SK DIGITAL SOLUTION · CHECKLIST

Make scenario checklist for HubSpot

Document how each scenario finds, writes and protects HubSpot data – then test it before go-live.

Companion to the article "HubSpot and Make Integration: Build Scenarios That Don't Duplicate or Lose Data" · English version · Status: 26 November 2026

1. Design decisions per scenario

Decision	Recommended default	Why it matters
Trigger	Instant trigger only where the next step must happen immediately; scheduled checks for batch work	Scheduled checks can collect several changes at once; scenarios that update the watched object can re-trigger themselves
Matching key	Contacts: email (Create or Update a Contact). Companies/deals: stable external ID or domain in a HubSpot property	The Make HubSpot CRM app lists no combined create-or-update module for companies and deals
Write mode	Search → update on one match, create on no match, review step on several matches	Prevents duplicates and random overwrites
API load	Filter early, write only changed fields, batch large sets, schedule heavy runs off-peak	OAuth apps: 110 requests / 10 s per HubSpot account; CRM search: 5 requests / s; 429 when exceeded
Error handler	Break for temporary errors (429, timeout) with incomplete executions allowed; Ignore only by documented decision	Failed records are kept for retry instead of disappearing
Alerting & owner	Notify a named owner with record ID and error text	Errors nobody reads are as bad as no error handling

2. Operating checks

- Are incomplete executions reviewed regularly, and by whom?
- Is the scenario description up to date with the properties it reads and writes?
- Who approves new HubSpot scopes when Make asks for reauthorisation (Super Admin)?
- Are tests repeated after changes to properties, pipelines or the connected system?

Sources (checked 25 November 2026): Make – HubSpot CRM app documentation (apps.make.com/hubspotcrm), "Quick error handling reference", "Incomplete executions"; HubSpot – "API usage guidelines and limits", "CRM Search API". Modules, limits and settings can change; confirm them in your accounts. Empty fields are working fields for your team, not test results.

3. Scenario inventory (to be completed by your team)

Scenario (job & direction)	Trigger	HubSpot objects & properties written	Matching key	Error handler	Alert to	Owner

4. Pre-launch tests (to be completed with test records)

Test case	Expected result	Pass	Fix needed / notes
New record arrives	One new record created, only intended properties set	☐	
Existing record arrives	Existing record updated, no duplicate	☐	
Key matches two records	Routed to review step, nothing overwritten	☐	
Required field missing / API error	Error handler runs, owner notified with record ID	☐	
Scenario updates the watched object	No self-triggered loop	☐	
Large batch (import or nightly sync)	No 429 errors, or failed bundles stored for retry	☐	