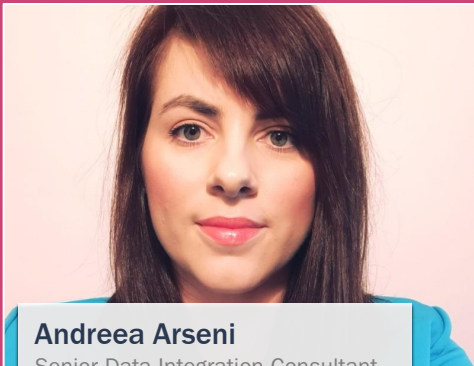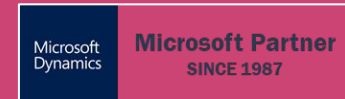RAPIDI

Welcome to Open Office Hours
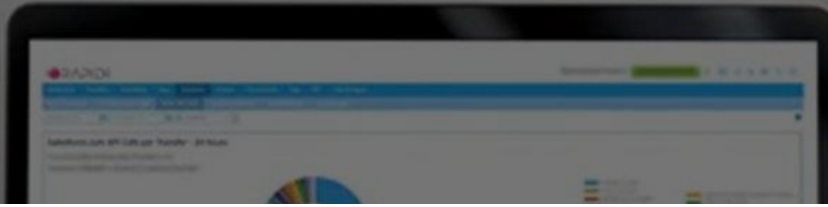## *Session 4: Connections - Salesforce & HubSpot*

Andreea Arseni
Senior Data Integration Consultant
& Customer Success

Agenda

- Best Practices:
  - Salesforce Connection
  - HubSpot Connection

- MyRapidi: Connections - Salesforce & HubSpot

- Recap: Salesforce & HubSpot Connections

- Questions

- Upcoming Sessions

- Resources

# Best Practices: Salesforce Connection

- **Use a dedicated integration user** - Create a specific user for the integration rather than using your own personal access. This ensures continuity if team members leave and makes audit trails clearer.

- **API user profile/permission set** - The integration user needs appropriate API access and permissions for all objects you'll be integrating.

- **API limits awareness** - Salesforce has daily API call limits based on license type.

- **Sandbox vs Production** - Always use a sandbox environment for testing purposes.

- **Field-level security** - The integration user must have read/write access to all fields being mapped in the integration.

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Best Practices: HubSpot Connection

- **Use a dedicated user** - Create a specific user for the integration rather than using your own access. This ensures continuity if team members leave and makes audit trails clearer.

- **Scope Selection** - The integration user needs the appropriate access to the objects that you'll be integrating.

- **Rate Limits -** HubSpot has both per-second (110-190 requests/10 seconds) and daily limits that vary by subscription tier.

- **Sandbox vs Production** - Always use a sandbox environment for testing purposes.

- **Custom objects access -** Custom objects require an Enterprise tier subscription. Verify subscription level before planning integrations involving custom objects.

MyRapidi: Connections - Salesforce & HubSpot
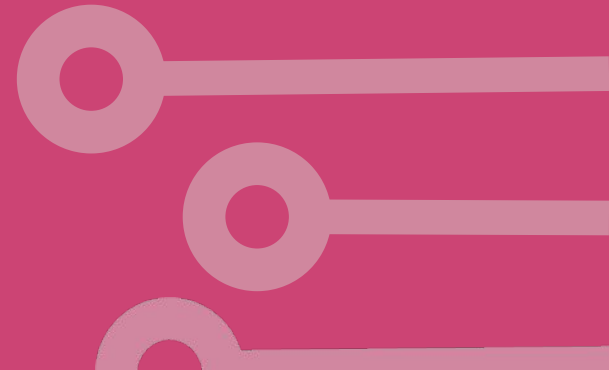
Recap: Salesforce & HubSpot Connections

Authentication & User Setup

- **Salesforce**: Use a dedicated integration user with API-enabled permissions.
- **HubSpot**: Use a dedicated user with the right scope access.

Security & Permissions

- Only grant the necessary permissions/scopes needed for the integration to work.
- Ensure the connection has access to all required fields and objects.

Testing Environments

- Salesforce: You can create Sandbox environments as partial or full copies of production. *Important: you must authorize the connection again because each sandbox is a new Salesforce org.*
- HubSpot: Sandboxes are available only with Enterprise subscriptions (one included).

Rate Limits & API Usage

- Both platforms have API rate limits - monitor your usage regularly.
- Salesforce: Daily limits based on license type.
- HubSpot: Burst limits (110-190 requests/10 seconds) and daily limits (depending on tier).
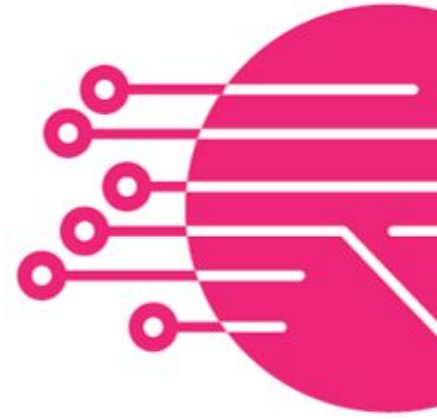
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Questions?

Register for the upcoming sessions...

Open Office Hours — Quick Links

- **Main page (what it is + upcoming sessions)**: Open Office Hours

  https://www.rapidionline.com/resources/open-office-hours

- **Complete Season 1 schedule (all 12 sessions + phases)**: Season 1 schedule

  https://www.rapidionline.com/product-updates/open-office-hours-season-1

- **Session 5 page (full details + registration)**: Field Mappings

  https://www.rapidionline.com/open-office-hours-field-mappings

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Complete Schedule for OOH Season 1

PHASE 1: FOUNDATION (JANUARY)

Learn to navigate MyRapidi, structure transfers, and connect your systems.

| Date	Session Title	Key Topics
Jan 15	**MyRapidi Interface Walkthrough**	Navigation, Transfers, Schedules, Groups, LinkStorages
Jan 22	**Transfer Design 101**	Actions, patterns, avoiding duplicates, design vs runtime
Jan 29	**Connections: D365 OData Cloud**	Azure App Registration, OAuth2, permissions, testing

PHASE 2: CONFIGURATION (FEBRUARY)

Master field mappings, timestamps, error handling, and CRM connections.

Date	Session Title	Key Topics
Feb 5	**Connections: Salesforce & HubSpot**	OAuth flows, user permissions, re-authorization
Feb 12	**Field Mappings**	Type conversions, conditional defaults, lookups, nulls
Feb 19	**Timestamps & RTI**	Change detection, Runtime Information Register, patterns
Feb 26	**Continue on Error & Data Errors**	Error handling, interpreting errors, and reprocessing safely

PHASE 3: ADVANCED (MARCH-APRIL)

Advanced troubleshooting, optimization, and multi-company patterns.

Date	Session Title	Key Topics
Mar 5	**Logs & Runs**	Troubleshooting flow, reading logs, isolating issues
Mar 12	**Link Storage Deep Dive**	Cross-referencing IDs, naming, import/export, and safety
Mar 19	**Scheduling**	Run windows, overlaps, dependencies, and time zones
Mar 26	**Triggers & Near-Real-Time Patterns**	When to trigger, rate limiting, polling vs triggers
Apr 9	**Tags & Reusability**	Parameterization, multi-company, variable substitution
Apr 30	**AI Albert Agent**	AI Assistant Albert with examples
May 7	**MCP Server**	MCP server setup to Rapidi
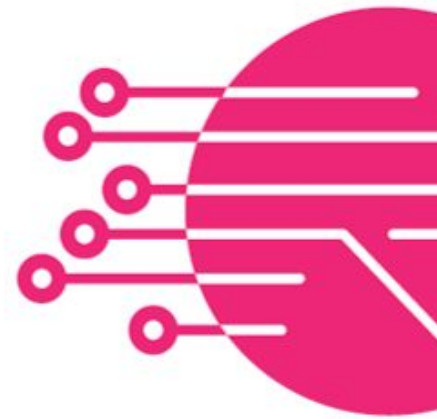
Give us Feedback

https://www.getfeedback.com/r/GLRQ1hn__W

RESOURCES (1)

Documentation: MyRapidi.com/wiki

Support: https://www.rapidionline.com/support

Submit a case: https://www.rapidionline.com/support/submit-a-case

Subscribe to Product Updates: https://www.rapidionline.com/product-updates

Product Releases Notes: https://myrapidi.com/wiki/product_release_notes

SIMPLE

With a standard subscription
you can create new integrations yourself

FAST

Rapidi can be
implemented as standard in just a few days

ROBUST

No programming and
proven best practice configurations

FLEXIBLE

Any transfer can be in
any direction or bi-directional

RESOURCES (2)

[Connections - General Overview](#)

[How to authorize/re-authorize your Salesforce Connection](#)

[How to set up the Integration User in Salesforce](#)

[How to connect to HubSpot](#)

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THANK YOU!

www.rapidionline.com

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