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HUBSPOT SALESFORCE INTEGRATION CHECKLIST

Make the five decisions, check the prerequisites and work the eight setup steps in order, so the connector syncs what you meant it to and nothing else.

WHO IT'S FOR

Admins and RevOps leads setting up the native HubSpot Salesforce connector for the first time

WHAT YOU NEED

Admin access to HubSpot Professional or Enterprise and to a Salesforce edition with API access, plus a Salesforce sandbox

FULL GUIDE

revblack.com/guides/hubspot-salesforce-integration

How to use this checklist

Work through it in order. The install sits at step 2 on purpose: everything before it is a decision or a prerequisite, and every step after it depends on the one before. Each step opens with what you'll have when it's done. Tick each box as you go and write your decisions straight onto the page.

Do all of it in a Salesforce sandbox first. Records don't sync automatically after install, so nothing reaches your real data until you trigger a sync.

0 **Before you start**
Choose an operating model, make the five decisions and check the prerequisites.

1 **Create the integration user**
A dedicated Salesforce user with its own profile and the right permissions.

2 **Install the connector**
Connect to your sandbox as the integration user. Nothing syncs yet.

3 **Build the inclusion segment**
Only the HubSpot contacts that meet your criteria can reach Salesforce.

4 **Decide leads or contacts**
Pick the Salesforce object new HubSpot contacts create, before go-live.

5 **Match company and deal sync**
Make sure only one system is creating accounts.

6 **Set the deletion policy**
Choose what happens in HubSpot when a Salesforce record is deleted.

7 **Map fields and sync rules**
Give every field that syncs a named winner.

8 **Configure activity sync**
Sync the activities reps act on and skip the rest.

9 **Test and go live**
Two rounds of testing, a backup, then daily error checks for two weeks.

HubSpot's docs call it an inclusion segment, and the setting inside the integration still says **Inclusion List**. They're the same thing. The full guide explains the reasoning behind each decision and links to the related RevBlack playbooks.

BEFORE STEP 1

MAKE THESE CALLS FIRST

Each of these turns into a specific setting later. Answer them with sales, marketing and RevOps in the room, and the setup steps become data entry instead of debate.

A Choose your operating model

Which platform leads depends on who drives revenue today, how complex the sales process is, and how fast the team wants to iterate. Write it down and tell both teams.

OUR MODEL

☐ HubSpot-centric ☐ Salesforce-centric ☐ Hybrid

HubSpot-centric suits marketing-led and SMB teams. Salesforce-centric suits territories, account hierarchies and long sales cycles. Hybrid suits acquisitions and several business units, and needs the most explicit ownership rules.

B Answer the five decisions

1. At what point does a record move from HubSpot to Salesforce? (step 3)

2. Which system wins when contact information conflicts? (step 7)

3. Which Salesforce fields should HubSpot never overwrite? (step 7)

4. Which activities does a rep actually need to see? (step 8)

5. What happens when a closed-lost lead re-engages in HubSpot? (step 3)

For decision 1, three questions settle it fast: where does marketing track campaign performance, where do your SDRs do their qualifying, and are you using the Lead object at all?

BEFORE STEP 1

CHECK THE PREREQUISITES

The setup can't finish if any of these are missing, so confirm each one before you start.

A Platform requirements

- ☐ HubSpot is on Professional or Enterprise of Marketing Hub, Sales Hub, Service Hub, Data Hub, Content Hub or Smart CRM.
- ☐ Salesforce is an edition with API access, or Salesforce Professional. Government Cloud works, Group Edition doesn't.
- ☐ A Salesforce system administrator is available to run the install.
- ☐ You have a Salesforce sandbox to test in.
- ☐ You're connecting one Salesforce instance. Each HubSpot account connects to only one.

B Two Salesforce settings

- ☐ **Enforce IP Restrictions on Every Request** is turned off. HubSpot connects from changing IP addresses, so the integration won't connect with it on. If you still need to restrict logins, set up a network IP range instead.
- ☐ Smart Transfer is turned off, if you used it to move Salesforce data into HubSpot. Running both at once creates duplicates in both systems.

C Salesforce API budget

- ☐ You know your daily Salesforce API limit and how much your other connected tools already use.
- ☐ You've planned for one contact sync taking up to four API calls.

Daily API limit _____

Share to give HubSpot (set after install) _____

After install, set HubSpot's share in the **Sync Health** tab under **Allocated to HubSpot**.

BEFORE STEP 1

CLEAR THE DATA AND AGREE THE RULES

Validation rules, duplicates and unwritten definitions are where most new integrations break. The sync copies every duplicate into the other system, so fix them now.

D Salesforce validation rules

- [ ] Every validation rule and required field on the objects you'll sync is checked, especially Leads and Contacts.
- [ ] Each rule has a condition that lets the integration user through.
- [ ] Required fields that should stay are required on the HubSpot form too, or filled by a HubSpot workflow.

When the integration hits a validation rule, the record doesn't save and the error usually lands in the custom code category on the **Sync Errors** page.

E Data

- [ ] Duplicates are cleared in both systems.
- [ ] Field values are standardized across both systems, so USA and United States don't both exist.
- [ ] You know which required fields are actually filled on contact and company records.

Duplicate rate before cleanup _____

F Team agreements

- [ ] Sales, marketing and RevOps agree on lifecycle stages, lead statuses, qualification criteria and handoff rules.
- [ ] Everyone agrees which system owns each major object.
- [ ] The lead management process is written down.
- [ ] A field-mapping spreadsheet exists, with every object, every field that syncs, its direction and its conflict rule. Step 7 has room to start one.

STEP 1 OF 8

CREATE THE INTEGRATION USER

Use a dedicated Salesforce user for the connection instead of a person's login, so the sync doesn't break when that person leaves or their password expires.

> **By the end of this step,** the user sees the records you expect and nothing more, and every change the sync makes in Salesforce shows its name.

- [ ] The user has its own profile, so you can tune its access without touching anyone else's.
- [ ] The profile has API Enabled, View Setup and Configuration, Download AppExchange Packages, Customize Application, and Modify All on every object you sync.
- [ ] Modify Metadata is added if you want the HubSpot Embed window or deal sync.
- [ ] The Task Type field is visible on the profile.
- [ ] The password is set to never expire.
- [ ] Sharing rules are checked. They decide which Salesforce records reach HubSpot, so criteria-based rules can keep whole categories of record from syncing.

Integration username _____

Profile name _____

STEP 2 OF 8

INSTALL THE CONNECTOR

Install into the sandbox and log in as the integration user, never as yourself.

> **By the end of this step,** you have an authenticated connection and nothing has synced yet.

- [ ] In HubSpot, click the **Marketplace** icon in the top navigation, search for the Salesforce app and install it.
- [ ] Select the sandbox checkbox before you continue.
- [ ] Log in with the integration user's credentials.
- [ ] Confirm nothing has synced. Records move only when you import them or a sync is triggered.

Leads and contacts sync to HubSpot contacts, accounts to companies, opportunities to deals and cases to tickets. Custom objects are Enterprise only and need to exist in HubSpot first. Campaigns don't sync.

STEP 3 OF 8

BUILD THE INCLUSION SEGMENT

The inclusion segment decides which HubSpot contacts are eligible to reach Salesforce. The setting takes seconds. The thinking behind it is decision 1.

> **By the end of this step,** only the HubSpot records that meet your criteria can reach Salesforce.

- [ ] An active segment is built whose criteria match decision 1. Anything at MQL or beyond is a common starting point.
- [ ] The segment is selected in the **Limiting what syncs** section of your Salesforce sync settings.
- [ ] Routing rules cover decision 5, so a re-engaged closed-lost lead goes where you decided.
- [ ] You know Salesforce-created records skip the segment if new Salesforce leads or contacts are set to create HubSpot contacts.
- [ ] Tested in the sandbox: one record that matches and one that doesn't, then a triggered sync.

Segment name _____

SEGMENT CRITERIA

Skipping the segment works if you plan for it: every HubSpot contact syncs, so you need clear routing and should sync as contacts, not leads. Selecting a segment doesn't push anyone right away. A contact syncs when something triggers it.

STEP 4 OF 8

DECIDE LEADS OR CONTACTS

In the contact sync rules, choose whether a new HubSpot contact creates or updates a Salesforce contact or a Salesforce lead. For most B2B teams with a defined TAM and ICP, we recommend contacts.

> **By the end of this step,** you've picked one object before go-live, because changing it later means correcting data.

NEW HUBSPOT CONTACTS CREATE A SALESFORCE

☐ Contact ☐ Lead

- ☐ If you chose leads, auto-create companies is turned off in HubSpot. HubSpot matches companies through associated contacts, and a lead has no account to match on.
- ☐ If you want auto-create companies on, you chose contacts.

STEP 5 OF 8

MATCH COMPANY AND DEAL SYNC TO YOUR MODEL

Company and deal field mappings can't be set up until object sync is on, which matters in step 7.

> **By the end of this step,** only one system is creating accounts.

- ☐ If Salesforce owns accounts, HubSpot's setting to automatically create and associate companies with contacts is off. With leads chosen in step 4, this is required.
- ☐ Company sync is on, if your model calls for it.
- ☐ Deal sync is on, if your model calls for it.

STEP 6 OF 8

SET THE DELETION POLICY

Deleting a HubSpot contact never deletes the Salesforce lead or contact. The other direction is your choice.

> **By the end of this step,** deletion works the way you intend in both directions.

WHEN A SALESFORCE CONTACT OR LEAD IS DELETED, HUBSPOT WILL

☐ Delete the contact ☐ Do nothing

We recommend **Delete the contact**, especially when Salesforce is your system of record.

STEP 7 OF 8

MAP FIELDS AND CHOOSE SYNC RULES

This is where decisions 2 and 3 turn into settings. Work from your field-mapping spreadsheet.

> **By the end of this step,** every field that syncs has a named winner.

- ☐ Every mapping has a sync rule: **Prefer Salesforce unless blank**, **Always use Salesforce**, **Two-way** or **Don't sync**. Custom object mappings also offer **Always use HubSpot**.
- ☐ Fields HubSpot should never overwrite use **Always use Salesforce**, with a validation rule that blocks the integration user from editing them as a second guardrail.
- ☐ Every default mapping the connector set up is reviewed. Standard mappings can't be deleted, so use **Don't sync** to stop one.
- ☐ Field types match: dropdown to picklist or reference, multiple checkboxes to multipicklist, number to double or int.
- ☐ No HubSpot property is mapped to more than one Salesforce field.
- ☐ Picklist values are the same in both systems.
- ☐ Reference fields that you need in segments or reports are mapped to a HubSpot dropdown property. They arrive as 18-digit record IDs otherwise.

YOUR FIELD MAP

Object	HubSpot property	Salesforce field	Sync rule	Why

Example line: Contact, country, Country, Prefer Salesforce unless blank, keeps one spelling of each country.

STEP 7 OF 8, CONTINUED

TURN ON CLOSED WON TO CUSTOMER

One more setting lets a Salesforce opportunity stage change update the HubSpot contact's lifecycle stage. All four of these need to be true for a contact to reach Customer when an opportunity closes.

- [ ] Account sync is on.
- [ ] **Automatic lifecycle stage transitions** is on.
- [ ] **Lifecycle stage sync** is on.
- [ ] Reps link at least one contact on the account to the opportunity through contact roles. An opportunity with no linked contacts won't move anybody's lifecycle stage.

The setting never moves a stage backwards, and a HubSpot lifecycle stage never changes anything in Salesforce, so marking someone Customer in HubSpot won't convert a Salesforce lead.

STEP 8 OF 8

CONFIGURE ACTIVITY SYNC

There are two activity syncs, both in the **Activities** tab of the integration settings. Timeline sync is one way and creates Salesforce tasks. Activity sync is two way and, for the same activity type, overrides Timeline sync.

> **By the end of this step,** reps see the activities that help them and none of the ones that don't.

- [ ] You checked which syncs are turned on before changing anything.
- [ ] Core sales activity a rep would act on is syncing: booked meetings, sales emails and calls.
- [ ] Marketing email opens, clicks and sends are not syncing. They aren't deduplicated, so five opens of one email create five Salesforce tasks.
- [ ] The Task Status picklist API names match what the HubSpot connector expects.
- [ ] The Task Type field is visible to the integration user's profile.

Activity types syncing _____

Timeline sync doesn't backfill. Sales activity syncs only after the contact syncs, marketing email events only within 30 days of the sync date, and form submissions only within one year.

BEFORE GO-LIVE

TEST IT AND GO LIVE

Run two rounds of user testing in the sandbox before anything touches production. Leadership tests the process as designed, and reps test it as lived, which is where the edge cases show up.

1 Round one: department heads

- ☐ Fields map where they should.
- ☐ Lifecycle transitions fire correctly.
- ☐ Routing sends records to the right owner.

2 Round two: reps

- ☐ Create a lead.
- ☐ Move a deal.
- ☐ Log a call.
- ☐ Check each one landed in the other system the way the field map says.

3 Go live

- ☐ To force a record to sync during testing, update any mapped field. Some teams add a Force sync to HubSpot checkbox in Salesforce for this.
- ☐ Data in both systems is backed up right before the production push.
- ☐ The **Sync Errors** page in HubSpot is checked daily for the first two weeks.
- ☐ Sales knows that fixing a long-standing sync error releases every record stuck behind it at once, and routing rules are checked before you fix it.

Backup taken (date) _____

Go-live date _____

Who checks sync errors _____

Check that it worked

The setup worked when marketing and sales report the same number of leads, and nothing reaches Salesforce that you didn't mean to send.

- ☐ New sync errors are down to a handful every two weeks, mostly older records being updated.
- ☐ Leads marketing counts as sent show up in Salesforce with the right owner.
- ☐ No new duplicate companies or accounts were created by the sync.
- ☐ Reps see booked meetings, sales emails and calls on the Salesforce record, without marketing email noise.

Keep it healthy

How often	What to do	Owner
Daily and weekly	Review and resolve sync errors.	
Monthly	Validate field mappings, collect user feedback, review adoption, and archive what's broken.	
Quarterly	Full sync audit: field mappings, user behavior and data quality trends.	
Annually	Review the architecture against how the business sells now.	

When something goes wrong

PROBLEM	LIKELY CAUSE	WHAT TO DO
The integration won't connect	**Enforce IP Restrictions on Every Request** is on in Salesforce	Turn it off, or set up a network IP range in Salesforce
Records fail with a custom code error	A Salesforce validation rule or required field blocked the save	Add a bypass for the integration user, or fill the field from HubSpot
Duplicate companies appear in HubSpot	Leads are syncing while auto-create companies is on	Turn off auto-create companies, or sync contacts instead of leads
A contact doesn't become Customer at Closed Won	No contact role on the opportunity, or one of the lifecycle settings is off	Add the contact role and check all four items in step 7
Salesforce fills up with email open tasks	Marketing email events are syncing to the timeline	Turn them off and sync only sales activity
Activity sync fails with no clear error	Task Status API names don't match, or Task Type is hidden	Fix the picklist API names and the field visibility
Hundreds of leads land on reps at once	A sync error was fixed and the backlog released	Tell sales before fixing it and check routing first

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RATHER TALK IT THROUGH FIRST?

We set up HubSpot and Salesforce together, starting with the five decisions and the field map, so both teams end up reporting the same number.

Talk through your setup at revblack.com/contact-us