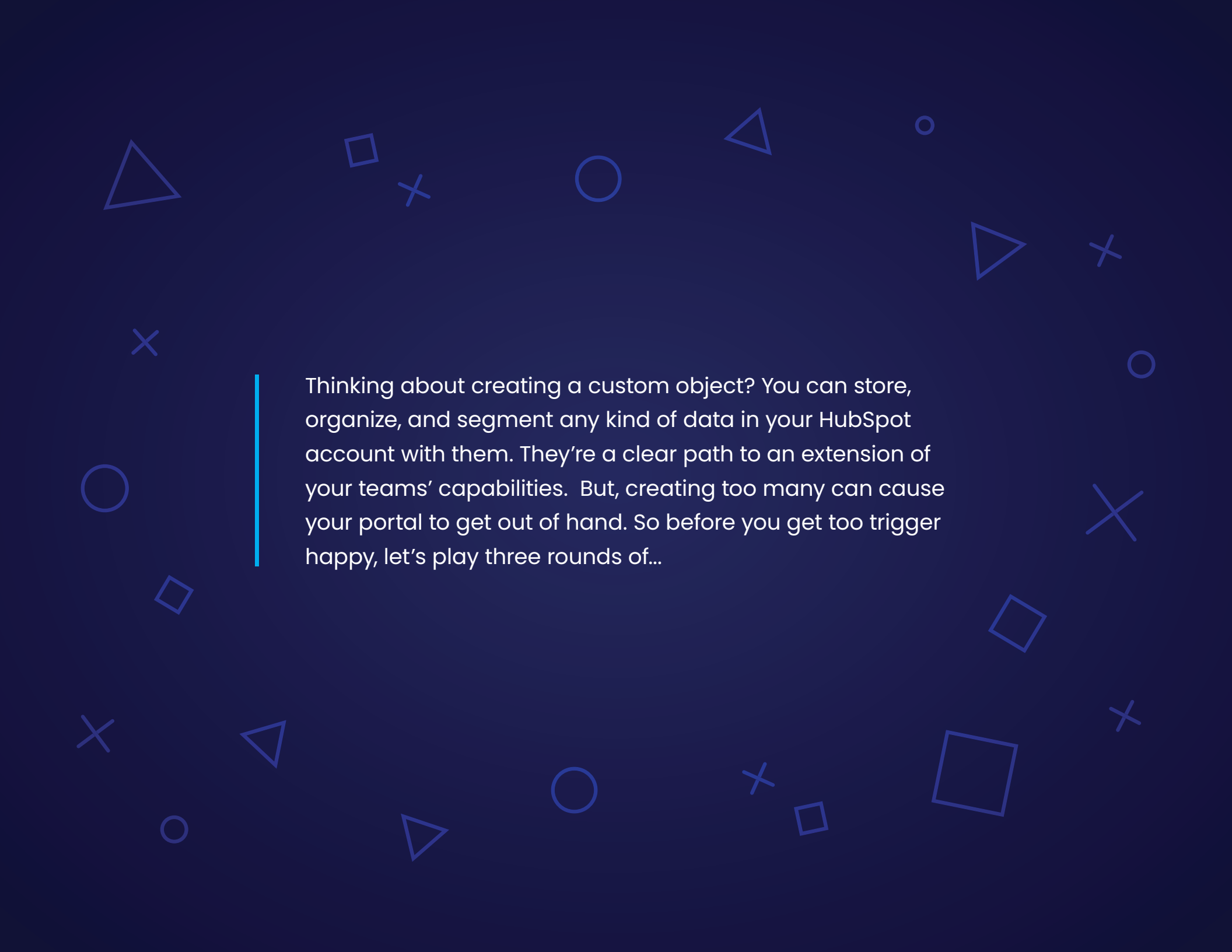


# CUSTOM OBJECTS

CRASH COURSE!



Thinking about creating a custom object? You can store, organize, and segment any kind of data in your HubSpot account with them. They're a clear path to an extension of your teams' capabilities. But, creating too many can cause your portal to get out of hand. So before you get too trigger happy, let's play three rounds of...

**CUSTOM OBJECTS  
GO OR NO GO!**

## ROUND 1:

# Deciding Whether a Custom Object Is Necessary

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### How will you use your custom object?

- Why are you creating it and what gap will this object be filling? Many businesses who need custom CRMs can utilize them, such as car dealerships, recruiting companies, property management firms, all kinds of service companies, and education institutions.

### Why do you need a custom object instead of a custom property?

- Is it possible that a custom property could fill your business needs? If you need a small snippet of additional information for a record, like geographic location, a custom property may fit the bill.

### Is HubSpot your “source of truth” for this data?

- If you’re using another system as your system of record, you may want to use a CRM extension instead.



**Did you answer yes to most of  
these questions?**

**If so, keep going.**

## ROUND 2:

# Defining Your Objects and Getting Your Team on Board

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### How will this change your business processes inside of HubSpot?

- How will it affect your company and will it benefit them? Think about your sales, marketing, and product teams and who will interact with your new records? Document and be sure to share this information company-wide.

### Will this be a one-to-one or one-to-many object?

- A one-to-one relationship involves an object relating to another, and only that other object. For example, when you buy something online you have one billing address. A one-to-many relationship involves an object relating to multiple other objects. You have one billing address, but you may have four shipping addresses. In this scenario, a one-to-one unique relationship can be made through a custom property, but a one-to-many can only be created with a custom object (if you don't want to jump through a million workarounds, that is!)

### Do you know what properties your custom object have?

- What is its name (singular and plural), primary display property, any other properties from the field list, and the relationship (look up!).



**Were you able to answer these questions clearly? Did your team agree on these answers?**

**Go to the next round!**

## ROUND 3:

# Implementing and Maintaining

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### **How will you add your custom object?**

- Will you do it yourself in HubSpot using the API or do you need third-party assistance?

### **Is HubSpot your “source of truth” for this data?**

- If you know how to do any of this with standard objects, you know how with custom objects! Establish how you will track your success with this object.

### **Are you able to do maintenance on your custom objects?**

- Whose responsibility will it be to update or add new records, redefine object definitions, or remove obsolete objects?





Did you have an answer to most of these questions? Then it's pretty clear custom objects will positively impact your teams and processes. If you're still a little hesitant because you answered "no" to using the HubSpot API, don't worry. Like we mentioned, there's always **Custom Objects HQ**.

**Want to learn more about how  
our app can help you create  
custom objects?**

[Learn More Today!](#)

 **syncsmart.io**