Salesforce and HubSpot Integration – A Comprehensive Technical Guide

Introduction:
Integrating Salesforce (a leading CRM platform) with HubSpot (an inbound marketing and CRM platform) is crucial for organizations that use both for different business functions. A robust integration ensures that marketing and sales teams share consistent data, streamlines lead management, and enables closed-loop reporting from marketing campaigns to sales revenue

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. This guide explores **why** Salesforce-HubSpot integration is important, details **which objects and data** are exchanged, describes **object and field mappings**, examines **various integration approaches** (native sync, third-party connectors, middleware, custom API solutions, and iPaaS platforms), and evaluates the **advantages and disadvantages** of each. The content is highly technical – intended for developers and architects – and includes configuration details, data structures, synchronization logic, examples of payloads, and technical diagrams. Best practices and real-world considerations (such as data quality, sync errors, and performance limits) are highlighted throughout.

1. Importance of Integrating Salesforce and HubSpot

Integrating Salesforce and HubSpot provides a unified view of prospects and customers across marketing and sales, eliminating data silos. **Key benefits include:**

- **Seamless Data Synchronization & Single Source of Truth:** Integration keeps contact and company data in sync between the marketing and sales databases, so both teams work with the same up-to-date information

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. This eliminates manual data transfer and reduces errors

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, ensuring that each system reflects the “single source of truth” for customer data

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- **Sales and Marketing Alignment:** By linking HubSpot’s inbound marketing and lead nurturing capabilities with Salesforce’s CRM and sales pipeline, organizations achieve tighter sales-marketing alignment

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. For example, sales reps using Salesforce can see marketing engagement data (email opens, website visits, form submissions) from HubSpot

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, helping them prioritize hot leads and personalize outreach. Meanwhile, marketers can see sales outcomes (e.g. opportunities and revenue) in HubSpot, enabling “closed-loop” reporting of campaign ROI

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- **Improved Lead Management and Conversion:** An integrated system can automatically pass leads captured in HubSpot to Salesforce, ensuring prompt follow-up by sales

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. As leads progress, their status (Lifecycle Stage in HubSpot or Lead Status in Salesforce) can sync, so both systems reflect whether a lead is Marketing Qualified (MQL), Sales Qualified (SQL), etc. Timely syncing of new leads and updates helps increase conversion rates by making sure no lead “falls through the cracks”

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- **Holistic Customer View:** With integration, sales reps get rich context on a contact’s marketing activities (e.g. content downloads, campaign interactions) right inside Salesforce, often via embedded HubSpot widgets or synced fields

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. Conversely, marketers using HubSpot can leverage Salesforce data (like opportunity status or past purchases) to segment contacts and tailor campaigns

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. This 360° view of the customer journey enables more personalized engagement and continuity as prospects transition from marketing to sales to service

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- **Elimination of Data Entry Duplication:** Integration automates what would otherwise be duplicate data entry across systems. For instance, once a sales rep converts a lead to a customer in Salesforce, that status can automatically update in HubSpot, saving the marketing team from manually updating lists. This reduces labor and human error, and keeps both systems synchronized in near real-time

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- **Workflow Automation Across Platforms:** Many processes can be automated when the systems are connected. For example, HubSpot workflows can assign a Salesforce task to a sales rep when a lead performs a high-value action, or Salesforce can trigger HubSpot to enroll a contact into a nurture workflow when an opportunity is marked Closed-Lost

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. The integration supports such cross-platform triggers through either the native sync or additional automation tools, boosting productivity by eliminating redundant manual steps

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- **Advanced Analytics and Closed-Loop Reporting:** By syncing opportunity and revenue data from Salesforce back into HubSpot, marketing teams can tie campaigns to real sales outcomes (Closed-Won deals)

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. Similarly, Salesforce users can incorporate HubSpot engagement metrics into their reports. This integration enables advanced reporting like campaign ROI, lead funnel conversion rates, and sales velocity with marketing touchpoints, giving better insight into what strategies drive revenue

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- **Scalability and Consistency:** As the business grows, an integration ensures both systems scale together without divergence in data. It enforces data governance rules across platforms (e.g., required fields, picklist values) and helps maintain consistent data definitions. Teams can refine their use of each platform (e.g., adopting new HubSpot marketing features or Salesforce custom objects) while keeping the integration mappings updated so data continues to flow correctly

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In summary, integrating HubSpot and Salesforce “closes the loop” between marketing and sales, driving efficiency and better customer experience. Marketing can seamlessly hand off qualified leads to sales and see feedback on outcomes, while sales gains valuable intelligence on prospect interest

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. This tight integration is often considered essential infrastructure for companies leveraging both platforms.

2. Data Objects Exchanged Between Salesforce and HubSpot

Salesforce and HubSpot each have their own data models and object terminology. Understanding which **objects** (record types) are shared and how they correspond is fundamental to a successful integration. Typically, the following objects are exchanged between the two systems:

- **Contacts (People):** In HubSpot, all individual person records are **Contacts**, whereas Salesforce uses **Leads** and **Contacts** to represent people at different stages

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. The integration treats HubSpot contacts as the primary object to sync; by default, every HubSpot Contact can sync to either a Lead or a Contact in Salesforce

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. HubSpot does **not** have a separate "Lead" object – instead, it uses a property called *Lifecycle Stage* to indicate if a contact is a lead, opportunity, customer, etc.

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. Therefore:

  - A new **HubSpot Contact** will sync to Salesforce as either a Lead or a Contact based on configuration (admin chooses one as the default for creation)

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. Many companies configure HubSpot to create new people as Leads in Salesforce until they are sales-qualified

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  - In Salesforce, both **Lead** and **Contact** records will sync to the single HubSpot Contact record (two Salesforce objects mapping to one HubSpot object)

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. If a Salesforce Lead is converted into a Contact, it continues syncing to the same HubSpot contact record (no duplicate HubSpot record)

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    - **Email address** is the unique key for HubSpot contacts. HubSpot only allows one contact per email; if Salesforce has multiple leads/contacts with the same email, only the most recently updated one will sync to HubSpot

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. This is an important consideration for data deduplication.

    - **Person Accounts:** If Salesforce uses Person Accounts (which combine account+contact for B2C scenarios), these can sync to HubSpot contacts as well (HubSpot can treat them like contacts/companies). By default, new HubSpot contacts become Salesforce Leads/Contacts – person accounts require special configuration per Salesforce's data model (the HubSpot integration supports Person Account sync with certain settings)

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- **Accounts/Companies:** A **Salesforce Account** (which represents a company or organization) corresponds to a **HubSpot Company** object

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. Company/Account sync is optional (it can be toggled on after contact sync is working)

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. When enabled:

    - Creating a **Company in HubSpot** can create an **Account in Salesforce** (with mapped fields like Company Name, domain, etc.), and vice versa

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. The integration will attempt to associate contacts to the appropriate account/company on each side.

    - The integration will automatically create a Salesforce Account from a HubSpot Company *only if* certain criteria are met, such as the HubSpot company having associated contacts that are syncing as Salesforce

Contacts (not leads) or the company was created via HubSpot's automatic association when a contact with a company domain is added

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. For example, if a HubSpot contact with no associated Salesforce Account (i.e., a standalone Contact in SF) is associated with a new Company in HubSpot, an Account can be created in Salesforce to mirror that company

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- Accounts will not be auto-created from HubSpot if the only associated contacts are still leads in Salesforce (since those leads aren't tied to accounts yet)

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. In such cases, the account creation is deferred until a contact is in Salesforce as an actual Contact under an Account.

- Changes to company data (like Company Name, Industry, etc.) will sync between HubSpot and Salesforce account fields per the field mappings configured. HubSpot uses the company's **domain (website URL)** as a unique identifier to prevent duplicate companies, whereas Salesforce may use Account Name plus other criteria for duplicates – the integration includes deduplication logic to avoid creating duplicate accounts

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- **Deals/Opportunities:** A **HubSpot Deal** (often used to track a sales opportunity in HubSpot's Sales Hub) maps to a **Salesforce Opportunity**

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. This object sync is also optional and typically enabled if you want to push deal pipeline info into HubSpot or vice versa.

    - **Deal to Opportunity Sync:** When enabled, creating a Deal in HubSpot can create an Opportunity in Salesforce with corresponding fields (Deal Name, Amount, Close Date, Deal Stage -> Opportunity Stage, etc.) and association to the proper Account/Contact

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. Conversely, Salesforce opportunities can be synced into HubSpot as deals, allowing marketing to see pipeline progress and revenue.

    - HubSpot deals are always associated with a company and/or contact in HubSpot. For the sync, the integration will attach the Salesforce Opportunity to the mapped Account (from the HubSpot deal's associated company) and possibly link the primary contact (often via Opportunity Contact Roles or a designated contact field). If the HubSpot deal is associated with multiple contacts, typically one primary contact is synced as the Opportunity's primary contact (others might not carry over, since Salesforce's standard Opportunity has related contacts via roles).
    - **Multi-currency and Products:** If the Salesforce Opportunity uses products or has multi-currency values, the basic HubSpot sync might not cover every detail (the native integration syncs core fields but not necessarily line items or advanced opportunity components). For advanced use cases (like syncing quote line items or custom opportunity fields), a middleware or custom solution might be needed beyond the native sync.

- **Tickets/Cases:** A **HubSpot Ticket** (customer service case in HubSpot's Service Hub) can sync with a **Salesforce Case** (if using Salesforce Service Cloud)

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. This allows a company to use HubSpot for support tickets but still have cases reflected in Salesforce, or vice versa. This sync is useful for aligning support teams (if one platform is used by support while the other is the central CRM).

    - Enabling tickets sync will map fields like Ticket ID, Status, Priority, Subject, etc., to the Salesforce Case fields. HubSpot tickets associated with a contact/company will sync to a case linked to the respective contact/account in Salesforce.
    - **Note:** The native HubSpot-Salesforce integration supports Tickets sync only for certain HubSpot tiers (Service Hub Professional/Enterprise in conjunction with Salesforce). If not using the native sync or if

customization is needed, an iPaaS or custom integration might be used to connect HubSpot's ticket pipeline with Salesforce cases.

- **Activities (Engagements & Tasks):** Activities such as tasks, calls, emails, meetings, and notes are handled somewhat differently:
    - HubSpot logs sales activities on the timeline of a Contact (e.g., marketing email sends, sales calls, form submissions). The **native integration can sync certain HubSpot engagement types to Salesforce as tasks** on the corresponding Lead/Contact record

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. For example, a form submission or marketing email open in HubSpot could be created as a completed task or custom activity in Salesforce for logging purposes.

- Likewise, **Salesforce Tasks/Events can sync to HubSpot's timeline**. The integration settings have an "Activities" tab where you can toggle sync for tasks, meetings, calls, and emails

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. When enabled, a new task created in Salesforce (e.g., a follow-up task) will appear in HubSpot on the contact's timeline

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. The sync is typically one-way for certain items (e.g., Salesforce -> HubSpot for tasks) and may not cover all activity types perfectly (for instance, HubSpot might only create a generic "Salesforce task" entry for any Salesforce task, without distinguishing call vs. email).

- **Limitation:** The native integration does not fully sync all activity details. As noted in user community discussions, HubSpot's integration "only syncs activities (emails, calls, notes) as tasks, not their specific activity type" in Salesforce

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. This means a call logged in HubSpot might just show up as a completed task in Salesforce (with subject line indicating it was a call). If preserving activity type is important, some custom integration logic might be needed.

    - The activity sync is helpful for sales reps to see marketing interactions (HubSpot can create Salesforce tasks for form submissions or email clicks), and for marketing to see when sales follow-ups occur (HubSpot timeline can get a Salesforce task entry when a rep completes a task). However, because of the limited fidelity and potential volume, not all organizations sync all activities – some choose to sync only key events (like form submissions as tasks in SFDC) or use reports instead of syncing every email open.

- **Custom Objects:** Salesforce allows custom objects, and HubSpot (with **Operations Hub** or certain editions) can also work with custom objects. The native integration now supports a one-way sync of **Salesforce custom objects to HubSpot** custom objects (professional/enterprise Ops Hub feature)

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. This means you could mirror a Salesforce custom object (say, “Subscription__c”) into HubSpot for use in marketing automation. This sync typically requires setup in HubSpot’s integration settings to map the custom object and its fields from Salesforce.

    - There is no out-of-the-box two-way sync for arbitrary custom objects; usually, HubSpot is the consumer of Salesforce custom object data. If two-way custom object integration is needed, an iPaaS or custom API solution is often employed.
    - **Custom Fields on Standard Objects** are covered under field mappings (discussed in the next section). Both platforms allow custom properties/fields on contacts, companies, etc., and these can be mapped and synced just like standard fields

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, as long as the field types are compatible.

Data Architecture Differences: It’s worth noting the fundamental data model difference: HubSpot is *contact-centric* (all person records are Contacts with a Lifecycle Stage property), while Salesforce is *account-centric* with a Lead->Contact conversion model

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. Additionally, HubSpot has a relatively simple set of core objects (Contacts, Companies, Deals, Tickets, plus Activities)

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, whereas Salesforce has a more complex schema (Accounts, Contacts, Leads, Opportunities, Cases, plus many others and custom objects)

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. Despite these differences, the integration has defined **object mappings** as summarized below:

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As shown above, one HubSpot object can map to different Salesforce objects depending on context (e.g., HubSpot Contact -> Salesforce Lead or Contact). Understanding these mappings sets the stage for configuring field-level sync, described next.

3. Object and Field Mapping Details

Effective integration requires careful mapping of **fields/properties** between HubSpot and Salesforce objects. Field mapping defines how data in a HubSpot property corresponds to data in a Salesforce field, including data type alignment and sync direction rules. This section provides a detailed look at mappings for each object type and key fields, including how to handle differences in data types and special considerations (like ownership, picklists, and IDs).

3.1 Contacts/Leads Field Mapping

When syncing HubSpot Contacts to Salesforce Leads/Contacts, you will map common fields such as name, email, phone, address, company, etc. HubSpot refers to fields as **Properties**. For example, HubSpot's default contact properties include First Name, Last Name, Email, Phone Number, Job Title, Lifecycle Stage, Lead Status, Company Name, etc., many of which have direct analogues in Salesforce:

- **Name Fields:** HubSpot stores First Name and Last Name as separate properties (and also has a combined "Full Name" that is usually auto-generated). These should map to the Salesforce Lead/Contact FirstName and LastName fields respectively. Middle name or salutation can also be mapped if needed (HubSpot has "Name" parts and Salesforce has fields like Salutation).

- **Email:** HubSpot's Email property maps to Salesforce Email field on Lead/Contact. This is a critical unique identifier. The integration uses email to match existing records: if a HubSpot contact's email matches an existing Salesforce record's email, it will sync to that record rather than create a new one

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(provided the integration user has access and no inclusion list filters it out).

- **Phone Numbers:** HubSpot has "Phone Number" and "Mobile Phone Number" by default. You can map these to Salesforce fields (Lead Phone, Mobile, etc.). Data types (string for phone) are compatible. Ensure formatting is considered (no strict formatting enforcement by integration, but using a consistent format is best practice).
- **Company Name (Contact Level):** HubSpot's Contact has a property "Company Name" (usually populated when a contact is associated with a Company record, but it can exist independently). In Salesforce, a Lead has Company as a field (for B2B leads) and a Contact has an Account Name lookup. Typically:
  - If syncing HubSpot Contact to a Salesforce **Lead**, the HubSpot contact's Company Name property maps to the Lead's Company field

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  - If syncing to a Salesforce **Contact**, the integration will try to map to Account. This is done via the Company object sync: usually the HubSpot Contact's associated Company (object) will sync as an Account, and the Contact will link to that Account. In practice, the integration will first attempt to find an existing Account in SF with the same name or domain (based on matching rules) or create one, then link the Salesforce Contact to it. If no company association, the Salesforce Contact might be created without an Account (or associated to a default "No Company" account if your Salesforce uses one for B2C).
  - It's important to decide if you will use **Salesforce Accounts** for all HubSpot Contacts. If not (e.g., if many leads are individuals without accounts yet), you might have HubSpot create Salesforce Leads (which don't require an Account) to avoid creating numerous placeholder accounts.
- **Lifecycle Stage and Lead Status:** HubSpot's **Lifecycle Stage** property indicates where a contact is in the marketing/sales funnel (e.g., Subscriber, Lead,

MQL, SQL, Opportunity, Customer). Salesforce’s nearest equivalents are **Lead Status** (for leads, e.g., Open, Contacted, Qualified, Converted) and an Opportunity stage if they’ve become a contact with an opportunity. These don’t map one-to-one, but many integrations choose to:

  - Map HubSpot Lifecycle Stage to a custom field in Salesforce (to bring that info over for reference), or
  - Use workflows: e.g., if Lifecycle Stage becomes “Opportunity” in HubSpot, that might trigger creation of an Opportunity in Salesforce rather than directly mapping to a field.
  - Alternatively, use **Lead Status**: some map HubSpot’s Lead Status (separate property in HubSpot which can be used similarly) to Salesforce Lead Status picklist. This requires aligning the values (HubSpot lead status options to match Salesforce’s values)

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  - There isn’t a default Salesforce field that holds both pre- and post-conversion stage, so some implementations create a custom “Lifecycle Stage” field on both Lead and Contact in Salesforce to mirror HubSpot. In any case, mapping these stage fields helps both systems know how far along the person is (e.g., a Contact in Salesforce might have a field “Lifecycle Stage = Customer” if they completed a deal, syncing back to HubSpot to mark that contact as Customer).

- **Owner Fields:** Both systems have an owner/assigned user field. HubSpot has “Contact Owner” (a HubSpot user), Salesforce has Owner (typically a lookup to User). You can map HubSpot Contact Owner to Salesforce Lead Owner/Contact Owner so that ownership stays aligned

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. HubSpot will store the Salesforce ID of the owner to map to the right user. Note: For this to work, the users must be present in both systems (often via matching email addresses). The HubSpot integration by default maps Owner two-ways (if possible) but requires that the integration user in Salesforce has access to all users or you set up a proper mapping (HubSpot may prompt to import SF users to HubSpot). Also, **Owner**

mapping is always two-way (even if the UI shows “prefer Salesforce,” owner actually syncs both directions)

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- **Addresses:** HubSpot contact has properties for City, State/Region, Zip, Country, etc. These can map to Salesforce’s Lead/Contact Mailing Address fields (or separate fields if using individual components). Matching data types (text for city, state, etc.) is straightforward. Be mindful of differences in country naming or state abbreviations if using picklists.
- **Custom Contact Fields:** Any custom property on HubSpot contact (text, number, date, dropdown, etc.) can be mapped to a Salesforce custom field on Lead/Contact, provided the data types are compatible

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. For example, if you capture “Favorite Product” in HubSpot (dropdown property), you can create a custom picklist on Lead/Contact in Salesforce and map them. The integration UI will show only compatible field-type pairings for mapping to prevent errors

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. (E.g., a HubSpot multi-checkbox property can only map to a Salesforce multi-select picklist

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- **Field Type Compatibility:** As a rule, ensure the HubSpot property type matches the Salesforce field type. HubSpot’s field types include single-line text, multi-line text, number, date, dropdown (single select), radio (single select), checkbox (boolean), multiple checkboxes (multi-select), etc. Salesforce has many field types; most common ones are supported by the integration with logical mappings

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:

    - Dropdown or Radio in HubSpot -> Picklist in Salesforce

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- Multiple checkboxes in HubSpot -> Multi-select picklist in Salesforce

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- Single checkbox in HubSpot -> Checkbox (boolean) in Salesforce

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- Number in HubSpot -> Number (Integer/Decimal) in Salesforce

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- Text (single-line) in HubSpot -> Text or Textarea in Salesforce

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- Date picker in HubSpot -> Date or DateTime in Salesforce

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- HubSpot **calculation or formula** properties usually need to map to a compatible static field in Salesforce (the integration doesn't recalc formulas, it just syncs values). Similarly, Salesforce formula fields can sync one-way to HubSpot (as read-only on HubSpot side) but not the other way around (HubSpot can't update a formula field).

If a mapping of incompatible types is attempted, the HubSpot integration UI will warn or prevent it

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. For example, a HubSpot "user" type property (linking to a HubSpot user) cannot map to a Salesforce field (no equivalent)

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Screenshot: HubSpot integration settings for Contacts, showing a list of property mappings and their sync rules. Each mapping links a HubSpot property to a Salesforce field and defines how changes sync between systems.

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- **Notable Constraints:** Salesforce has some field types that HubSpot cannot sync to, as noted in HubSpot's documentation

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. For instance, Salesforce Lookup or Master-Detail fields (relationships) generally aren't targetable by HubSpot's integration (except Owner and maybe Campaign ID association in limited ways). If you need to set a lookup (e.g., link a contact to a specific record via lookup), you might need custom logic. Salesforce formula fields, roll-up summaries, auto-numbers are read-only in Salesforce; HubSpot can read them (sync SF->HS) but cannot write to them (HS->SF is not applicable). Dropdown value mismatches can cause errors (if HubSpot tries to sync an option that isn't an active picklist value in Salesforce, Salesforce will reject it)

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. The integration doesn't automatically deactivate or create picklist values – admins must keep picklist options in sync between systems to avoid errors

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- **Record IDs:** The integration will store Salesforce record IDs in HubSpot fields for reference and vice versa. For example, HubSpot by default adds hidden properties "Salesforce Lead ID" and "Salesforce Contact ID" on HubSpot contact records

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. These are populated when a contact syncs. They allow HubSpot users to know if a contact is linked to Salesforce and even whether it's currently a Lead or Contact (Salesforce IDs have prefixes: 00Q for Lead, 003 for Contact

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). On the Salesforce side, the installed HubSpot package similarly can add a field for "HubSpot Contact ID" on Leads/Contacts (so you can see the HubSpot GUID). These ID fields are technical, usually not edited by users, but are crucial for the integration to match and update existing records.

- **Example Contact JSON:** When using the APIs for integration, the data structures differ:
    - *HubSpot contact output example (JSON):*

json

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```
{
  "id": "25101",
  "properties": {
    "firstname": "Alice",
    "lastname": "Johnson",
    "email": "alice.johnson@example.com",
    "phone": "555-1234",
    "company": "Acme Corp",
    "lifecyclestage": "opportunity",
    "hs_lead_status": "New",
    "salesforcecontactid": "0031U00000XYZ123",
    "salesforceleadid": null
  }
}
```

This is how HubSpot might represent a contact via API – note the use of internal property names and a Salesforce ID reference.

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    - *Salesforce Lead/Contact JSON (via REST API):*

json

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```
{
  "Id": "00Q1U00000ABC999",
  "FirstName": "Alice",
  "LastName": "Johnson",
  "Email": "alice.johnson@example.com",
  "Phone": "555-1234",
  "Company": "Acme Corp",
  "LeadSource": "Web",
  "HubSpot_Contact_ID__c": "25101",
  "IsConverted": false
}
```

A Salesforce Lead record as JSON might include custom field HubSpot_Contact_ID__c to store the HubSpot ID. If converted (IsConverted=true), it would be a Contact record with potentially AccountId referencing an Account.

- Custom integrations map and transform these payloads between systems using the APIs, but the native integration handles it under the hood. It’s still useful to know the shape of data if troubleshooting or extending integration logic.

3.2 Accounts/Companies Field Mapping

For Company/Account sync, typical mappings include Company Name, Company Domain (Website URL), Industry, Annual Revenue, Number of Employees, Address, etc.:

- **Company Name:** HubSpot “Name” maps to Salesforce Account Name (straightforward text mapping).
- **Domain (Website):** HubSpot’s default “Company Domain Name” (website URL) can map to Salesforce Website field on Account. HubSpot also uses Domain to auto-associate contacts to companies (if a contact’s email domain matches a company’s domain, it can auto-link). In Salesforce, Website is just an informational field – but it’s often unique per company. The integration also uses Domain for deduplicating companies (HubSpot won’t create two companies with the same domain by default, and similarly it can try to match to an existing Account by website).

- **Address fields:** Sync street, city, state, postal code, phone, etc., between HubSpot company and Salesforce account. These are usually one-to-one text or picklist mappings (Country might be a picklist in Salesforce vs. single-line text in HubSpot, so ensure values align).
- **Industry:** Both systems have Industry fields (HubSpot's is a single-select dropdown by default). Ensure the picklist values in Salesforce match those in HubSpot. If Salesforce has additional industries, consider adding them to HubSpot or vice versa, or restrict to common set. If a value is retired on Salesforce (made inactive), and HubSpot tries to sync it, that can cause a sync error

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(e.g., if "Telecommunications" is removed from Salesforce picklist but a HubSpot record still has it, Salesforce will reject it; the best practice is to delete or update such values on HubSpot to valid ones).

- **Company Owner:** If enabled, map HubSpot Company Owner to Salesforce Account Owner (again linking user records). This is less commonly needed unless account ownership is distinct from contact owner.
- **Record Associations:** HubSpot Companies naturally link to Contacts and Deals. When syncing to Salesforce, the integration ensures:
    - Contacts associated with a HubSpot Company become Contacts under the corresponding Account in Salesforce (once the Account exists and contact is converted to a Contact in SF).
    - Deals associated with a company will sync as Opportunities under that Account.
    - The integration takes care of linking these by creating or matching the account first, then attaching the other records. For example, if a HubSpot deal syncs to Salesforce, it will look up the Salesforce Account via the HubSpot company's mapping, so the Opportunity gets correctly related.
- **Multi-Company Contact:** HubSpot allows associating a contact to multiple companies (with one primary). Salesforce natively allows a contact to relate to one account (unless using Contact Roles on multiple accounts which is not common). The integration will typically use the **primary company association** for syncing to Salesforce (so the contact goes under that one Account). If a contact in HubSpot has multiple companies, be aware only one account link can exist in Salesforce – a design decision must be made on how to handle the

secondary associations (often left out, or managed via custom objects like AccountContactRelation in Salesforce if needed).

- **Inclusion Criteria:** HubSpot can limit which companies sync. If a company has no associated contacts that qualify for sync (like all contacts are excluded leads), the company might not sync at all

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. One scenario from HubSpot docs: a HubSpot company will *not* create a Salesforce account if none of its contacts are eligible to sync (e.g., all contacts filtered out by inclusion list, or only exist as leads in Salesforce)

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. Thus, you may see some companies not appear in Salesforce until a contact meets criteria to trigger it.

- **Custom Company Fields:** As with contacts, you can map custom properties on HubSpot companies (e.g., "Customer Tier", "Renewal Date") to custom fields on Salesforce Account. Data types need to align.
- **Deduplication:** Salesforce Accounts are typically deduplicated by name (and maybe additional logic). HubSpot companies by domain. When syncing, **duplicate handling** can be tricky:
    - If two HubSpot companies have the same name, Salesforce will treat them as separate if, say, domain differs (Salesforce doesn't have domain by default except as website). Conversely, if Salesforce has two accounts with same name (common in different industries or locations), HubSpot might only want one if domain is same. The integration doesn't perform complex fuzzy matching – it relies on either IDs or simple keys. A best practice is to keep a unique identifier like domain or an internal ID to match companies between systems, or manage duplicates beforehand.
    - HubSpot's documentation notes it has logic to deduplicate Salesforce accounts syncing to HubSpot

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(likely by name or ID). Admins should review any sync warnings about duplicates and possibly use HubSpot's deduplication tool or Salesforce duplicate rules to maintain integrity.

3.3 Deals/Opportunities Field Mapping

For sales pipeline data:

- **Deal Name -> Opportunity Name:** Straight mapping of text.
- **Amount:** HubSpot Deal Amount (typically one currency field) to Salesforce Opportunity Amount. If multi-currency is enabled in Salesforce, ensure HubSpot deals have currency property or you handle currency conversion (HubSpot deals can have a currency property if multiple currencies are used, to correspond to SF record currency).
- **Close Date:** Map HubSpot Close Date to Salesforce Close Date. Both are date fields.
- **Deal Stage -> Opportunity Stage:** This is crucial but not one-to-one because HubSpot and Salesforce may have different pipeline stage names. You should map each HubSpot Deal Stage (which is defined per pipeline in HubSpot) to the equivalent Salesforce Opportunity Stage. The native integration sync will likely require the stage names to match exactly or you might use a workflow. Often companies align the naming so that if HubSpot has stages like “Appointment Scheduled”, “Contract Sent”, etc., they create matching stage values in Salesforce. If they don’t match, consider a custom text field to carry HubSpot stage, or simply rely on one system as master for stage progression:
    - Some choose to have Salesforce Opportunity Stage be the source of truth (sales updates stage in SF, which then could update a Lifecycle Stage or Deal Stage in HubSpot via sync). Others let HubSpot sales reps update deal stage and push to Salesforce. Either way, mapping these values and sync rules (discussed below) correctly is needed to avoid conflicts.
    - HubSpot also has a property “Deal Stage Probability” (percentage) and Salesforce uses “Forecast Category” or probability on opportunities. These could be mapped if desired, but usually stage name implicitly carries probability.
- **Deal Owner:** Map to Opportunity Owner if needed (often the same person as contact owner, but could differ if, say, account executives own deals while BDRs own leads).
- **Pipeline:** If you have multiple sales pipelines in HubSpot, and multiple Opportunity record types or sales processes in Salesforce, you’ll need to ensure deals go to the correct pipeline. The integration may not automatically know where to put a deal unless configured. One approach is to have separate connections or field to indicate which pipeline. Alternatively, some use separate HubSpot->Salesforce integration settings per pipeline (HubSpot now supports multiple pipelines, but the integration will likely push all deals to a default

Salesforce pipeline unless you have custom logic). An iPaaS solution can route deals to different opportunity record types based on criteria.

- **Custom Deal Fields:** E.g., “Product Interest”, “Competitor”, etc., mapping to SF fields.
- **Opportunity ID:** Salesforce Opportunity ID can be stored in a HubSpot deal property once synced, which is useful for troubleshooting or for HubSpot workflows (you could store the SF ID and use it in custom actions or simply for reference).
- **Opportunity Contact Role:** If a HubSpot deal is associated with multiple contacts, Salesforce might want to assign those contacts as Opportunity Contact Roles. The native integration historically does not manage contact roles. It usually links the primary associated company to Account, and may attach one contact (possibly the HubSpot contact who is marked as primary on the deal). If having multiple contacts per opportunity is important, a custom integration or manual adjustment in Salesforce might be needed to add additional contact roles.
- **Line Items/Products:** HubSpot has a Line Items feature on Deals (if using Sales Hub with Products). Salesforce Opportunities have OpportunityLineItems (Products on an Opportunity). The standard HubSpot-SF integration **does not sync individual line items**. That requires either using HubSpot’s API or an iPaaS that can map HubSpot products & line items to Salesforce PriceBook entries and OpportunityLineItem records. This is a more advanced integration scenario beyond default field mappings.

3.4 Tickets/Cases Field Mapping

If syncing support tickets:

- **Ticket ID -> Case Subject or Custom Field:** HubSpot Ticket ID (or Ticket Name) could map to Salesforce Case Subject or a custom field. Often Case Subject might be a short summary, which could map from HubSpot Ticket Title.
- **Ticket Description -> Case Description:** Rich text/long description can carry over.
- **Status:** Map HubSpot Ticket Status (new, waiting, closed, etc.) to Salesforce Case Status values. Make sure the statuses align (e.g., HubSpot “Closed” corresponds to Salesforce “Closed”). If HubSpot has intermediate statuses not in SF, either add them to SF or have them map to a nearest equivalent.
- **Priority:** If used, map priority (HubSpot priority to Salesforce Priority field).

- **Ticket Owner -> Case Owner:** Similar user mapping.
- **Related Contact/Company:** The integration ensures the HubSpot ticket's associated contact and company correspond to the Case's Contact and Account in Salesforce. It will use the contact's mapping to find the SF Contact and link that in the Case Contact field.

If not using HubSpot ServiceHub extensively, this might not be enabled. But for those who do, aligning support data means salespeople in Salesforce can see recent ticket history and support can feed ticket escalations to Salesforce.

3.5 Activity (Engagement) Mapping

While not a field mapping per se, it's worth noting how activity data mapping works:

- The integration doesn't have a field map UI for activities; instead it has toggles (e.g., "Sync HubSpot tasks to Salesforce tasks" etc.). Internally, it maps certain activity properties: e.g., a HubSpot call's notes might go into the Salesforce Task Comments, the call type might go into Subject with a prefix.
- **Email activities:** HubSpot sales emails can sync to Salesforce as completed tasks (subject like "Email: [Subject Line]"). HubSpot marketing emails might also sync as an activity or list membership on campaign (though more common is just as tasks if enabled).
- **Form submissions:** There is an option to log form submissions as Salesforce tasks (with details of the form)

community.hubspot.com

. This can alert reps of new form responses via their task list.

- **Meeting booked:** Could create a Salesforce event.
- These mappings are somewhat hard-coded in the integration – you mostly choose on/off and a default task type (e.g., log HubSpot calls as Task with Type "Call" in Salesforce). It's recommended to test this with a sandbox to see exactly how the activities appear, as overly voluminous activity sync can clutter Salesforce.

3.6 Sync Rules and Data Flow Logic

Beyond mapping fields 1-to-1, the integration provides **sync rules** that determine the direction of data flow and conflict resolution on a per-field basis:

- **"Prefer Salesforce unless blank"** (one-way priority): Salesforce is treated as the source of truth except when its field is empty knowledge.hubspot.com

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. This means:

- If the Salesforce field has a value, it will always overwrite the HubSpot property on sync (even if HubSpot's value is newer). Changes in HubSpot are ignored unless Salesforce is blank.
- If Salesforce field is blank and HubSpot has data, then HubSpot will populate Salesforce.
- Use case: for fields managed by sales (e.g., Lead Source once a rep qualifies it, or contact address if sales has the most up-to-date info). This rule prevents marketing from accidentally overwriting sales-entered data, except to fill blanks. It's the **default rule for many fields** in the HubSpot mapping UI

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- **"Always use Salesforce"** (strict one-way): Salesforce always overwrites HubSpot; HubSpot never sends its value to Salesforce

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. Essentially read-only in HubSpot. Use this for fields that should only be updated in Salesforce – e.g., an Account ID or a field that marketing should not modify. HubSpot will receive updates but if you change the property in HubSpot, it won't sync back.

- **"Two-way"**: The last modified value wins, regardless of system

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. This allows true bidirectional updates. For example, if a phone number is updated in HubSpot by marketing, it will push to Salesforce; if later updated in Salesforce by sales, it will come back to HubSpot. If both changed in a short interval, the later timestamp update overwrites the other.

    - Caution: Use two-way only when you're confident that both teams might update the field and you want the most recent to prevail. Avoid for fields that could **"flap"** back and forth (where each system repeatedly overwrites the other) – typically managed by timestamps, but if an external system or user changes values frequently, you might see unexpected oscillation. Common two-way fields: Email, Phone, Address, as both marketing and sales might gather updates.

- **"Don't sync"**: The field is ignored by the integration

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. No data passes either way. Use this if you have fields that are too different or not relevant to sync. For instance, if HubSpot has a specific field that has no place in Salesforce, just leave it unmapped or set to no sync. Or if you want to temporarily pause syncing a certain field due to issues.

These sync rules are configured per field mapping in HubSpot's integration UI

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. In practice, an admin will decide these based on process:

- For example, **"Email"** might be two-way (since both systems should have the same email always, though often it's set to prefer Salesforce or two-way).
- **"Lead Source"** might be set to prefer Salesforce unless blank, so initial source from HubSpot can populate a new lead in Salesforce, but once sales changes it, HubSpot won't override it.
- **"Lifecycle Stage"** might be one-way from Salesforce (if you only want to update HubSpot when an opportunity is won, etc.), or not synced if it's managed within HubSpot exclusively.
- **Owner** is always two-way (by design of integration)

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- **Picklist fields** often are two-way if both sides might add values, but ensure the value sets are same.

Triggering and timing: The sync is generally near-real-time event-driven combined with periodic checks. HubSpot's integration listens for changes in HubSpot and pushes them to Salesforce (within minutes), and uses the Salesforce API to query for changes on the Salesforce side (using polling or Salesforce's streaming API behind scenes). The exact mechanism is managed by HubSpot's connector package:

- The installed package in Salesforce includes Apex that helps communicate with HubSpot (for example, when a record is created or updated in Salesforce, it can notify HubSpot via a callout or mark for sync – details vary in versions). Typically, the integration uses the Salesforce API from HubSpot's side on a schedule. There is mention that any HubSpot contact added to the inclusion list triggers an immediate sync

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- **Inclusion List:** As referenced earlier, you can set up a HubSpot **inclusion list** (an active list of contacts who are eligible to sync)

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. If used, only contacts meeting the criteria (e.g., Lifecycle Stage is MQL) will sync to Salesforce

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. This is a best practice to avoid syncing irrelevant contacts (like raw leads that aren't ready). It also means if a contact isn't syncing, check the inclusion list rules

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. The inclusion list doesn't prevent Salesforce-to-HubSpot sync; it just gates HubSpot-to-Salesforce.

- **API Limits:** The integration uses Salesforce API calls. Admins can set a limit in HubSpot settings for how many API calls per 24h it can consume

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. If a large volume of changes occur (e.g., updating thousands of records at once), you could hit the Salesforce API daily cap and the integration will pause until limits reset

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. HubSpot provides a “API calls used” monitor in the sync health dashboard

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. Best practice: allocate perhaps 10-15% of your SF API calls to HubSpot integration (depends on org’s edition and usage).

- **Error Handling:** If a field mapping is misconfigured or a value fails to sync, the integration will log a sync error accessible in HubSpot’s interface

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. For example, trying to sync “TX” into a numeric field, or a too-long text, or owner mismatch, etc. HubSpot’s integration settings have a **Sync Errors** section where you can see error details and affected records

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. Common errors include picklist value not found, required field missing (e.g., Salesforce requires Last Name on Contact; if HubSpot contact had none, sync error until provided), or validation rule failures. Solving these might involve cleaning data or adjusting the mapping.

3.7 Best Practices for Mapping and Sync Configuration

- **Start with Standard Fields:** Get basic fields like name, email, company, phone syncing correctly before adding numerous custom field mappings. The default mappings HubSpot provides (for standard fields) use sensible sync rules

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- **Use an Inclusion List:** As mentioned, use an inclusion list in HubSpot to only sync high-intent contacts to Salesforce

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. This reduces clutter in Salesforce (sales doesn’t want every newsletter sign-up as a Lead immediately). For example, only sync contacts once they reach Lifecycle Stage “MQL” or once they fill a demo request form.

- **Data Hygiene Before Sync:** Clean up data in both systems prior to integration. Remove or merge duplicates, standardize picklist values, and delete irrelevant or test records

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. Integration will replicate data issues across systems if not addressed.

- **Field Naming and Semantics:** Ensure that mapped fields truly mean the same thing on both sides. For instance, “Lead Source” in Salesforce might be captured via a different mechanism in HubSpot (maybe original source drill-down properties). You might decide to map HubSpot’s “Original Source” to Salesforce Lead Source. Align the semantics so reports make sense after integration. If not alignable, consider leaving some fields unmapped and handling via reporting outside integration.
- **Minimize Unnecessary Mappings:** Only map fields that you need to use on the other side. Every mapped field is another thing to sync and monitor (HubSpot allows up to 500 mappings per object

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, but you likely don’t need that many). Also, the more fields you sync, the more API calls and potential for sync issues. Focus on key data points that drive processes.

- **Testing:** Test the mappings with a small batch of records or in a sandbox environment. For example, create a test contact in HubSpot that meets inclusion criteria and watch it create a Lead in Salesforce with all mapped fields – verify values came through correctly. Similarly, update a field in Salesforce and see if it reflects in HubSpot as expected per sync rule.
- **Conversion Handling:** Understand how lead conversion is handled. As noted, when a Salesforce Lead converts to a Contact, the integration will simply switch to syncing to the contact record (maintaining the link via the record ID)

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. Make sure any Lead-only fields (like Lead Rating) are mapped to Contact fields or custom fields if you want to retain that info post-conversion.

- **Opt-Outs and Compliance:** Sync of email opt-out or subscription preferences should be carefully managed. HubSpot manages subscription statuses; Salesforce might have a boolean “Email Opt Out”. It’s wise to sync these (e.g., if a contact unsubscribes in HubSpot, check “Email Opt Out” on Salesforce Contact). Use one-way (prefer HS) for unsubscribes to avoid accidentally emailing someone who opted out in one system. Also consider GDPR fields (consent captured) if relevant.
- **User Training:** Ensure that end users know that certain fields are synced and if one system is considered the master for a field. For instance, tell sales that

changing an email in Salesforce will update HubSpot within a few minutes (so they don't also change it in HubSpot, which could create a race condition).

- **Monitor Sync Health:** Regularly check the HubSpot Sync health dashboard for errors or high API usage

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. Adjust mappings or data as needed. Keep an eye on any new fields added by teams – if a field is important and not mapped, decide if it should be mapped.

- **Date/Time and Timezones:** If mapping date/time fields, remember Salesforce stores DateTime in UTC, HubSpot might use a specific timezone or just date. Usually it's fine, but for critical timeline fields make sure no off-by-one-day issues (particularly if mapping a date only field to a datetime).
- **Calculated Fields:** If Salesforce has a formula like "Contact Age" and you want that in HubSpot, map it read-only (Salesforce to HubSpot). If HubSpot has lead score and you want it in Salesforce, map that one-way HubSpot to a custom field in Salesforce. Because both platforms may have their own scoring, be intentional about which one is source.
- **Campaigns and Marketing Activities:** The native integration does **not automatically sync campaigns** or campaign membership. HubSpot has a concept of Campaign (grouping marketing assets) which is different from Salesforce Campaign (which is a list of leads/contacts for tracking). Those are largely separate; integration won't merge them

hackernoon.com

. If you need to tie HubSpot campaign influence to Salesforce, you might manually export lists or use an add-on tool. Some third-party integrations or custom solutions map form submissions or workflows to Salesforce Campaigns (e.g., adding a contact to a SF Campaign when they fill a certain form). This typically requires additional configuration or tools (HubSpot workflow can create a Salesforce campaign task, but not direct campaign member by native means).

In conclusion, setting up field mappings is a critical step that demands understanding both systems' data structures. Taking the time to map thoughtfully and configure sync rules according to business logic will pay off in a smoother integration with fewer data conflicts.

4. Integration Approaches (Methods to Connect HubSpot and Salesforce)

There are several approaches to integrate Salesforce and HubSpot, ranging from using the **native built-in sync** provided by HubSpot, to leveraging third-party integration tools and iPaaS platforms, to building a **custom API-based integration** or using middleware. Each approach has its own setup process, capabilities, and trade-offs. This section outlines the main approaches and how they work:

4.1 Native HubSpot-Salesforce Connector (Built-In Sync)

Overview: The simplest method is to use HubSpot's official Salesforce integration, a **vendor-built native connector** maintained by HubSpot

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. This is available in HubSpot (requires at least certain HubSpot subscription levels, e.g., Professional or Enterprise for some features

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). The native connector is installed via a Salesforce managed package and configured in HubSpot's UI

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How it Works: You begin by installing the HubSpot package in Salesforce (which adds the necessary components like custom fields, a "HubSpot Intelligence" Visualforce page, and permission sets)

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. In HubSpot, you authenticate with Salesforce and configure settings (choose Sandbox or Production org, etc.). Once connected, you select which objects to sync (contacts are required; companies, deals, tasks, tickets optional)

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, set up field mappings and sync rules as discussed, and define the inclusion list if needed. After configuration, the sync runs automatically. HubSpot's servers handle data exchange via the Salesforce API and the installed package enables features like embedded HubSpot timelines in Salesforce and possibly helps with push notifications from Salesforce.

When active, the native sync will create/update Salesforce records as HubSpot data changes (with minimal delay), and vice versa. For example, if a new contact in HubSpot qualifies, it will within minutes create a new Lead in Salesforce

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. If a sales rep edits a mapped field in Salesforce, HubSpot will update that property on the next sync cycle. The integration runs continuously in the background.

Configuration in Salesforce: The package adds a **HubSpot Visualforce widget** that can be placed on Lead/Contact/Account/Opportunity page layouts to show HubSpot activities (timeline) within Salesforce

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. Setting that up is a one-time admin task (drag the "HubSpot Intelligence" section onto layouts)

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. The managed package also handles Salesforce-side integration logic and includes a permission set to give the integration user proper access.

Advantages (Native Sync):

- *Ease of Setup:* Designed to be installed in minutes with no coding

hubspot.com

. HubSpot provides a step-by-step install wizard.

- *Supported and Maintained:* HubSpot's team maintains the integration, providing updates and support. Less chance of breaking when Salesforce API versions change or new features (HubSpot will adapt the connector accordingly).
- *Bi-Directional Out-of-box:* Handles core use cases of bidirectional sync for standard objects (contacts, accounts, etc.) with an intuitive UI to manage it.
- *Rich Features:* Has nice add-ons like the Visualforce widget in Salesforce (so sales can see HubSpot data inside SF)

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, and the ability to trigger HubSpot workflows from Salesforce via that widget (like enrolling someone in a HubSpot sequence from Salesforce)

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. It also logs sync errors and API usage clearly in HubSpot for admin oversight.

- *No Additional Cost (aside from subscription):* It's included with HubSpot subscription; no separate connector fee (some other marketplace apps might charge).
- *Security and Governance:* Data stays between HubSpot's cloud and Salesforce's via secure API calls; no third-party handling of data. You use OAuth to connect to Salesforce securely.

Disadvantages (Native Sync):

- *Limited to Preset Objects:* Only supports the objects HubSpot defines (Contacts, Leads, Contacts, Accounts, Deals, Tasks, Cases, and recently Salesforce custom objects sync one-way). If you need to sync other entities (e.g., Salesforce Campaigns <-> HubSpot, or complex many-to-many relationships), the native tool won't cover it out-of-the-box.
- *Customization Limitations:* The logic is somewhat fixed – e.g., it will only create either leads or contacts from HubSpot (cannot vary record type by criteria easily)

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. If you need custom logic (e.g., different lead assignment rules, conditional sync of certain fields, data transformations), you can't change how the native integration works under the hood. You might then need supplemental workflows or move to a custom approach.

- *Volume/Performance Constraints:* The native integration can handle fairly large volumes, but extremely large data syncs might be slow. HubSpot has some documented limits (e.g., **200,000 records max in one batch sync for companies** to avoid errors)

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. If you have millions of records, initial sync can be time-consuming, and you'll rely on the allocated Salesforce API calls. Very high-frequency updates might approach the rate limits of the connector since it's a shared environment.

- *Error Handling and Transparency:* While HubSpot shows errors, debugging complex issues can be challenging because you don't have full control or visibility into the integration's code. You might have to contact HubSpot support for deep issues. In a custom solution, you'd control logging and error handling more directly.

- *Schedule of Sync:* The native sync is near-real-time but not instantaneous. There can be a short lag (usually a few minutes). If truly real-time (sub-second) sync is needed for some reason, this may not guarantee that.
- *Single Salesforce Org:* The native connector links one HubSpot portal to one Salesforce org. If you have more complex multi-org environments (e.g., one HubSpot feeding two Salesforce orgs), you'd need custom solutions or multiple HubSpot portals.

Overall, the native integration is typically the **first choice** because of its simplicity and support. It covers the majority of standard use cases for aligning sales and marketing data

noboundsdigital.com

. Only when requirements go beyond its limits do teams look to other approaches.

4.2 Third-Party Connector Tools

Overview: There are many third-party integration solutions specifically geared toward syncing CRM and marketing data. These include both standalone data sync apps and connectors available on marketplaces. They often provide point-and-click integration between HubSpot and Salesforce, sometimes with more flexibility or niche capabilities than the native tool. Examples: **Outfunnel**, **Zapier (simple workflows)**, **PieSync** (which was acquired by HubSpot and partly became the Ops Hub data sync), or connectors on the Salesforce AppExchange.

How it Works: Third-party tools typically operate as a cloud service in between the two systems:

- Some are pure **data synchronizers** (like the old PieSync or Outfunnel) that continuously sync contacts one-to-one between systems with configurable field mappings. They require connecting both accounts via API keys or OAuth, then setting up rules in their interface (very similar to native mapping).
- Others like **Zapier** are trigger-action automation tools. For example, you can create a Zap: "When a new contact is created in HubSpot, create a Lead in Salesforce" or "When an Opportunity in Salesforce is updated to Closed-Won, update the contact's Lifecycle Stage in HubSpot." Zapier provides templates for HubSpot <-> Salesforce, essentially building custom sync logic via a series of if/then steps. Zapier is not a continuous sync engine, but rather task-based event processing (though you can simulate two-way sync with multiple zaps).

- There are also specialized connectors on AppExchange (e.g., ones that might push HubSpot form submissions to Salesforce campaigns, etc.). These require installing a package or using an external service's integration.

Advantages (Third-Party Tools):

- *Possibly More Custom Logic:* Some tools (like Zapier or Workato) allow inserting custom filters or transformations. For example, with Zapier you could format a phone number before sending to Salesforce, or only trigger sync on certain conditions beyond what the native inclusion list allows.
- *Quick to Implement:* Many have pre-built recipes or minimal setup, no coding required. E.g., Outfunnel touts "set up in minutes" to keep contacts and activities in sync

outfunnel.com

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- *Focus on Specific Use Cases:* If you only have a very specific integration need (like "I want form submissions in HubSpot to create tasks in Salesforce" or "sync email opens to Salesforce campaign member statuses"), a targeted connector might do just that one thing well, without the complexity of a full-blown sync of everything.
- *Decoupling and Control:* Using a third-party means the sync is not tied to HubSpot's release cycle. If you want to pause or adjust independently, you can, without touching HubSpot config. Also, these tools often have their own monitoring dashboards for integration jobs.
- *Additional Features:* Some third-party services add value by, say, performing data cleaning (like deduplication or enrichment) during sync. Or offering scheduling (run sync nightly vs continuous, if that's desired for control).
- *Multi-system support:* If you want to integrate *more* than just HubSpot and Salesforce (say also sync with an email tool or a database), some third-party platforms can serve as a hub. Zapier for example can connect many apps in one workflow.

Disadvantages (Third-Party Tools):

- *Cost:* Many are paid services (Zapier has free tiers but limited tasks – a continuous sync between two databases usually needs a paid plan; others like Outfunnel or custom connectors have subscription fees). This adds to the tech stack cost.

- *Complexity for Comprehensive Sync:* Using generic tools like Zapier to replicate what the native integration does can become complex (you'd have to set up many zaps for creation, updates, deletion, for each object type). It's doable but essentially re-engineering a sync, which then requires maintenance. Errors might be harder to track across multiple zaps.
- *Rate Limits & Performance:* If not carefully designed, third-party tasks can hit API limits too. E.g., Zapier might attempt to update records individually and could consume a lot of calls. Also, triggers might fire rapidly – ensuring the third-party can handle bursts is essential. Some third-party connectors might not be as optimized as the native integration which batches requests.
- *Data Security:* Involving a third-party means you are sending data through their servers. It's important to assess the vendor's security. The native integration sends data directly between HubSpot and Salesforce. A third-party adds another potential point of failure or breach. Enterprise security teams might require vetting such tools for compliance.
- *Support and Reliability:* If the third-party is small or the integration is one of many features, you might not get the same level of support. There could be times the integration service has downtime which could affect sync. One must monitor that separately.
- *Limited Scope:* Many third-party sync apps mainly handle contacts and maybe companies. Fewer handle opportunities or complex objects well. So, you might still use the native for those and a third-party for something like activities, leading to a mix that's harder to manage.

Example Use Cases:

- **Outfunnel:** A service specifically for marketing-sales data sync. It can keep Salesforce contacts and HubSpot contacts in two-way sync and also log email marketing engagement from HubSpot into Salesforce (like add tasks or custom records for email opens)

outfunnel.com

. A company might use this if the native integration wasn't used, or in addition to cover something like syncing HubSpot marketing emails to Salesforce campaign objects (which the native doesn't do).

- **Zapier:** If an organization has a simpler need, e.g., they don't want a full sync but just "when a form on HubSpot is submitted, create a new lead in Salesforce", they might do that with Zapier rather than enabling the whole connector. Zapier can also augment the native integration for edge cases – e.g., HubSpot doesn't sync campaign membership, but a Zapier workflow could add someone to a SF Campaign via API when they fill a certain HubSpot form.

- **Custom AppExchange connectors:** Some consultancies offer pre-built integrations (beyond what HubSpot offers) maybe to sync additional objects or handle special transformations. Using one of these might be considered if it exactly matches your scenario.

In summary, third-party tools can either completely replace the native integration (less common, since native is strong), or complement it for features it lacks. They are best for quick solutions and specific workflows, but can introduce complexity and cost if used to replicate large-scale syncing.

4.3 Middleware / ESB (Enterprise Service Bus)

Overview: Middleware in this context refers to a dedicated integration application or enterprise service bus that sits between HubSpot and Salesforce to route and transform data. This could be a custom-built middleware app, a message queue system, or an ESB (like Mule runtime if used in a custom way, or an on-prem integration server). It differs from iPaaS in that it might be self-hosted or bespoke, and from simple third-party connectors in that it’s a general-purpose integration layer, often used by larger enterprises to decouple systems.

How it Works: Instead of connecting HubSpot directly to Salesforce, both systems connect to the middleware. For example:

- Salesforce could be configured to send outbound messages or platform events to the middleware whenever certain records change (using Salesforce Outbound Message on workflow or a callout in a Flow). The middleware receives these events (like in a queue), transforms the payload to HubSpot’s format, and calls HubSpot API to create/update the contact or deal.

- HubSpot can send notifications to the middleware via webhooks (HubSpot allows registering webhooks for events via its developer app framework or workflows). So when a HubSpot contact is created or updated, a webhook hits the middleware, which then calls Salesforce API (or writes to a staging database that Salesforce reads).

- Alternatively, the middleware might poll both systems periodically and reconcile differences.

This approach often uses message queues (to buffer and retry), and a transformation engine to map fields. It might be part of a larger ESB that connects multiple systems (not just HubSpot).

Advantages (Middleware/Custom ESB):

- *Maximum Flexibility:* You can implement any logic – e.g., complex conditional rules (if prospect type = X, create Salesforce Opportunity and a custom object, else just a lead; if data quality is poor, send to a manual review queue instead of syncing). You aren't limited by off-the-shelf mapping capabilities.
- *Scalability:* A well-built middleware can handle very high volumes reliably by scaling horizontally, using queues, etc. If your data change volume is extremely high (e.g., tens of thousands of updates per hour), a custom integration can be optimized for that scenario more than a generic tool.
- *Enterprise Integration Patterns:* You can leverage patterns like guaranteed delivery, transaction management, and event logs. For instance, every event from Salesforce is logged, and if HubSpot is down, the middleware can retry later, ensuring no data is lost (this decoupling is harder with direct integrations which might drop updates if one system is unavailable momentarily).
- *Visibility and Control:* You can build dashboards or logs to monitor every sync event at a granular level. If something fails, your middleware can capture it and perhaps even automatically correct or alert. This is important in scenarios where integration is mission-critical.
- *Extendability:* The same middleware could integrate multiple systems. For example, maybe you also want to integrate Salesforce with an ERP and with HubSpot. A central integration layer can handle all, applying consistent data governance (like master data management rules) across. This avoids point-to-point spider web of integrations (follows a hub-and-spoke model, which simplifies adding systems).
- *No reliance on external services:* Everything is within your control environment (good for compliance if you need all data processing in-house or in a specific region, etc.).

Disadvantages (Middleware/ESB):

- *High Initial Development Effort:* You essentially have to build what the native/third-party tools already offer, and more. This requires developers who understand both systems' APIs, plus possibly managing infrastructure for the middleware (servers or cloud services).
- *Maintenance:* You'll need to maintain this integration code whenever APIs change or new requirements arise. For example, if Salesforce introduces a new field that must sync, you update code. If HubSpot API version updates, adapt code. The burden is on your dev team.

- *Cost:* Aside from development cost, if using enterprise integration software (like MuleSoft, IBM Integration Bus, etc.), licensing can be expensive. If building on cloud (say an AWS Lambda + SQS approach), you pay for those resources (though that might be relatively minor compared to personnel cost).
- *Complexity:* An overly complex integration can become a black box if not documented well. If the original developers leave, others might find it hard to troubleshoot. Using standard patterns and robust documentation is necessary.
- *Latency:* Depending on design, a middleware might not achieve real-time updates if, say, it processes things in batches or is limited by queue processing time. However, it can be built to be near real-time if needed, albeit with more components.
- *Potential Duplication of Effort:* Recreating standard sync functionality that the native integration offers could be considered reinventing the wheel unless there's a clear need.

When to Use: A custom middleware approach is typically considered when **requirements are very bespoke or enterprise-scale**, such as:

- The business has a complex data model mapping that outstrips native integration capabilities.
- There are multiple systems to integrate, not just HubSpot and Salesforce, and a unified integration platform is strategic.
- There are strict compliance requirements (data residency, logging, etc.) that off-the-shelf connectors can't meet.
- The volume of data or frequency of changes is so high that the company prefers fine-tuned control to optimize throughput.
- Need for on-prem integration (though both SF and HubSpot are cloud, some might route through on-prem for security).

Example: A company might have a middleware where any new customer data flows from Salesforce to HubSpot and also to an ERP. The middleware could ensure that, say, the Salesforce Account, after converting from lead, triggers creation of a customer in ERP and a company in HubSpot, all with the same ID. It might manage an internal ID mapping table to correlate record IDs across systems. If one fails, it can roll back or retry without affecting the others. This is the kind of robust scenario a custom ESB can handle.

4.4 API-Based Custom Integration (Point-to-Point Custom Code)

Overview: An API-based integration means writing custom code (scripts, applications, or functions) that directly uses the Salesforce and HubSpot APIs to sync data, *without* a large middleware platform. It’s similar to middleware but often implies a simpler setup, possibly just a scheduled script or microservice. Essentially, you become the integrator by coding the logic using the **HubSpot APIs** and **Salesforce APIs** (REST, SOAP, or Bulk APIs).

How it Works: A common pattern might be:

- A scheduled job (e.g., a cron job or serverless function running every X minutes) fetches new or updated records from one system via API, then upserts them into the other system via its API.
- Alternatively, set up **webhooks**: HubSpot allows registering webhook subscriptions for certain events (through a HubSpot private app or developer app) – your service receives an HTTP POST when a contact changes, then your code calls Salesforce API to update/create. Salesforce can send outbound messages or you could use the Streaming API (PushTopic or Platform Event) to get changes in real-time – your code subscribes to those and then calls HubSpot API.
- The custom code handles authentication (e.g., using OAuth tokens or API keys for HubSpot, OAuth or a Salesforce integration user credentials for Salesforce). It must also handle error responses, rate limits (backing off or batching as needed), and data transformation (mapping fields, converting types).

This approach can be deployed on an AWS Lambda, Azure Function, Google Cloud Cloud Run, or a small app server.

Advantages (Custom API Integration):

- *Tailored to Exact Needs:* You have full control to implement exactly what you want. If, say, you want to only sync one direction for certain fields and the opposite for others, you can code that logic precisely.
- *No Third-Party Service Fees:* You only pay for your runtime (which could be negligible if using serverless for occasional tasks) and developer time. There’s no per-sync licensing (though developer time is not free, of course).
- *Lightweight:* For a moderately complex sync, a few hundred lines of code might suffice, which is easier to reason about than deploying a full ESB. If your use case is straightforward (e.g., just sync contacts one way on creation), a custom script can be very straightforward.

- *Use of Bulk APIs:* You can optimize by using Salesforce Bulk API or composite calls and HubSpot batch APIs to transfer data in chunks, which can be faster for large data migrations than some generic tools.
- *Extensibility:* You can incorporate additional logic – e.g., call an external validation API or enrichment service (maybe when syncing a new contact, call Clearbit API to enrich data before inserting to Salesforce).
- *Complete Ownership of Data:** All data transfer is via your application; no external system sees the data except Salesforce, HubSpot, and your integration code. This can mitigate some security concerns if the code runs in your controlled environment.

Disadvantages (Custom API Integration):

- *Requires Programming Expertise:* This approach demands knowledge of both Salesforce and HubSpot APIs (which have their quirks) and handling auth for each. Developers must also consider all the edge cases (like API downtime, partial failures, rate limit handling).
- *Maintenance and Tech Debt:* The code might be quick to write, but someone has to maintain it. If API versions change (e.g., HubSpot moving to a new version or deprecating something), you must update your code. Also, if the person who wrote it leaves, another engineer must pick it up – proper documentation and possibly tests are important.
- *Reinventing Functionality:* You might end up implementing features that the native integration already solved, which can be time-consuming. For example, writing logic to detect and resolve deletes or merges might be tricky (the native integration doesn't even fully do deletes – it doesn't delete in the other system to avoid accidental data loss). If needing parity in features, your code can grow in complexity.
- *Limited UI/Visibility:* Unless you build an admin UI, monitoring is via logs. It may not be as user-friendly for an admin to adjust a mapping or view an error as a dedicated integration tool would be. You might need to code additional tools or scripts for viewing sync statuses or reprocessing failures.
- *One-off Nature:* A custom script is by nature specific. If the business needs change (e.g., now also sync deals), you need to extend it. iPaaS or middleware might have those connectors ready to add by configuration; with custom code it's another coding project.

Example Approach: A simple example is using Python with the simple-salesforce library and HubSpot's REST API:

python

CopyEdit

```
# Pseudocode
hs_contacts = hubspot_client.get_recent_contacts(since=last_sync_time)
for contact in hs_contacts:
    sf_record = map_to_salesforce(contact)
    salesforce_client.upsert('Lead', {'Email': sf_record['Email']}, sf_record)
```

This could run every 5 minutes to upsert leads. Similarly, a process for Salesforce-to-HubSpot using SOQL to get modified records and calling HubSpot’s Contacts API to update. Logging, error catching, and not reprocessing the same records repeatedly would need to be built in. Over time, you might add things like:

- Mark records with a sync timestamp or use the HubSpot vid-offset or SF SystemModstamp to get only deltas.
- Handle deletions (maybe if a contact is deleted in HubSpot, either re-create or also delete in Salesforce depending on policy, though often deletions are not synced to avoid accidental mass deletion).
- Perhaps build in a small UI (or at least config file) to manage field mappings outside of code, so changes don’t require code deployment.

4.5 Integration Platform as a Service (iPaaS)

Overview: iPaaS refers to cloud-based integration platforms that provide a toolkit to connect multiple systems with workflows and pre-built connectors. Examples include **MuleSoft Anypoint Platform**, **Dell Boomi**, **Informatica Cloud**, **Jitterbit**, **Workato**, **Tray.io**, **Celigo**, **Make (Integromat)**, and others

[dckap.com]()

[outfunnel.com]()

. These are more heavy-duty (especially the enterprise ones like MuleSoft, Boomi) compared to simple connectors or Zapier. They often have graphical editors to design data flows, handle complex transformations, and orchestrate multi-step integrations.

How it Works: Using an iPaaS, you typically:

- Use a **connector** for Salesforce and a connector for HubSpot. The vendor provides these connectors which encapsulate authentication and API calls. For instance, a Salesforce connector might let you easily do “Upsert Account” or “Query Contacts” in the workflow design.
- Build an **integration workflow (called recipes, flows, processes)** in a visual interface. For example: a trigger could be “on new record in HubSpot” or simply a schedule that queries HubSpot. Then you add transformation steps (map fields from HubSpot to Salesforce structure), then an action step (create/update in Salesforce). You can branch logic, add conditions, loops, etc., usually with a drag-and-drop or low-code interface

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- The iPaaS runs these flows on their cloud, managing the execution, scaling, and error retry. You monitor in the iPaaS dashboard where you can see run logs, error messages, etc.

Advantages (iPaaS):

- *Rapid Development with Low-Code:* Building an integration with, say, Boomi or Workato is generally faster than fully coding it. The platforms have many pre-built functions (e.g., Boomi has a library of common mappings, error handlers) and a user-friendly way to design data mapping between fields visually. You can often configure a complex multi-object sync just by dragging connectors and setting mapping rules.
- *Rich Connectors and Templates:* iPaaS vendors often have connectors not just for the two systems in question but for many others, enabling more comprehensive workflows. For Salesforce-HubSpot specifically, there may be existing **templates** you can start from. For example, Boomi might have a recipe “Sync HubSpot contacts to Salesforce leads” to import and tweak, covering common field mappings

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- *Maintenance and Monitoring:* The platform handles running the processes reliably. They typically have built-in retry mechanisms, alerting for failures (you can get email if an integration run fails), and versioning. If you need to update the mapping, you do it in the interface and deploy a new version with minimal downtime. Also, you don’t worry about scaling servers; the iPaaS scales as needed (within your contract limits).

- *Complex Transformations:* iPaaS tools often include the ability to do data enrichment, lookups in other systems, complex scripting if needed (they allow custom script blocks), and merging/splitting data flows. For instance, you could have a single workflow that takes a HubSpot contact, splits off to update Salesforce and also update a marketing data warehouse, etc., all in one orchestrated process.
- *Enterprise Features:* Things like role-based access (teams can collaborate on integration design), audit logs of changes, compliance certifications (if needed, many iPaaS are SOC2, GDPR compliant etc.), and **no-code** or **low-code** approach means less risk of developer errors. Testing tools might be built-in (e.g., run a test with sample payload).
- *Reusability:* If you need to integrate another pair of systems, you use the same platform. It becomes a standard integration layer for the organization. You can reuse components – for example, a common data format or a common sub-process (maybe a standard way to format phone numbers or create an error notification) can be reused across flows.

Disadvantages (iPaaS):

- *Cost:* High-end iPaaS like MuleSoft or Boomi are expensive (often pricing is based on number of connections or transactions – can be tens of thousands of dollars per year for enterprise packages). Even mid-range ones (Workato, Tray) have significant subscription costs though they might be more moderate. For small businesses, this is usually overkill financially compared to native or cheaper connectors.
- *Learning Curve:* There is a learning curve to each iPaaS platform’s interface and quirks. A developer might need training or certification (MuleSoft, for example, has a whole certification path for developers). It’s easier than raw coding, but still requires specialized knowledge. For a one-time simple integration, the overhead might not be worth it.
- *Overhead for Simplicity:* If your use case is simple (just sync contacts), using a heavy iPaaS might be like using a sledgehammer for a small nail. The overhead of the platform might be unnecessary. Also, it introduces another vendor dependency.

- *Performance Limits:* iPaaS are powerful, but they also have usage limits (transactions per second, etc.). For most, these are high, but if doing extremely large bulk migrations, a direct Bulk API script might achieve more throughput because you can tailor it. iPaaS likely use the same underlying APIs, but there might be slight overhead in the orchestration.
- *Black Box Connectors:* While they simplify, sometimes the connectors abstract away details that you might need to tweak. For instance, a connector might not expose all HubSpot API capabilities (if the vendor hasn't updated it to the latest API version, you might be stuck if you need a new property that the connector doesn't fetch yet). Some iPaaS allow custom API calls as a backup though.
- *Cloud Dependency:* iPaaS is cloud-based. If their service has an outage, your integration stops (though same could happen with any cloud). Many iPaaS offer good uptime, but it's something to consider (some allow on-premise agents or runtimes to execute flows which can mitigate this, e.g., Boomi has an Atom that can run on-prem).

When to Use: iPaaS is usually chosen by organizations that have multiple integrations to manage or that anticipate changes. It's also common when an enterprise already has an iPaaS (like since Salesforce owns MuleSoft, a Salesforce-heavy org might standardize on MuleSoft for all integrations). If the integration between HubSpot and Salesforce is part of a larger ecosystem, iPaaS shines. If it's the only integration needed, the cost/benefit might not pan out unless the processes are complex enough to need it.

Example: Using **MuleSoft (Anypoint Platform)**, a developer could use the Salesforce Connector to subscribe to platform events for changes in Contact and Lead. When an event is received, the Mule flow could then use the HubSpot Connector to update/create the contact in HubSpot. Similarly, a scheduled flow might pull new HubSpot contacts via HubSpot Connector's query, then use Salesforce Connector to upsert. The MuleSoft flow could contain a transformation map where you draw lines between Salesforce fields and HubSpot fields for mapping, apply functions (maybe concat first + last name if needed, or date format conversions). Once built, you deploy this integration to MuleSoft's CloudHub worker and it runs continuously. If any errors (like a field mapping issue), MuleSoft would catch exception and you could define a handler to maybe send an email alert with the error details and record info.

In Workato (another iPaaS), you might not even need to write code – just configure triggers and actions in a recipe. Workato and others sometimes have community-contributed recipes for HubSpot and Salesforce sync.

Real-World: Many mid-to-large companies use iPaaS as a **strategic integration layer**: e.g., a company uses Salesforce as CRM, HubSpot for marketing, NetSuite for ERP. They might implement an iPaaS solution that synchronizes customers and orders across Salesforce <-> NetSuite and at the same time, uses it to feed HubSpot with customer data from Salesforce for marketing. This centralizes integration logic on one platform.

Having outlined these approaches, it becomes clearer how to choose one or a combination:

- If you need a quick, standard solution and your use cases are largely covered by what HubSpot's native sync does, the **native integration** is usually best (simple and robust).
- If you have a small variation or one-off need, a **third-party tool or Zapier** might fill the gap.
- For maximum customization and control but heavier investment, a **custom integration (middleware or code)** is viable. This is often justified for large enterprises or unique requirements.
- An **iPaaS** sits in between – offering customization with less coding, suitable if you plan to manage many integration processes or want an enterprise-grade managed solution.

Next, we'll compare the advantages and disadvantages of each approach side by side.

5. Comparing Integration Approaches: Pros and Cons

Each integration approach has distinct pros and cons. The best choice depends on factors like budget, timeline, complexity of requirements, volume of data, and internal expertise. Below is a comparison summary of the approaches:

- **Native HubSpot-Salesforce Sync** – *Pros:* Easiest to implement (no code), official support from HubSpot, covers core needs (contacts, companies, deals, basic activities)

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, maintained as platforms evolve, minimal cost if you already have required subscriptions. *Cons:* Less flexible for custom objects or logic, cannot sync some data like campaigns or advanced field mappings (limited to provided settings)

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, reliance on HubSpot for fixes if issues arise, and may not scale or perform well for extreme volumes (API limit considerations) compared to tailored solutions. Also, it's "all or nothing" sync unless you carefully use inclusion lists; fine-tuned selective sync beyond that can be tricky.

- **Third-Party Connectors / Tools (e.g., Zapier, Outfunnel)** – *Pros:* Quick to set up specific workflows, often very user-friendly, can fill gaps (like syncing something the native integration doesn't), and many have free or low-cost plans to get started. They allow some custom filtering and transformation without a full dev effort. *Cons:* They might not handle large-scale sync or all object types; can become hard to manage if you need to string many zaps (for example) to mimic a full sync. Also introduces a new vendor (with its own reliability and security profile) into your data flow. For critical data, a simple tool might not offer the robust error handling needed (Zapier jobs can fail silently if not monitored). In terms of cost, while cheaper than enterprise iPaaS, costs can rise if you have high task volumes (Zapier charges by task runs, etc.)

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- **Middleware/Custom Integration (Custom Middleware or ESB)** – *Pros:* Ultimate flexibility – you can tailor every aspect: which events trigger sync, how data is transformed, how errors are handled. It can integrate multiple systems in one place and enforce business rules strongly. Good for high-volume enterprise needs due to the ability to optimize and queue. *Cons:* High complexity and maintenance burden. Requires developer time to build and monitor. Essentially, you become the "integration provider", which might divert resources from other projects. There's risk of technical debt if not built cleanly. Also, initial build can take weeks of development and testing, whereas a native integration might take hours or days to set up.
- **API-Based Custom Code (Point-to-Point)** – (This is a subset of middleware approach but without a heavy platform). *Pros:* Simpler than full ESB, you control logic via code, perhaps faster to implement specific behavior than configuring an iPaaS when requirements are known. With modern serverless tech, can be cheap to run and scale automatically. *Cons:* Still requires coding and maintenance. Lacks the nice interface of iPaaS for non-developers to adjust.

Monitoring must be set up (like CloudWatch logs or custom dashboards). If requirements grow, the code can become as complex as a mini ESB, at which point investing in an iPaaS might have been better.

- **iPaaS (e.g., MuleSoft, Boomi, Workato)** – *Pros:* Combines flexibility with a managed platform. Good for long-term maintainability – easier to update mappings via GUI, handle multi-step flows, and integrate other systems beyond HubSpot and Salesforce

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. Provides reliability, support, and often templates to accelerate development. Non-engineers (with some training) can even manage or monitor it, freeing up dev resources. *Cons:* Cost is the big one – these platforms can be expensive

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. Also, using an iPaaS could be overkill if you only have one simple integration to do (the ROI comes when you use it for many integrations or complex ones). There's also a dependency on the iPaaS vendor – if the vendor's connector has a bug or doesn't support a new API feature, you wait for them to update it or implement a workaround.

To illustrate, consider a **scenario**: A mid-sized company wants to integrate HubSpot and Salesforce so that sales gets marketing-qualified leads automatically, and marketing sees when opportunities close. They have relatively standard needs and limited IT support. The **Native integration** is likely the best fit, because it's quick and does what they need (contacts, accounts, deals sync). Now, suppose they also want every email open from HubSpot to log in Salesforce (not just as an aggregate lead score, but every single open as a task, which is not fully out-of-box). They might add a **Zapier** workflow for that one detail, supplementing the native sync.

On the other hand, a **large enterprise** with millions of contacts might find the native connector struggling with volume or with their custom data model (maybe they heavily use Person Accounts, multi-currency, and custom objects). They might opt for an **iPaaS like MuleSoft** (especially if they already have MuleSoft for other integrations) to build a tailored integration that, for instance, syncs person accounts properly, handles multiple HubSpot instances (if they have several business units each with a HubSpot portal) to one Salesforce, and integrates data quality checks. The cost and effort are justified by the scale and complexity.

Another case: a company in a **regulated industry** may have to audit every data transfer. A **custom middleware** approach could log every sync transaction to an internal database for auditing – something not easily done with native or third-party tools.

Real-world use and performance considerations: Many users start with the native integration and only switch to others if they encounter limitations. Common triggers for moving away from native:

- They need to sync an object or field type that isn't supported (for example, syncing Salesforce Campaign membership with HubSpot – often done via custom integration).
- They experience a lot of sync errors due to data complexity (like many duplicate leads causing issues) and want more sophisticated handling (like merging logic) than the native integration offers.
- API call limits are constantly being hit with native, throttling their processes; a custom solution might use Bulk APIs to reduce calls.
- They require on-demand sync faster than the native cycle – e.g., sales needs a lead in Salesforce within seconds of form submission. Native is reasonably fast but not guaranteed instant, whereas a custom webhook approach could be near-instant.

It's also not uncommon for organizations to use a **hybrid approach**: use native sync for the heavy lifting of contacts/companies (because it's convenient) and use supplemental scripts or iPaaS flows for edge cases. For example, native sync but then a Boomi process to also sync Salesforce Case data into HubSpot (since native doesn't sync SF Cases unless you map to Tickets, which requires using HubSpot Tickets).

Maintenance and Support: When evaluating approaches, consider who will support the integration:

- If using native, HubSpot Support can help if things go wrong (though within limits – they won't design your process, but they'll fix connector issues).
- If using a third-party or iPaaS, that vendor's support is your go-to for any connector malfunctions, but your internal team still needs to support the integration logic you implemented on those platforms.
- If custom, it's entirely on your developers/IT.

Conclusion: The Salesforce-HubSpot integration is important for keeping marketing and sales aligned, but there is no one-size-fits-all method to implement it. Simpler needs lean towards ready-made solutions, while complex enterprise needs may justify custom or advanced iPaaS integrations. It’s crucial to weigh the pros and cons – ease vs. flexibility, cost vs. control – and possibly start small (with native or simple tools) and only invest in heavier solutions if requirements grow.