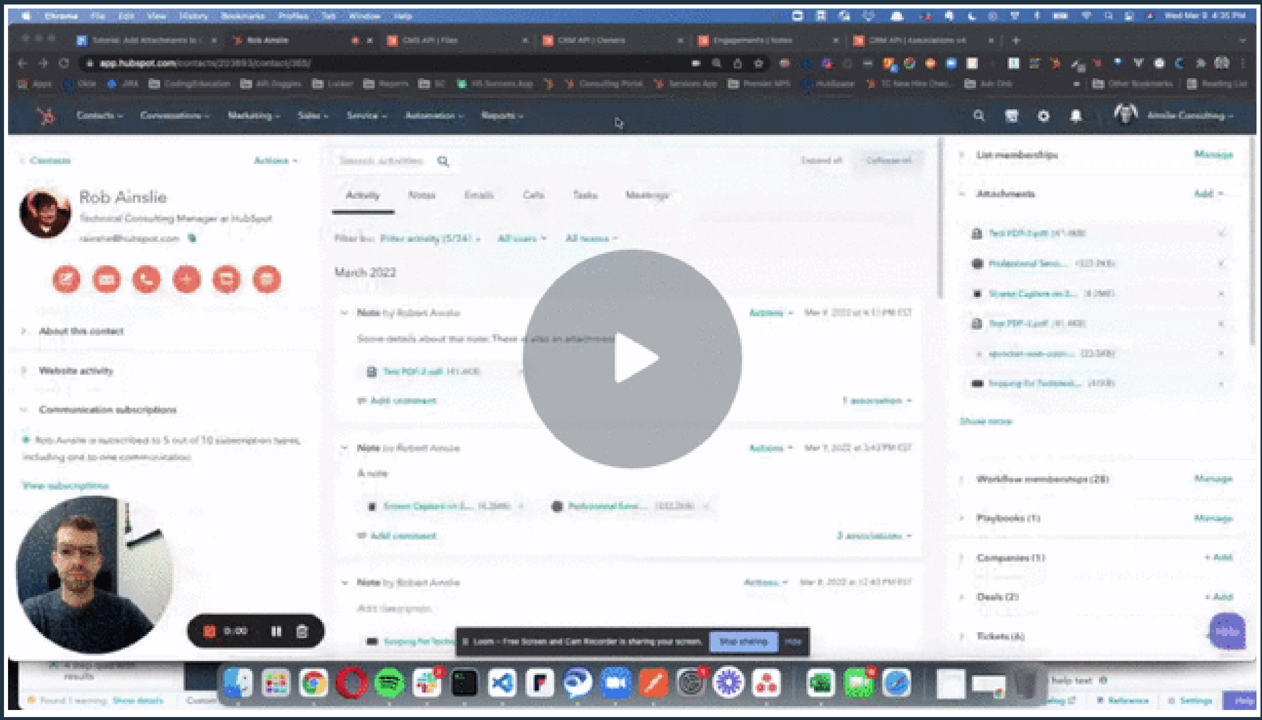
Goal and use case

It's quite common that a HubSpot user will want to attach relevant documents to a HubSpot CRM record. These could be any document, but commonly could be documents like historical contracts, purchase histories, resumes/CVs, etc. If you were to accomplish this task in the UI of HubSpot, a HubSpot user can use the 'Add attachment' button in the left pane of the CRM record. This will create an Engagement of type Note with the attachment associated.

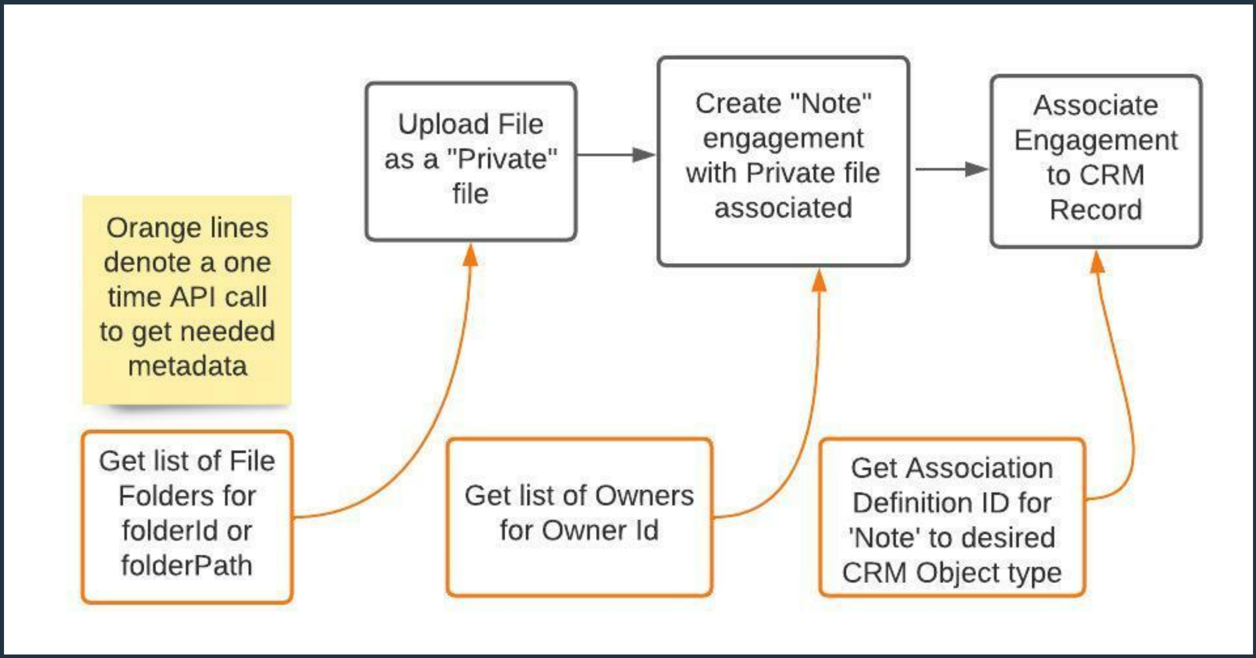


Let's learn how to do this using the HubSpot API.

Watch this Loom for an overview of the required steps
Upload File Attachments to CRM Records via Engagements - Watch Video



The flow of the requests required is outlined in this diagram:



Try it

1. Import this Postman collection
2. Reference the documentation for each of the endpoints used
    a. CMS Files API to upload the file
    b. CRM Owners API to find the owner ID who will own the Engagement

    c. CRM Engagements API for Notes where the file will be attached and associated to the right CRM record
    d. CRM Associations API to find the association definition for the Note to desired CRM record type
3. Use the 'Search File Manager File Folders' endpoint to find the folder ID or folder path for files.
    a. Find an existing folder where you wish to upload the file and make note of either the 'folderPath' or 'folderId' (if none exist, use the API to create a new folder).
4. Use the Upload Private File endpoint to select the file binary.
    a. Update the folderPath or add/update the folderId in the API call in the Postman collection - either the folderPath or folderId is needed, don't use both
    b. Select a local file in Postman using the File selector
5. Gather metadata required to create the engagement and associate the file to the Note engagement
    a. Get owners and find the Owner ID that should own the Note Engagement
    b. Update the API call with the Owner ID and place the File ID in the "hs_attachment_ids" key
    c. Make the API call to create the Note
    d. Note that the parameter 'hs_attachment_ids' is not currently documented. Additionally, multiple attachments can be added using a semi-colon separated value: "hs_attachment_ids":"234;567"
6. Associate the Note to a CRM record
    a. You will need the association definition ID to associate the Note to a Contact. You can also find the association definition for other CRM objects if desired
    b. Make API call to associate Note to Contact