Learn Like a Pro: Associations
Association Terminology & Use Cases

The purpose of this reference guide is to familiarize yourself with the terminology we use when talking about associations in HubSpot.

You'll find some typical use cases to see how associations give you the ability to customize your instance of Hubspot.

Key Terminology

Object

Represents a type of data in HubSpot.

E.g. Foundational, standard objects of HubSpot CRM are contacts, companies, deals, and tickets.

Other object types include engagements, products, quotes, and custom objects created by users.

Record

The specific instance of an object.

There can be any number of records in a HubSpot account.

E.g. "John Doe" is an example of a contact record, not a contact object.

Association

Represents a connection (a relationship, transaction, or interaction) between objects in HubSpot.

To keep track of connections between objects, you can associate records together.

Association Definition

An association definition is a relationship between two objects in the HubSpot framework.

E.g. Contacts and companies.

Association Instance

An association instance represents a specific relationship connecting two records.

E.g. Maggie is associated with HubSpot.

Association Label

Optional field that 'labels' the connection between two records
(i.e. how or why they're associated with each other).

E.g. Jeff could have the label 'mostly a nuisance' on his association with HubSpot.
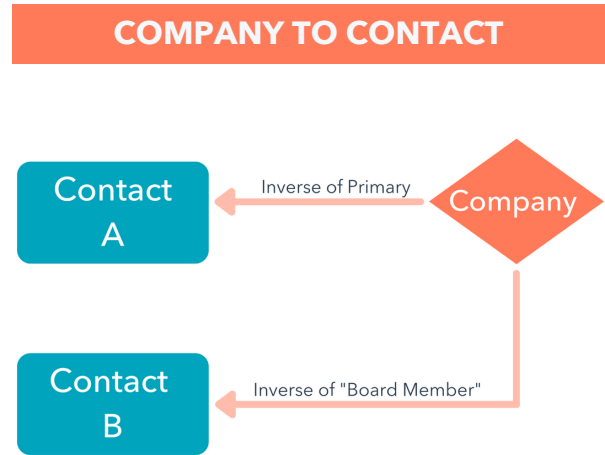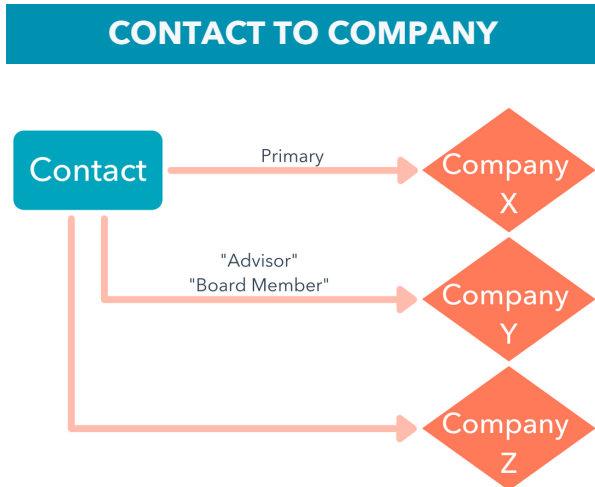
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Contact to Company Associations   *The Big Fish of Associations*

Contacts can associate with multiple different companies, and those specific associations can come with really unique labels.

The first company becomes the 'Primary' association, but this can be changed.

CONTACT TO COMPANY

Contact —Primary→ Company X

Contact —"Advisor" "Board Member"→ Company Y

Contact → Company Z

COMPANY TO CONTACT

Contact A ←Inverse of Primary— Company

Contact B ←Inverse of "Board Member"— Company

Deal to Company / Ticket to Company

Like contact to companies, often there is more than one company tied to a deal or ticket.

With associations, our goal is to add a lot of the same functionality with contacts; the ability to have a primary company, the ability to add multiple companies to a deal, or ticket, the ability to add custom labels.

There are 10 labels per association definition.

The deal to company and ticket to company association types are more customisable.

- The first company added will be identified as the primary
- Multiple companies can be added in the UI to a deal or ticket
- Custom labels can now be applied to these associations
- Multiple labels can be applied per association paid

Deal / Ticket —Primary→ Company A

Deal / Ticket —"Subcontractor"→ Company B
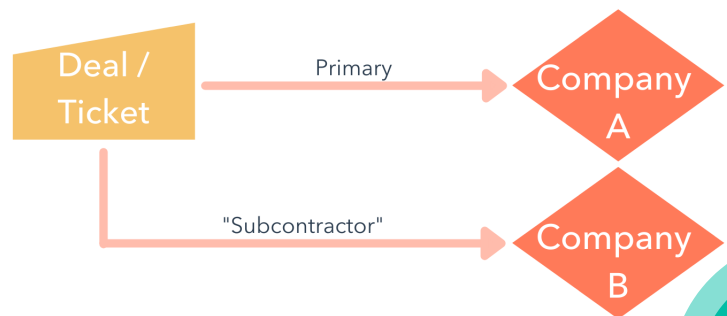
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Below is a non-exhaustive list of use cases for why you would want to use associations to customize your HubSpot instance.

Company : Contact

Former Employer	Tracking where a contact used to work, for inside sales teams to identify leads already familiar with the platform.
Advisor	For coaching and education-based offerings to track who is being mentored by their different partner companies.
Board Member / Investor	To track non-employee influencer relationships between a person and a company.

Company : Deal / Ticket

Partner / Service Provider	Track who is helping out in closing the deal.
Re-seller	Track who is doing the actual selling of a particular deal.

Contact : Deal

Buyer roles	For assigning the different roles people can have in the buying process. For ensuring a decision-maker exists, for instance.
Lead / Secondary	Separating who is truly involved in the deal from additional people tangentially involved.
Seller roles	Track the different people on the seller-side and their involvements. Has come up most for more involved Enterprise deals.

Contact : Contact

Pod X	For connecting teammates who frequently work together.
Parent / Child	Potential future upgrades to association hierarchy to come, but simply showing the connection between two contacts.
Advisor	For coaching and education-based offerings to track who is being mentored by their different partner companies.

Company : Company

Agency	For displaying the universe of related entities a company may be engaged with.
Related	For showing non-hierarchical relationships between regional offices, related companies, etc.