Setting Up and Understanding Data Sync

HubSpot

The Overview

Data Sync, the new integration engine available with the addition of Operations Hub, is deeply powerful and easy to use. This reference guide will walk you through the steps to set up a Data Sync connection as well as common points of confusion or roadblocks within each step.

Before creating a Sync relationship, you'll need to make sure you have access to the correct subscription tier and level of account access in each to leverage the connector. All our available Data Sync connectors are listed on our App Marketplace, and this will be listed on the "requirements" section of the page for each individual sync in the marketplace.

Consider your goals before connecting an integration.

When adding a connector to your account, you should make sure you know the answers to the following three questions. This will help you make sure you're working towards a meaningful and impactful solution, rather than connecting your apps without a goal in mind.

What is my goal with establishing this connection?	Which system should be my system of record, or source of truth?	What are my non-negotiables and what data has to sync for this to work?

Step 1: Authenticate any external applications.

To access the connector configurations, you'll need to authenticate with your external application. Essentially, you need to log in. If you're unable to find documentation for the specific app you're connecting with, you can find app-specific processes in this Knowledge Base article. Depending on the application, it will be one of two processes.

OAuth

When using OAuth, you'll be prompted to enter your login credentials to authenticate the application. In this case, you'll need access to:

- Your username or email for the external application.
- Your password for the external application.

If your login fails, you'll be prompted in the window to attempt again. If this happens repeatedly, check to make sure your username and password are correct.

App Parameters

When using App Parameters, this will feel similar to Oauth, but you'll need some additional information to authenticate the application. This includes your username and password, but also could include the following:

- Organization name
- Organization URL
- Domain name
- API Key

This will be specific to the application you're authenticating, so be sure to collect these values prior to authentication.

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Step 2: Configure the integration.

Once you've authenticated the integration, you'll need to configure the integration to sync the correct records and fields. There are three key steps here that we'll look at. You can learn more about the specific steps in each area by going through this Knowledge Base article.

Determine which contacts will sync.	Configure the properties that will sync.	Select the sync direction.
If you'd like to sync only a subset of contacts, you'll need to create a list to use as an inclusion list. This will act as the door between HubSpot and your external platform.	Free users will be able to select from a number of default fields to sync. Paid users will have the option to edit field mappings and create custom field mappings at this step.	Bidirectional sync will allow both platforms to update contacts based on the most recent changes, whereas one-way sync will push data from one platform to another.

Step 3: Turn on the connector.

Congrats, you've completed the setup of your Data Sync connector! Now you just need to make sure the correct data is syncing between your platforms. Here are some steps you can take:

- ✅ If sending contacts to an external tool, check to make sure the full list has been created as contacts. For any that were not created, check for existing records using the same email address.

- ✅ If bringing contacts into HubSpot, check to see if those records were created. You can use the original source and create date to create a filter and understand which records were created today.

- ✅ If using the connector to update fields in either platform, create a filter in the destination app to understand whether or not the target field was populated. You can use specific contact records to cross-check the field values in this case.

Wait, the sync isn't working as expected.

While our Support Team is happy to help get to the bottom of any unexpected behavior, here are a few things you can check before calling in:

- ❓ Do the contacts you're looking to sync have email addresses? These are typically used as an identifier to create or update records.

- ❓ Are the contacts in question free of accidental data and do they have the correct opt-in statuses? Ensuring your data is clean and up-to-date will make sure your sync is only moving information you want it to.

- ❓ Is the list criteria the best for your goal? When was the last time you updated the list? Similar to above, making sure your criteria is finely tuned to your goal will give you more control over the data syncing.

- ❓ Do either platforms have field validation such as mandatory fields or formatting restrictions? Does your data meet the validation criteria? This is required for data to sync as designated in the connector settings.

If you're still unable to determine why the sync didn't work as intended, reach out to our Support Team for help getting to the bottom it.