

Making QuickBooks and HubSpot Actually Agree

THE CHALLENGE

Sales and accounting systems that don't agree with each other create duplicate customers, mismatched revenue, and invoices nobody fully trusts.

OUR APPROACH

Started with the human problem, not the API. HubSpot owns the pipeline, QuickBooks owns the money. Sales reps can trigger an invoice request, but never touch a financial record directly.

Deduplication had to be strict. A verified email domain or tax ID became the real unique identifier, so "Acme LLC" and "Acme Incorporated" don't fragment into two customers.

We synced line items, not just "Closed-Won." SKU-level items map to the right accounting category, with the correct tax code and a generated draft invoice.

Automation breaks. We planned for that. If a sync fails, the system sends a direct alert with a link straight to the record, not a silent failure.

THE RESULT

An integration that runs without silent failures, duplicate customers, or a bookkeeper reconciling invoices by hand every month.