HubSpot Installation & Configuration Guide

Last update: 15 April 2025

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Quick Start Checklist

- [ ] Connect your SalesIntel CRM Admin to HubSpot
- [ ] Set enrichment settings and mappings
- [ ] Test enrichment through a small manual job
- [ ] Set up auto enrichment jobs

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Prerequisites

Supported Editions of HubSpot

All versions of HubSpot are supported except for free versions. In order to conduct an enrichment program, you will need a minimum of 10 available custom fields on each object you want to enrich. These fields are used for tracking purposes and installed automatically by SalesIntel's integration.

SalesIntel CRM Admin Role

In order to use SalesIntel enrichment services, you must have a designated CRM Admin on your SalesIntel account. That SalesIntel CRM admin must also have access to an active HubSpot account with the following permissions:

- CRM Export - used to retrieve the records to be processed during enrichment
- CRM Import - used to write back the updates to the records
- CRM Lists (read) - used to define an enrichment job based on an existing HubSpot List
- CRM Companies (read/write) - used to retrieve and write back records
- CRM Contacts (read/write) - used to retrieve and write back records
- CRM Object Owners (read) - used to ensure records ownership is respected
- CRM Schema Companies (read/write) - used to access available fields and write custom field to track enrichment
- CRM Schema Contacts (read/write) - used to access available fields and write custom field to track enrichment
- oauth - used to connect the SI and HS user accounts

You may also designate other users as Operations Admins. Operations admins have the same access as CRM Admins, so that the team can work together. Contact support@salesintel.io or your CS/AM team to set your CRM Admin and any additional OpsAdmins.

Preparing for Enrichment

To prepare for enrichment, you'll need to connect to HubSpot and set up your field settings and mappings.

In order to use HubSpot enrichment, your CRM Admin must first connect SalesIntel and HubSpot. If this connection is not made or is broken at any time, users will not be able to access enrichment and enrichment will not run until the connection is re-established.

To connect:

1. Log in to SalesIntel at https://app.salesintel.io

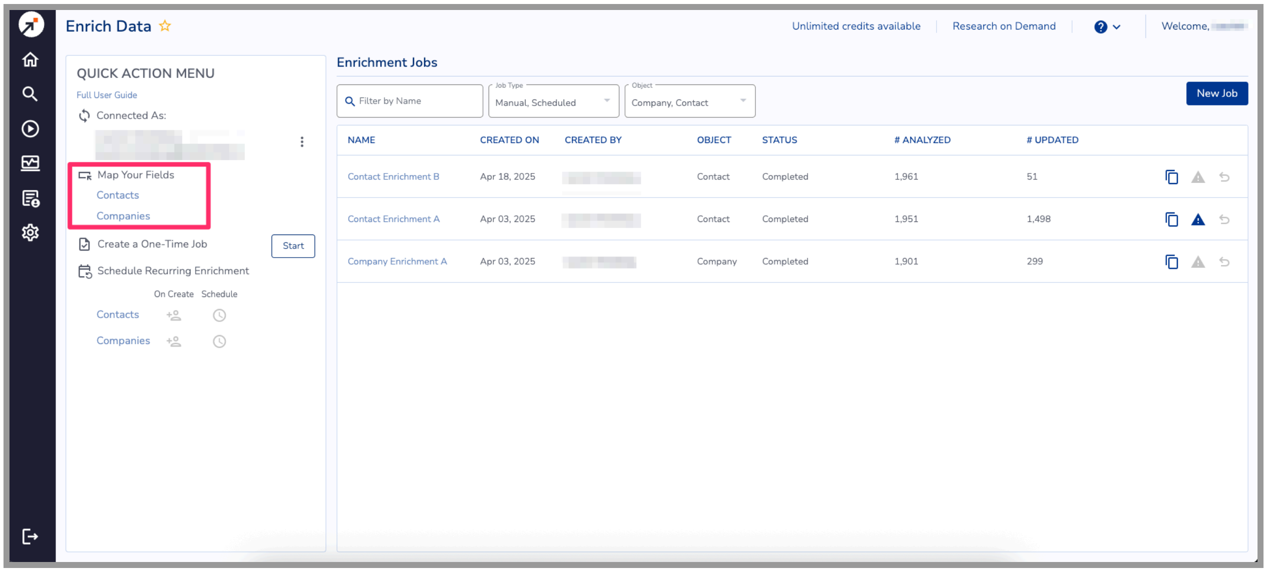
2. Click on Enrichment > HubSpot Enrichment in the main menu
3. Click the “Connect Now” button in the center of the screen
4. Log in to HubSpot when prompted. If you have multiple HubSpot accounts, ensure that you connect to the correct account where you want to run the enrichment program.

If you do not see the Enrichment menu item, please contact support@salesintel.io or your Success team.

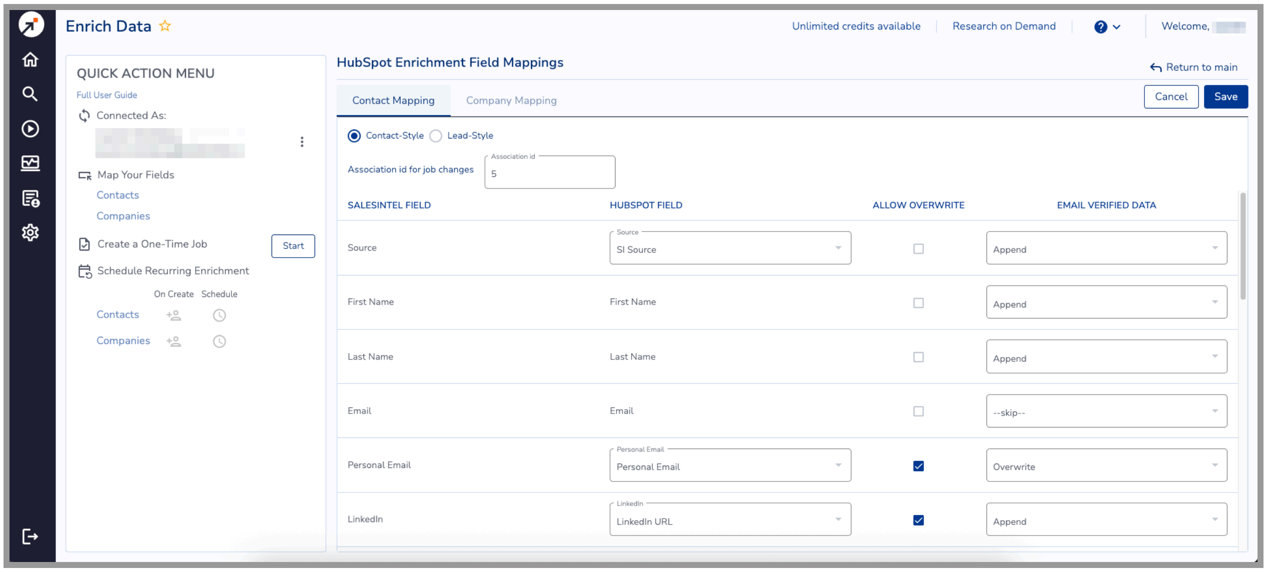
Object Settings and Field Mappings

In order to enrich your data, you will need to apply settings and field mappings for each object that you want to enrich. Only your integration admin or operations admins can set up field mappings and enrichment jobs. If you do not have one of these SalesIntel roles, you will not see the Enrichment menu item and cannot access HubSpot enrichment.

Start by going to the Enrichment tab and selecting Contacts or Companies under *Map Your Fields*. For each object you’d like to enrich, the process will be the same.



Map the fields in your HubSpot instance to the SalesIntel fields. For each field, you will also be able to set an Overwrite directive (1). If this value is unchecked, your original data will be preserved. If this value is checked, SalesIntel will overwrite your data with updates that we may have (if we have no data, your data will be preserved).



In column (2) you can designate similar instructions for email verified data (contacts only). Your main mappings and settings apply to SalesIntel's human verified data - our highest accuracy tier. You can also choose to enrich with email verified data, which is one step down. If you choose to do so, you can decide to either fill only missing values with this type of data, or overwrite your existing data. [Learn more about accuracy tiers.]

For example, you may choose to overwrite phone data with human verified phone numbers, but only fill empty phone fields with email verified data. To skip all email verified data, just leave the field on –skip–.

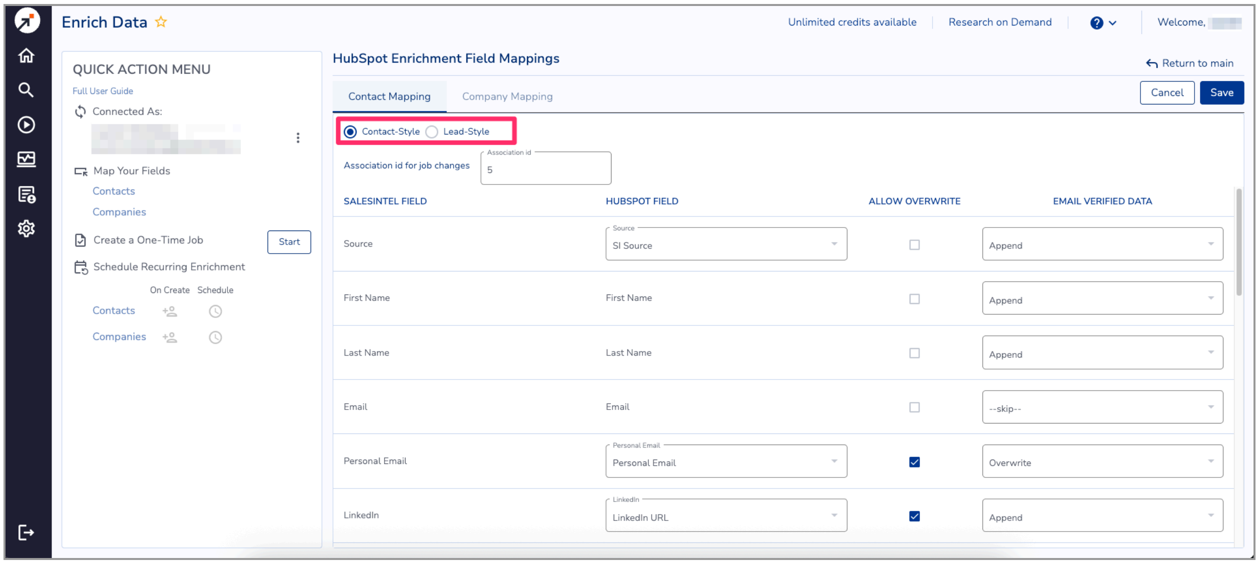
> *The difference between human verified data and email verified data is that human verified data has been reviewed by a researcher and is 95% accurate. Email verified data has not been reviewed, but has a 90% email deliverability rate.*

It is important to map as many fields as possible, as your original data is used to find the match to the SalesIntel database. More data means more matches, so that we can service more records for you.

Lead vs Contact Mapping

If you do not use the Company object in HubSpot, you may prefer to receive company data written directly to your contact record. SalesIntel calls this "Lead-Style". In this case, select this option from the top of the contact mapping screen. It is not recommended to use the lead-style mapping if you are using the Company object in HubSpot.

Whichever option you select and save will be your default used when running enrichment.

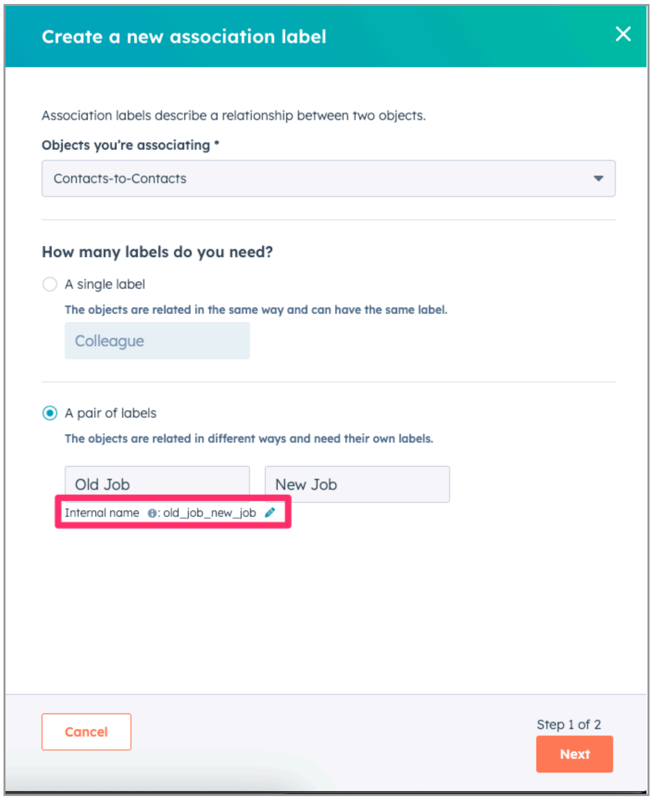


Association ID for Job Changes

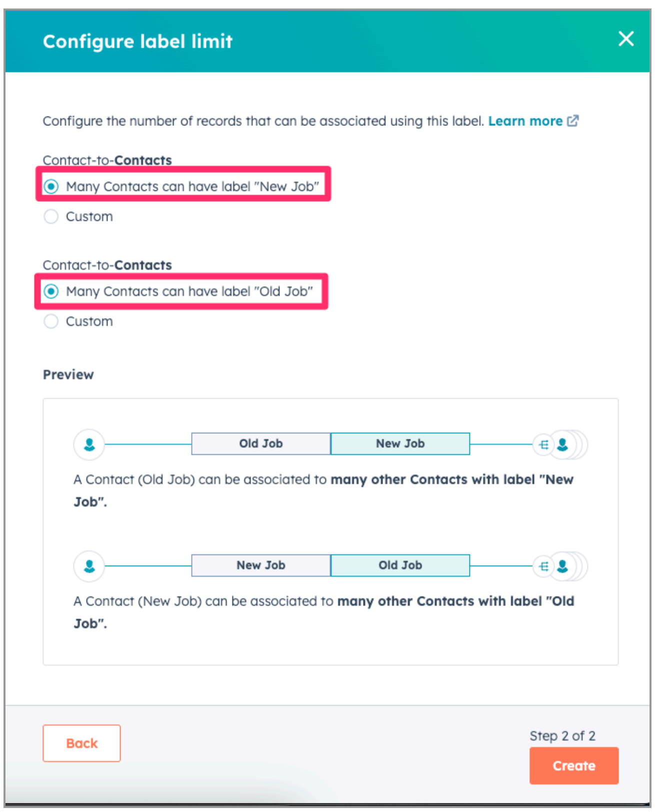
In some cases, SalesIntel may find that a contact in your HubSpot database has changed jobs and is no longer at that company. When you set up your enrichment job, you will have the option to indicate how to handle those changes. If you would like a new contact created, you may optionally add association instructions to link the old and new contact records in HubSpot, making it easier for you to find these changes in your data. **If you do not want a new contact created or you do not want to associate the old and new contacts, you may skip this step.**

To take advantage of the option to link these contacts, you must first create a custom association id in HubSpot:

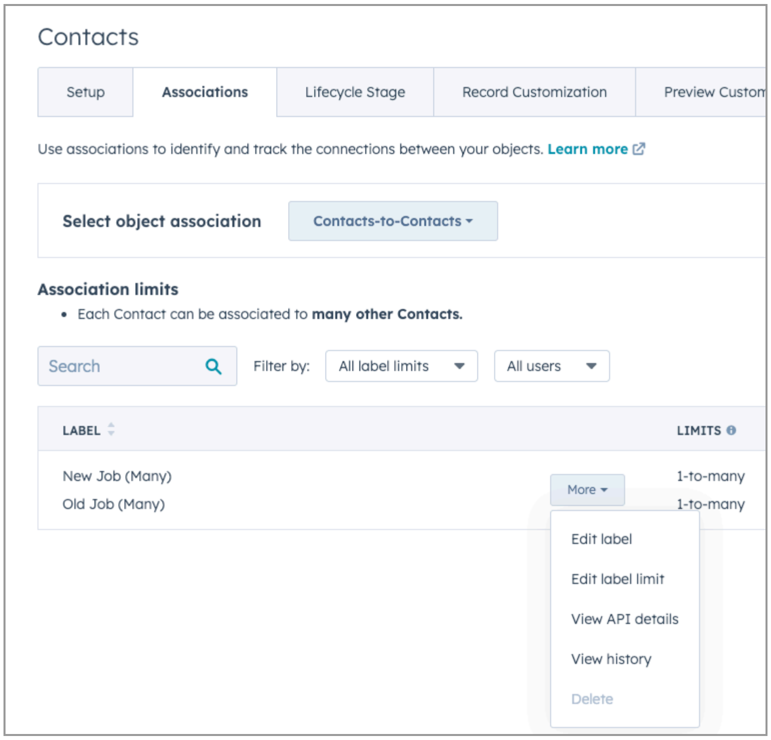
1. Navigate to HubSpot Settings > Objects > Contacts and select the Associations tab
2. Select Create and Configure > Create and Configure Label Limits
3. Choose to associate Contacts-to-Contacts and select “A pair of labels”. Your labels should read **Old Job** in the first field and **New Job** in the second. It is very important to apply the labels in this order. If you want to use custom labels, you may do so, but make sure that the internal name field appears as *old_job_new_job*, as shown in the image below:



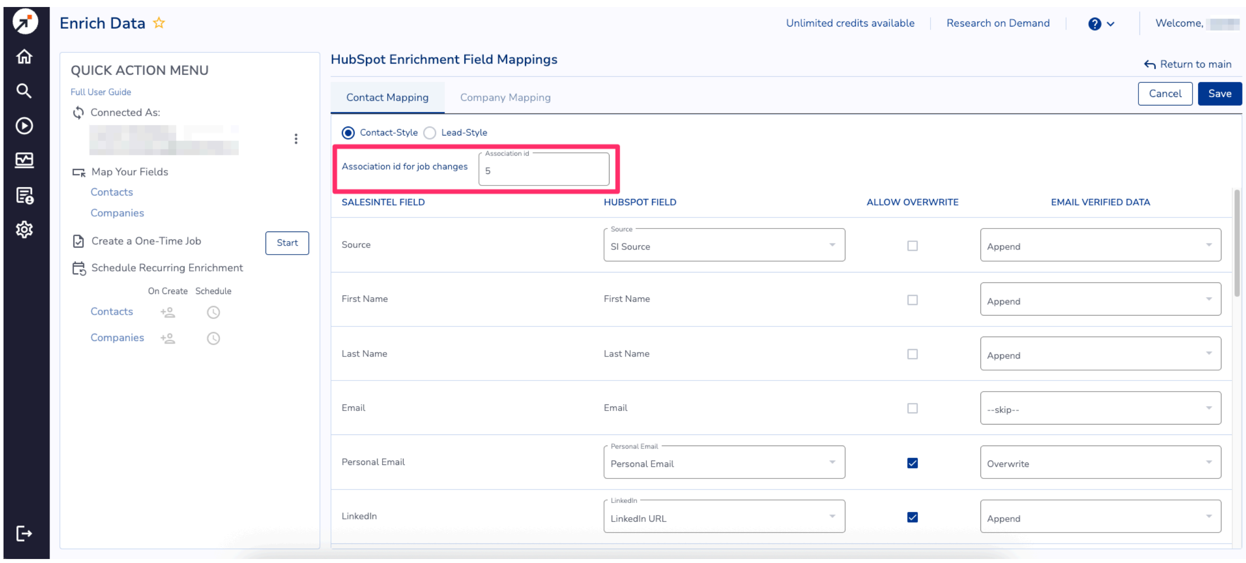
4. Click next to configure label limits, and choose the option “Many Contacts can have the label New Job” and “Many Contacts can have the label Old Job”. Click Create.



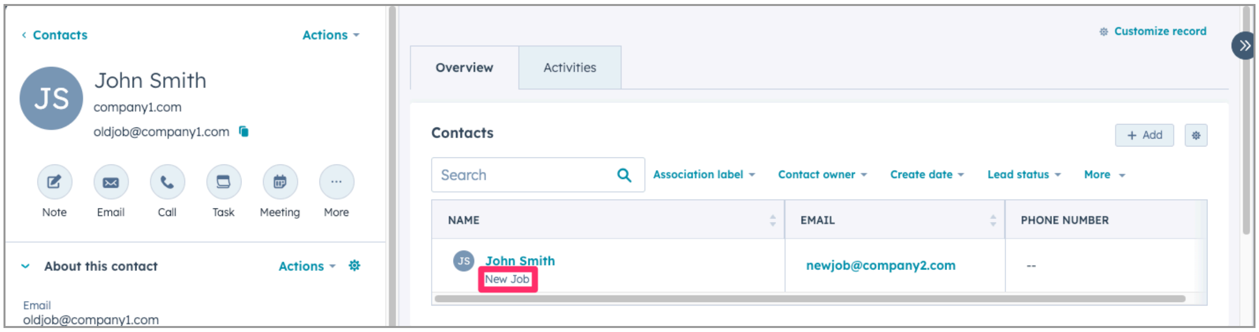
5. Select the association in the associations list, and choose View API Details from the “More” menu



6. Add the association id presented here to the association id field in your contact mappings in SalesIntel to complete the association process.



Now, when a contact changes jobs and this change is identified via enrichment, any new contacts created will be associated through this id. The old record will show a link to the record tagged with New Job, and vice versa.



Job changes are only processed once. If a contact is found to have changed jobs, enrichment will be skipped the next time that contact is submitted to a job. In the event that you update your job change settings or association id, you can rerun these records only by clearing the job change disposition fields shown in the next section.

Enrichment tracking (disposition) fields

The following custom fields are installed on each impacted object (Companies, Contacts) when connecting HubSpot for enrichment. You may choose to add these to your object views or reporting to assist you in understanding the impact of SalesIntel enrichment on your data.

First Enriched Date	Date that data was added to the record for the first time
Last Enriched Date	Most recent date where data was added to the recorded
SalesIntel Enriched	If SalesIntel has ever added data to a record, the checkbox will be marked TRUE
Attempted Enrichment	The record was part of an enrichment job
Attempted Enrichment Disposition	Outcome of the latest enrichment job (Matched / Unmatched / Invalid)
Last Attempted Enrichment	Last date the record was included in an enrichment job
Last Matched Date	Last date the record matched to the SalesIntel data set. It may not be enriched, based on available data, accuracy tier, and other settings.
SalesIntel Enrichment Accuracy Tier	The accuracy tier of the SalesIntel data match: Human Verified, Email Verified, Machine Verified, Outdated. By default, Human Verified data is available for enrichment. You may optionally add Email Verified data matches. Outdated matches indicate a contact who has left a role, but we cannot locate their new position.
SalesIntel Changed Job (contacts only)	For contacts and leads only, if the person is found to be at another organization now, this checkbox will be marked TRUE. The original record will not be otherwise updated. In the future, this record will not be reprocessed.
SalesIntel Changed Job Date (contacts only)	If the Changed Jobs field is TRUE, this box has the Date the box was checked. In the future, the date should not be updated, even if the record

	is included in subsequent jobs. In the future, this record will not be reprocessed.

Enrichment Jobs

Three Types of Enrichment

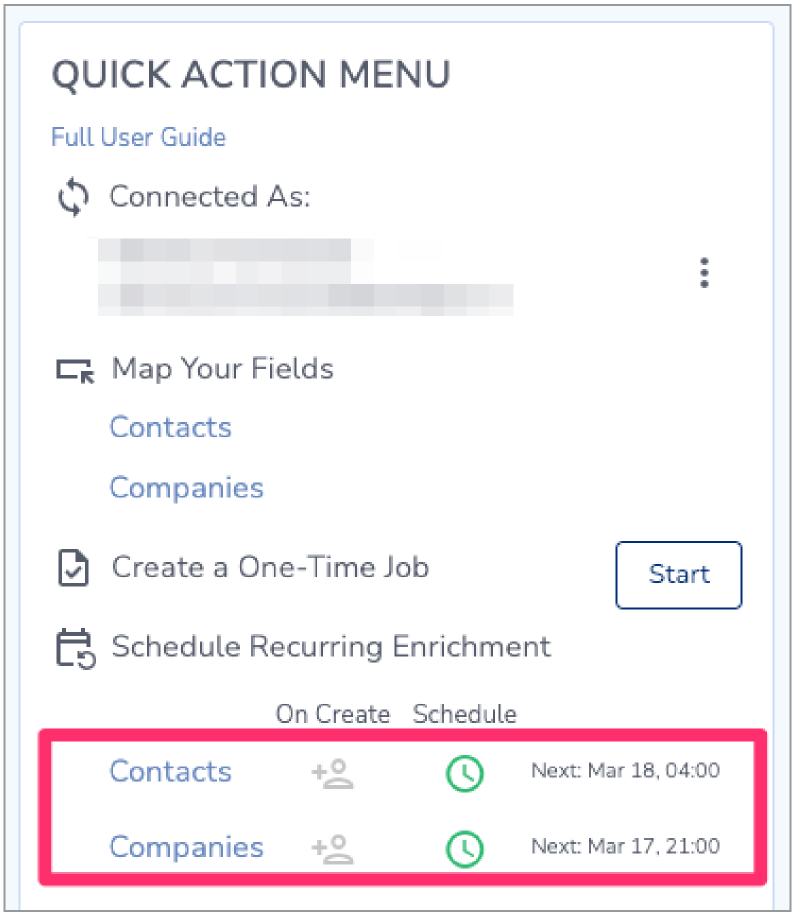
All enrichment types can be run on Company and Contact records. Each object is managed and run separately. The length of time it takes to complete an enrichment task is dependent on the size of the task and busyness of the platform.

Type	Timing	Description
Manual	Asynchronous process	Manual enrichment is a one-time enrichment job that you set up and run on a set of records of interest.
Triggered	Asynchronous process	Triggered enrichment runs when a new record is created. This is a "set and forget" style of enrichment.
Scheduled	Asynchronous process	Scheduled enrichment runs on a frequency of your choosing. You can add filters to scheduled enrichment to enrich only certain records. This is a "set and forget" style of enrichment.

Scheduled and Triggered Enrichment

Note: For scheduled auto-enrichment, SalesIntel recommends using non-operational hours, such as evenings and weekends, to avoid any potential disruption to workflows.

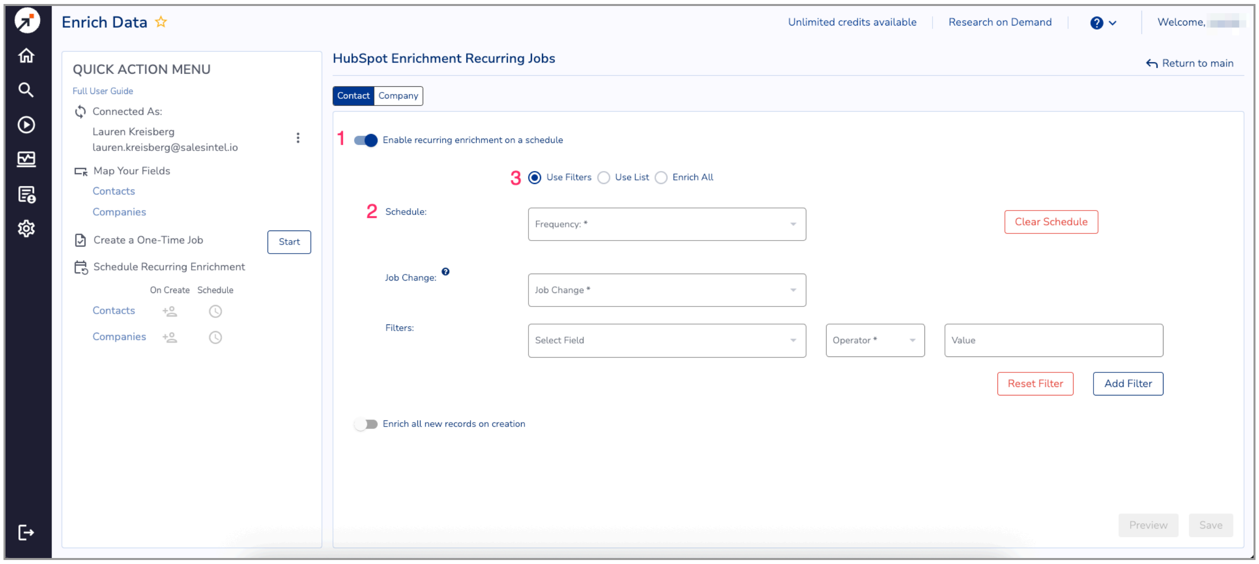
To create recurring enrichment, navigate to the configuration page using the Quick Action Menu on the left to select the object.



Once on the configuration page, you'll see two toggles:

- Enable recurring enrichment on a schedule
- Enrich all new records on creation

Setting up a Schedule



1. **Click the first toggle to expose the scheduler.** Scheduled jobs can be created for daily, weekly or monthly intervals. Your schedule is always shown based on your computer's timezone. For example, if your colleague in California schedules enrichment for 2am but you are in New York, your schedule would show as 5am.
2. **For contact records, choose how to handle job changes.** A job change occurs when you have a record in HubSpot that belongs to a contact who is now in a different role. SalesIntel recognizes this change through identifiers that do not update frequently (like a LinkedIn URL) or through our graph of previous vs current positions.

   In all cases, the job change disposition fields will be updated and the original record with the history of the previous role's activity will not be enriched. You may choose to either stop there or create a new record for the updated contact. You may also associate the old and new records by setting an association ID on the mapping tab.
3. **Choose which records to include:**
   a. User-defined filters
   b. A pre-existing HubSpot list
   c. Enrich all records.

   When using user-defined filters, you may select **up to three filters**, which are **combined with an AND operator**. If you need more filters or more control over those filters, using a list defined in HubSpot is recommended. Both active and static lists are supported.

Before you save your configuration, you can use the Preview button to get an estimate of the number of records eligible for enrichment and to see a preview of up to 50 records, to help confirm that you have selected the intended records.

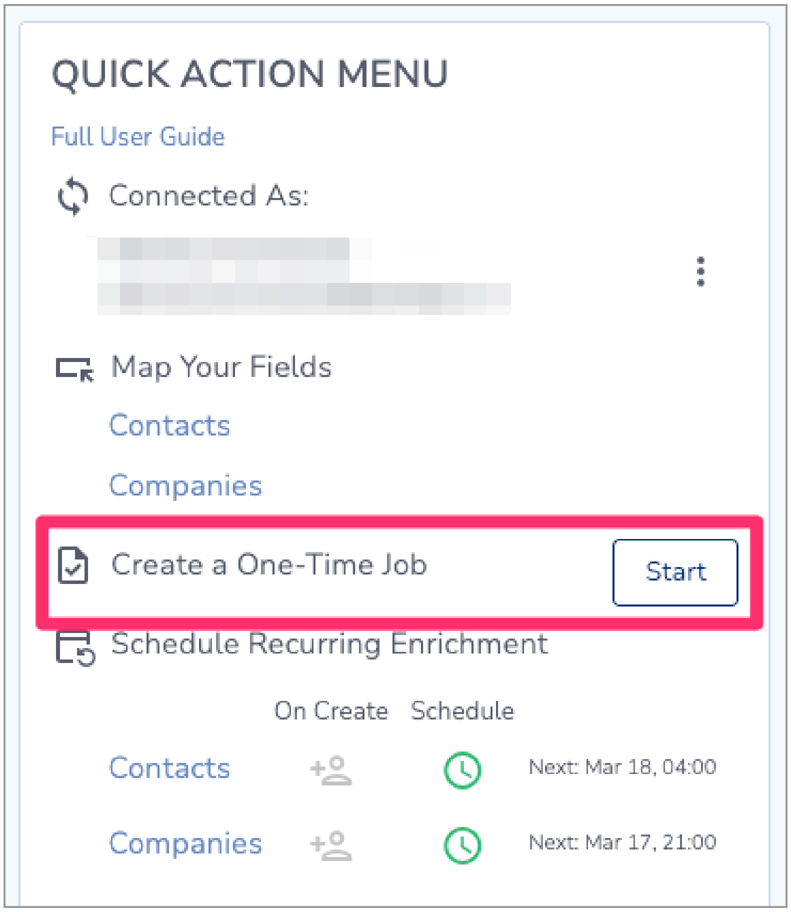
To change your schedule or configuration, simply return to this page and make updates. To turn off the schedule, slide the toggle to off.

Setting up Triggered Enrichment

To set up triggered enrichment, simply click the “Enrich all new records on creation” toggle and save. To turn off the schedule, slide the toggle to off.

Manual Enrichment

To create recurring enrichment, navigate to the configuration page using the Quick Action Menu on the left.



1. **Choose contact or company, name your job, and choose your task type.** An auto task will run both matching and writeback once you click Start. A manual task will require you to come back to SalesIntel to initiate the writeback process. You will receive an email when the matching process is complete and can return to the app to view the match report and start enrichment.

2. **For contact records, choose how to handle job changes.** A job change occurs when you have a record in HubSpot that belongs to a contact who is now in a different role. SalesIntel recognizes this change through identifiers that do not update frequently (like a LinkedIn URL) or through our graph of previous vs current positions.

   In all cases, the job change disposition fields will be updated and the original record with the history of the previous role's activity will not be enriched. You may choose to either stop there or create a new record for the updated contact. You may also associate the old and new records by setting an association ID on the mapping tab.
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   a. User-defined filters
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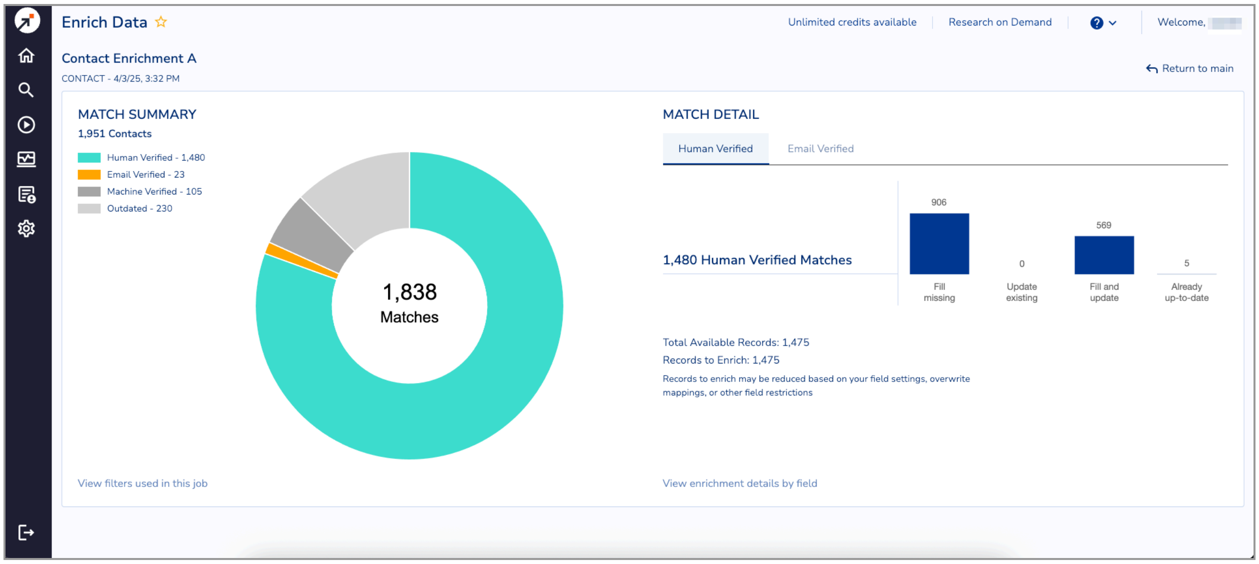
   When using user-defined filters, you may select **up to three filters**, which are **combined with an AND operator**. If you need more filters or more control over those filters, using a list defined in HubSpot is recommended. Both active and static lists are supported.

Before you save your configuration, you can use the Preview button to get an estimate of the number of records eligible for enrichment and to see a preview of up to 50 records, to help confirm that you have selected the intended records.

If you choose the “Manual” task type, you will receive an email when the results are ready, but before they are written back to HubSpot. You must return to the application, view the enrichment report, and click “Start Enrichment” to write your results back.

Enrichment Reporting & Analytics

To review what occurred during your enrichment task, or to start the writing process on a manual enrichment task, access the report by selecting the job from the enrichment task table. The *Start Enrichment* button in the upper right will begin the process of writing back your updated data if you ran a manual one-time job.



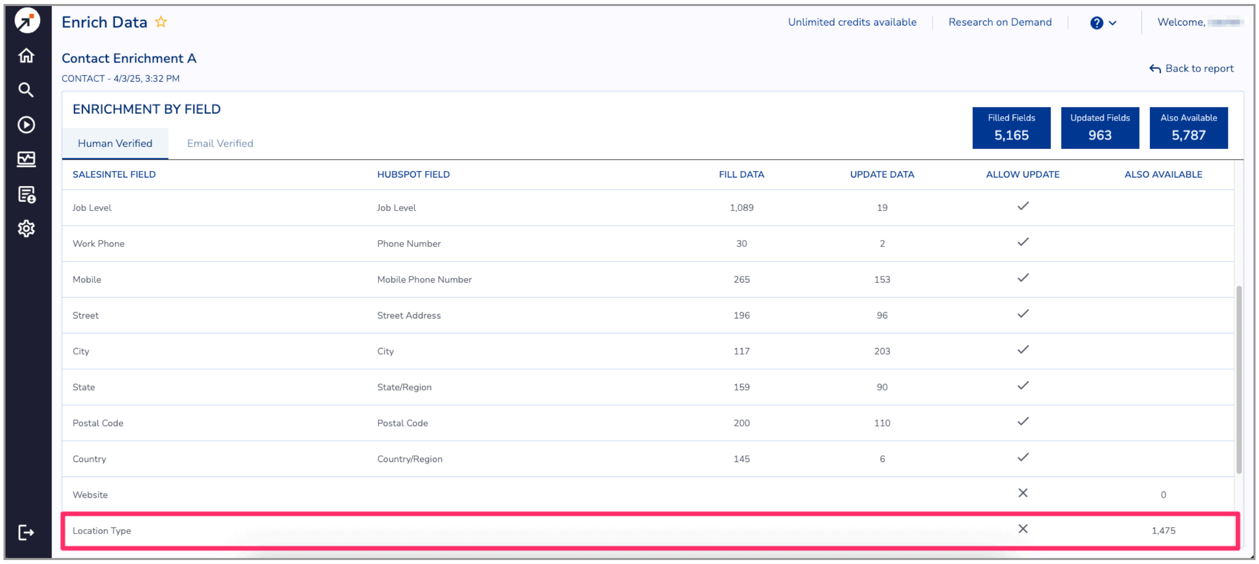
The left side of the report shows your overall match rate, broken down by accuracy tier. Only your human verified and email verified (for contacts and leads) matches are eligible for enrichment.

The right side of the report further breaks down those human or email verified matches based on the updates provided:

1. **Fill missing**: The number of matches where only empty fields could be updated
2. **Updated existing:** The number of matches where only fields with existing data could be updated
3. **Fill and update:** The number of matches where both empty fields and existing fields could be updated
4. **Already up-to-date**: The number of matches where nothing needs updating

The total available records is the sum of 1, 2, and 3 above – all records where something could be updated. However, based on your overwrite settings, it is possible that we will not be able to write all updates. The “Records to Enrich” value indicates the records that both have data to write and which follow your settings.

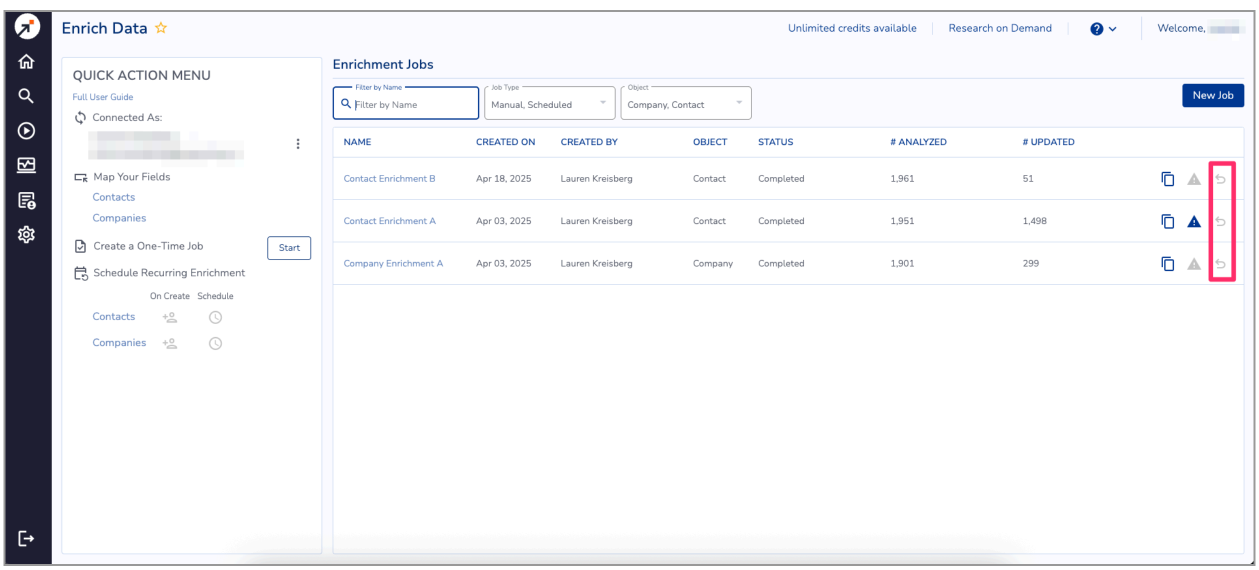
By clicking on the link “View enrichment details by field”, you can also see the individual fields that will be updated, overwritten, or skipped, as well as possible additional data that is available should you map more fields. In this example, the location type field is not mapped, but SalesIntel has 1,475 records with this information. Mapping this field in the future will get you access to this data.



Roll Back Your Enrichment

Occasionally, you may find it necessary to roll back an enrichment due to mistakes in mapping fields or applying settings. You have 15 days to roll back a job. Rolling back a job will reset any fields updated by that job back to their status before the job started. Any further changes made to these fields after the enrichment tasks ran will be lost.

To roll back your job, click the rollback icon next to the job name. The rollback process will start and you will receive notification once it is complete.



Data Matching

For all jobs (manual, scheduled, triggered), SalesIntel uses multiple fields to match your data to our database. The more fields you have mapped, the more matches can be made, and the more up-to-date your resulting data will be. If you want to map a field but want your existing data to take priority, make sure to set the Allow Overwrite checkbox to unchecked when mapping your fields.

The following fields are used in the matching process:

- **Accounts**: name, website, country, LinkedIn URL, HQ Phone (some fields are used in pairs to ensure uniqueness)
- **Contacts**: name, email, personal email, LinkedIn URL, company name, company website, mobile phone, work phone, title (some fields are used in pairs to ensure uniqueness)
- **Lead-Style Contacts**: name, email, personal email, LinkedIn URL, company name, company website, mobile phone, work phone, title
- **Partial Lead Enrichment (available on with lead-style contacts)**: If an exact contact cannot be matched for a lead, any available company data is used to derive a company match, to assist in routing and prioritization, including email domain, company website, country, company name.

Support

If you have any questions, please contact us at support@salesintel.io.