

SETUP GUIDE

Cloudingo for HubSpot: Setup Guide

This guide walks you through connecting Cloudingo to HubSpot, choosing how merges run, and merging safely when HubSpot syncs with Salesforce.

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Before you start

Check three things before connecting: your HubSpot permissions, your daily API limit, and whether HubSpot syncs with Salesforce.

Confirm your HubSpot permissions

The HubSpot user who connects Cloudingo needs the permissions below. If you're not a HubSpot admin, send this list to your admin before you begin.

- App Marketplace access
- Deals writer
- Campaigns read
- Contacts writer
- Custom object unassigned editor
- Leads unassigned editor
- Partner admin
- Companies writer

Know your daily API limit

Cloudingo runs merges through the HubSpot API. Each HubSpot tier has its own daily limit (refreshes automatically).

HubSpot tier	Daily API calls
Free/Starter	250,000
Professional	625,000
Enterprise	1,000,000

A native merge of a 200-record group takes 199 merge calls, plus follow-up update calls. Large duplicate groups use more of your daily limit. See section 4.

Is your HubSpot account synced to Salesforce? Read section 5 before you run your first merge.

Connect Cloudingo to HubSpot

HubSpot connects through OAuth only, the same pattern you use to connect Salesforce.

- 1 **Click the HubSpot login link in Cloudingo.** You'll be redirected to HubSpot to confirm the connection.
- 2 **Review the access Cloudingo requests.** HubSpot lists the OAuth scopes Cloudingo needs from the HubSpot API.

Cloudingo requires these 15 scopes:

-  View properties and other details about companies.
-  Create, delete, or make changes to companies.
-  View properties and other details about contacts.
-  Create, delete, or make changes to contacts.
-  View details about custom objects in the CRM.
-  Create, delete, or make changes to custom objects in the CRM.
-  View properties and other details about deals.
-  Create, delete, or make changes to deals.
-  View properties and other details about leads.
-  Create, delete, or make changes to leads.
-  View details about marketing campaigns and associated assets.
-  Create, delete, or make changes to marketing campaigns.
-  View properties about the installing account including primary domain and user emails.
-  View details about users assigned to a CRM record.
-  Allows for reading User CRM object data.

- 3 **If you're missing permissions, HubSpot shows which ones you lack.** Use **Copy missing permissions** and send the list to your HubSpot admin.

Choose your merge type

Cloudingo for HubSpot offers two merge types: Native and Synthetic. Choose Synthetic if external systems rely on your master record IDs.

	Native	Synthetic
How it works	Standard HubSpot merge API, plus a follow-up update for the merge values your automation rule selects	Archives the child record in HubSpot and applies field value updates to the master
Available for	Contacts and Companies only	All objects, including deals, tickets, and custom objects
Master record ID	A new master ID is created with each merge	Master ID does not change
GDPR merge link	Included: merged records stay linked	Not included
Reversible	No, merges can't be reversed in HubSpot	Archived child records can be restored from HubSpot
History and associations	Moved to the master record	Cloudingo attempts to move them, but it's a separate step and not guaranteed
Best for	Standard HubSpot cleanup on Contacts and Companies	Accounts where external systems rely on the master ID

To change the merge type, go to **Manage Objects** in Cloudingo. You can switch between Native and Synthetic there.

Account
Settings

Manage Objects
Owner Mapping
Run Window & Throttle

Manage Object Settings (Indexed Fields)

Companies

Standard

Save Cancel

Company name
Create Date
Last Modified Date

Custom

Available Fields

☒ Use Native Merge

Cancel

Contacts

Standard

Company Name
Create Date
Email
First Name
Last Modified Date

Last Name
Object last modifi...
Work email

Custom

☐ Use Native Merge

Manage Object Settings, use Native Merge checkbox

SECTION 04

How native merges work in HubSpot

Native merges in HubSpot don't always work the way you'd expect. Keep these three points in mind.

- 1 HubSpot merges two records at a time.** Each merge pairs one master with one child, so larger groups take multiple API calls: the group size minus one. A group of 200 duplicates takes 199 merge calls.
- 2 Every merge needs a follow-up update.** HubSpot doesn't accept master values as part of the merge. Cloudingo applies your selected values in a follow-up update call after the merges complete.
- 3 HubSpot creates a new master ID with each merge.** Merging a group of 200 creates 199 new records and IDs in HubSpot. The merged records stay linked to one another. Cloudingo's merge reporting records every merge and shows the original master ID and the final master ID, not each of the 199 intermediate IDs.

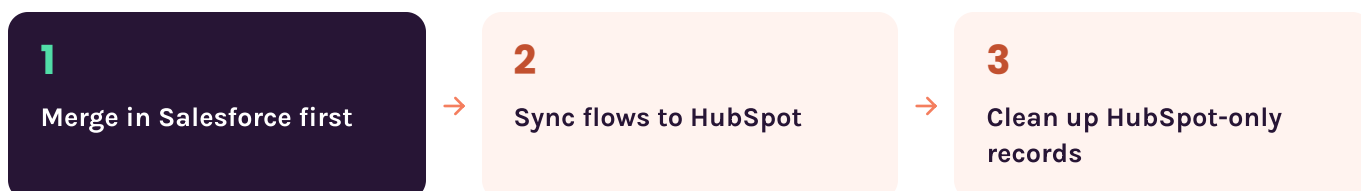
Because large groups use many API calls, check your daily API limit (section 1) before merging at scale.

SECTION 05

Merging when HubSpot syncs with Salesforce

Merge in Salesforce first, and keep the actively syncing record as the master.

Once records are paired, HubSpot anchors each one to its Salesforce Lead ID or Contact ID, so merging in the wrong order or picking the wrong master can break field mappings or leave orphaned data.



If you merge in Salesforce (recommended first step)

Salesforce keeps the master record ID and deletes the losing record IDs.

- **How HubSpot reacts:** The native HubSpot integration detects the deletion or update of the losing Salesforce records. If your HubSpot integration settings allow HubSpot records to be deleted when the matching Salesforce record is deleted, the losing HubSpot contact is removed or consolidated.
- **Pick the right master:** Always select the Salesforce record that's actively syncing with HubSpot as the master. If you choose a non-syncing record, the active HubSpot contact loses its sync connection. It shows an error or disconnected state until you re-link it manually.

If you merge in HubSpot

HubSpot combines timelines, properties, and associated assets onto one surviving profile.

- **How Salesforce reacts:** A HubSpot merge does not trigger a merge in Salesforce.
- **What happens to the sync:** If the two HubSpot records were tied to different Salesforce records, only the primary HubSpot record keeps its sync. The losing Salesforce record stays in Salesforce but is no longer connected to HubSpot. That leaves an unlinked duplicate in Salesforce until you merge or clean it up there.

Best practices to prevent sync conflicts

- **Merge in Salesforce first.** Keep the actively syncing record as the master, let the changes flow to HubSpot, then finish any HubSpot-only cleanup.
- **Check your ID mappings.** Make sure the Salesforce Contact ID and Salesforce Lead ID properties are visible and mapped correctly in HubSpot, so you know which profile is anchored to Salesforce before you merge.

SECTION 06

What's not supported yet

These Cloudingo features aren't available for HubSpot at this time:

- Undo/Restore
- Third-party Integrations
- Cloudingo Intelligence
- Data Quality Dashboard
- Convert & Mass Convert
- Field Analysis
- Automation Preview
- Real-time Merge

Child records archived by a Synthetic merge can still be restored from HubSpot. See section 3.

Questions? Email sales@cloudingo.com.

