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Sync health check: Demo MSP (made-up data)

Prepared 09 Nov 2026 from CSV exports of HubSpot and ConnectWise PSA. Read-only: nothing was changed in either system.

What we read	HubSpot	ConnectWise PSA
companies	19	21
contacts	39	37
deals / opportunities	20	18

Finding	Count	Priority
Won deals with no PSA opportunity	2	HIGH
Won deals with no value in the PSA	1	HIGH
Customers missing from the PSA	1	HIGH
Duplicate companies	3	HIGH
Deals won in HubSpot but still open or lost in the PSA	1	MEDIUM
Deal values that differ	1	MEDIUM
Contacts in HubSpot only	2	MEDIUM
Contacts filed under a different company on each side	1	MEDIUM
Duplicate contacts	1	MEDIUM
Same company, different name	1	MEDIUM
Contacts in the PSA only	1	LOW
Won in the PSA, not in HubSpot	1	LOW

7 high, 7 medium and 2 low priority items. Every item, with record IDs from both systems, is in findings.csv.

Want this fixed and kept fixed? Swivelfree is building a self-serve HubSpot to PSA sync with a dry run before any write, matching before it creates, and undo. Founding price $149/mo, first month free. Reply to this email or write to hello@swivelfree.com.

Won deals with no PSA opportunity (2)

Deals marked won in HubSpot that we could not find in the PSA. Each one is either re-keyed by hand later, or a client that is not set up or billed.

- Won in HubSpot, no PSA opportunity: 'Tidewater Engineering managed services' (Tidewater Engineering), 2,750.00
- Won in HubSpot, no PSA opportunity: 'Lumen Street firewall project' (Lumen Street Marketing), 4,200.00

Won deals with no value in the PSA (1)

The opportunity exists in the PSA but carries no amount, so pipeline and revenue reports disagree.

- 'Oakhurst Property Management managed services' is 2,750.00 in HubSpot but has no value in the PSA

Customers missing from the PSA (1)

Companies with a won deal in HubSpot and no matching company in the PSA.

- 'Tidewater Engineering' has a won deal in HubSpot but no matching company in the PSA

Duplicate companies (3)

Records inside one system that look like the same business (same domain, or near-identical names).

- 2 HubSpot companies look like one business: Brightwater Dental; Brightwater Dental Group
- 2 PSA companies look like one business: Copperline Logistics; Copperline Logistics LLC
- 2 PSA companies look like one business: Summit Ridge Accounting; Summit Ridge Accounting Inc

Deals won in HubSpot but still open or lost in the PSA (1)

- Won in HubSpot but 'Proposal' in the PSA: 'Fairview Family Medicine managed services' (Fairview Family Medicine)

Deal values that differ (1)

Same deal, different amount on each side (over 1 percent).

- 'Kestrel Manufacturing Ltd managed services': 1,500.00 in HubSpot vs 1,200.00 in the PSA

Contacts in HubSpot only (2)

People at companies that exist in both systems, but who are missing from the PSA.

- Dana Whitlock (Bluejay Architecture) is in HubSpot but not in the PSA
- Lee Ostrander (Silverline Freight) is in HubSpot but not in the PSA

Contacts filed under a different company on each side (1)

- robin@westgaterealty.com is under 'Westgate Realty Partners' in HubSpot but 'Cedar Point Orthodontics' in the PSA

Duplicate contacts (1)

More than one contact with the same email inside one system.

- 2 PSA contacts share the email pat.greer@pinecrestliving.com

Same company, different name (1)

Matched by domain or a close name; worth aligning.

- same company, named differently: HubSpot 'Harbor & Pine Legal LLP' vs PSA 'Harbor Pine Legal Services'

Contacts in the PSA only (1)

Often fine (technical contacts), listed so you can decide.

- Pat Greer (Pinecrest Senior Living) is in the PSA but not in HubSpot

Won in the PSA, not in HubSpot (1)

These are missing from HubSpot's revenue reporting.

- Won in the PSA, not won in HubSpot: 'Ironbridge onboarding' (Ironbridge Wealth)

How we matched

Companies: same website domain (or the domain most of their contacts' emails use), then the same name ignoring case, punctuation and suffixes such as Inc, LLC and Ltd, then near-identical names. Contacts: email address. Deals: same company, then the closest name and amount. Matching is automatic and can be wrong on unusual names, so please check an item before acting on it.

Your files

Processed on one computer, not shared with anyone and not sent to any AI service. Deleted by 09 Dec 2026; we will confirm by email.