

Data Acquisition
Direct Syncing Your HubSpot Data with Cien.ai

API Sync

Introduction

Syncing your HubSpot data to Cien.ai with our API Sync is incredibly easy. You will receive a Sync email; simply click on it and follow the on-screen instructions.

There are two methods to sync your data:

1. **Automated HubSpot Sync**
2. **Manual Download of HubSpot Data to a Local Computer**

This document explains process #1, detailing what happens when you sync your data. Please see below for detailed information.

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Sync Overview

Why Sync Your CRM Data?

The TrueAI engine from Cien.ai provides unprecedented insights into your Go-To-Market (GTM) strategy, enabling you to address issues that emerge through CRM data analysis. Because the analysis is automated and based on sophisticated AI models, insights and key metrics are updated in nearly real-time as new data is available. To do that, Cien needs to process a lot of data from multiple CRM entities (database tables). In general, there are tens of millions of records and data points. In other words, this analysis is much deeper than simply exporting an opportunity file or similar.

What Data Does Cien.ai Sync?

Cien.ai has developed a one-click API connection to HubSpot, enabling the retrieval of relevant data for conducting GTM analysis. Below is a list of the entities Cien.ai accesses in a read-only mode that is queried (can be modified if needed):

1. HRUser
2. Companies
3. Contacts
4. Deals
5. Deals_property_history
6. Engagements
7. Leads
8. Line_items
9. Products
10. Users

For each entity, the sync retrieves all standard fields, with the exception of a few (see below). In some cases, custom fields are retrieved too. For example, you may have a custom classification of your target accounts that tracks their existing vendors. If so, those fields can easily be mapped into the sync process.

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Sync Security

Secure Authentication with OAuth 2.0

Sync uses OAuth 2.0 – HubSpot's preferred method for granting access to HubSpot API data without sharing login information. OAuth 2.0, also known as Open Authorization, is an industry-standard protocol for authorization. It is a way to securely allow a program to access another program's data using previously verified credentials. Chances are, you encounter this technology regularly. For example, if you add your Gmail account to your iPhone, you authorize the Mail app to access your Gmail account using OAuth.

Who Can Facilitate the Sync Connection?

Typically, we recommend that HubSpot System Administrators authorize the OAuth 2.0 sync connection, as a HubSpot log-in is required. The process to allow the link is as simple as clicking on a pop-up screen.

Automatic Data Masking of PII

Data breaches are always a concern, especially as they pertain to PII (Personally Identifiable Information). In many jurisdictions, there are stringent privacy laws that require disclosure and specific care regarding how this data is handled.

To circumvent these issues, Cien.ai has an automated method to mask all sensitive PII in-flight (i.e., we never store this sensitive data). The following information will be replaced with a one-way hash token that cannot be decrypted:

- First Name
- Last Name
- Email
- Phone
- Street Address

Please note that user data is not masked (unless explicitly requested), as users are typically employees or contractors of your company and are not subject to the same rules. If you mask user information, many reports that list rep names will be harder to interpret.

At Cien.ai, we are fully committed to protecting our customers' data privacy. Please review our Security and Privacy Overview for more information.

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Automated HubSpot Data Sync through the Cien App

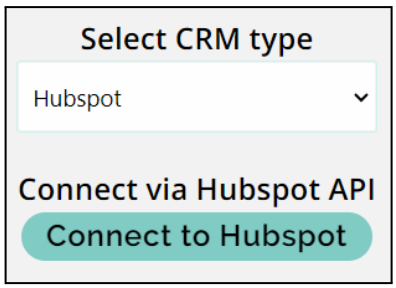
Automated Sync Overview

The Cien App is the easiest way to process data on the TrueAI platform securely. It allows for continuous syncing of read-only data and automatically applies the data masking described above (unless explicitly turned off). The Cien App is a verified partner app.

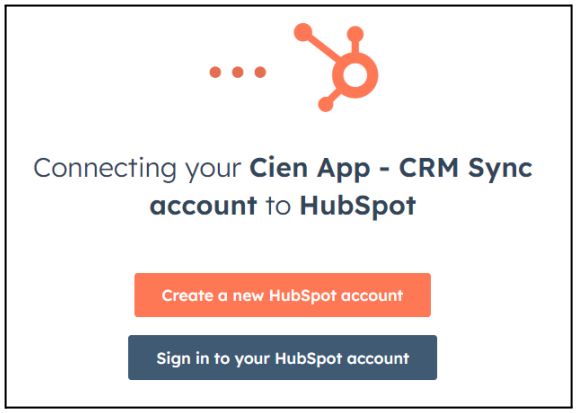
Step 1 – Click On Your Sync Link

You should have received/will receive an email with a personalized sync link. When clicked, it will take you to the screen shown below. Please verify that the company name matches the name of your organization. In “Select CRM type”, choose “HubSpot”.

Click "Connect to HubSpot”



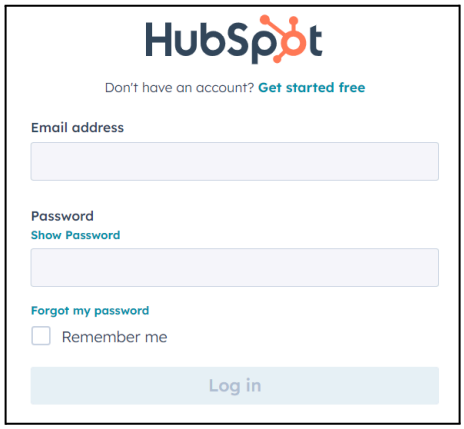
Click "Sign in to your HubSpot account”



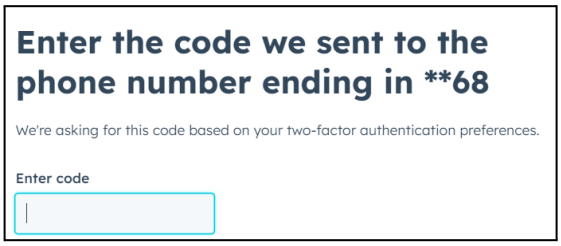
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Step 2 – Authenticate In HubSpot

You will then be directed to HubSpot's login page, prompting you to enter your username and password. Please note that you are logging in to HubSpot, not the Cien App; Cien.ai never gets your login credentials.



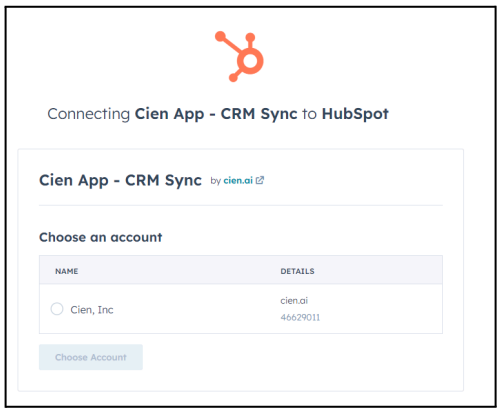
A 2-step verification process might be requested (with a code or authentication app)



Step 3 – Authorize the Cien App

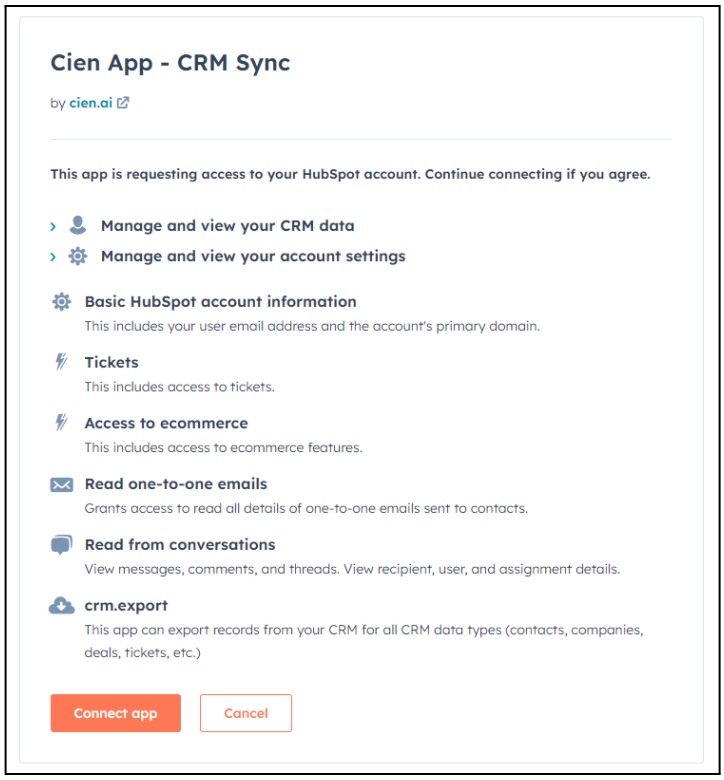
After logging in, you will be asked to consent to Cien App accessing the information displayed in the list. You can see exactly what operations the Cien App can perform. As previously stated, this connection is read-only, and it automatically masks sensitive Personally Identifiable Information (PII).

Select "Cien, Inc."

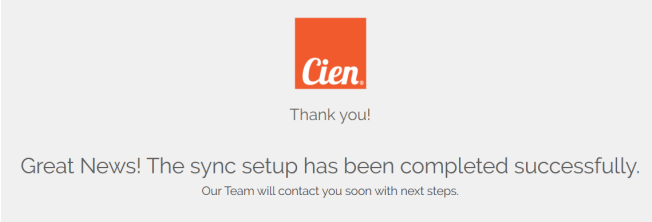


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Select “Connect app”



Upon successful completion of this step, you will see this message. The data sync is now ready to start.



Revoking Cien App Access

You can change or remove the app access you granted at any time. HubSpot has a dedicated thread explaining the step-by-step (Link to HubSpot Knowledge Base).

Questions and Support

If you have any questions before, during, or after this process, do not hesitate to contact us at: satccess@cien.ai. We’re eager for your feedback, and if you have any suggestions on how to improve this process, please don't hesitate to share them.

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Appendix: **Enhanced PII Redaction**

Protecting your data is at the core of Cien.ai's GTM Suite. With our latest release, we've introduced **Enhanced PII Redaction** to give you even greater control over sensitive information.

How it works

- Redaction is configurable at the sync mapping level and can be applied to any field.
- Three options are available:
    - **None** – No redaction applied.
    - **Level 1** – Hash redaction while preserving structure (e.g., anonymized emails/phone numbers).
    - **Level 2 (NEW)** – Full PII redaction, covering emails, phone numbers, SSNs, credit cards, IBANs, national IDs, URLs, IPs, MAC addresses, crypto wallets, and more.

By default, redact level 2 is applied to description fields on all CRM activity data (Salesforce, Dynamics, HubSpot, etc.).

In-flight redaction
Redaction occurs **during the sync process**. This means unredacted data is never written to or stored on Cien.ai's systems once the redact level is set—further reducing your privacy risk.

Example
A CRM activity containing names, emails, payment details, or IDs will automatically be transformed into placeholders such as `<EMAIL>`, `<SSN_CTX>`, or `<CREDIT_CARD>`. This ensures sensitive personal data remains protected while preserving the context required for analysis.

With Enhanced PII Redaction, you can be confident that your CRM data remains both practical and compliant, while safeguarding the privacy of your customers and employees.

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Appendix: **Data Extract Fields**

This is the list of data that is retrieved from HubSpot. Additional Custom Fields can also be retrieved, if specified by the Data Owners.

HRUser

- Id
- crm_user_id
- hr_first_name
- hr_last_name
- hr_status
- hr_addr_city
- hr_addr_country
- hr_addr_postal_code
- hr_addr_state
- hr_addr_street
- hr_department
- hr_division
- hr_classification
- hr_email
- hr_manager_id
- hr_manager_name
- hr_profile_url
- hr_role
- hr_time_zone
- hr_title
- hr_employee_type
- hr_username
- hr_direct_reports
- hr_is_manager
- hr_is_remote
- hr_termination_date
- hr_hire_date

companies

- id
- updatedAt
- archived
- hubspot_owner_id
- website
- hs_parent_company_id
- createdAt
- hs_created_by_user_id
- updatedAt
- hs_updated_by_user_id
- hs_last_sales_activity_timestamp
- hs_analytics_source
- city
- state

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- zip
- numberofemployees
- name
- type

contacts

- id
- updatedAt
- archived
- hubspot_owner_id
- createdAt
- hs_created_by_user_id
- updatedAt
- hs_updated_by_user_id
- hs_last_sales_activity_timestamp
- firstname
- lastname
- city
- state
- zip
- phone
- email
- jobtitle
- hs_analytics_source
- salutation

deals

- id
- updatedAt
- archived
- hubspot_owner_id
- createdAt
- hs_created_by_user_id
- updatedAt
- hs_updated_by_user_id
- hs_latest_meeting_activity
- dealname
- hs_deal_stage_probability
- closedate
- hs_analytics_latest_source
- dealtype
- hs_is_closed
- hs_is_closed_won
- dealstage
- deals_property_history
- xkey
- _airbyte_ab_id
- archived
- dealId
- timestamp
- updatedByUserId

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engagements

- id
- ownerId
- createdBy
- modifiedBy
- type

leads

- id
- updatedAt
- archived
- hubspot_owner_id
- createdAt
- hs_created_by_user_id
- updatedAt
- hs_updated_by_user_id
- hs_last_activity_date
- hs_associated_company_name
- hs_pipeline_stage_category
- hs_primary_company_id
- hs_primary_contact_id
- hs_associated_contact_firstname
- hs_associated_contact_lastname
- hs_contact_job_title
- hs_lead_source
- hs_associated_contact_email

line_items

- id
- updatedAt
- archived
- createdAt
- updatedAt
- name
- description
- hs_sku
- properties_price
- quantity
- discount
- hs_product_id
- converted_net_price_to_company_currency
- monthly_recurring_net_amount__in_company_currency
- hs_line_item_currency_code
- amount
- recurringbillingfrequency

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products

- id
- updatedAt
- archived
- createdAt
- updatedAt
- name
- hs_sku
- description
- hs_product_type

users

- hubspot_owner_id
- updatedAt
- archived
- hs_email
- hs_email
- createdAt
- hs_created_by_user_id
- hs_given_name
- hs_family_name
- hs_job_title
- hs_last_activity_time
- hs_standard_time_zone
- hs_access
- hubspot_team_id

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