

OPTI
Smarter, Safer, Scalable

Invoice synchronization and payment reconciliation in HubSpot for AI-assisted collections

Morning-HubSpot Integration for Revenue Agent

CASE STUDY

Industry: Marketing & PR
Client: Glare Marketing Technologies, Israel
Year: 2026

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INTRODUCTION

Glare Marketing Technologies is a marketing and HubSpot consulting agency based in Israel that used Morning for invoicing and HubSpot for customer relationship management.

Starting in July 2026 — coinciding with access to the private beta version of the new HubSpot Revenue Agent — OPTI developed a custom Morning-HubSpot integration using webhooks and APsI. The integration synchronizes Glare's invoices, links them to the corresponding individuals and companies, and reconciles subsequent payments.

For this project, carried out during the private beta phase of HubSpot Revenue Agent, OPTI collaborated directly with Glare and the HubSpot team developing the new AI agent. The integration was developed based on requirements provided directly by the HubSpot team. The solution has been operational for Glare Marketing since September 2026.



CHALLENGE

Integration of Morning external invoicing with Revenue Agent, a HubSpot AI agent in private beta, during the summer of 2026.

1. Invoices were managed outside of HubSpot

Morning was generating the billing documents, while the commercial data about the clients was kept in HubSpot.

2. Prerequisites for HubSpot Revenue Agent (in beta)

The AI agent required data on open invoices -including outstanding balance, due date, and currency - as well as associations with contacts or companies. Also, the external invoices provided a link for the client to view and pay them, which necessitated the use of the HubSpot property *hs_external_invoice_link* for the *Invoice* object.

3. The collection documents were distinct items

Morning payment proofs had to follow the invoices - including within HubSpot - without duplicating them.

4. Updating balances after partial payments

Once an invoice is finalized, HubSpot internally tracks the outstanding balance and the amount paid. Partial or future payments from Morning required a reconciliation method using HubSpot payment objects.



SOLUTION

An API integration that preserves financial logic with clean data for the HubSpot Revenue Agent.

1. Invoice synchronization upon issuance

We implemented a workflow triggered by Morning webhooks. Upon issuance, the integration retrieves the necessary data and creates an *Invoice* record in HubSpot, complete with identifier tracking and mappings.

2. Creating invoices in HubSpot Orders

The integration creates invoices by following a specific sequence of stages. First, an invoice is generated in a "draft" state; then, the contact, company, and content are associated with it; finally, it is marked as either "open" or "paid." This sequence ensures accurate data for the Revenue Agent, which tracks revenue by company.

3. Reconciliation of full and partial payments

We implemented payment reconciliation using HubSpot payment objects (*commerce_payments*) and Morning relationships (*linkedDocuments*). Instead of creating a new invoice upon a partial payment, a payment object is recorded for the amount paid and associated with the existing invoice.

DIRECT COLLABORATION WITH HUBSPOT

- July 30: HubSpot confirms the possibility of integration via API and provides the mandatory properties
- August 12: HubSpot confirms the activation of write access for the *hs_external_invoice_link* property via the API, which is required for connecting to the Morning invoice.
- August 31: OPTI confirms the integration of external invoices into the HubSpot data model and continues technical validation.
- **The result of the collaboration:** integrating external invoices and payments into Revenue Agent, in accordance with requirements communicated directly by the HubSpot product team.



TESTIMONIAL

"OPTI have been our trusted partners for over three years - the best professionals for any new HubSpot module, especially regarding applications in the HubSpot Marketplace, integrations, and data migrations involving other CRMs or data systems. An excellent collaboration."

- Karin Tamir

CEO Glare Marketing

ARCHITECTURE

The integration uses Morning as the source for financial documents, an integration service developed by OPTI for processing, along with HubSpot APIs. Revenue Agent will utilize this data.

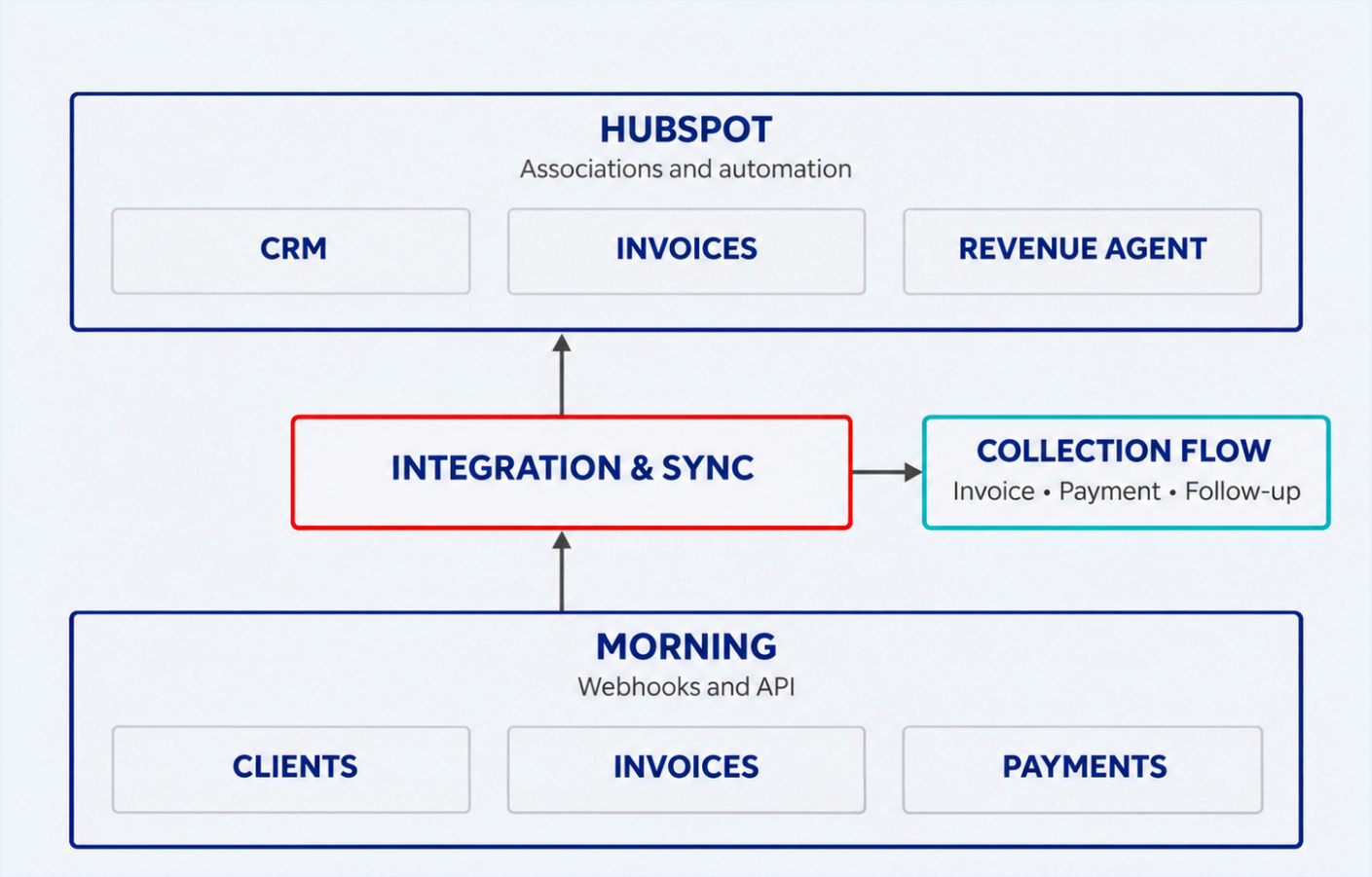

Fig.1. Synchronized external invoices for Revenue Agent

REVENUE AGENT BENEFITS IN HUBSPOT

- Monitor eligible open invoices.
- Create collection follow-up plans - including communications to clients - based on your configuration and approval settings.
- Works with invoicing generated within HubSpot or externally (as in this case).

A WORD FROM THE TEAM



"The most important feature was ensuring the invoice status remained accurate following subsequent partial payments. HubSpot manages the balances of finalized invoices internally, so we utilized payment objects and their associations. Furthermore, it was a great experience to work directly with the HubSpot Revenue Agent team on a feature that is still officially in beta." ***— Daniel Curculescu, Data Engineer***

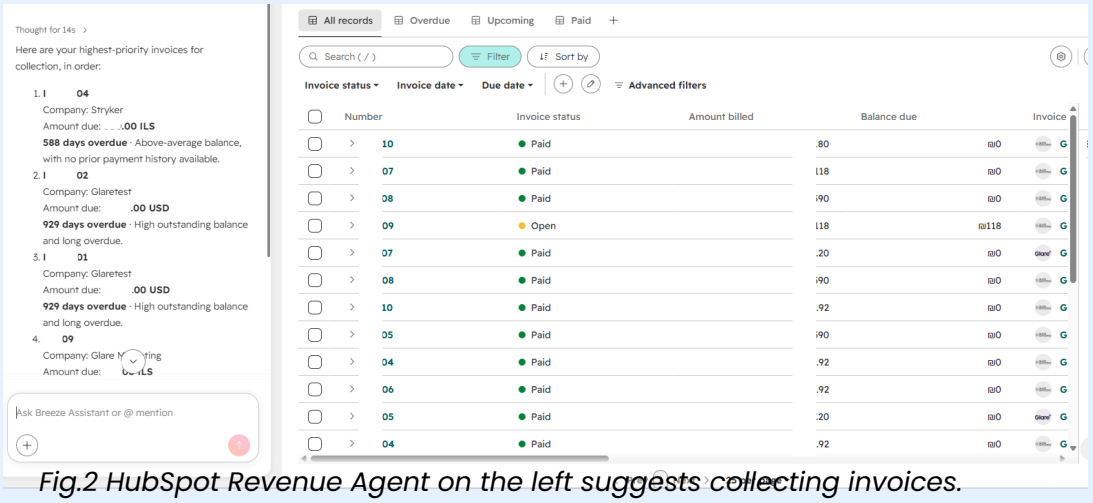

Fig.2 HubSpot Revenue Agent on the left suggests collecting invoices.

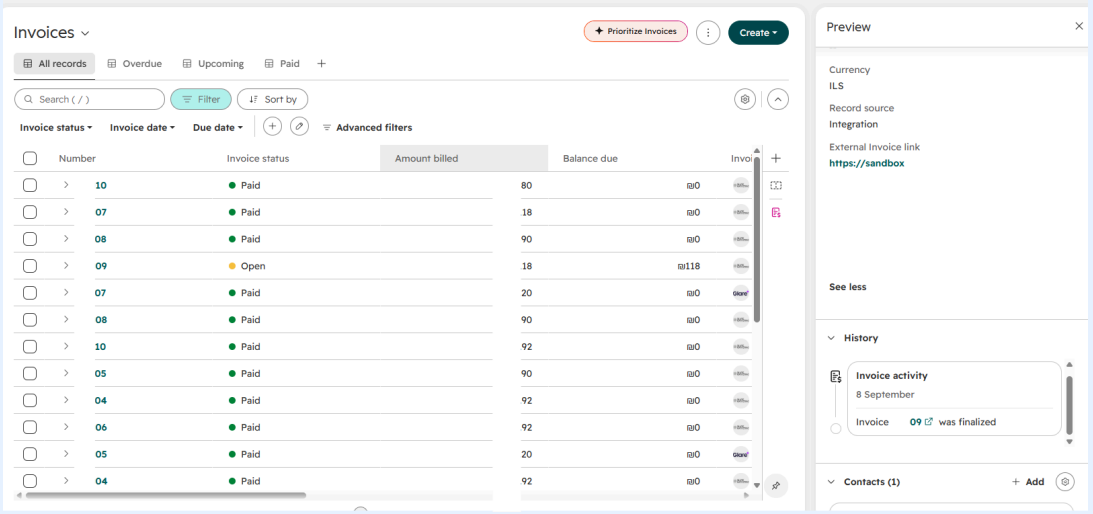

Fig.3 Invoices with anonymized property details, including an external payment link



RESULTS

Invoices and payments connected to HubSpot, without replacing your invoicing system.

Automatic synchronization

Invoices are synchronized, receipts are reconciled as HubSpot payments.

Financial visibility

Invoices are linked to the corresponding CRM contacts and companies.

Reconciliation of subsequent payments

The integration allows for the handling of full and partial payments via the HubSpot data model.

The payment flow remains in Morning

The integration works without the native HubSpot checkout, keeping the external system in place.

Revenue Agent ready to go

HubSpot's Revenue Agent has the information needed to monitor balances and create collection plans.

Collaboration with HubSpot

We received specifications directly from the Revenue Agent engineers, ahead of the public documentation.

TECHNOLOGIES AND METHODOLOGY

Services: HubSpot integration, automation via API / webhooks, CRM data modeling, invoice synchronization, payment reconciliation, HubSpot AI features.

Tech: Morning API and webhooks, HubSpot CRM API v3, HubSpot Associations API v4, HubSpot Invoice and Line Item objects, HubSpot commerce_payments, HubSpot Revenue Agent (in private beta at the time of development), PHP

Methodologies and best practices: analysis of the invoicing workflow, definition of associations between objects, API prototyping, direct clarifications with the HubSpot team, testing and quality assurance

Standards: ISO 9001 (quality), ISO 27001 (information security), ISO 42001 (AI management).

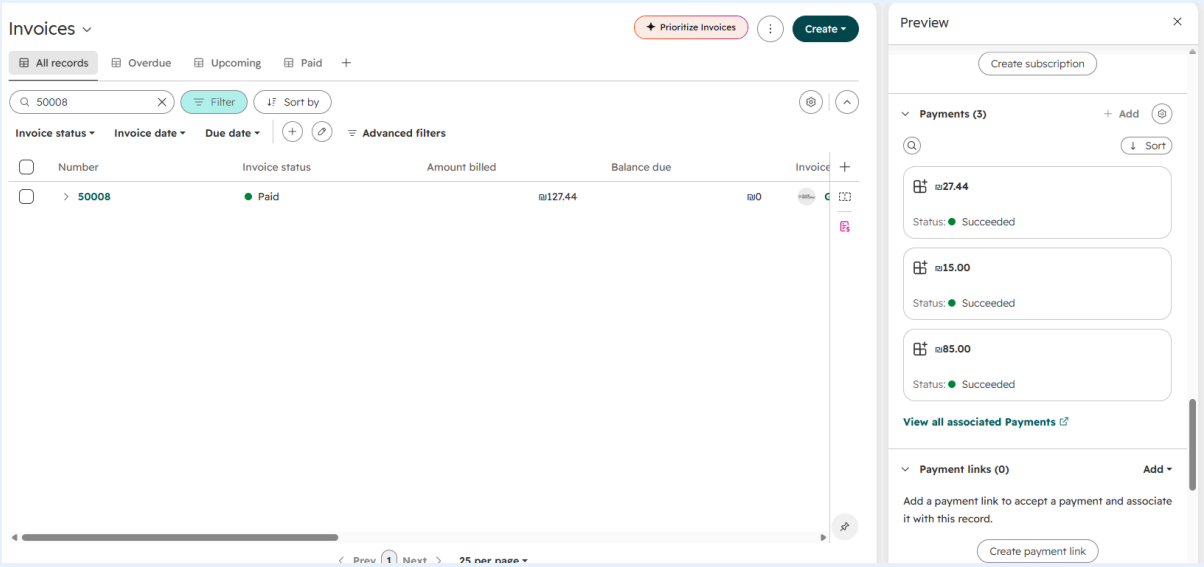

Fig.4 Multiple payments recorded on the same HubSpot invoice

LEARN MORE

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OPTI Software

Smarter business processes. Scalable results.

We build **software, AI agents, and data integrations** using Google Cloud services and HubSpot CRM, backed by quality, security, and AI certifications.

We have received multiple awards and distinctions, including **Best R&D Program of the Year** at the 2026 ANIS Gala and **Bronze Startup of the Year** at the ROMANIA Startup Awards. Founded in 2005, OPTI is a HubSpot Solution Partner and Google Cloud Partner, with staff individually certified in the technologies used.

CERTIFICATION

HubSpot Partner · Google Cloud Partner · ISO 27001 · ISO 42001 · ISO 9001 · Microsoft Certification CRM · Microsoft Certification ERP · Google Workspace Administrator · Data Engineer · REVIEWED ON Clutch 5/5 RATING

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