TriLumen Systems

CASE STUDY

Independent Engagement · Small Business Systems Integration

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

We started with the human problem, not the API. Before any technical work happened, we defined a clear boundary: HubSpot owns the pipeline, QuickBooks owns the money. Sales reps can trigger an invoice request from HubSpot, but they can never touch a financial record or tax setting directly.

Deduplication had to be strict, not cosmetic. We never relied on company name matching alone. A verified email domain or tax ID became the real unique identifier, so "Acme LLC" and "Acme Incorporated" didn't quietly become two different customers with a fractured history.

We synced line items, not just "Closed-Won." When a deal closed, we mapped the actual SKU-level line items to the right accounting category, applied the correct tax code by shipping address, and generated a draft invoice, not just a status flag someone had to interpret.

Automation breaks. We planned for that, not around it. If an API limit was hit or a required field was left blank, the system didn't fail silently. It sent a direct alert to whoever needed to fix it, with a link straight to the record.

THE RESULT

10 hrs/week → 0 hours

Re-key between QuickBooks and HubSpot

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

> *"Our sales team was living in HubSpot while our bookkeeper was working in QuickBooks, and the two systems constantly argued with each other over names and invoices. TriLumen set up a clean boundary where HubSpot owns the pipeline and QuickBooks owns the money, and it actually stays synced. We went from ten hours a week of manual data re-keying down to zero."*
>
> MANAGING DIRECTOR, PROFESSIONAL SERVICES FIRM

Have a Problem That Looks Like This?

(570) 392-9116 | hello@trilumensystems.com
trilumensystems.com/case-studies