PipelineSync

FREE TEMPLATE · MIGRATION

CRM Data Migration Mapping Sheet

Map every object, field, value, owner and link before anything moves to HubSpot, then test, cut over and validate against the same sheet. Reference pages, a worked example and fillable worksheets.

Field mapping | Value and owner maps | Test and QA | Cutover and validation

Edition October 2026 · HubSpot facts checked 27 Oct 2026

Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Migration quality is decided before the first import. This sheet records, for every field you move, where it comes from, where it goes in HubSpot, what it means and how its values change, so the migration is a documented agreement rather than an improvised upload.

1 Learn the rules
Read how HubSpot matches records on import and which migration method fits your source (pages 3 and 4).

2 List the objects
Fill in the object inventory and association map, with a decision for every object (page 6).

3 Map every field
One row per source field on the contacts, companies, deals and custom object worksheets (pages 8 to 11).

4 Map values and owners
Write the transformation rules and value map, then map old users and agree the dedupe plan (pages 5 and 12).

5 Test on a sample
Import a sample, reconcile counts and check records field by field until every check passes (page 13).

6 Cut over and validate
Run cutover day in order, then log the validation checks on day one and day five (pages 14 and 15).

What is inside

Page	Section	Use it to
03	**Reference: matching and importing**	Understand matching keys, import order and what the import tool can't undo
04	**Reference: methods and object map**	Choose Smart Transfer, a Marketplace app or the import tool, and the four decisions
05	**Transformation rules and value map**	Agree how formats change, and which new value each old dropdown value becomes
06	**Object inventory and associations**	Record every object, its count, key and import order, and how records link
07	**Worked example**	See a filled-in mapping for an illustrative legacy CRM
08–11	**Field mapping worksheets**	Map contacts, companies, deals, custom objects and activities
12	**Owner mapping and dedupe plan**	Give every record an owner and import one version of each record
13	**Test import and QA**	Reconcile record counts and check a sample before the full run
14	**Cutover plan**	Run cutover day in order, with a freeze window and rollback point
15	**Post-migration validation log**	Prove the migration worked on day one and day five

Tip: Every worksheet is fillable: type into the boxes in Adobe Acrobat Reader, Preview or your browser, or print it. For large migrations, use the spreadsheet version on the template page at pipelinesync.net, which has room for 150 fields and the same columns.

REFERENCE · CHECKED OCTOBER 2026

How HubSpot matches and imports records

HubSpot deduplicates contacts by email address and companies by company domain name. Record ID can match any record type, and a custom property set to require unique values can match contacts, companies, deals, tickets and custom objects. Without a matching key, an import creates new records.

Matching keys on import

Object	Matches on (HubSpot, October 2026)	What to plan in the mapping
Contacts	Email address, Record ID, or a unique-value custom property	Which email is the unique key when a person has several
Companies	Company domain name, Record ID, or a unique-value custom property	Clean domains, and parent and child companies
Deals, tickets	Record ID or a unique-value custom property	Store the source record ID in its own property
Custom objects	Record ID or a unique-value custom property	The same: no natural key, so store the source ID

Import in dependency order

01 **Owners** — Users set up first

02 **Companies** — Matched on domain

03 **Contacts** — Matched on email

04 **Deals, tickets** — Linked by stored IDs

05 **Activities** — Once, after the records

Associations are rebuilt from the source IDs stored on every record, so a record keeps its context even when names or emails change.

The import tool, when we checked in October 2026

Topic	What HubSpot's documentation said
File types	.csv, .xlsx or .xls files
File size on paid plans	Up to 512 MB and 1,048,576 rows, with fewer than 1,000 columns
Several objects at once	One import can bring in several objects with their associations
Activities	Existing emails, meetings, notes and tasks can't be updated by importing again

Store the source ID everywhere

Put the old system's record ID in a dedicated HubSpot property on every object. You can then reconcile, re-run imports and trace any record back to its source.

Activities go in once

Because imported activities can't be fixed by importing again, test them on a sample and import them last, after the records they belong to are in place.

REFERENCE · CHECKED OCTOBER 2026

Migration methods and what maps where

There are three routes: HubSpot Smart Transfer, a migration app from the HubSpot Marketplace, or an export from the old system imported with HubSpot's import tool. Smart Transfer suits standard data from supported CRMs. Apps and imports give more control over mapping, history and custom fields, at the cost of more setup.

Method	Good for	Watch for (HubSpot, October 2026)
Smart Transfer	A one-way move of standard objects from a supported app. Configuring creates backfill workflows, for example for create and close dates.	Super Admins only. Custom objects not supported. Custom field mappings and Pipedrive activities need Data Hub. Attachments move once and don't update.
Marketplace app	Full activity history or complex field mapping without Data Hub, usually with a sample migration first	Confirm your source is supported and run the sample on real data
Import tool	Unsupported sources, custom objects, or data you want to clean in a spreadsheet first	Activity history and attachments take more work

Smart Transfer listed 13 apps: Pipedrive, Zoho CRM, Dynamics 365, ActiveCampaign, Copper, Mailchimp, Keap, Salesforce, Account Engagement (Pardot), Marketo, Zendesk, Freshdesk and Monday.com. It doesn't support some Salesforce field types, including encrypted, reference and calculated fields, and HubSpot advises against running it alongside the Salesforce integration. Reverting a transfer deletes what it created. Custom objects need an Enterprise subscription.

Usual destinations in HubSpot

Source (Salesforce / Pipedrive)	HubSpot	Decision to make
Leads, contacts / People	Contacts	How lead vs contact maps to lifecycle stage and lead status
Accounts / Organizations	Companies	Domain as the matching key; parent and child structure
Opportunities / Deals	Deals	Stage map per pipeline; record types to separate pipelines
Cases	Tickets	Ticket pipeline and status mapping
Tasks, events, notes	Activities	How much history to bring, and what it associates to
Custom objects / fields	Custom objects or properties	Whether it is still needed, and whether your tier supports it
Users	Users and record owners	An owner for every record, including people who have left

Every object and field gets one decision

Migrate

Comes across as data, with a target property and a rule.

Archive

Stored in a file outside HubSpot, so nothing is lost.

Calculate

HubSpot derives it, such as a rollup, instead of a stale value.

Exclude

Left behind on purpose, such as fields nobody fills in.

STANDARDS · AGREE ONCE, APPLY TO EVERY FIELD

Transformation rules and value map

Map by business meaning, not by label. A source field called "Status" may mean something different from a HubSpot property with the same name. Write each rule before any data moves.

Data	Suggested rule (good practice, adapt it)	Your rule
Dates	One date format for every file; keep original created and close dates in their own properties, because imported records get a new created date	
Dropdowns	Every old value maps to exactly one allowed value, or is marked for review (table below)	
Multi-select	One separator for all values; each value mapped like a dropdown	
Currency, numbers	Numbers only: no symbols or thousands separators; currency in its own column	
Countries, phones	One country list and one phone format before import	
Domains, emails	Trim spaces and lower-case; domains without protocol, www or paths	
Checkboxes	Agree the true and false values, and what blank means	

Value map: old dropdown values to HubSpot values

List every value the old field actually contains, not just the values its settings allow, with how many records use each. Values with few records are often typos or retired options.

Source field	Old value	Records	New HubSpot value	Decision	Notes
Status	*Cust - Active*	*1,240*	*Customer*	*Map*	
Status	*Customer (old)*	*85*	*Customer*	*Merge*	
Status	*Partner?*	*9*	*For review*	*Review*	*Owner decides first*

Decision: Map, Merge, Leave blank, Review. Example counts are illustrative. Lifecycle stage and deal stage values deserve the most care, because reports and automation depend on them.

WORKSHEET

Object inventory and association map

One row per object in the old system, including ones you plan to leave behind. The record counts become the baseline for testing and validation.

Source object	Records	HubSpot object	Decision	Matching key	Source ID property	Order	History to keep	Owner	Notes
Account	*4,200*	*Company*	*Migrate*	*Company domain*	*Legacy CRM ID*	*2*	*All open and won*	*Sales ops*	*Parent accounts first*

Association map

From object	To object	Association label	Source ID used to rebuild	Order	Notes
Contact	*Company*	*Primary*	*Source account ID stored on both records*	*3*	*Example*

Decision: Migrate, Archive, Calculate, Exclude. Order follows page 03: owners, companies, contacts, deals and tickets, then activities. Example counts are illustrative.

WORKED EXAMPLE · ILLUSTRATIVE

Legacy CRM to HubSpot: a filled-in mapping

A made-up legacy CRM with generic fields. Your fields and values will differ; the point is that every row has a meaning, a rule, a decision and an owner before anything moves.

Object	Source field	Target property	Business meaning	Type	Transformation rule	Decision	Key	Owner	Test status
Contact	Email_Address (Email)	Email	Work email of the person	Text	Trim spaces, lower-case	Migrate	Yes	Mktg ops	Passed
Contact	Contact_Status (Status)	Lifecycle stage	Stage in the buying journey	Dropdown	Value map on page 05	Migrate	No	RevOps	Passed
Contact	Region_Code (Region)	Region (new)	Sales region used for routing	Dropdown	EU to EMEA, NA to Americas	Migrate	No	Sales ops	Passed after fix
Contact	Fax_Number (Fax)	None	Not used in daily work	Text	None	Exclude	No	Mktg ops	Not needed
All	Legacy_ID (Record ID)	Legacy CRM ID	Source ID for reconciling	Text	Copy as is; unique values required	Migrate	Yes	Migr. lead	Passed
Company	Website_URL (Website)	Company domain name	Main website, for matching	Text	Remove https://, www. and paths	Migrate	Yes	Sales ops	Passed
Company	Account_Tier (Tier)	Account tier (new)	Contracted service level	Dropdown	Gold to Tier 1, Silver to Tier 2	Migrate	No	CS lead	Passed
Company	Open_Deal_Count	None	Number of open deals	Number	Rebuilt in HubSpot from deals	Calculate	No	RevOps	Passed
Deal	Opp_Stage (Stage)	Deal stage	Buyer milestone reached	Dropdown	Old-to-new stage map, per pipeline	Migrate	No	Sales ops	Passed
Deal	Created_On (Created)	Original created date	Date the deal was opened	Date	Convert DD/MM/YYYY to one agreed format	Migrate	No	Sales ops	Passed
Deal	Amount_Text (Value)	Amount	Expected contract value	Number	Remove symbols and separators	Migrate	No	Finance	Passed
Custom	Plan_Name (Subscription)	Plan (Subscription)	Plan the customer is on	Dropdown	Value map (custom object)	Migrate	No	CS lead	Passed
Activity	Call notes before 2022	None	Older than the history window	Text	Exported to an archive file	Archive	No	Sales ops	File checked

Owners

"Rep 07" has left: open deals go to the region's sales lead; closed deals keep a "Former owner" value.

Associations

Contacts and deals link to companies through the account's Legacy CRM ID, stored on every record.

Dedupe

Same email is a duplicate contact; the most recently active record wins; consent and owner are kept from either.

WORKSHEET · FIELD MAPPING 1 OF 4

Field mapping: contacts

Source object: _____ **Target object:** Contact **Matching key:** _____ **Records:** _____

Source field (API name, label)	Target property	Business meaning	Data type	Allowed values	Transformation rule	Decision	Key	Field owner	Test status
Email_Address (Email)	*Email*	*Work email that identifies the person*	*Text*	*Valid email*	*Trim spaces, lower-case*	*Migrate*	*Yes*	*Mktg ops*	*Passed on sample*

Data type: Text, Number, Date, Dropdown, Multi-select, Checkbox, Other. Decision: Migrate, Archive, Calculate, Exclude. Key: Yes or No. Decide which email is the key when a person has several, and which lifecycle stage each contact starts in.

WORKSHEET · FIELD MAPPING 2 OF 4

Field mapping: companies

Source object: _____ **Target object:** Company **Matching key:** _____ **Records:** _____

Source field (API name, label)	Target property	Business meaning	Data type	Allowed values	Transformation rule	Decision	Key	Field owner	Test status
Industry_Code (Industry)	*Industry*	*Primary industry used for routing and reporting*	*Dropdown*	*The agreed industry list*	*Map each legacy value to one agreed value*	*Migrate*	*No*	*Sales ops*	*Passed on sample*

Companies match on company domain name, so clean domains before import. Decide how parent and child companies are kept, and which values HubSpot should calculate rather than import, such as counts and rollups.

WORKSHEET · FIELD MAPPING 3 OF 4

Field mapping: deals

Source object: _____ **Target object:** Deal **Pipeline(s):** _____ **Records:** _____

Source field (API name, label)	Target property	Business meaning	Data type	Allowed values	Transformation rule	Decision	Key	Field owner	Test status
Close_Date (Close date)	*Close date*	*Date the deal was won or lost*	*Date*	*Any date*	*Convert to the agreed date format*	*Migrate*	*No*	*Sales ops*	*Passed on sample*

Map old stages to new stages in the value map (page 05), one pipeline at a time. Record types often become separate pipelines. Keep the original created date in its own property, because imported records get a new created date.

WORKSHEET · FIELD MAPPING 4 OF 4

Field mapping: custom objects, tickets and activities

Source object: _____ **Target object:** _____ **Still needed?** ☐ Yes ☐ No **Records:** _____

Source field (API name, label)	Target property	Business meaning	Data type	Allowed values	Transformation rule	Decision	Key	Field owner	Test status
Plan_Name (Plan)	*Plan (Subscription object)*	*Plan the customer is on*	*Dropdown*	*Current plan list*	*Map retired plans to their replacement*	*Migrate*	*No*	*CS lead*	*Passed on sample*

When we checked in October 2026, custom objects needed an Enterprise subscription and Smart Transfer didn't move them; use the import tool, a Marketplace app or the API. Activities can't be updated by importing again, so decide how far back history goes and import it once, last.

WORKSHEET · BEFORE IMPORT

Owner mapping and dedupe plan

Owner mapping

Set owners up as HubSpot users first, then map every old user, including people who have left, so ownership history is not lost.

Old user	Old user email	Still here?	HubSpot owner	Notes
Rep 07	*rep07@example.com*	*No*	*EMEA sales lead*	*Open deals reassigned; open tasks too*

Dedupe plan

> Deduplicate before import, in the old system or the export files. Every duplicate you import brings its own activities, associations and owner, and merging in HubSpot afterwards costs more than cleaning the source.

Object	Counts as a duplicate when	Record that wins	Values to protect	Before	After
Contact	*Same email*	*Most recently active*	*Consent, lifecycle, owner*	*18,400*	*17,950*

Common rules: same email, same domain, same external ID, or a normalized name match. Example counts are illustrative.

DONE FOR YOU

Rather have the mapping run by a HubSpot Gold Partner?

We audit the source, map every field, deduplicate before import, test on a sample and run cutover with you.

Book a free consultation

WORKSHEET · SAMPLE IMPORT

Test import and QA

Import a sample into a HubSpot sandbox or test portal, then compare it with the source. Fix the mapping and repeat until every check passes. Nobody imports in full until every row has an owner's decision.

Record counts

Object	In source	Excluded	Expected	In HubSpot	Difference	Result
Company	*200*	*0*	*200*	*200*	*0*	*Pass*
Companies						
Contacts						
Deals						
Tickets						
Activities						

QA checklist

- [ ] Counts match, minus excluded records
  Per object and per pipeline
- [ ] About twenty records per object checked
  Field by field against the source
- [ ] Dropdown values follow the value map
  No unmapped or review values left
- [ ] Dates and amounts look right
  Original dates kept in their properties
- [ ] Associations correct
  Contacts to companies, deals, activities
- [ ] Every record has the right owner
  Including former users' records
- [ ] No new duplicates created
  Matching keys did their job
- [ ] Critical reports return the same totals
  The ones leadership relies on

Test log

Date	Object	Check	Result	Fix	Checked by
2026-10-27	*Contact*	*Region on 20 sample records*	*Fail*	*Blank codes sent to review*	*Migration lead*

WORKSHEET · CUTOVER DAY

Cutover plan

Keep the overlap short: freeze edits in the old system, run the final import, reconcile, then switch the team over with the old system kept read-only for reference. Write the rollback criteria before cutover, not on the day.

Freeze window		**Announced on**	
Rollback point		**Decided by**	
Rollback criteria			

#	Step	Who	Planned time	Done	Notes
1	**Freeze edits in the old system**				
2	**Final export**, including records changed since the test				
3	**Import owners and companies**				
4	**Import contacts**				
5	**Import deals and tickets**				
6	**Import activities**				
7	**Rebuild associations** from stored IDs				
8	**Reconcile counts and critical reports**				
9	**Switch integrations and forms** to HubSpot				
10	**Open HubSpot to the team**; old system read-only				

- [ ] Automation rebuilt and tested
  Old reminders stop on cutover day
- [ ] Team trained by role before cutover
  On your own portal and data
- [ ] Read-only period agreed for the old system
  End date: _____
- [ ] Named owner for questions in week one
  Name: _____

Go or no-go

Before the team switches over	Go / No-go	Decided by	Time
Counts reconciled against the final export			
Critical reports return the same totals			
Rollback criteria not met			

WORKSHEET · AFTER GO-LIVE

Post-migration validation log

Run the same checks as the sample import on the full data, then check again on day one and day five: routing, workflows, reports and sync errors. Spot-check deals with each owner.

Date	Day	Area	Check	Expected	Actual	Result	Fix and owner	Checked by
2026-10-27	*Day 1*	*Counts*	*Deals in HubSpot vs final export*	*3,100*	*3,100*	*Pass*		*Migration lead*
2026-10-31	*Day 5*	*Routing*	*New form leads get an owner*	*All assigned*	*2 unassigned*	*Fail*	*Fallback owner added; RevOps*	*RevOps lead*

Migration signed off by		Date		Old system retired	

Area: Counts, Records, Associations, Owners, Reports, Workflows, Routing, Integrations, Sync errors. Keep this sheet after go-live: the business meanings become your property definitions and the field owners your property owners.

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want your migration mapped, tested and cut over for you?

We audit the source, map every field by meaning, deduplicate before import, test on a sample and run cutover, then hand over this sheet filled in as your documentation.

CRM migration to HubSpot

From Salesforce, Pipedrive, Zoho, a legacy CRM or spreadsheets: audit, mapping, deduplication, sandbox QA, cutover and training.

CRM cleanup and data quality

Record quality audit, systematic deduplication, field standardization and the rules that keep HubSpot clean.

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