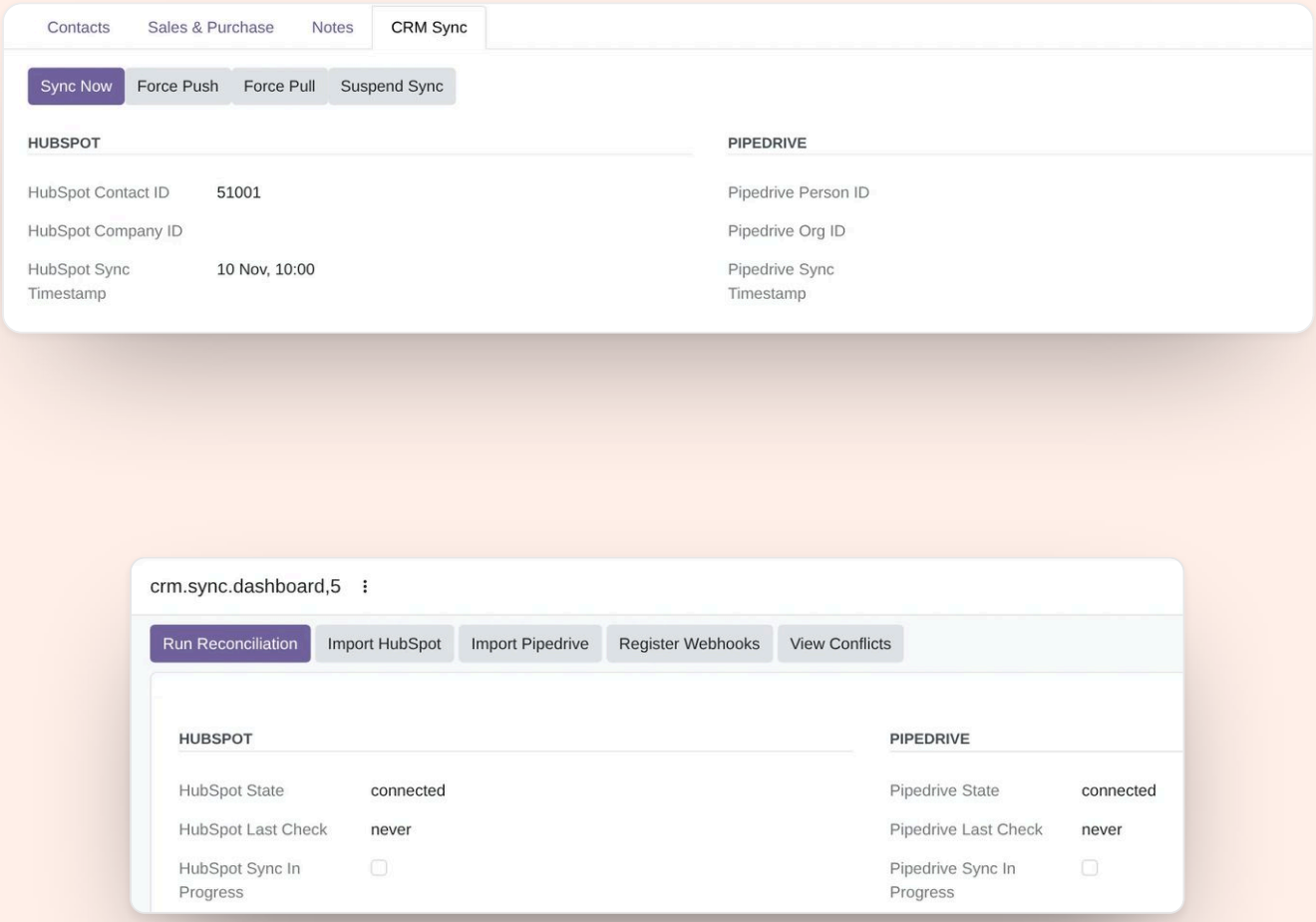
USER MANUAL · CRM AND SALES

HubSpot and Pipedrive for Odoo

For those who already have the connector: install it, activate it, connect it, set it up and use it, step by step.

Module version 20.0.1.2.2 | Odoo 20 screenshots | Edition of 14-11-2026



Real Odoo 20 screenshot. The CRM Sync tab of a contact linked with HubSpot and, in front, the panel with the two connected CRMs.

Contents

On the right, the page where each section starts. Menu and button names are those of Odoo in English.

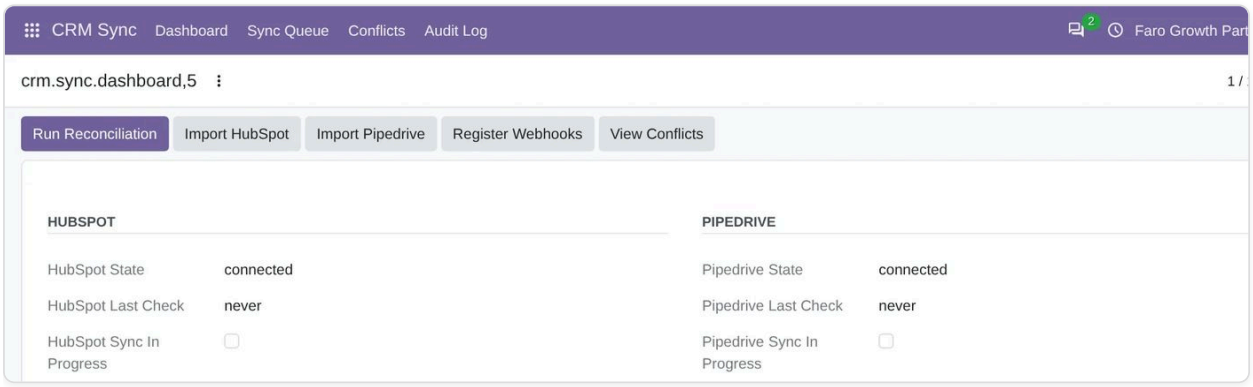
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This manual describes version 20.0.1.2.2 of the module (Odoo branch 20.0, commit ad585998f). Everything it says comes from its code: menus, buttons, fields, scheduled actions and error messages.

The screenshots come from a test Odoo 20 database, with a made-up company and data and no real connection to HubSpot & Pipedrive. In Odoo 17, 18 and 19 the module has its own version: if something on your screen does not match, write to us.

1 What it is and where it is

The connector links Odoo contacts with HubSpot or Pipedrive contacts. It adds the CRM Sync app to Odoo, a tab on each contact and a section in Settings.



- **Real Odoo 20 screenshot.** The CRM Sync app: its four menus, the panel buttons and the status of the two CRMs.

Dashboard	The panel: the status of HubSpot and Pipedrive, the import buttons and the reconciliation.
Sync Queue	The queue: what is waiting to go out to the CRM or to come into Odoo.
Conflicts	The fields the connector has not wanted to decide on its own.
Audit Log	The record of each synchronisation: when, in which direction, with which CRM and how it ended.

Outside the app, the connector works in **Contacts**: each contact has a **CRM Sync** tab with its HubSpot and Pipedrive IDs and its buttons. And in **Settings › CRM Sync** you will find the consent, the tokens and the direction of each CRM.

> The module does not come with translations: its menus, buttons and fields appear in English, even with Odoo in Spanish. That is why this manual quotes them in English, as you will see them.

2 Before you start

This is what you need. The connector is the Odoo part: you obtain the CRM account and its token yourself.

- For HubSpot: a private app in your HubSpot account, with permission to read and write contacts and to read companies, and its access token.
- For Pipedrive: the API token of your Pipedrive user.
- Odoo 17, 18, 19 or 20, on Odoo.sh or on your server, not on Odoo Online. It works on Community and on Enterprise.
- An Odoo administrator: accepts the FlexigoTech Cloud data list and the connector's consent.
- If you want it to work on its own, developer mode to switch on its scheduled tasks (chapter "Switching on the scheduled tasks").

You can connect HubSpot, Pipedrive or both: each CRM has its own token, direction and status.

> The connector does not create your HubSpot private app or your Pipedrive token: that is done in the CRM.

3 Installation

The module is installed like any third-party Odoo module. An administrator is needed.

How to get it

From its page on Odoo Apps (**https://apps.odoo.com/apps/modules/20.0/flexigo_hubspot_pipedrive_two_way_crm_sync_lite**) or from the connector's page on flexigotech.com. Choose the Odoo version you use: each version is a separate module.

The module depends on `flexigotech_cloud`, the connection to FlexigoTech Cloud. On Odoo Apps, the module page lists it under "Community Apps Dependencies" and its price already includes it; it is also free and has its own page (**https://apps.odoo.com/apps/modules/20.0/flexigotech_cloud**). Put both folders together in the same modules path and Odoo installs `flexigotech_cloud` at the same time.

On Odoo.sh

1. **Upload the folders to your repository**
   Copy `flexigo_hubspot_pipedrive_two_way_crm_sync_lite` and `flexigotech_cloud` into your project branch, in your modules folder, and push.
2. **Wait for Odoo.sh to build the branch**
   When it finishes, both modules are in the branch.
3. **Install the app**
   In **Apps**, click **Update Apps List** (with developer mode), search for "HubSpot/Pipedrive Two-Way CRM Sync Lite" and click **Activate**.

On your server

1. **Copy the folders**
   Leave `flexigo_hubspot_pipedrive_two_way_crm_sync_lite` and `flexigotech_cloud` in a folder that is on the `addons_path` of your Odoo.

2. **Restart Odoo**
   So that it reads the new modules.

3. **Install the app**
   In **Apps**, **Update Apps List**, search for "HubSpot/Pipedrive Two-Way CRM Sync Lite" and click **Activate**.

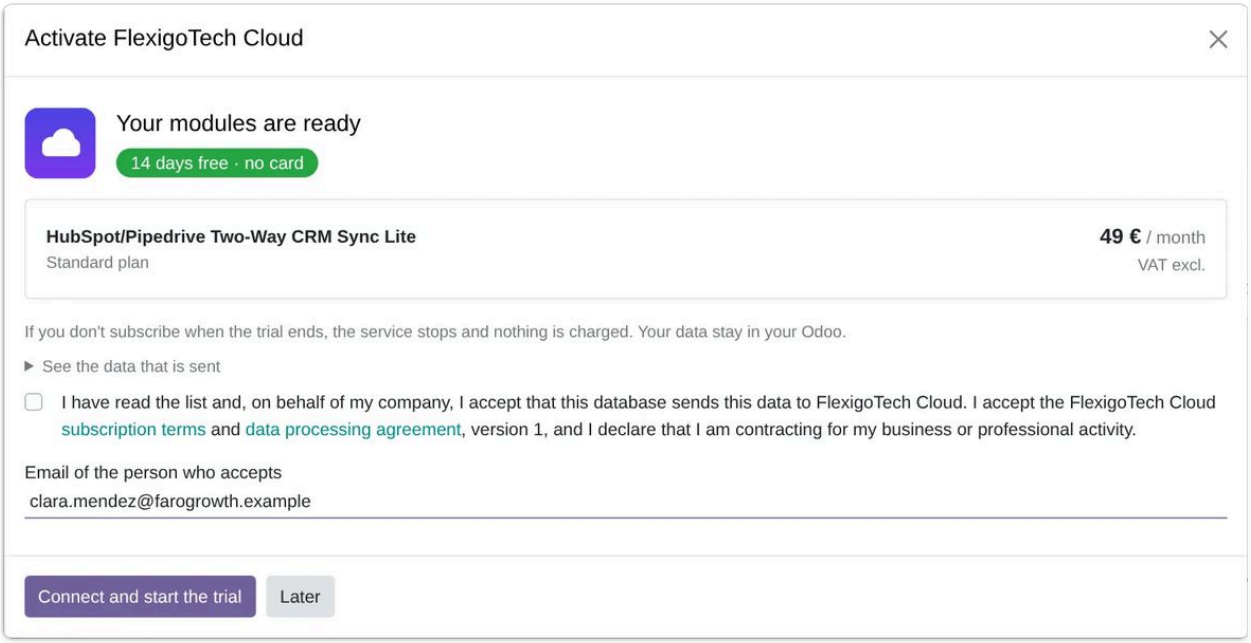
> When installing it, Odoo also installs the apps the module depends on: Contacts and Discuss. If you already use them, nothing you have changes.

USER MANUAL · HUBSPOT & PIPEDRIVE

4 Activating FlexigoTech Cloud: the 14-day trial

A new connection goes through FlexigoTech Cloud: your CRM token goes to the cloud once, encrypted, and the cloud puts it into each call to HubSpot or Pipedrive. Until the database is connected and the module has a trial or subscription, the connector does not talk to your CRM.

1. **Click Activate in the bar at the top**
   It appears as soon as you install the module. Open the **Activate FlexigoTech Cloud** window, with the Standard plan and its 14 free days, no card required.



- **Real Odoo 20 screenshot.** The activation window: read the data list, tick the box and enter your email.

2. **Accept and enter your email**

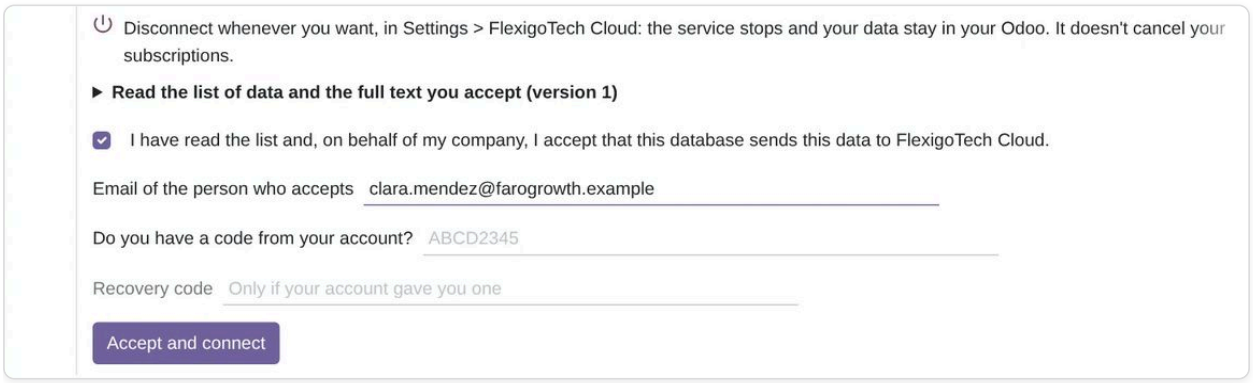
Tick "I have read the list and, on behalf of my company..." (it includes the subscription terms and the data processing agreement) and enter the **Email of the person who accepts**.

3 **Click Connect and start the trial**

Odoo registers the database with FlexigoTech Cloud and starts the module's trial. If you prefer to leave it for later, **Later** closes the window.

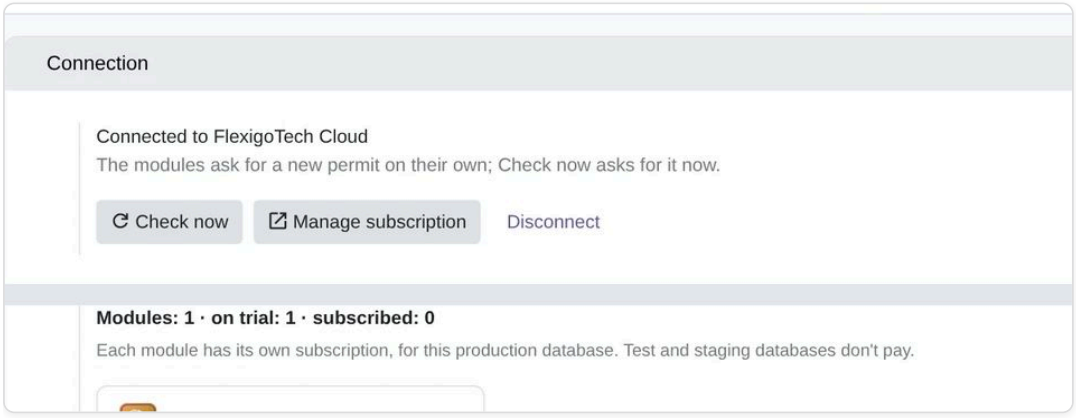
The same, from Settings

In **Settings › FlexigoTech Cloud** there is the full list of what the database sends. Tick the box, enter the email and click **Accept and connect**. If you already have an account at app.flexigotech.com, the field **Do you have a code from your account?** links the database to it (the code is valid for 10 minutes).



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud, before connecting: the ticked box, the email and **Accept and connect**.

With the database connected, the **Modules** block shows each module with its status: **On trial** and the date it ends, **Subscribed**, etc. From there you choose the plan (Standard or Pro, monthly or yearly) and click **Subscribe**: payment is made on the Stripe page, outside Odoo.



- **Real Odoo 20 screenshot.** Settings › FlexigoTech Cloud with the database connected and the connector on trial.

PLAN	PRICE	INCLUDES
Standard	€49 per month or €490 per year	Support response within 1 business day, up to 3 accounts
Pro	€98 per month or €980 per year	Response within 4 business hours, up to 10 accounts and a video call if needed

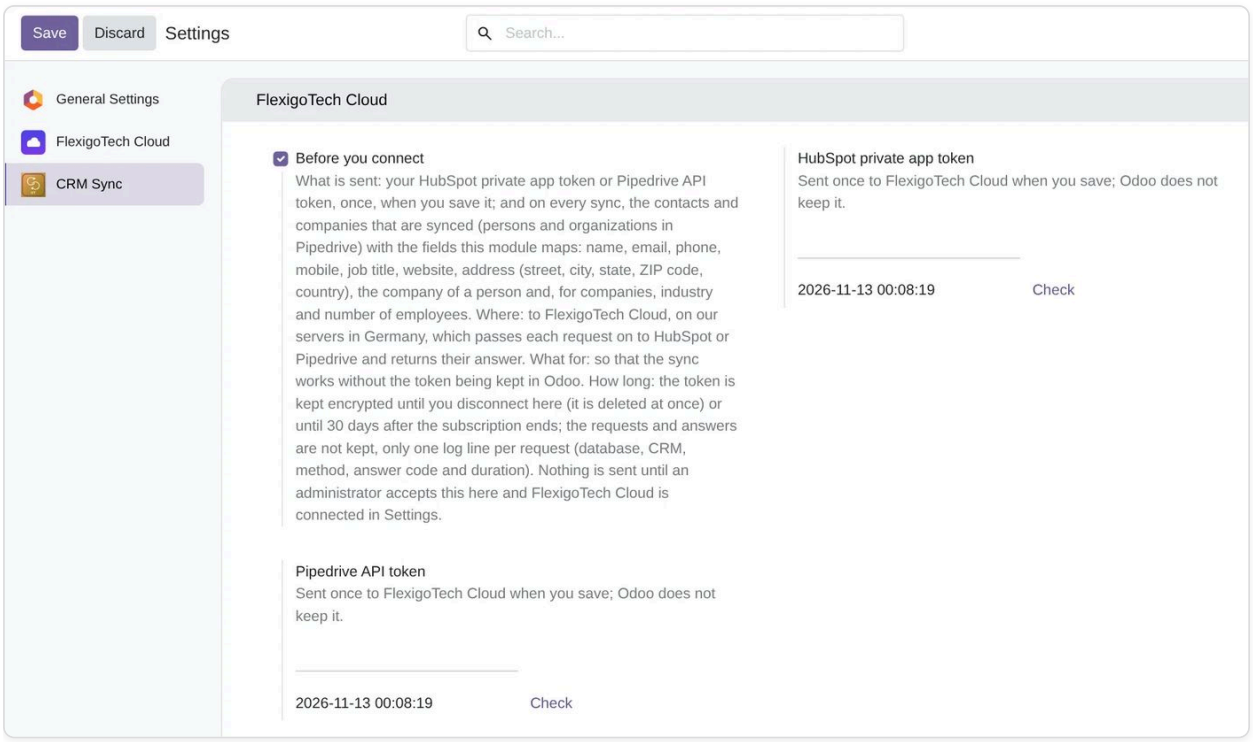
Prices exclude VAT. If you do not subscribe when the trial ends, the service stops and nothing is charged; your data stays in your Odoo. **Check now** asks for permission right away (otherwise the module renews it by itself every 6 hours).

> You cannot start a trial on a neutralised copy (staging) or on a database with demo data: Settings says so with "This database is a neutralised copy or has demo data, so trials can't be started here."

USER MANUAL · HUBSPOT & PIPEDRIVE

5 Connecting HubSpot or Pipedrive

Everything is done in **Settings › CRM Sync**, in the **FlexigoTech Cloud** block. An administrator is needed.



- **Real Odoo 20 screenshot.** The two tokens stored in FlexigoTech Cloud, each with its date and its **Check**.

1. **Read and tick Before you connect**

   The text says what is sent (the token, once, and in each synchronisation the contacts and companies with the fields from the map), where to (FlexigoTech Cloud, on our servers in Germany), what for and how long it is kept. Without this box, nothing is sent to the cloud.

2. **Paste the token**

   That of your HubSpot private app in **HubSpot private app token** or that of your user in **Pipedrive API token**. You can enter both.

3. **Click Save**

   The token goes to FlexigoTech Cloud and Odoo does not keep it: the field comes back empty and below it appears the date it was saved.

4. **Click Check**

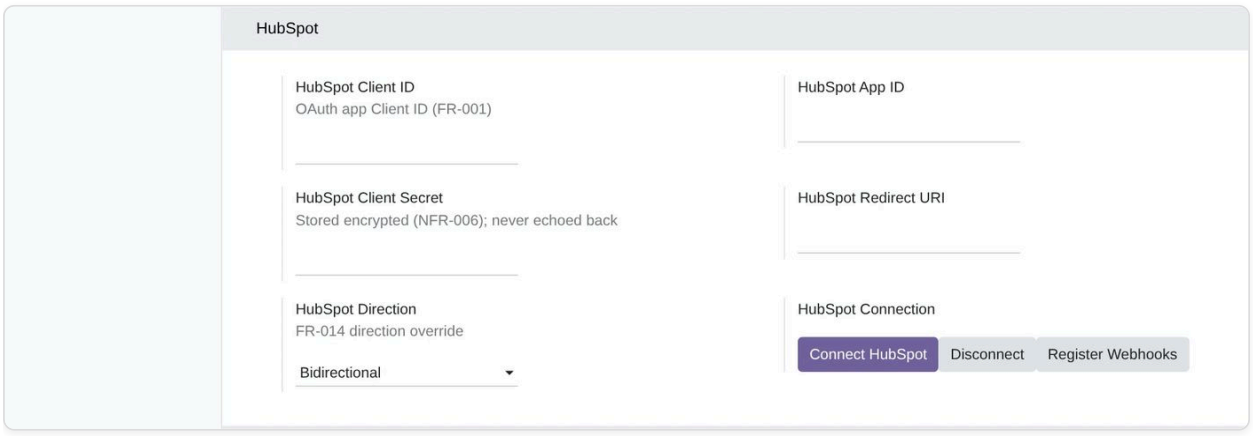
It tells you whether the token is stored in the cloud, when it was saved and when it changed.

Below, the **HubSpot** and **Pipedrive** blocks include OAuth fields (**HubSpot Client ID**, **HubSpot Client Secret**, **HubSpot Redirect URI**…) and the **Connect HubSpot** button. You don't need them: the connection is made with the token in the block above, and **Connect HubSpot** only reminds you of it.

> To change the token, paste the new one and save: it replaces the previous one in the cloud.

6 The direction of each CRM and the warnings

Each CRM has its own direction. It is chosen in that CRM's block, in **Settings › CRM Sync**.



- **Real Odoo 20 screenshot.** The HubSpot block of the settings: **HubSpot Direction** and, to the right, the connection buttons.

Bidirectional	This is the default. What comes in from the CRM comes in, and what you change in Odoo goes out.
Inbound only (External → Odoo)	Only comes in: Odoo sends nothing to that CRM.
Outbound only (Odoo → External)	Only goes out: the import, the reconciliation and the webhooks of that CRM bring nothing in.

Notification User, in the **General** block, is the person who receives the connector's warnings as activities: a token that needs re-authorising, a connection that fails three times in a row, or a contact that is no longer sent after five failures. If you leave it empty, the administrator receives them. For each type of warning, at most one is sent every 24 hours, so the inbox does not fill up.

7 Switching on the scheduled tasks

The module comes with its 8 scheduled tasks switched off and nothing switches them on. Without them, the buttons work, but nothing leaves the queue and there is no hourly reconciliation.

1. **Activate developer mode**

   In **Settings**, at the very bottom, is the link to activate it.

2. **Open Settings › Technical › Scheduled Actions**

   Search for "CRM Sync". As they come switched off, they are among the archived ones: add that filter in the search bar.

3. **Switch on the ones you want**

   Open each one, tick **Active** and save. The minimum for it to work on its own: **CRM Sync: Process Queue** and **CRM Sync: Reconciliation Sweep**.

TASK	FREQUENCY	WHAT IT DOES
CRM Sync: Process Queue	Every minute	Sends Odoo's changes to the CRM and applies what arrived by webhook.
CRM Sync: Reconciliation Sweep	Every hour	Reads back up to 500 linked contacts from the CRM.
CRM Sync: Connection Health Check	Every 30 minutes	Tests the connection and raises an alert on the third consecutive failure.
CRM Sync: Flush Audit Buffer	Every minute	Writes to the log what is waiting in memory.
CRM Sync: Purge Old Audit Logs	Every day	Deletes log lines older than 90 days.
CRM Sync: Purge Resolved Conflicts	Every day	Deletes resolved conflicts older than 90 days.
CRM Sync: Purge Done Queue Items	Every day	Removes completed items from the queue that are older than 7 days.
CRM Sync: Bulk Import	Every day	Imports everything from both CRMs. Better to leave it switched off and use the buttons.

> Scheduled tasks you switch on by hand stay on when you update the module: the file that creates them is not loaded again.

8 The first import

The **Import HubSpot** and **Import Pipedrive** buttons on the dashboard bring everything from that CRM into Odoo, page by page.

1. **Open CRM Sync › Dashboard**

   The dashboard shows **HubSpot State** and **Pipedrive State**: it must say **connected** for the CRM you are going to import from.

2. **Press Import HubSpot or Import Pipedrive**

   From HubSpot it brings in contacts and companies; from Pipedrive, persons and organisations. Each one becomes an Odoo contact with its CRM ID in the **CRM Sync** tab.

3. **Repeat it whenever you like**

   The next import finds the contact by its CRM ID and updates it, field by field.

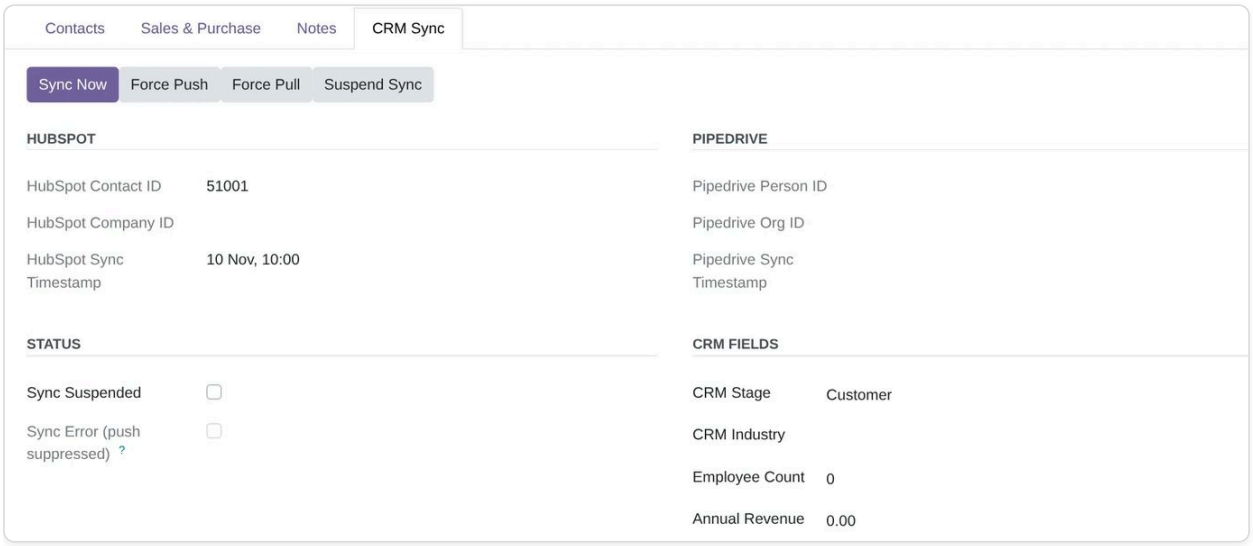
What currently goes wrong in the first import

- A HubSpot contact comes in with its email as the name. HubSpot's first and last name are stored in **CRM First Name** and **CRM Last Name**, in the **CRM Sync** tab, and you have to copy them into the name by hand.
- The first import raises an **Empty Field Guard** conflict for each field that is empty on both sides (website, street, state, sales rep...). No data changes: you can resolve them all at once with **Keep Odoo Value** (chapter "Conflicts").
- In Pipedrive, a person's email and phone arrive in the format of its API and are stored as they are, as text like "[{'value': ..., 'primary': True}]". They need to be cleaned up on the contact.
- The import only recognises a contact by its CRM ID. If that contact already existed in Odoo without an ID, the import creates another one: you should merge the duplicates afterwards.
- HubSpot companies and Pipedrive organisations come in as individual contacts, without the company checkbox.

> All of this is noted to be fixed in the module. In the meantime, if your CRM has many contacts, write to us before the first import and we will help you prepare it.

9 The CRM Sync tab of each contact

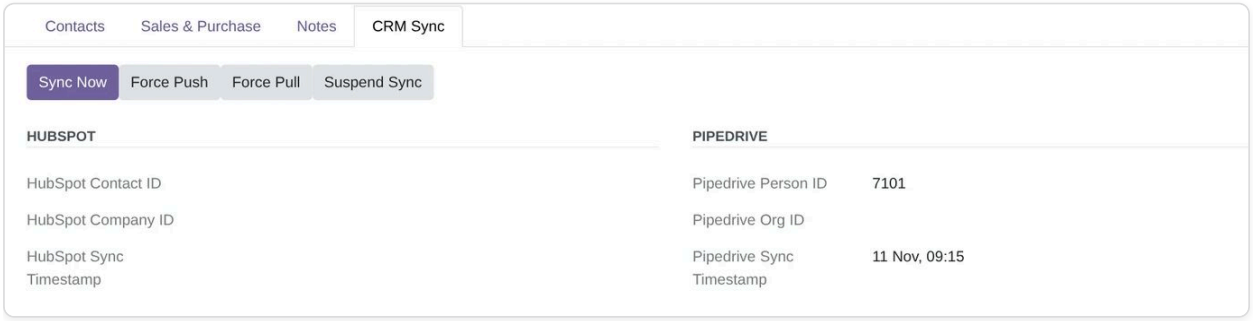
Every Odoo contact has the **CRM Sync** tab: which CRM record it is linked to, and the buttons to synchronise it manually.



- **Real Odoo 20 screenshot.** A contact linked to HubSpot: its buttons, its **HubSpot Contact ID** and the last synchronisation.

Sync Now	Fetches this contact's data from the CRM and decides it field by field.
Force Push	Sends all the fields in this contact's map to the CRM, without comparing dates. **CRM Sync / Admin** only.
Force Pull	Fetches this contact's data from the CRM and overwrites Odoo's, without comparing dates. **CRM Sync / Admin** only.
Suspend Sync	Stops sending changes of this contact to the CRM until **Resume Sync**.

Below, the IDs of each CRM (**HubSpot Contact ID**, **HubSpot Company ID**, **Pipedrive Person ID**, **Pipedrive Org ID**) with the date of their last synchronisation, the status (**Sync Suspended** and **Sync Error (push suppressed)**) and the fields that come from the CRM: **CRM Stage** (the HubSpot lifecycle stage), **CRM Industry**, **Employee Count** and **Annual Revenue**.



- **Real Odoo 20 screenshot.** A contact linked to Pipedrive, with its **Pipedrive Person ID**.

To suspend or resume many at once: in the **Contacts** list, select them and, under **Actions**, choose **CRM Sync: Suspend** or **CRM Sync: Resume**.

> **Sync Error (push suppressed)** is set automatically when a contact fails five times when sending to the CRM: from then on it is not sent. Correct the data and clear the flag.

10 What travels in each direction

The field map is fixed: no fields are added and their pairings are not changed.

HubSpot contacts

HUBSPOT FIELD	ODOO FIELD	DIRECTION
firstname, lastname	**CRM First Name**, **CRM Last Name**	Both ways
email, phone	Email, phone	Both ways
mobilephone	Mobile (only in Odoo 17 and 18: Odoo 19 and 20 do not have that field)	Both ways
jobtitle, website	Job title, website	Both ways
address, city, zip	Street, city, postcode	Both ways
state, country	State, country (by name)	Both ways
lifecyclestage	**CRM Stage**	Inbound only
hubspot_owner_id	Sales rep	Inbound only

HubSpot companies

HUBSPOT FIELD	ODOO FIELD	DIRECTION
name, domain, phone	Name, website, phone	Inbound only
address, city, state, zip, country	The address	Inbound only
industry, numberofemployees	**CRM Industry**, **Employee Count**	Inbound only
annualrevenue	**Annual Revenue**	Inbound only

Pipedrive persons and organisations

PIPEDRIVE FIELD	ODOO FIELD	DIRECTION
first_name, last_name	**CRM First Name**, **CRM Last Name**	Both ways
email, phone, mobile	Email, phone, mobile	Both ways
org_id, owner_id	Company, sales rep	Inbound only
Organisation: name, address, phone	Name, address, phone	Inbound only
Owner: owner_id	Sales rep	Inbound only

Only contacts and people leave Odoo: companies and organisations only come in. Opportunities, notes, activities and custom fields are not synchronised.

> Country, province, company and sales rep are looked up by name in Odoo. If it cannot find one (a country written in a different way, for example), that field is skipped and everything else carries on.

11 How each field is decided

When something changes on both sides, the connector does not pick a whole record: it decides field by field.

- It compares the date of the last change in the CRM with the date of the last sync of that contact in Odoo.
- The most recent one wins. If the two are within 2 seconds of each other, they count as equal and nothing is touched.
- An empty value never overwrites a filled one: instead, it opens a **Empty Field Guard** conflict in **Conflicts**.
- Every decision is recorded: which field, who won and what changed.

So if your sales team changes a phone number in HubSpot while someone in Odoo corrects the address, both changes are kept. And if someone empties a field in the CRM by mistake, the data in Odoo is not lost.

12 The queue

CRM Sync › Sync Queue holds what is waiting to go out to the CRM or to come into Odoo.

Inbound Webhook	Priority 1: what arrived by Pipedrive webhook. It goes first.
Outbound Push	Priority 10: a change to a linked contact that you made in Odoo.
Reconciliation	Priority 20: what the reconciliation needs to review.

When you save a linked contact, its change enters the queue as **Outbound Push**, with the fields from the map at that moment. The **CRM Sync: Process Queue** task empties it every minute, within the rate each CRM allows: HubSpot, 100 calls every 10 seconds; Pipedrive, 10 per second.

If an outbound push fails, it is retried after 2, 4 and 8 seconds. On the fourth failure it stays in **Error** with the CRM's message in **Error Message**. Completed and failed items are deleted after 7 days.

> With **CRM Sync: Process Queue** switched off, the queue grows and nothing goes out: changes wait in **Pending** until you switch it on or press **Force Push** on the contact.

13 Conflicts

CRM Sync › Conflicts gathers the fields that the connector has not wanted to decide on its own.

Each conflict shows the contact, the CRM, the field, the type, the value in Odoo and the value in the CRM. At present the connector only opens conflicts of the **Empty Field Guard** type: one side has the data and the other is empty.

1. **Select the conflicts**
   One or many, in the list.

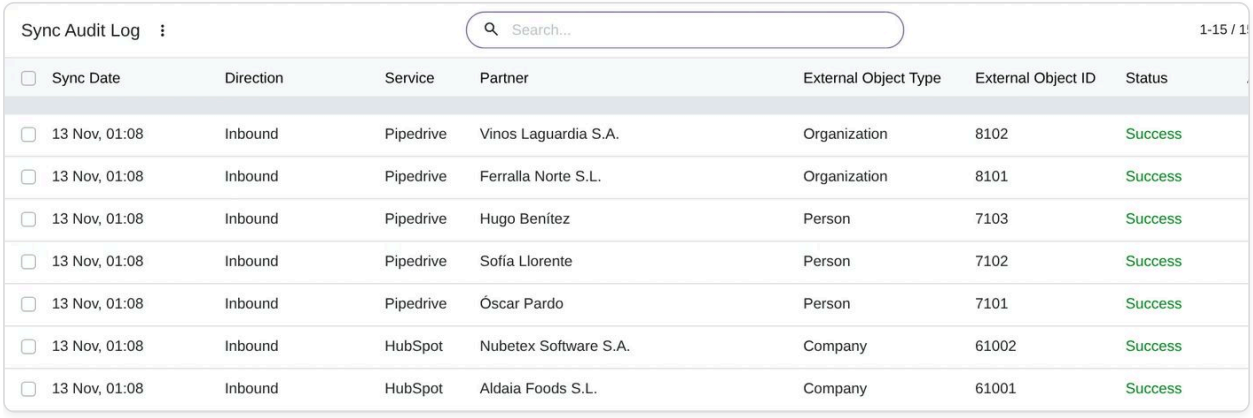
2. **In Actions, press Resolve Conflicts**
   A window opens with the selected ones.

3. **Choose which value stays**
   Keep Odoo Value (as it appears), **Keep External Value** or **Manual Value**, which you type yourself. When applied, the value is written to the contact and the conflict is marked resolved with your user and the time.

A contact has at most 10 unresolved conflicts: further ones are not recorded until you resolve some. Resolved ones are deleted after 90 days.

14 The audit log

CRM Sync › Audit Log records every sync: date, direction, CRM, contact, record type, its ID and how it ended.


Sync Audit Log

Search...

1-15 / 1

Sync Date	Direction	Service	Partner	External Object Type	External Object ID	Status
13 Nov, 01:08	Inbound	Pipedrive	Vinos Laguardia S.A.	Organization	8102	Success
13 Nov, 01:08	Inbound	Pipedrive	Ferralla Norte S.L.	Organization	8101	Success
13 Nov, 01:08	Inbound	Pipedrive	Hugo Benítez	Person	7103	Success
13 Nov, 01:08	Inbound	Pipedrive	Sofía Llorente	Person	7102	Success
13 Nov, 01:08	Inbound	Pipedrive	Óscar Pardo	Person	7101	Success
13 Nov, 01:08	Inbound	HubSpot	Nubetex Software S.A.	Company	61002	Success
13 Nov, 01:08	Inbound	HubSpot	Aldaia Foods S.L.	Company	61001	Success

- **Real Odoo 20 screenshot.** The log after importing from both CRMs: people and organisations from Pipedrive, and companies from HubSpot.

Inbound and Outbound	What came into Odoo and what went out to the CRM.
Orphan	A linked contact whose record no longer exists in the CRM. It stays in Odoo.

GDPR Erasure	A linked contact that you deleted in Odoo. It keeps its CRM IDs, so you can delete it there if you wish: the connector does not delete anything in the CRM.
Transfer Disclosure	The acceptance of the notice on the transfer of data to the USA.

Opening a line shows what was decided for each field and which fields changed. Lines are deleted after 90 days.

> Most entries are first held in memory and written by the **CRM Sync: Flush Audit Buffer** task every minute (or when it reaches 500 lines). Without that task running, the log falls behind.

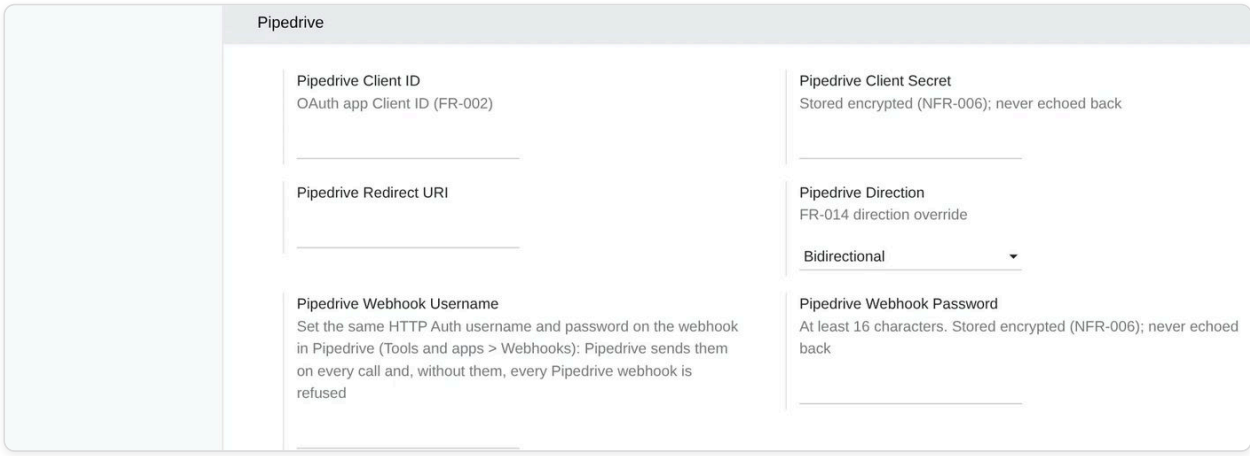
15 Webhooks

With webhooks, a change in the CRM enters the queue immediately, without waiting for the reconciliation. The module does not register them automatically: **Register Webhooks** does not register anything in either CRM.

Pipedrive

1. **Set the username and password in Odoo**

   In **Settings › CRM Sync**, **Pipedrive** block: **Pipedrive Webhook Username** and **Pipedrive Webhook Password**, at least 16 characters each. Save.



- **Real Odoo 20 screenshot.** The Pipedrive block: the direction and the username and password for its webhooks.

2. **Create the webhook in Pipedrive**

   In Pipedrive, in its webhooks, one for people and one for organisations, pointing to **https://your-odoo/crm_sync/pipedrive/webhook**, with the same username and password.

3. **Switch on CRM Sync: Process Queue**

   What arrives waits in the queue as **Inbound Webhook** until that task applies it.

A person deleted in Pipedrive is not deleted in Odoo: a line is left in the log. While the connector is paused, notifications are ignored and picked up by the next reconciliation.

HubSpot

Odoo has the address for HubSpot webhooks, but at present it does not verify their signature as HubSpot sends it (version 3) and would reject them. With HubSpot, rely on the hourly reconciliation and on **Sync Now**.

16 If you cancel the subscription, disconnect or uninstall

Your contacts in Odoo are not deleted in any of these three cases.

Without trial or subscription	Synchronisation is paused: no calls go out and nothing is marked as failed. It resumes on its own when you renew. The token is kept for up to 30 days after the subscription ends.
Disconnect	**Disconnect** deletes the FlexigoTech Cloud token immediately, whether or not there is a subscription.
Uninstall	When the module is uninstalled, Odoo asks the cloud to delete the tokens. The contacts stay in Odoo; the module's fields (the CRM IDs and the CRM Sync tab) go with it.

17 If something goes wrong

What usually happens and where to look.

The panel says disconnected	The token or the consent is missing: **Settings › CRM Sync**, **Check**.
The queue is not going down	**CRM Sync: Process Queue** is switched off (as it appears). Switch it on.
HubSpot Last Check says never	**CRM Sync: Connection Health Check** is switched off.
A contact does not go out to the CRM	Check **Sync Suspended**, **Sync Error (push suppressed)** and the CRM's direction.
An outbound push in Error	Open it in **Sync Queue**: **Error Message** shows what the CRM replied.
Many conflicts after importing	These are the empty fields on both sides: **Resolve Conflicts** with **Keep Odoo Value**.

A pause in FlexigoTech Cloud does not delete anything or disconnect the CRM: when the service returns, everything carries on where it left off.

18 Support

Write to us to install it, configure it or with any question. On the Standard plan we reply within 1 working day; on the Pro plan, within 4 working hours, and if needed we can go through it by video call. Tell us your Odoo version, the module version and, if there is an error, its full text.

Email

To install it, set it up or for any question.
comercial@flexigotech.com

On the web

The connector page, with the guide and the prices.
flexigotech.com/en/crm-sync-hubspot-pipedrive-odoo.html

On Odoo Apps

The module page on the Odoo store.
apps.odoo.com

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