HUBSPOT-XERO INTEGRATION CHECKLIST

Use this checklist to reduce invoicing delays and manual rekeying between HubSpot and Xero

A practical planning asset for UK finance managers, operations leads, and founders who need a faster path from closed-won deal to invoice-ready finance work.

Many growing B2B teams run sales in HubSpot and finance in Xero. The problem usually starts after a deal is marked closed-won. Someone still has to copy customer details, billing information, and commercial context into Xero by hand. That slows invoicing down, creates duplicate admin, and makes it harder for finance and operations to trust the records they are working from.

This checklist is designed to help you identify whether your data, process, and integration logic are ready before implementation starts. It is intentionally fast to read and focused on the decisions that usually determine whether HubSpot-to-Xero handoff will be reliable in day-to-day use.

What this checklist helps with

- [ ] Spotting the data gaps that usually break invoice handoff
- [ ] Defining what must be present in HubSpot before Xero actions should run
- [ ] Clarifying mapping, trigger, and sync-direction decisions early
- [ ] Reducing duplicate invoices, failed syncs, and messy downstream corrections
- [ ] Preparing for a practical implementation conversation

Quick fit check

- [ ] HubSpot is your main CRM for pipeline management
- [ ] Xero is used for invoicing or finance operations
- [ ] Your team still re-enters customer or billing data manually
- [ ] Invoicing speed has a direct impact on cash flow
- [ ] Reporting gets harder when CRM and finance data drift apart

Fast self-assessment:

- [ ] We know exactly which HubSpot stage should trigger finance handoff
- [ ] We can identify the billing contact and billing company reliably
- [ ] Required invoicing fields are consistently present in HubSpot
- [ ] We know which system owns each critical field
- [ ] We have a way to prevent duplicate downstream creation

Data readiness

The most common integration issue is not the API. It is incomplete or inconsistent CRM data. Before defining automation, confirm whether the records in HubSpot are ready to support downstream finance actions in Xero.

Contacts checklist

- [ ] Primary billing contact can be identified clearly
- [ ] Email address is present where required
- [ ] Contact naming is consistent
- [ ] Duplicate contacts are controlled
- [ ] Inactive or outdated contacts are not used accidentally

Ask: Which contact should be used for billing, and what happens if no valid contact is present?

Companies checklist

- [ ] Legal or billing entity can be identified clearly
- [ ] Company naming is consistent enough for matching
- [ ] Billing address fields are present where needed
- [ ] VAT or tax-related fields are defined if relevant
- [ ] Duplicate company records are being managed

Ask: Which company record should own the invoice, and what happens if HubSpot has multiple possible matches?

Required-data checklist

Field	Required?	Source of truth	Checked before sync?
Billing contact			
Billing company			
Billing email			
Billing address			
Currency			
Amount			
Reference / PO			
Tax / VAT data			

Decision point: Which required fields are missing most often today, which values are entered inconsistently, and which data problems should block sync rather than create a bad record in Xero?

Integration checklist

The goal is not to sync everything. The goal is to move the right data at the right moment in a way finance and operations can trust.

Trigger checklist

- [ ] Deal reaches closed-won
- [ ] Deal reaches an approved finance-ready stage
- [ ] Invoice request is confirmed manually
- [ ] Another controlled trigger is used

Ask: What exact event should trigger Xero processing, and which deals should be excluded from automatic action?

Mapping checklist

- [ ] HubSpot contact to Xero contact
- [ ] HubSpot company to Xero customer
- [ ] HubSpot deal amount to Xero invoice amount
- [ ] HubSpot currency to Xero currency
- [ ] HubSpot reference fields to Xero invoice reference
- [ ] HubSpot line-item or service description to Xero invoice detail

Sync-direction checklist

- [ ] HubSpot to Xero only
- [ ] Xero back to HubSpot for invoice status or reference values
- [ ] One-way for most fields, selected two-way updates only where useful

Ask: Which system owns billing status, and which fields must never be overwritten automatically?

Validation checklist

- [ ] Required fields checked before sync
- [ ] Duplicate-event protection defined
- [ ] Create-versus-update logic agreed
- [ ] Invalid records blocked rather than processed silently
- [ ] Failed records logged for review
- [ ] Manual correction path defined

Minimum viable first phase:

- [ ] Customer and contact matching
- [ ] Invoice-ready handoff or invoice creation
- [ ] Basic validation and exception handling
- [ ] Status visibility for finance or operations

Common mistakes

Most HubSpot-Xero problems come from data and control gaps rather than platform limitations. Use this page to review the mistakes that usually make the handoff harder to trust.

Duplicate invoices

Cause: repeated deal events, unclear create-versus-update rules, or no unique reference across systems.

- [ ] A unique transaction reference is defined
- [ ] Retries cannot create a second invoice silently
- [ ] Repeat events are handled safely

Missing data

Cause: finance-required fields stay optional, deals close before billing details are complete, or validation is missing.

- [ ] Mandatory billing fields are agreed
- [ ] Incomplete deals are blocked from downstream processing
- [ ] A clear ownership path exists for fixing missing data

Broken mapping

Cause: fields mean different things to different teams, values are not standardised, or mapping was designed from labels rather than business meaning.

- [ ] Each mapped field has one clear meaning
- [ ] Source-of-truth ownership is agreed
- [ ] Test records are reviewed before rollout

Over-automating too early

Cause: trying to cover every edge case in phase one or introducing more process complexity than the workflow needs.

- [ ] First release scope is narrow and testable
- [ ] Exceptions can be reviewed safely
- [ ] Manual override remains possible where needed

Self-check before rollout:

- [ ] We can prevent duplicate downstream creation
- [ ] We know which missing fields should block sync
- [ ] We have agreed the mapping for core billing data
- [ ] We have defined a safe first-phase scope
- [ ] We know who reviews exceptions after launch

Next steps

By this point, you should have a clearer view of whether the issue is mainly missing CRM data discipline, unclear billing ownership, undefined integration rules, lack of validation, or a broader process gap between sales and finance.

What to do next

- [ ] Confirm the exact trigger point for finance handoff
- [ ] List the fields that must be present before Xero processing can start
- [ ] Decide which system owns each critical billing field
- [ ] Define create-versus-update and duplicate-protection rules
- [ ] Keep phase-one scope tight enough to test safely

When to involve MPED

- [ ] Turn a manual HubSpot-to-Xero handoff into a governed integration flow
- [ ] Define field mapping, validation, and sync-direction rules
- [ ] Reduce invoice delays and duplicate admin between sales and finance
- [ ] Plan a practical first release without overcomplicating the workflow

If your team is still relying on manual rekeying between HubSpot and Xero, the next step is usually a short scoping conversation rather than a large discovery project.