

# Handwrytten — Admin Setup Guide

This guide walks a HubSpot portal admin through installing the new Handwrytten app, connecting a Handwrytten account, configuring per-portal settings, and migrating saved card-send activity from the legacy Handwrytten app.

It assumes you already have a HubSpot portal with Marketplace install permissions and an active Handwrytten account. If you do not have a Handwrytten account yet, sign up at <https://www.handwrytten.com> before continuing.

---

## 1. Before you start

Have these ready:

- **A HubSpot Super Admin** (or at minimum a user with permission to install Marketplace apps and read/write CRM objects).
- **A Handwrytten account login.** The app uses OAuth to connect to Handwrytten — you'll be redirected to Handwrytten to sign in and approve scopes during the connection step.
- **The legacy Handwrytten HubSpot app installed** in the same portal, if you have historical card-send activity you want to carry forward. You will keep the legacy app installed during the migration step and uninstall it after the migration completes.

The new app supports HubSpot Developer Platform Projects 2026.03 and replaces the previous Handwrytten Marketplace listing in place.

---

## 2. Install the app from the HubSpot Marketplace

1. In HubSpot, click the Marketplace icon in the top nav and choose **App Marketplace**.
2. Search for **Handwrytten** and open the listing.
3. Click **Install app**, choose the portal you are installing into, and review the requested scopes. The app needs read on contacts/companies/deals/tickets, write on contacts/deals, custom CRM objects (read/write + schemas), plus timeline, automation, and `settings.users.read`. These are the scopes that allow card sends to be logged on the timeline, the Place Card workflow action to fire, and User Management to map HubSpot users to Handwrytten senders.
4. Approve the install. HubSpot will redirect you back to the app once OAuth completes.

After install, the Handwrytten cards appear on the right rail of contact, company, deal, and ticket records, and the Handwrytten settings page is reachable under **Marketplace → Connected apps → Handwrytten → Settings**.

---

## 3. Connect your Handwrytten account

Open **Settings → Handwrytten → Connection** in the app and follow the on-screen flow.

5. Click **Connect via OAuth**. A new browser tab opens at Handwrytten.

6. Sign in to Handwrytten and approve the requested scopes (`read:profile`, `send:cards`, `read:orders`, `read:contacts`, `write:contacts`, `read:balance`).
7. The tab closes itself. Return to the HubSpot Settings tab; the **Connection** panel will show **Connected**, the linked account name, and a **Test mode** badge if your Handwrytten account is in test mode.

The **Reconnect** button re-runs OAuth (useful if scopes change), and **Disconnect** clears the stored credential.

**Test mode.** If your Handwrytten account is in Test mode, every send is accepted but nothing is printed or mailed. The app surfaces a yellow **Test mode** badge wherever a send can happen so you don't ship test traffic to real recipients by accident.

---

## 4. Configure your settings

Settings are split across five tabs. Walk through them in order on first install.

### Connection

Already covered above. From here you can also Reconnect or Disconnect at any time.

### Defaults

Pick the defaults that pre-fill every send and every workflow action:

- **Default sender** — sourced from your Handwrytten address book (`Senders`). This is the return-address identity that goes on cards when a workflow doesn't override it.
- **Default handwriting font** — sourced from Handwrytten's font catalog.
- **Default signature** — sourced from your saved Handwrytten signatures.
- **Activity logging style** — choose how sends appear in HubSpot timelines (App Event vs. plain note). App Event gives a richer rendered card thumbnail; plain note is the fallback if your portal does not yet have App Events authorization.

Click **Save** at the bottom to persist.

### Recipient mapping

Tells the app which HubSpot contact properties to read when building a recipient address. Defaults work for most portals (firstname, lastname, address, city, state, zip, country), but if your portal uses custom property names for any of these — for example, `mailing_address_1` instead of HubSpot's standard `address` — pick the right property from each dropdown. Required fields: first name, last name, street, city, state, ZIP. Click **Save** when done.

### Migration

Used once, during cutover from the legacy app. See section 5 below.

### User Management

Controls which HubSpot users can send cards on the connected Handwrytten account.

- **Share mode** — `All users` (any HubSpot user in the portal can send) or `Allowlist` (only users you explicitly add).

- **Members** — when in allowlist mode, add HubSpot users by email. Members see the connected account in their card panels but can't change the account-level defaults.

Multiple admins can each connect their own Handwrytten account into the same HubSpot portal. The User Management tab includes a small ownership selector when you own more than one connection, so you can configure each one independently.

---

## 5. Migrate data from the legacy Handwrytten app

If you used the previous Handwrytten HubSpot app, your historical card-send activity lives on the contact timeline as legacy timeline events. The new app reads those events from HubSpot, converts them into the new app-event format, and re-emits them so they remain visible after you uninstall the legacy app. This is a per-portal action and only needs to run once.

**Important.** Keep the legacy Handwrytten app installed while you migrate. The new app reads legacy events through the legacy app's installation; uninstalling the legacy app first will lose the audit trail.

### Step 1 — Open the Migration tab

In **Settings** → **Handwrytten** → **Migration** the tab loads a summary from the BFF showing:

- **Total legacy events found** — how many candidate events were detected on contact timelines in this portal.
- **Migrated** — how many have already been converted into the new app's event store.
- **Remaining** — how many still need to be processed.
- **Failed attempts** — anything that errored on a previous run (if any).

If the count of total events is zero, you don't have any legacy activity to migrate and can skip to Step 4.

### Step 2 — Run the migration

Click **Migrate legacy activity**. The migration runs in batches of 25 events. Progress text updates as each batch finishes ("Processed N events this run"). The whole run typically takes a few seconds per hundred events; large portals may take a couple of minutes.

When the run completes you'll see a summary like *"Migration run complete. Created 312 new app-event occurrences and verified 14 existing app-event occurrences."* The **Updated events** table below lists the most recent migrated events with the originating contact, the legacy order ID, and the resulting HubSpot write status.

### Step 3 — Re-run if needed

You can rerun migration at any time:

- If a previous run had failures (visible under **Recent failures**), click **Migrate legacy activity** again. The run is idempotent — events already migrated are detected via a stable per-portal event ID and not re-emitted.
- If everything migrated cleanly but you want to verify the writes, the button changes to **Re-run event migration**, which replays existing events into the new app and confirms each one is present.

- If something went wrong end-to-end and you want to start over, **Clear migration log** wipes the migration bookkeeping for this portal so the next run starts from scratch. (Click once for the safety prompt, click again to confirm.)

#### Step 4 — Validate, then uninstall the legacy app

Once **Remaining** is 0 and the **Failed attempts** count is 0, open a contact that previously had legacy card-send activity and confirm the timeline shows the same events under the new app's name. Then go to **Settings → Marketplace → Connected apps**, find the legacy Handwrytten app, and uninstall it. The new app's events remain in place after uninstall.

If both apps stay installed simultaneously, new sends will appear twice on the timeline (once from each app's webhook listener) until the legacy app is removed. The migration prompt is intentionally a soft prompt rather than a forced uninstall — keep the legacy app installed only as long as you need it for the migration step.

#### What the migration carries forward

The migration tool moves these data points from legacy timeline events into the new app's event store:

- The legacy order ID (preserved in the new event so historical reports stay joinable).
- Recipient name and contact association.
- Card name, handwriting style, gift card detail, and message body as parsed from the legacy event detail text.
- Original event date (preserved via HubSpot's `occurredAt` field — events are not stamped "now").

Things that **do not** carry forward automatically:

- **Connection credentials.** OAuth has to be re-completed in the new app — there is no legacy credential we can read from.
- **Per-user sender mappings.** If your team had User Management or sender mappings configured in the legacy app, redo them under the new app's User Management tab.
- **Spend caps and per-contact suppression rules.** Re-enter under Defaults / Guardrails (Guardrails ships at v1.1).

## 6. Verify the install works end-to-end

A 60-second smoke test:

8. Open any contact record. The right rail shows a Handwrytten card. Click **Send a card**, choose a template, type a short message, and send. (Use a Handwrytten test-mode account if you don't want a real card mailed.)
9. After a few seconds the contact's timeline shows a new "Card sent" event with the card thumbnail.
10. Open **Workflows → Create workflow**, add the **Place Handwrytten card** action, point it at a contact, and run the workflow once. Confirm the order is placed and a second timeline event appears.

If both work, you're connected, your defaults resolve correctly, and your workflow actions can reach the BFF.

---

## 7. Troubleshooting

**"App is missing its BFF host" alert on the Settings page.** The deployed project bundle does not have a `BFF_HOST` variable in its profile. Contact whoever deployed the HubSpot project bundle and ask them to re-upload with the right profile (`hs project upload -p prod`).

**Connection tab keeps showing "Loading connection..."** The settings page can't reach the BFF. Check that `https://hubspot.handwrytten.com/health` returns `{"ok": true}` in a browser. If it doesn't, the BFF is down — contact Handwrytten support.

**Migration shows "Total legacy events found: 0" but you know there were sends.** The legacy Handwrytten app must still be installed in the portal during migration. If it has already been uninstalled, the legacy timeline events are no longer queryable through HubSpot's timeline API and cannot be migrated. Contact Handwrytten and we can help you re-install the legacy app.

**Migration completes with "Failed attempts" greater than zero.** Each failure shows the legacy order ID, the contact ID, and the error message. The most common failure modes are missing contacts (the contact was deleted between the legacy send and today) and rate-limit pushback from HubSpot. Click **Migrate legacy activity** again to retry — the failure list clears as items succeed.

**Workflow action runs but no timeline event appears.** Open the workflow execution log inside HubSpot. If the action returned an error, the message includes a hint (most commonly "address invalid" or "no Handwrytten connection"). If the action returned successfully but the timeline is empty, the portal may not have App Events authorized — go to **Settings → Defaults → Activity logging style** and switch to **Postal mail (note)** as a fallback.

**Card preview won't load on the contact card.** Confirm the connection is healthy (Connection tab shows the linked account). If yes, refresh the page once — the card panel caches preview images per session.

For anything else, reach out to [support@handwrytten.com](mailto:support@handwrytten.com) or open a chat from <https://www.handwrytten.com/contact> and include your HubSpot portal ID (visible in the URL when you're inside HubSpot).