

FREE CHECKLIST

HubSpot + WhatsApp Go-Live Checklist

The checks we run before switching on WhatsApp automations from HubSpot: data, consent, templates, WhatsApp rules and fixes for common errors.

Tick each box as you go

Before you go live

Six checks before you switch automations on for everyone.

- ☐ **Clean phone numbers in HubSpot**
Country code included, and the WhatsApp number in **Mobile phone number** (for India: +91 98xxxxxxx, not 098xxxxxxx).
- ☐ **Record opt-in**
Add a WhatsApp consent checkbox to your HubSpot forms and keep it in a contact property.
- ☐ **Get templates approved first**
Meta usually reviews templates within minutes, but allow up to 24 hours.
- ☐ **Use active HubSpot lists for sequences**
People drop out automatically when they convert.
- ☐ **Test with your own number**
Trigger the HubSpot event for a test contact that has your phone number before turning it on for everyone.
- ☐ **Switch on ads attribution**
Turn it on in WhatsApp Manager before running click-to-WhatsApp ads. Meta attaches ad details only to a customer's first message and can't backfill them.

WhatsApp rules every integration must follow

- ☐ **Get opt-in first**
Message only people who agreed to hear from you on WhatsApp, and honour STOP replies.
- ☐ **Start conversations with approved templates**
Outside the 24-hour window you can only send a Meta-approved template. Order and appointment updates are Utility; offers are Marketing.
- ☐ **Respect marketing limits**
Meta may hold back marketing templates from people who already get many (error 131049). Don't put one contact in several marketing automations that can fire the same day.
- ☐ **Message valid numbers only**
WhatsApp needs a number with a country code; contacts without one can't be messaged.

Lessons from running it in production

From building Vatli's HubSpot integration and using it on Ixoric's own HubSpot account.

- ☐ **Send one booking confirmation per burst**
HubSpot sends two or three webhook events for each booked meeting. Confirm the booking's start time, not HubSpot's meeting ID, so people don't get duplicate "thanks for booking" messages.
- ☐ **Split audiences above 10,000 contacts**
HubSpot's search stops at 10,000 results. Break very large audiences into several lists, for example by city or lifecycle stage.
- ☐ **Grant the least access possible**
A messaging tool rarely needs to write to your CRM. Check the permissions on HubSpot's consent screen.

If something isn't working

Problem	Fix
"Number is already in use" when connecting	The number is connected to the WhatsApp app or another provider. Disconnect it first, or use coexistence.
Template rejected by Meta	Check the category, add sample values for every variable, and avoid a variable at the very start or end.
HubSpot event fires but nothing is sent	The contact has no phone number, has opted out, or the template isn't approved yet.
Messages fail with error 131026	The number isn't on WhatsApp or is missing its country code.
Native HubSpot templates stop sending	The 1,000-per-month template limit has been reached.

Connect HubSpot to WhatsApp in about 15 minutes

Vatli works on every HubSpot plan, including Free. Book a demo at ixoric.com/vatli-whatsapp-api/