Teamulate

A PRACTICAL GUIDE FROM TEAMULATE

The Connection Route Check

Can AI work with the tools you already use, without switching systems?

A practical guide from Teamulate. Pick one business result, write down what each connection route can read, write, match and skip, and name an owner for its errors before you call the connection done.

Seven questions for every route

Reads | Writes | Permissions | Matching | Skipped checks | Limits | Errors

Who this is for

Owners, operations leads and marketing leads at B2B professional and service firms who already run a CRM, an inbox and a website form, and want an AI assistant to work with them instead of replacing them.

You need admin access to your CRM (or the person who has it), the list of tools that touch a new inquiry, and time set aside to check one business result.

The idea in one paragraph

> "There is a connector" is not the same as "the process works". A connection route is only finished when you know what it can read, what it can write, whose permissions it uses, how it decides that two records are the same, which checks it skips and who fixes it when it fails. Check one business result across the routes you have, and choose the simplest route that covers it.

PART 1

What the public documentation shows, and what it does not

Source	What it shows	What it does not show
1 **HubSpot Knowledge Base, connector for ChatGPT (updated October 19, 2026)**	Reads, creates and updates contacts, leads, companies, deals and tickets, but does not delete; users see only what their HubSpot permissions allow; bulk changes of up to 10 records at a time; custom validation rules, including pipeline stage validations, are not applied to its changes	That the records it writes are right for your process
2 **HubSpot Developer Blog, deep research connector (June 4, 2025)**	At launch the connector read deals, companies, contacts, tickets and their associations with "read access only"	What the connector can do today
3 **Microsoft Learn, Copilot connectors overview**	Synced connectors index outside data; federated connectors fetch it live; both respect the permissions of the source; federated connectors are described as read-only, with write actions noted for early October 2026	That every tool you use has a connector
4 **Microsoft Learn, prerequisites for connectors**	Setup needs an AI administrator; synced connectors need admin access to the outside service; federated connectors need a Microsoft 365 Copilot add-on license for every user who queries them	What the licenses cost you
5 **Zapier Help Center, HubSpot on Zapier**	"Create or Update Contact" updates an existing contact based on email address; one Zapier connection per HubSpot account at a time, and a new one invalidates the previous one; dates sent to HubSpot are rounded down to UTC midnight	How your own form data will behave

What changed. HubSpot announced the connector in 2025 as read only. The help page we checked on November 3, 2026 says it can now create and update records. Check the current page of each vendor before you decide, and write down the date you checked.

Documented examples. HubSpot, Microsoft and Zapier are documented examples you can check, not recommendations.

PART 2

One business result, three routes

Start with the result, not the tool. In this guide the result is: **a new inquiry becomes one correct CRM record with an owner, and the assistant can answer questions about it later.**

Route	What it is	What to check first
1 **Native feature**	Something your CRM or inbox already does on its own, such as a form that writes straight into the CRM	Whether it covers the whole result, including the owner
2 **Standard connector**	A ready connection between an AI assistant and your tool, such as the HubSpot connector for ChatGPT or a Copilot connector	What it reads, what it writes, and whose permissions it uses
3 **Automation tool**	A rule in a tool such as Zapier that moves data from one app to another	How it matches records, what it rounds or drops, and who replays failed steps

A custom connection is a fourth option, not a starting point. It makes sense only when an object, a field, a direction or a refresh time you need is missing from the routes above. Price it separately for your case.

PART 3

Seven questions for every route

1. What can it read? Name the objects and fields, not "the CRM".
2. What can it write? Create, update, delete, or nothing at all.
3. Whose permissions does it use? The person asking, an admin, or a shared account.
4. How does it decide two records are the same? An email address, an ID, or nothing.
5. Which checks does it skip? Required fields, stage rules or approvals that apply in the screen but not through this route.
6. What are its limits? Batch sizes, rounding of dates, one connection per account, license requirements.
7. Who owns its errors? Who notices a failed step, who replays it and who reconnects it.

A teaching example of a connected assistant that still loses an inquiry. The same person sends two inquiries a month apart from the same email address. A rule that creates or updates a contact by email updates one contact; it does not create a second request. If the second inquiry is a new piece of work, it needs its own record, such as a deal or a ticket, or it disappears inside the old contact.

PART 4

Route worksheet

Question	Route 1	Route 2	Route 3
Reads			
Writes			
Permissions used			
How records are matched			
Checks it skips			
Limits found			
Error owner			
Date you checked the docs			

Fill one column per route you actually have. Leave a cell empty if you do not know yet; an empty cell is a question, not a no.

PART 5

What the documented examples teach

- **Writing is not the same as checking.** HubSpot says custom validation rules, including pipeline stage validations, are not applied when the ChatGPT connector creates or updates records. A rule you set up in the screen may not protect records that arrive this way.
- **Permissions follow the source.** HubSpot and Microsoft both document that the assistant sees only what the user may see in the source system. That is good for safety, and it also means "the AI sees everything" is not true by default.
- **Matching decides duplicates.** Zapier's "Create or Update Contact" works by email address. Decide in advance what a second inquiry from a known contact should become.
- **One connection can break another.** Zapier allows one connection per HubSpot account at a time. When someone reconnects, the earlier connection stops working, so record who owns it.
- **Licenses decide what is possible.** Microsoft lists which connector types each license supports. Check that before you plan a route.

PART 6

A test you can run on one result

Use test data first. Run every case before any real record goes through the route.

- Choose one business result and write down what done means, such as "one record, the right owner, answerable later".
- Pick the routes you already have access to. Do not buy anything for the test.
- Run the same test inquiries through each route on test data first: a new contact, a second inquiry from a known email, a missing field, a date with a time, a step that fails, and someone reconnecting the account.
- For each case, record whether the result was complete and correct, how many human steps it needed, and what you had to fix.
- Count numerators and denominators. "It worked" is not a result; the number of complete test inquiries out of all you ran is.

Control case, on test data	What to look for
1 **New contact, all fields**	One record with an owner
2 **Second inquiry from a known email**	A new request is kept, not merged away
3 **Required field left empty**	Whether the route stops it or lets it through
4 **Date and time in the form**	Whether the time survives
5 **A step fails**	Who is told, and how it is replayed
6 **Someone reconnects the account**	Which existing rules stop working

PART 7

Checklist before you call a connection done

- [ ] One business result is written down, with what done means.
- [ ] Each route has its seven answers, with the date you checked the docs.
- [ ] You know which checks the route skips, and you have a replacement check.
- [ ] Duplicate and repeat inquiries have a rule.
- [ ] A named person owns errors, replays and reconnections.
- [ ] You tested on test data before real data.
- [ ] A custom connection is chosen only for a gap you can name.

Limits of this guide

- Vendor features change. Nothing here promises that a route will keep working the way it is documented today.

Want a second pair of eyes?

If you would rather not map the routes alone, Teamulate connects the CRM, inbox and assistant for this kind of work as part of the marketing operations our AI marketing team runs with you, with every step visible. Request a demo at https://teamulate.ca/request-demo/

Sources

Checked November 3, 2026:

- HubSpot Knowledge Base: Set up and use the HubSpot connector for ChatGPT. https://knowledge.hubspot.com/integrations/connect-your-hubspot-account-to-chatgpt
- HubSpot Developer Blog: Introducing the HubSpot deep research connector. https://developers.hubspot.com/blog/hubspot-deepresearch-connector
- Microsoft Learn: Copilot connectors overview. https://learn.microsoft.com/en-us/microsoft-365/copilot/connectors/overview
- Microsoft Learn: Prerequisites for deploying connectors. https://learn.microsoft.com/en-us/microsoft-365/copilot/connectors/prerequisites
- Zapier Help Center: How to get started with HubSpot on Zapier. https://help.zapier.com/hc/en-us/articles/8495919882253-How-to-get-started-with-HubSpot-on-Zapier