



HubSpot Installation & Configuration Guide

Last update: 27 April 2026

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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Major Release Update - April 2026

[Technographic fields for enrichment](#) are now available for all users. Add tech stack details to companies and leads for prioritization and better conversations.

Major Release Update - January 2026

- A set of new fields is available for enrichment:
 - **New Company Enrichment Fields**
 - SalesIntel Company ID
 - Year founded
 - Last Funding Round
 - Last Funding Date
 - Last Funding Amount
 - Total Funding Amount
 - Sector List
 - Industry List
 - NAICS List
 - Finance Department Size
 - HR Department Size
 - IT Department Size
 - Legal Department Size
 - Marketing Department Size
 - Operations Department Size
 - Procurement Department Size
 - R&D Department Size
 - Sales Department Size
 - **New Contact Enrichment Fields**
 - SalesIntel Match ID
 - HQ Street
 - HQ City
 - HQ State
 - HQ Postal Code
 - HQ Country
 - HQ State Abbreviation
 - HQ Country Abbreviation
 - **New Lead Enrichment Fields**



- A union of all of the above

Major Release Update - October 2025

- [Buying center enrichment](#) is now available for all enrichment users. Make sure you have the contacts you need to close open deals.

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

If the CRM Admin wants to use SalesIntel for Buying Center Enrichment, they must also have access to below permissions:

- CRM Deals (read/write) - used to retrieve deal information and write back custom fields
- CRM Schema Deals (read/write) - used to access available fields and create custom fields to track enrichment

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.

In addition, for Buying Center Enrichment, your CRM Admin needs to connect the BCE app to the HubSpot instance. For connecting the BCE app to HubSpot, navigate to Enrichment Module > Create a One-Time Job > Select Buying Center. Or click on ‘Buying Center’ under ‘Schedule Recurring Enrichment’.

The screenshot shows the 'Enrich Data' interface. The top navigation bar includes 'Research on Demand', 'Get Help', and 'Unlimited credits available'. The main content area is titled 'HubSpot Enrichment Recurring Jobs' and has tabs for 'Contact', 'Company', and 'Buying Center'. The 'Buying Center' tab is active. A message in the center reads: 'To proceed with Hubspot Buying Center Enrichment, please log in and connect.' Below this message is a yellow 'Connect Now' button. The left sidebar contains a 'QUICK ACTION MENU' with a 'Full User Guide' section, 'Connected As: Lauren Kreisberg', and a 'Specify your Settings' section with links for 'Contacts', 'Companies', 'Buyer Personas', and 'Technographics'. Below that is a 'Create a One-Time Job' section with a 'Start' button, and a 'Schedule Recurring Enrichment' section with a table:

	On Create	Schedule
Contacts	👤+	🕒
Companies	👤+	🕒
Buying Center	👤+	🕒

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



Types of Enrichment

Object	Description
Company	Update or fill missing company information.
Contact	Update or fill missing contact information.
Deal (Buying Center)	Add buying center (persona) contacts to companies associated with open deals. This type of enrichment does not update existing records.

All enrichment types can be run on Company, Contact, and Deal 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.

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 *Specify Your Settings*. For each object you'd like to enrich, the process will be the same.



Enrichment Jobs

Filter by Name: Job Type: Manual, Scheduled Object: Company, Contact, ... New Job

NAME	CREATED ON	CREATED BY	TYPE	STATUS	# ANALYZED	# UPDATED	
CRM Enrichment	Apr 14, 2026		Compa...	Completed	370	358	
New Business	Apr 02, 2026		Buying Center	Completed	2	10	
New Opps	Apr 02, 2026		Buying Center	Completed	1	0	
Existing Business	Oct 14, 2025		Buying Center	Completed	2	9	
Contact Enrichment B	Apr 18, 2025		Contact	Completed	1,961	51	
Contact Enrichment A	Apr 03, 2025		Contact	Completed	1,951	1,498	
Company Enrichment A	Apr 03, 2025		Compa...	Completed	1,901	299	

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).

HubSpot Enrichment Field Mappings Return to main

Contact Mapping Company Mapping Cancel Save

Contact-Style Lead-Style

Association id for job changes:

SALESINTEL FIELD	HUBSPOT FIELD	ALLOW OVERWRITE	EMAIL VERIFIED DATA
Source	Source: SI Source	<input type="checkbox"/>	Append
Match ID	Match ID: --skip--	<input checked="" type="checkbox"/>	Overwrite
First Name	First Name	<input type="checkbox"/>	Append
Last Name	Last Name	<input type="checkbox"/>	Append
Email	Email	<input type="checkbox"/>	--skip--

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.

The screenshot shows the 'HubSpot Enrichment Field Mappings' interface. At the top, there are tabs for 'Contact Mapping' (selected) and 'Company Mapping'. Below the tabs, there are radio buttons for 'Contact-Style' (selected) and 'Lead-Style'. An 'Association id' field is set to '5'. The main area contains a table with columns: SALESINTEL FIELD, HUBSPOT FIELD, ALLOW OVERWRITE, and EMAIL VERIFIED DATA.

SALESINTEL FIELD	HUBSPOT FIELD	ALLOW OVERWRITE	EMAIL VERIFIED DATA
Source	SI Source	<input type="checkbox"/>	Append
Match ID	--skip--	<input checked="" type="checkbox"/>	Overwrite
First Name	First Name	<input type="checkbox"/>	Append
Last Name	Last Name	<input type="checkbox"/>	Append
Email	Email	<input type="checkbox"/>	--skip--

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:

Create a new association label [X]

Association labels describe a relationship between two objects.

Objects you're associating *

Contacts-to-Contacts [v]

How many labels do you need?

A single label
The objects are related in the same way and can have the same label.
Colleague

A pair of labels
The objects are related in different ways and need their own labels.

Old Job [] New Job []

Internal name: old_job_new_job [edit]

Cancel [] Step 1 of 2 Next []

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.



Configure label limit
✕

Configure the number of records that can be associated using this label. [Learn more](#)

Contact-to-Contacts

Many Contacts can have label "New Job"

Custom

Contact-to-Contacts

Many Contacts can have label "Old Job"

Custom

Preview

Old Job

New Job

A Contact (Old Job) can be associated to **many other Contacts with label "New Job"**.

New Job

Old Job

A Contact (New Job) can be associated to **many other Contacts with label "Old Job"**.

Back

Step 2 of 2

Create

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

Contacts

Setup
Associations
Lifecycle Stage
Record Customization
Preview Custom

Use associations to identify and track the connections between your objects. [Learn more](#)

Select object association Contacts-to-Contacts ▾

Association limits

- Each Contact can be associated to **many other Contacts**.

Search Filter by: All label limits ▾ All users ▾

LABEL	LIMITS
New Job (Many)	1-to-many
Old Job (Many)	1-to-many

More ▾

- Edit label
- Edit label limit
- View API details
- View history
- Delete



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

HubSpot Enrichment Field Mappings

Return to main

Contact Mapping Company Mapping Cancel Save

Contact-Style Lead-Style

Association id for job changes Association id 5

SALESINTEL FIELD	HUBSPOT FIELD	ALLOW OVERWRITE	EMAIL VERIFIED DATA
Source	SI Source	<input type="checkbox"/>	Append
Match ID	--skip--	<input checked="" type="checkbox"/>	Overwrite
First Name	First Name	<input type="checkbox"/>	Append
Last Name	Last Name	<input type="checkbox"/>	Append
Email	Email	<input type="checkbox"/>	--skip--

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.

Contacts Actions

John Smith
company1.com
oldjob@company1.com

Note Email Call Task Meeting More

About this contact Actions

Overview Activities Customize record

Contacts + Add

Search Association label Contact owner Create date Lead status More

NAME	EMAIL	PHONE NUMBER
John Smith New Job	newjob@company2.com	--

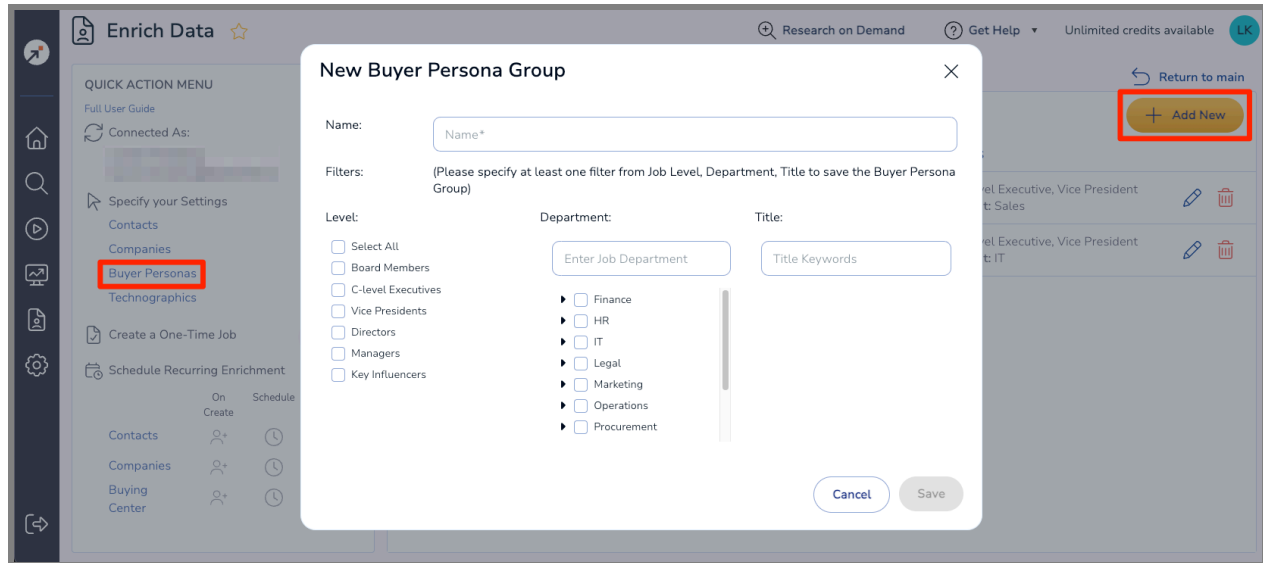
Job changes are only processed once. If a contact is found to have changed jobs, enrichment will be skipped the next time that contact is submitted to a job. In the event that you update your job change settings or association id, you can rerun these records only by clearing the job change disposition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

Buyer Persona Groups

If you wish to run [buying center enrichment](#), you must create buyer persona groups which will be included in buying center jobs. You can create buyer persona groups using any combination of job level, department (or sub-departments), and title based on your decision-makers and key stakeholders.



To create buyer persona groups, go to the Quick Action Menu and follow this path: Specify your settings > Buyer Personas. Click on 'Add New' and start creating the buyer persona groups as below. You can edit/delete the buyer persona groups post creation.



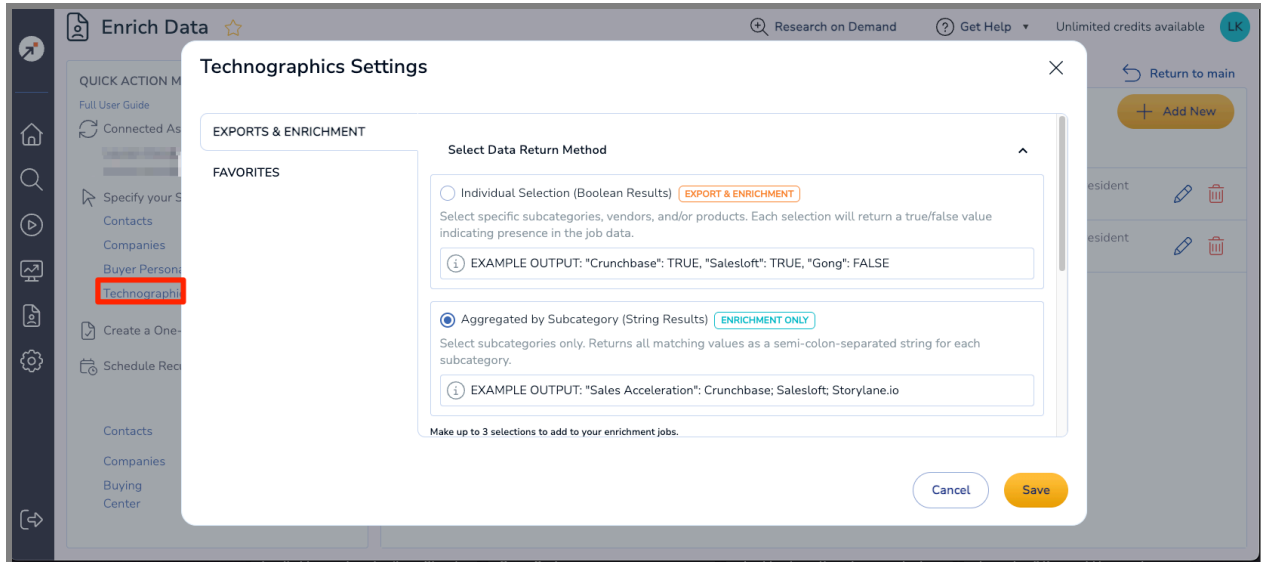
Please note that buyer persona groups are mandatory for creating buying center enrichment jobs. Once they are linked to asynchronous jobs (scheduled or triggered), they can't be edited or deleted unless you first remove them from those job settings.

Adding Technographics

Technographics can be included in company and contact lead-style enrichment jobs. To select technologies, go to the Quick Action Menu and choose *Technographics* under *Specify Your Settings*.

There are two ways to add technographic details:

1. **Individual selection** allows you to choose products, vendors, or subcategories individually. Each selection will be written back to HubSpot as a true/false (yes/no) value and requires an individual checkbox field type. This option is best if you have a small set of very specific products of interest. This option can also be used to include technographics when you export data from searches.
Answers the question: "Does this company use HubSpot?"
2. **Aggregated by Subcategory** allows you to choose a specific type of product. Each selection will be written back to HubSpot as a text value and requires an individual text field type. One or more products for each subcategory will be written back, depending on the company's usage of that technology. This option is not available for exports at this time.
Answers the question: "What CRM does this company use?"



Once you have selected the technographics of interest, you must map these to their designated fields in HubSpot, one field per selection. When using Individual Selection, you will map to a checkbox (Boolean) field. When using Aggregated by Subcategory, you will map to a text field. To map your selections, go to *Settings (in the main navigation menu) > Integrations > HubSpot Settings > Company Mappings*.

Enrichment tracking (disposition) fields

The following custom fields are installed on each impacted object (Companies, Contacts, Deals) 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. Deal fields are only added if you connect to Buying Center enrichment.

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.
Buying Center Enriched (contacts only, when Buying Center Enrichment is enabled)	The value will be 'Created' for contacts exported during buying center enrichment jobs.

Contact and Company Enrichment Jobs

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.



QUICK ACTION MENU

[Full User Guide](#)

Refresh icon Connected As: [blurred] ⋮

Cursor icon Specify your Settings

- Contacts
- Companies
- Buyer Personas
- Technographics

Clipboard icon Create a One-Time Job Start

Calendar icon Schedule Recurring Enrichment

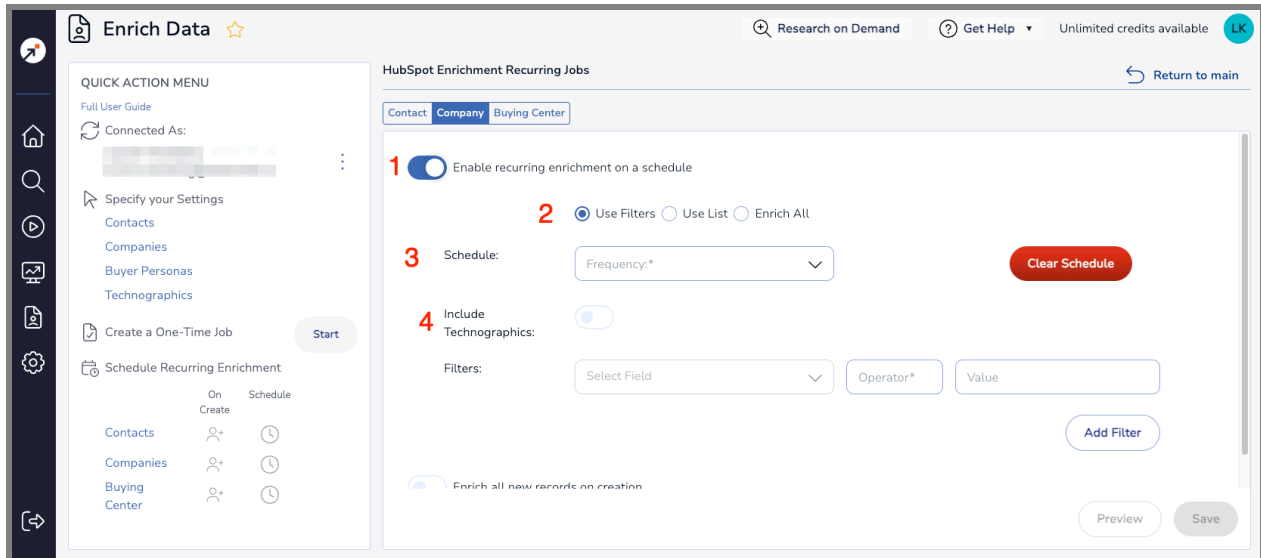
	On Create	Schedule
Contacts	Person icon +	Clock icon
Companies	Person icon +	Clock icon
Buying Center	Person icon +	Clock icon

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. **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.

3. **Set your frequency and choose a time.**
4. **For company records, choose whether to include technographics.** If you choose to add technographics to your job, make sure you've [chosen your technologies and mapped your fields](#).

The screenshot shows the 'HubSpot Enrichment Recurring Jobs' configuration interface. On the left is a 'QUICK ACTION MENU' with options like 'Full User Guide', 'Connected As: Lauren Kreisberg', and 'Specify your Settings'. The main area is titled 'HubSpot Enrichment Recurring Jobs' and has tabs for 'Contact', 'Company', and 'Buying Center'. The configuration includes: 1. A toggle to 'Enable recurring enrichment on a schedule'. 2. Radio buttons for 'Use Filters' (selected), 'Use List', and 'Enrich All'. 3. A 'Schedule' dropdown menu with 'Frequency*' selected. 4. A 'Job Change*' dropdown menu. 5. 'Filters' section with 'Select Field', 'Operator*', and 'Value' input fields. 6. A 'Clear Schedule' button. 7. An 'Add Filter' button. 8. A 'Preview' button and a 'Save' button. At the bottom, there is a toggle for 'Enrich all new records on creation'.

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.

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.

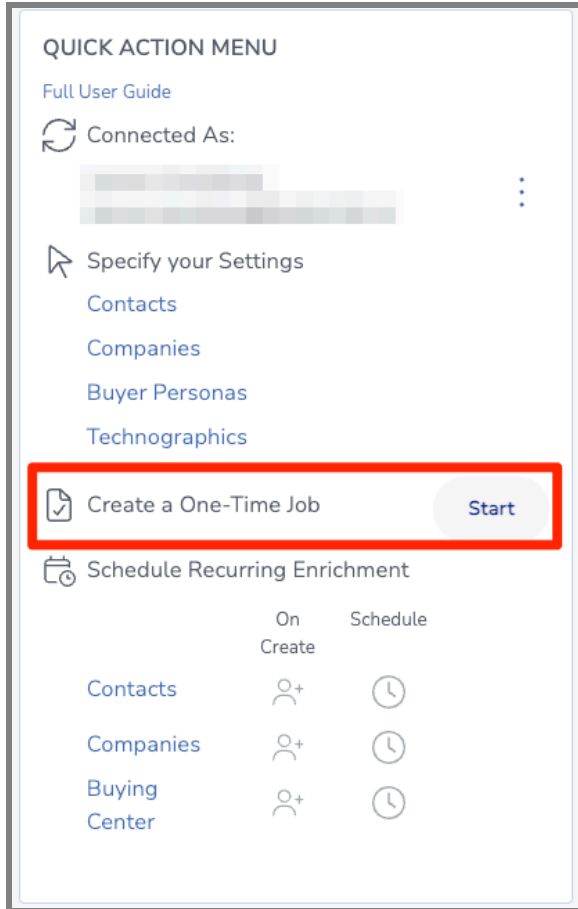
To change your schedule or configuration, simply return to this page and make updates. To turn off the schedule, slide the toggle to off.

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. You can also add technographics for triggered enrichment jobs to instantly add tech stack to new company records.

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. **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.

3. **For company records, choose whether to include technographics.** If you choose to add technographics to your job, make sure you've [chosen your technologies and mapped your fields](#).

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.

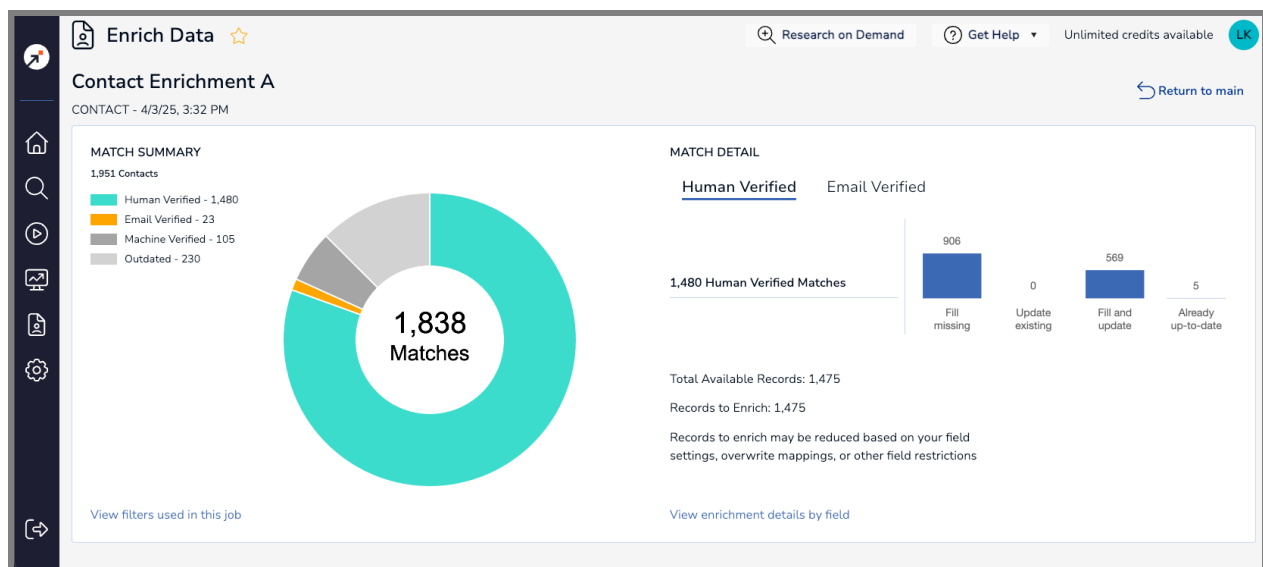
In all cases, [the job change disposition fields](#) will be updated and the original record with the history of the previous role's activity will not be enriched. You may choose to either stop there or create a new record for the updated contact. You may also associate the old and new records by [setting an association ID](#) on the mapping tab.

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.

Enrich Data

Contact Enrichment A

CONTACT - 4/3/25, 3:32 PM

Back to report

ENRICHMENT BY FIELD

Human Verified | Email Verified

Filled Fields: 5,165 | Updated Fields: 963 | Also Available: 5,787

SALESINTEL FIELD	HUBSPOT FIELD	FILL DATA	UPDATE DATA	ALLOW UPDATE	ALSO AVAILABLE
State	State/Region	159	90	✓	
Postal Code	Postal Code	200	110	✓	
Country	Country/Region	145	6	✓	
Website				×	0
Location Type				×	1,475
State Abbreviation				×	1,454
Country Abbreviation				×	1,468
Work HQ				×	1,374








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.

The screenshot shows the 'Enrich Data' interface with a sidebar on the left and a main table of 'Enrichment Jobs'. The table has columns for NAME, CREATED ON, CREATED BY, TYPE, STATUS, # ANALYZED, and # UPDATED. A red box highlights the rollback icon (a circular arrow) next to the 'CRM Enrichment' job.

NAME	CREATED ON	CREATED BY	TYPE	STATUS	# ANALYZED	# UPDATED	
CRM Enrichment	Apr 14, 2026		Compa...	Completed	370	358	
New Business	Apr 02, 2026		Buying Center	Completed	2	10	
New Opps	Apr 02, 2026		Buying Center	Completed	1	0	
Existing Business	Oct 14, 2025		Buying Center	Completed	2	9	
Contact Enrichment B	Apr 18, 2025		Contact	Completed	1,961	51	
Contact Enrichment A	Apr 03, 2025		Contact	Completed	1,951	1,498	
Company Enrichment A	Apr 03, 2025		Compa...	Completed	1,901	299	

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.



Buying Center Enrichment (BCE)

Buying Center Enrichment is a special type of enrichment that adds contacts to companies based on open Deal records and your defined buyer persona groups. For each buyer persona group, we'll export the top contacts based on accuracy tier and hierarchy. In future runs, only new contacts that qualify among the top for their group will be exported.

To get started with Buying Center enrichment, review the prerequisites [here](#). Buying Center enrichment creates new contacts in company records, using SalesIntel export credits associated with the connected CRM Admin.

Since Buying Center enrichment concludes with the export of the contacts, your CRM Admin must connect the main SalesIntel-Hubspot export integration by navigating to Settings > Integrations > Hubspot Settings. If you have multiple HubSpot accounts, ensure that you connect to the correct account where you want to run the buying center enrichment program. More information on connecting to HubSpot and setting up your contact export mappings is available [here](#).

A snapshot of the CRM Admin's export mappings at the start of the job can be seen from "View Export Settings" in the job report.

Scheduled and Triggered Buying Center Enrichment

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



QUICK ACTION MENU

[Full User Guide](#)

Refresh Connected As:
[Redacted] ⋮

Specify your Settings

- [Contacts](#)
- [Companies](#)
- [Buyer Personas](#)
- [Technographics](#)

Create a One-Time Job Start

Schedule Recurring Enrichment

	On	Schedule
Create		
Contacts		
Companies		
Buying Center		

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

The screenshot shows the 'HubSpot Enrichment Recurring Jobs' interface. On the left is a sidebar with a 'QUICK ACTION MENU' containing options like 'Full User Guide', 'Connected As:', 'Specify your Settings', 'Create a One-Time Job', and 'Schedule Recurring Enrichment'. The main area has tabs for 'Contact', 'Company', and 'Buying Center'. It features a toggle to 'Enable recurring enrichment on a schedule' (labeled 1), radio buttons for 'Use Filters' (labeled 2), 'Use List', and 'Enrich All'. Below is a 'Schedule' section with a 'Frequency:*' dropdown (labeled 3) and a 'Clear Schedule' button. A 'Filters' section includes a 'Select Field' dropdown, an 'Operator*' dropdown, and a 'Value' input field, with an 'Add Filter' button. Informational text at the bottom explains that only open deals with primary companies are considered and that distinct buyer persona groups are used for enrichment. 'Preview' and 'Save' buttons are at the bottom right.

1. **Click the first toggle to expose the scheduler.** Scheduled jobs can be created for 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. **Choose which Deal 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.

3. **Set your frequency and choose a time.**



The screenshot shows the HubSpot Enrichment Recurring Jobs configuration page for the Buying Center. The page is titled "HubSpot Enrichment Recurring Jobs" and has a "Return to main" link. The configuration is for the "Buying Center" entity. The page includes a "QUICK ACTION MENU" on the left with options like "Specify your Settings", "Create a One-Time Job", and "Schedule Recurring Enrichment". The main configuration area includes:

- Buyer Persona Groups:** A dropdown menu with a red "4" next to it, indicating the number of groups selected. Below it, a note says "Select at least 1 and no more than 5". A link "Define new buyer persona groups here" is provided.
- Accuracy Tier:** A slider between "Machine Verified", "Email Verified", and "Human Verified".
- Maximum Contacts per Buyer Persona Group:** A dropdown menu labeled "Maximum Contacts*".
- Enrich all new records on creation:** A toggle switch that is currently turned on.

At the bottom right, there are "Preview" and "Save" buttons.

4. **Select buyer persona groups which you define [here](#).** At least 1, and at most 5, buyer persona groups can be selected per job.
 - a. Specify the maximum number of contacts which need to be exported per buyer persona group
 - b. Select the accuracy tier of contacts to be exported. If Machine Verified export is enabled for the CRM Admin, you will be able select Machine Verified as the accuracy tier; otherwise, only Human Verified or Email Verified will be available. [Learn more about accuracy tiers.](#)

Before you save your configuration, you can use the Preview button to get an estimate of the number of Deals eligible for enrichment and to see a preview of up to 50 records, to help confirm that you have selected the intended records. Buying Center enrichment will only consider the deals which are open (deal stage is not closed lost/closed won) and have an associated primary company, so that the correct contacts can be identified.

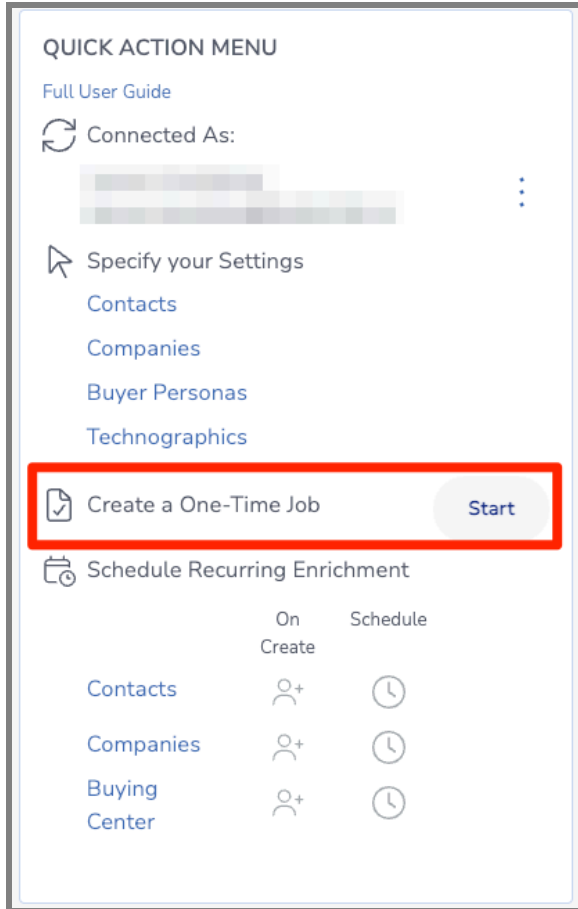
To change your schedule or configuration, simply return to this page and make updates. To turn off the schedule, slide the toggle to off.

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 Buying Center Enrichment

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



1. **Choose Buying Center, name your job, and choose your task type.** An auto task will run both matching and export once you click Start. A manual task will require you to come back to SalesIntel to initiate the export 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 export.
2. **Choose which Deal 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.
3. **Select buyer persona groups which you define [here](#).** At least 1, and at most 5, buyer persona groups can be selected per job.
 - a. Specify the maximum number of contacts which need to be exported per buyer persona group
 - b. Select the accuracy tier of contacts to be exported. If Machine Verified export is enabled for the CRM Admin, you will be able select Machine Verified as the



accuracy tier; otherwise, only Human Verified or Email Verified will be available. [Learn more about accuracy tiers.](#)

Before you save your configuration, you can use the Preview button to get an estimate of the number of Deals eligible for enrichment and to see a preview of up to 50 records, to help confirm that you have selected the intended records. Buying Center enrichment will only consider the deals which are open (deal stage is not closed lost/closed won) and have an associated primary company, so that the correct contacts can be identified.

Once all the settings are defined, click on 'Start' to start the enrichment job.

Buying Center 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 pre-enrichment and post-enrichment reports are slightly different in terms of job summary.

The pre-enrichment report has below major highlights:

1. Job Summary - This includes number of deals analyzed, total companies associated with the open deals, matched companies against the SalesIntel records and total number of estimated contacts to be exported.
 - a. Deals - These are the number of open opportunities with associated accounts in Hubspot.
 - b. Companies - These are the number of accounts having open deals.
 - c. Matched Companies - These are the number of companies which matched against the SalesIntel database.
 - d. Estimated Contacts - Post analysis, these are the maximum number of contacts which will be exported to Hubspot post successful enrichment.



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New Business Return to main

Buying Center - 4/2/26, 6:20 PM

Deals	Companies	Matched Companies	Contacts Exported	Duplicate Contacts
2	2	2	10	10

Job Summary: [View Deal Filters](#) [View Buyer Personas](#) [View Export Settings](#)

Contacts (Use the row and column dropdowns to view the number of contacts in each category)

Rows: Job Level Columns: Department

	PROCUREM...	R&D	SALES	CROSS FUNCTIONAL	FINANCE	LEGAL	HR	IT	OPERATIONS	MARKETING	TOTAL
Board Member	0	0	0	0	0	0	0	0	0	0	0
C-level Executive	0	0	2	0	0	0	0	3	0	0	5
Vice President	0	0	8	0	0	0	0	7	0	0	15

2. **View Buyer Personas:** This displays the buyer personas along with the attributes chosen during the enrichment job.

Buyer Persona Groups:

[VP/C-Level IT](#) [Sales Decision Makers](#)

Buyer Persona Attributes:

LEVEL - C-level Executive, Vice President

DEPARTMENT - IT, Sales

[Close](#)

3. **View Export Settings:** This displays the export settings of the CRM Admin which will be used for buying center contacts export, maximum number of contacts to be exported per buyer persona group and the accuracy tier for the contacts to be exported.



Export Settings:

Max Contacts per Buyer Persona Group: **15**

Accuracy Tier: **Email Verified** **Human Verified**

Contact Mappings:

SALESINTEL FIELD	HUBSPOT FIELD
Source	--skip--
Match ID	--skip--
Accuracy Tier	--skip--
First Name	First Name

[Close](#)

4. **Contacts Matrix:** Select accuracy tier, job level, department, deal stage, or deal type as row or column headers to see how contacts are grouped within each category.

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New Business Return to main

Buying Center - 4/2/26, 6:20 PM

contacts in each category)

	PROCUREM...	R&D	SALES	CROSS FUNCTIONAL	FINANCE	LEGAL	HR	IT	OPERATIONS	MARKETING	TOTAL
Board Member	0	0	0	0	0	0	0	0	0	0	0
C-level Executive	0	0	2	0	0	0	0	3	0	0	5
Vice President	0	0	8	0	0	0	0	7	0	0	15
Director	0	0	0	0	0	0	0	0	0	0	0
Key Influencer	0	0	0	0	0	0	0	0	0	0	0
Manager	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	10	0	0	0	0	10	0	0	20

Once the job is completed, you can click on the job name and view the post-enrichment report as well. The post-enrichment report job summary includes number of deals analyzed, total companies associated with the open deals, number of matched companies against the



SalesIntel records, actual number of contacts exported along with count of duplicate contacts, if any.

Roll Back

Roll back is not available for buying center enrichment, as SalesIntel does not delete contacts from your HubSpot account.

Support

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