

Automating 1k credit checks / day in HubSpot — Synced with the erp

How we helped a financial services firm push live credit data into HubSpot — kept in sync with their ERP every 30 minutes



1k credit checks / day



Synced every 30 min



15 hours of manual work saved / month

Commercial teams worked in HubSpot. Finance and delivery worked in an ERP whose integration surface is licensed and switched on by the vendor, one customer at a time. The only supported path in was the vendor's own plugin, polling the CRM on a schedule. Two things had to be solved upstream: reliable record matching, and external credit data arriving at the moment it mattered.

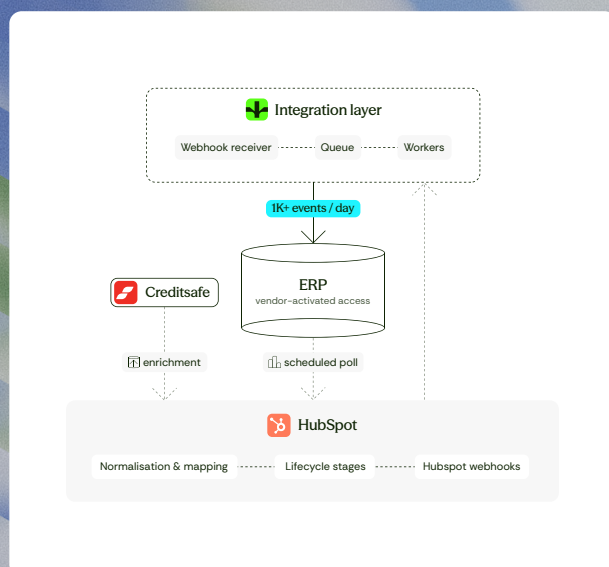
Constraints →←

Vendor-activated API access

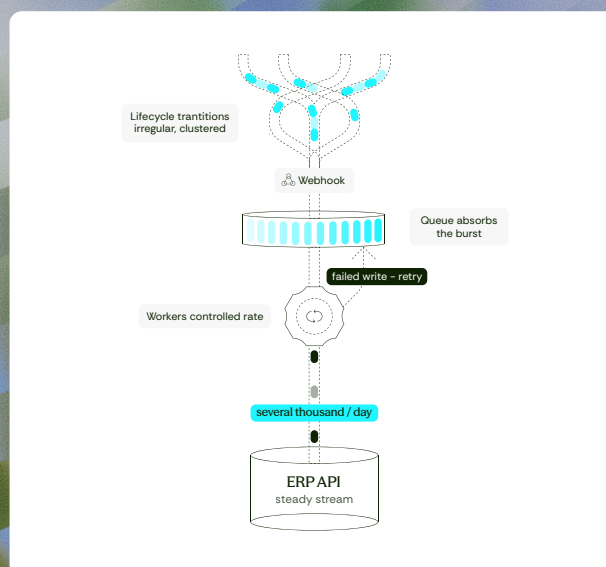
Matching logic owned by the vendor plugin

Write bursts to avoid hitting ERP rate limits

Normalise upstream.
Enrich downstream.



Bursts in. Steady stream out.
Several thousand enrichment writes a day.



Solutions ✓

1 Deterministic Matching

Unique identifiers on every company record, and a normalised address pattern enforced in HubSpot before the plugin reads it. Field mapping rationalised across both systems — once as a cleanup, then as a standing rule.

2 Event-Driven Enrichment

A lifecycle transition fires a webhook. The payload queues. Workers drain it at a pace that stays within the ERP's rate limits. Several thousand enrichment writes a day at peak, and the ERP

The Benefits Gained +

- + Credit data where the commercial team already works
- + One client record in the ERP, not a duplicate estate
- + ~15 hours a month of manual entry and lookups removed
- + No ERP change: no vendor negotiation, no new licence

Data problems shaped like this one?

datsugi.com