

Zoom Events / HubSpot Integration Guide



Events

User Guide



- **General installation and Setup**
- **Registration from HubSpot workflow**
- **Workflow triggers**
- **Using HubSpot + Zoom Events**
- **Common Errors**

HubSpot Integration Overview

1) Register contacts from a HubSpot workflow

- Add registrants to a Zoom Event from a HubSpot workflow
- Automatically assign the relevant event ticket

2) Add registrants and attendees to HubSpot workflows

- Automatically enroll registrations to a selected Workflow
- Automatically enroll attendees to a selected Workflow
- People are added as new contacts if they don't already exist

3) Map registration fields and send join link to Contact fields

- In HubSpot configuration map HubSpot contact fields to Zoom Events registration fields
- Join link automatically added to a contact field



General Installation and Setup

The overall Zoom Account Admin can install the HubSpot app from the Zoom App Marketplace. Search “HubSpot” in the search toolbar. Click “Zoom Events for HubSpot”

The screenshot displays the Zoom App Marketplace interface. On the left, a sidebar contains navigation options under 'Categories' (Analytics, Broadcasting & Streaming, Business System Integrator, CRM, Carrier Provider Exchange, Collaboration, More) and 'Featured' (New, Essential Apps, Conversational AI, Apps built by Zoom, Apps for Zoom Events, Apps for Team Chat). Below this is a 'Filters' section with 'App Types' (Zoom Apps: 229, Integrations: 2333) and 'Zoom Products' (Zoom Meetings: 2302, Zoom Marketplace: 911). The main content area features a search bar with 'hubspot' entered. Below the search bar, a 'Discover apps' section shows a list of search results: 'Zoom for HubSpot', 'Zoom Phone for HubSpot', 'HubSpot App for Zoom Meetings', 'Zoom Events for HubSpot', and 'PandaFlow - Sync Zoom with Salesforce or HubSpot'. A blue box highlights the 'Zoom Events for HubSpot' result. Below this, an 'Essential Apps' section is visible, featuring three app cards: 'Just click to highlight, AI does the rest', 'With Microsoft the AppSearch?', and 'This is Code'.



App Marketplace > Zoom Events for HubSpot



Zoom Events for HubSpot

By Zoom
[View developer profile](#)

Add

Open the app listing and click “Add”

Overview

Requirements

Permissions

Scopes

Developer resources

Manage

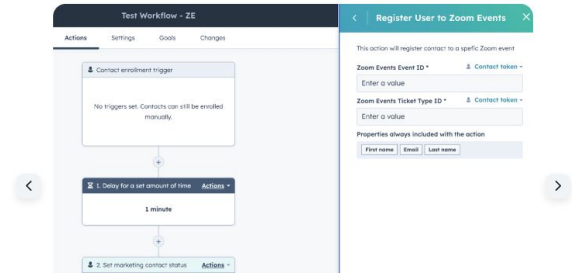
Overview: what is Zoom Events for HubSpot ⓘ

CRM Marketing

Built specifically for virtual and hybrid events, Zoom Events features innovative tools to showcase your content, connect attendees, and keep your audiences engaged.

With Zoom Events for HubSpot you can seamlessly register event attendees from HubSpot workflows to multi or


Show more




Click "Allow"





You are about to add Zoom Events for HubSpot

 wrenludlow.pr@gmail.com [Switch Account](#)


 App can access and manage this information even when not using the app.

App can view information

App can view information

-  Profile & Contact Information >
-  Settings >

App can view information

-  Product Usage >

By clicking Allow, you give permission to this app to use your information in accordance with their [Terms](#) & [Privacy Policy](#). You can remove this app at any time in [My Apps](#).

[Allow](#) [Decline](#)

Choose an account (if applicable).



Connecting **ZoomEvents for HubSpot** to **HubSpot**

ZoomEvents for Hubspot by zoom.us

Choose an account

NAME	DETAILS
<input type="radio"/> Wren test account 2	Wren test account 2-dev-40169511.com 40169511
<input type="radio"/> Wren ZE / Hubspot test account	ZE / Hubspot test account 1-dev-24118161.com 24118161
<input type="radio"/> Zoom Video Communications	hubspot-developers-1ubaiws.com 23398319
<input type="radio"/> Zoom Video Communications	hubspot-developers-1qiicy.com 20895134

Choose Account

Click “Connect app”



Connecting ZoomEvents for HubSpot to HubSpot

You're connecting an unverified app

This app's details haven't been reviewed or verified by HubSpot. Make sure you trust the developer before connecting it to your account.

ZoomEvents for Hubspot

This app is requesting access to your HubSpot account. Continue connecting if you agree.

Manage and view your CRM data

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 details about marketing events.
Create, delete, or make changes to marketing events.

View details about property settings for contacts.
Create, delete, or make changes to property settings for contacts.

View details about custom object definitions in the CRM.

Workflows

This includes workflows.

Basic HubSpot account information

This includes your user email address and the account's primary domain.

Connect app

Cancel



Once the app is successfully installed a success confirmation message will be shown.

The HubSpot for Zoom Events app has been installed. You may now close this window or click the button below to configure your events.

[Configure Events](#)

Important notes

- The Admin installing the integration app needs to be added as a Hub Host to the Zoom Events hubs. Without this the integration won't be able to access individual events or sessions.
- To open the app configuration page the HubSpot marketer needs to have a licensed Zoom account under the Zoom admin account that installed the app

Register contacts from a workflow action



Create a Workflow with a trigger
(example: form submission)

The screenshot shows a workflow editor interface. At the top, there is a dark header with a back arrow and the text "Back to workflows". The main title of the workflow is "External registration to a Zoom Event" with an edit icon. To the right of the title, it says "Workflow is OFF" and a "Review and publish" button. Below the header, there are tabs for "Alerts", "Details", "Actions", "Settings", "Goals", and "Changes". The "Actions" tab is currently selected. In the top right corner of the editor area, there are buttons for "Clean up", "Test", and "More".

The main workspace shows a workflow diagram. It starts with a "Contact enrollment trigger" block. A pop-up window titled "Contact enrollment trigger" is open, showing the configuration for this trigger. The configuration includes the text "Events that will trigger this workflow:" followed by a box containing "Form submission" and "Form name is any of Event Registration Form 1". Below this, there is a checkbox labeled "Only enroll each contact once" which is currently checked. A plus sign (+) is located below the trigger block, indicating where to add the next step in the workflow. The workflow ends with an "END" block.

At the bottom right of the interface, there are two buttons: "Explore Operations Hub" (orange) and "Help" (blue).

Add an action step in the workflow.
Choose the action called
“ZoomEvents for HubSpot”

The screenshot displays a workflow editor interface. At the top, it shows "Back to workflows" and "Unnamed workflow - Fri Sep 8 2023 14:55:43 GMT+0000". Below the header, there are tabs for "Alerts", "Details", "Actions", "Settings", "Goals", and "Changes". A "Review and publish" button is visible in the top right corner.

The left sidebar, titled "Choose an action", lists various actions categorized into:

- Remove from audience
- Set marketing contact status
- Ads management
 - Add to ads audience
 - Remove from ads audience
- Property management
 - Set property value
 - Copy property value
 - Copy company property value
 - Clear property value
 - Increase or decrease property value
 - Manage email subscription status
- Zoom
 - Add Contact to Zoom Webinar
- ZoomEvents for HubSpot
 - Register User to Zoom Events

The "Register User to Zoom Events" action is highlighted with a blue border. The main workspace shows a workflow diagram starting with a "Contact enrollment trigger" (Action: Contact enrollment trigger) which triggers the workflow. Below the trigger, there is a box for "Events that will trigger this workflow:" containing "Form submission" with "Form name is any of Event Registration Form 1". A checkbox "Only enroll each contact once" is present. The workflow continues to a "New action" step, followed by an "END" node.

At the bottom right, there are buttons for "Explore Operations Hub" and "Help".

Configure the action and add the Event ID and Ticket Type ID from the Zoom Event. This is for single-session events and multi-session events.

The screenshot displays the Zoom workflow editor interface. At the top, a dark header bar contains the text "Back to workflows", "Unnamed workflow - Fri Sep 8 2023 14:55:43 GMT+0000", "Workflow is OFF", and "Review and publish". Below the header, there are tabs for "Alerts" and "Details", and a sub-header for "Register User to Zoom Events" with "Cancel" and "Save" buttons. The main configuration area on the left includes a description: "This action will register contact to a specific Zoom event". It features two input fields: "Zoom Events Event ID *" and "Zoom Events Ticket Type ID *", both with a "Contact token" dropdown menu and an "Enter a value" text box. Below these is a section "Properties always included with the action" with three checkboxes: "First name", "Email", and "Last name". The right side of the interface shows a workflow diagram with a "Contact enrollment trigger" box containing "Events that will trigger this workflow:" and "Form submission" (with "Form name is any of Event Registration Form 1"). Below the trigger is a "New action" box, and at the bottom is an "END" node. The bottom right corner has "Explore Operations Hub" and "Help" buttons.

Add additional Workflow steps as desired. Click “Review and publish”.

***it is recommended to test the registration flow end-to-end before broad promotion**

The screenshot displays a workflow editor interface. At the top, there is a dark header with a back arrow and the text "Back to workflows". To the right of the header, it says "Unnamed workflow - Fri Sep 8 2023 14:55:43 GMT+0000" and "Workflow is OFF" with a "Review and publish" button. Below the header, there are tabs for "Alerts", "Details", "Actions", "Settings", "Goals", and "Changes". The "Actions" tab is selected. On the left side, there are zoom controls (+, -) set to 100% and a "Show minimap panel" link. The main workspace shows a vertical flow of steps connected by plus signs. The first step is a "Contact enrollment trigger" with a dropdown menu for "Actions". Below it, a box lists "Events that will trigger this workflow:" with "Form submission" and "Form name is any of Event Registration Form 1". A checkbox option "Only enroll each contact once" is also present. The second step is "1. Register User to Zoom Events" with a dropdown menu for "Actions" and the text "Zoom Events Registration". The third step is "2. Delay" with a dropdown menu for "Actions" and the text "2 hours". The flow ends with an "END" node in a green circle. At the bottom right, there are buttons for "Explore Operations Hub" and "Help".

Check the enrollments history to verify if contacts are moving through the workflow. HubSpot will show errors if a contact fails to go through the action step.

The screenshot displays the HubSpot workflow editor for "External registration to a Zoom Event". The workflow consists of the following steps:

- Contact enrollment trigger**:
 - Events that will trigger this workflow:
 - Form submission
 - Form name is any of Event Registration
 - Form 1
 - Only enroll each contact once
- 1. Register User to Zoom Events**: Zoom Events Registration
- 2. Delay**: 2 hours Active contacts in this action
- END**

The right-hand panel shows the "Enrollment history" for this workflow. It includes a date range selector (MM/DD/YYYY to MM/DD/YYYY) and a "Select a contact" dropdown. Below this, a table lists the enrollment details for a contact:

CONTACT	TIME
Wren Ludlow (wren.test1900@gm..)	Sep 9, 2023 11:05 AM EDT

The contact is noted as "Enrolled in workflow".

Registrants from the HubSpot workflow are immediately registered and visible in the Zoom Event. You can check by clicking “Manage Registrants” and checking the registrant name.

Zoom Events Integrations 2.0
Dec 4, 2023 12:00 AM - Dec 6, 2023 12:01 AM CST

Published Dates & Links See More

NEW Email Builder
See What's New

Overview

Event Configuration

Event Branding

Event Detail Page

Registration

Event Access

Tickets and Registration

Manage Registrants

Event Experience

Event Content

Special Roles

Post Event

Analytics

Communication

Manage Registrants

Registration Tools

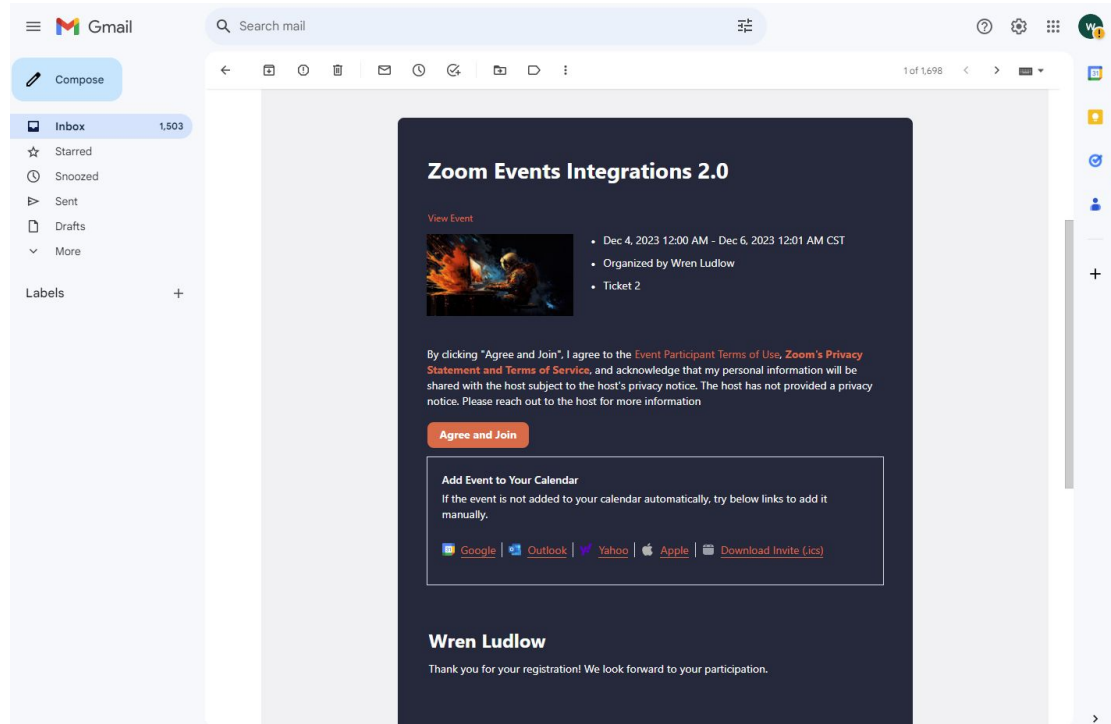
Registrants Orders Refunds

Search registrant by name or email All Tickets All Registration Status Export Registrants Pre-register Guests

Name	Email	Ticket	Registration Status
Thursday Test	thursday.test@zoom.us	Ticket 3	Pre-registered
Wren Ludlow	wren.test1900@gmail.com	Ticket 2	Pre-registered

< 1 2 3 > 42 results

By default a confirmation email will be sent to registrants. See “Pre-registration confirmation” in the Zoom Events email management to turn off automatic confirmations.



Workflow triggers



Create and publish a HubSpot workflow that will be triggered.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reporting ▾

Wren ZE / HubSpot test account

Workflows

Deleted Needs review Unused + Add view (4/50) - All views Folders

On or Off ▾ Type ▾ Creator ▾ Tool created from ▾ Advanced filters (0) Save view

Organize your workflows with views

In this tab, you'll find all your workflows based on your current filters. Save those filters with **Add view**.

Views work separately from your folders. Each workflow can be inside of one folder and inside of several views.

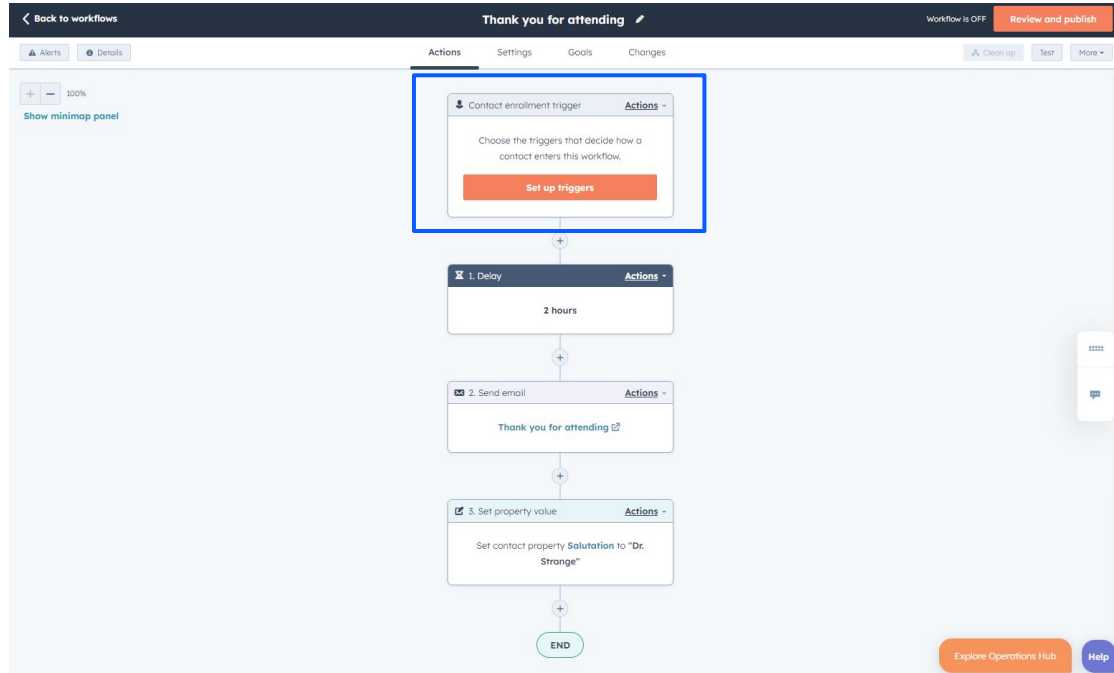
One way to use views is to pick an important task, then decide which columns are needed for that task. Filter those columns to show the workflows you need and save the view.

Search workflows

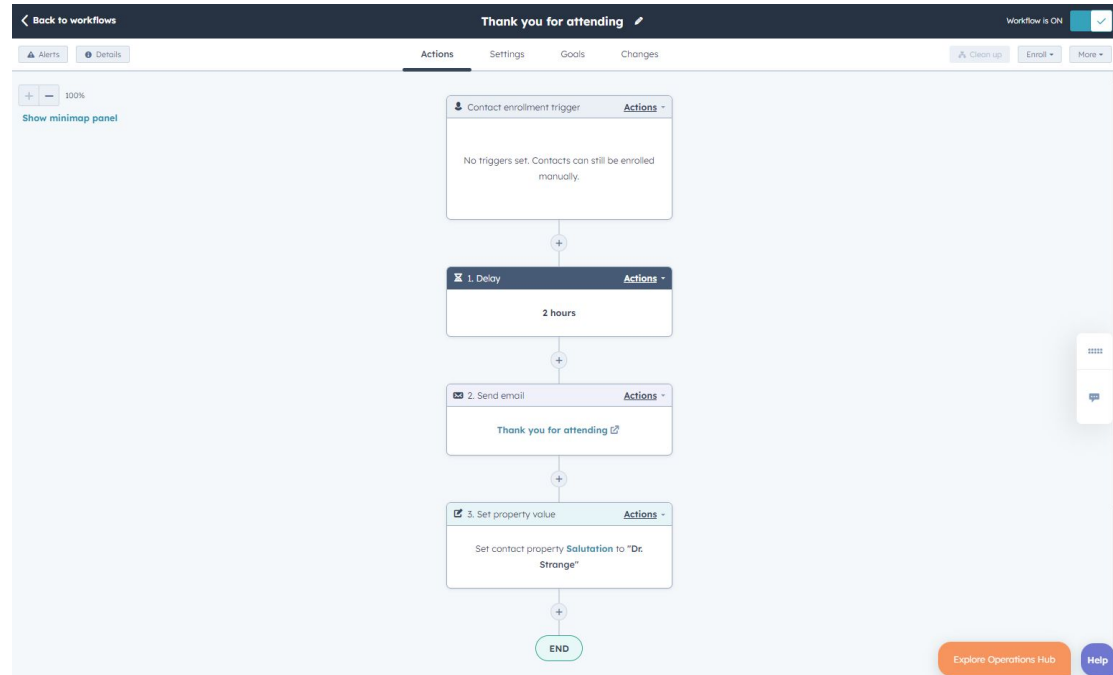
<input type="checkbox"/>	NAME	ON OR OFF	DESCRIPTION	OBJECT TYPE
<input type="checkbox"/>	Sanity check 9/7	● On	--	Contact
<input type="checkbox"/>	Unnamed workflow - Thu Sep 7 2023 21:16:12 GMT	● Off	--	Contact
<input type="checkbox"/>	Unnamed workflow - Thu Aug 31 2023 20:22:15 GM	● Off	--	Contact
<input type="checkbox"/>	Register for HubSpot test 8/29	● On	--	Contact
<input type="checkbox"/>	Thank you for attending	● On	--	Contact
<input type="checkbox"/>	Thank you for registering	● On	--	Contact
<input type="checkbox"/>	HubSpot Demo - Thank you for Attending	● Off	--	Contact
<input type="checkbox"/>	HubSpot demo	● On	--	Contact
<input type="checkbox"/>	My Zoom Event Attendance	● On	--	Contact
<input type="checkbox"/>	Register for HubSpot test event	● On	--	Contact
<input type="checkbox"/>	Send confirmation emails for events	● On	--	Contact
<input type="checkbox"/>	Unnamed workflow - Thu Mar 2 2023 01:49:16 GM	● Off	--	Contact
<input type="checkbox"/>	Webinar test 5_2	● Off	--	Contact
<input type="checkbox"/>	Unnamed workflow - Tue Apr 25 2023 20:18:26 GM	● Off	--	Contact
<input type="checkbox"/>	Pipeline is "Support Pipeline", Ticket status is "Clo	● Off	--	Ticket
<input type="checkbox"/>	Change ticket status when an email is sent to a cu	● Off	--	Ticket

Prev 1 Next 25 per page - Explore Operations Hub

In the Workflow leave the default “Contact enrollment trigger”. The Event trigger will be managed on a separate configuration page.



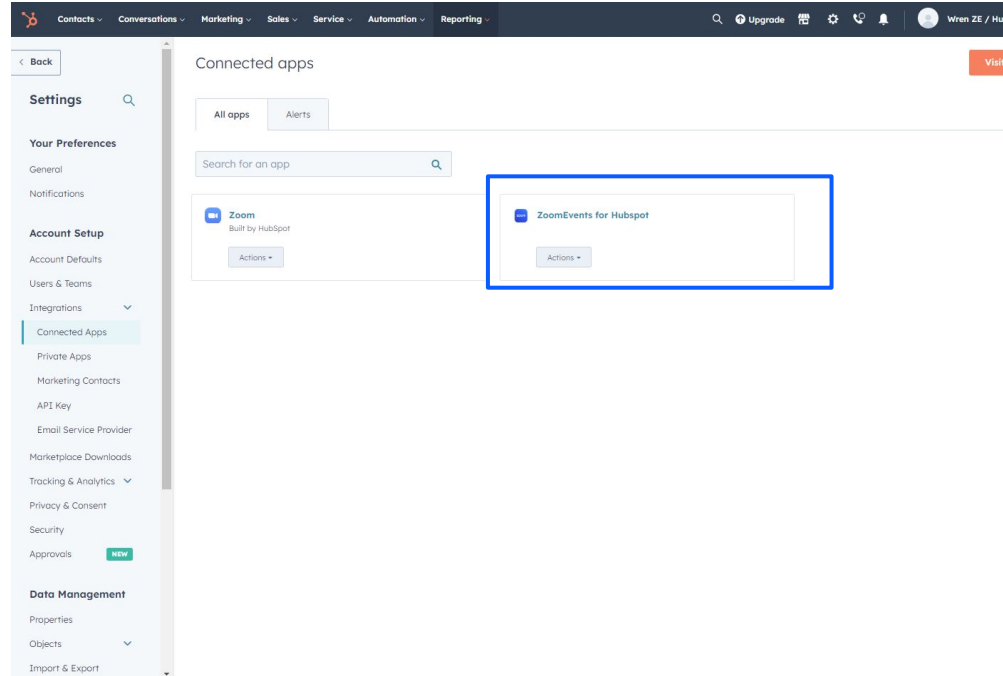
Add any additional workflow steps then review and publish.



To navigate to the trigger configuration page go to “Settings” and “Connected Apps”. Click the app called “ZoomEvents for HubSpot”

Alternatively you can access directly using this URL:

<https://applications.zoom.us/hubspot-v2/settings>



Click “Configure Triggers”.

The screenshot displays the HubSpot user interface. At the top, a dark navigation bar contains menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reporting. On the right side of this bar are icons for search, upgrade, a calendar, settings, a refresh icon, and a notification bell, followed by the user profile 'Wren ZE / Hubspot test account'. A left-hand sidebar is visible, with 'Settings' at the top and a search icon. Below it are sections for 'Your Preferences' (General, Notifications), 'Account Setup' (Account Defaults, Users & Teams, Integrations, Connected Apps), and 'Data Management' (Properties, Objects, Import & Export). The 'Connected Apps' section is expanded, showing 'ZoomEvents for HubSpot'. The main content area is titled 'ZoomEvents for HubSpot' and includes a user profile 'Joe Doe'. Below this is a 'General settings' tab. Under the 'General settings' heading, there is a note: 'These preferences apply only to this app and how it works in HubSpot.' The primary section is 'Configure Workflow Triggers', which includes the instruction 'Configure your custom workflow to trigger on Zoom Event attendance.' A button labeled 'Configure Triggers' is highlighted with a blue rectangular box. A 'Help' button is located in the bottom right corner of the interface.

The configuration page will show a list of published events from the linked Zoom account.

You can also go directly to this page through this URL:

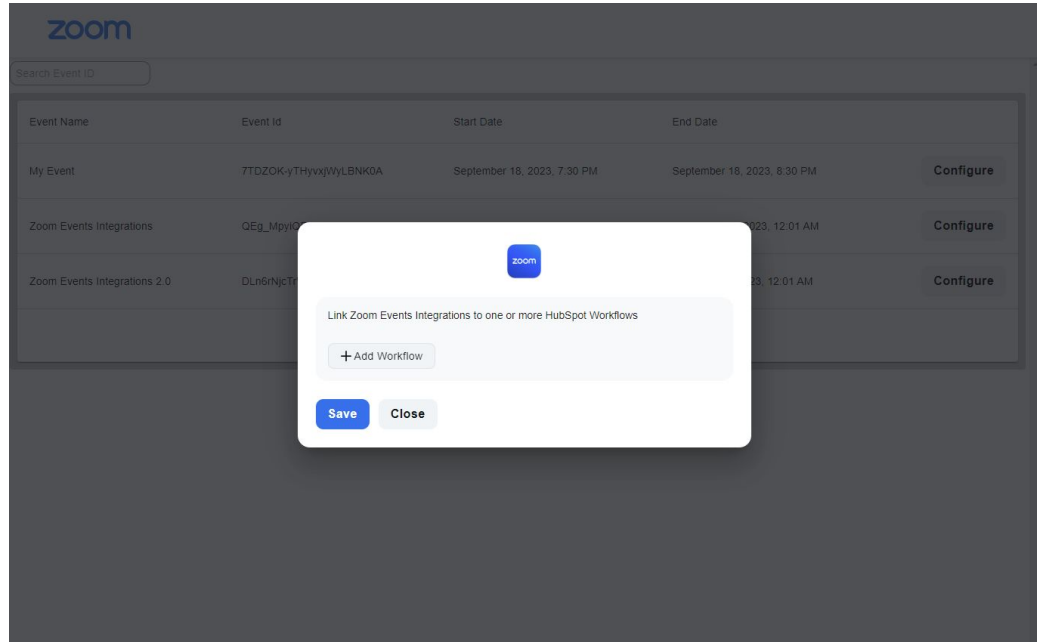
<https://applications.zoom.us/hubspot-v2/settings>

*the Zoom admin who installed the app needs to be added as a hub host. Only events from those hubs will appear

Event Name	Event ID	Start Date	End Date
Integrations Demo 5.0	ivY3fryCSS-JhA9g3Xgig	September 4, 2023, 10:00 AM	September 8, 2023, 5:00 PM
My Event	7TDZOK-yTHyvxjMyLBNK0A	September 18, 2023, 7:30 PM	September 18, 2023, 8:30 PM
Zoom Events Integrations	QEg_MpyjQF6BzCH-72u65A	November 27, 2023, 12:00 AM	November 29, 2023, 12:01 AM
Zoom Events Integrations 2.0	DLn6rNjcTrWLHluqUuFWYQ	December 4, 2023, 12:00 AM	December 6, 2023, 12:01 AM

Load More Past Events

Click “configure”. Click “Add Workflow” to connect a HubSpot workflow to a Zoom Events registration or attendance trigger.

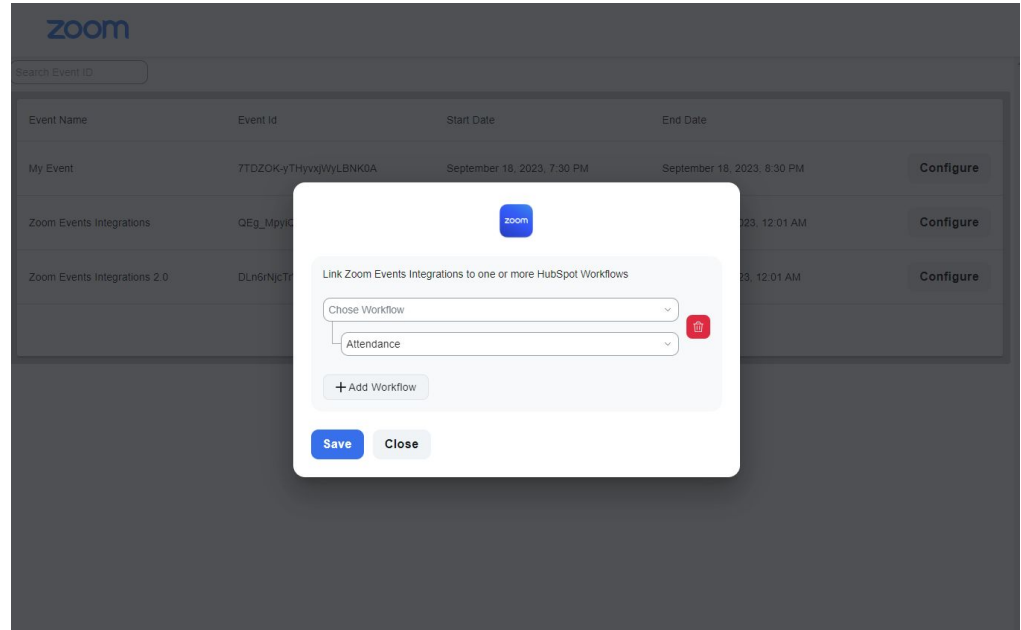


The screenshot shows the Zoom Events integrations page. At the top, there is a search bar labeled "Search Event ID". Below it is a table with the following columns: "Event Name", "Event Id", "Start Date", "End Date", and "Configure". The table contains three rows:

Event Name	Event Id	Start Date	End Date	Configure
My Event	7TDZOK-yThyvxjMyLBKk0A	September 18, 2023, 7:30 PM	September 18, 2023, 8:30 PM	Configure
Zoom Events Integrations	QEg_Mpyj...		2023, 12:01 AM	Configure
Zoom Events Integrations 2.0	DLn6Njct...		2023, 12:01 AM	Configure

A modal window is open in the foreground, featuring the Zoom logo at the top. The modal text reads: "Link Zoom Events Integrations to one or more HubSpot Workflows". Below the text is a button labeled "+ Add Workflow". At the bottom of the modal are two buttons: "Save" and "Close".

Click the “Choose Workflow” dropdown and choose the HubSpot workflow that was created. Choose if the trigger will be Attendance or Registration - Attendance is selected by default.



**Map up to 5 workflows per event.
Each workflow will be triggered
based on the trigger type.**

- **Registrations are enrolled immediately.**
- **Attendees are enrolled within an hour after the session has ended.**

The screenshot shows the Zoom Events Integrations 2.0 interface. A modal window is open, titled "Link Zoom Events Integrations 2.0 to one or more HubSpot Workflows". The modal contains two sections of workflow configuration:

- Registration:** A dropdown menu is set to "Thank you for registering", with a trash icon to its right.
- Attendance:** A dropdown menu is set to "Thank you for attending", with a trash icon to its right.

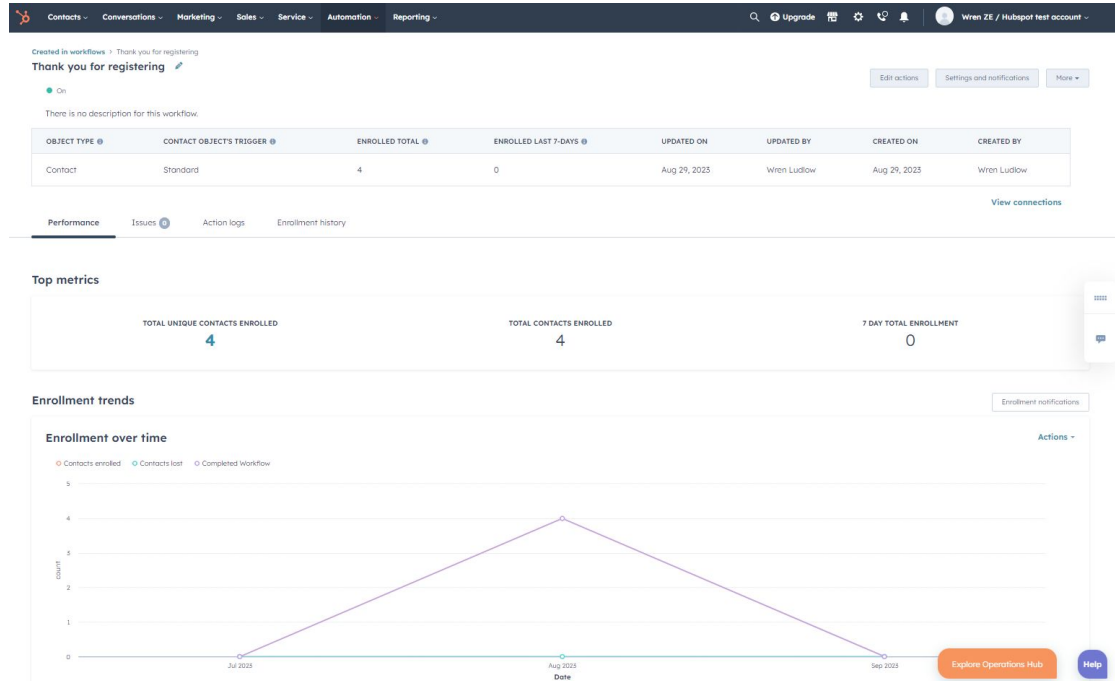
Below these sections is a "+ Add Workflow" button. At the bottom of the modal are "Save" and "Close" buttons. The background shows a table of event integrations with columns for Event Name, Event Id, Start Date, End Date, and a Configure button.

You can verify the triggers are working by registering a test contact from the Zoom Event. Go to the workflow and check enrollment history. Enrolled contacts will be visible.

The screenshot displays a workflow editor interface. At the top, there is a navigation bar with a back arrow and the text "Back to workflows". The main header area contains the text "Thank you for registering" and a pencil icon. Below this, there are tabs for "Alerts", "Details", "Actions", "Settings", "Goals", and "Changes". The "Actions" tab is selected, showing a workflow diagram. The diagram starts with a "Contact enrollment trigger" box, which contains the text "No triggers set. Contacts can still be enrolled manually." This is followed by a plus sign, then a "1. Set property value" box with the text "Set contact property Job title to 'Assistant to Regional Manager'". This is followed by another plus sign and an "END" circle. On the right side, an "Enrollment history" panel is open, showing a date range filter and a dropdown menu with the contact "Wren Ludlow (wren.test1900@gmail.com)". Below this is a table with columns for "CONTACT" and "TIME".

CONTACT	TIME
Wren Ludlow (wren.test1900@gm...)	Aug 29, 2023 11:56 AM EDT
Completed workflow	
Wren Ludlow (wren.test1900@gm...)	Aug 29, 2023 11:56 AM EDT
Enrolled manually by Wren Ludlow	

For more granular information click “Details” in the upper-left corner of the workflow page and view enrollment history as well as any workflow issues.



Using HubSpot + Zoom Events for marketing

Using HubSpot + Zoom Events

Use rich data and signals from Zoom Events to power different marketing activities in HubSpot.

How to use the integration to engage prospects and accounts in Pardot

- ✓ Create automation campaigns using HubSpot workflows
- ✓ Sync data to trigger sales actions and other CRM flows
- ✓ Customize touch points based on event attendance or non-attendance
- ✓ Send personalized confirmations and reminders based on the event lifecycle
- ✓ Score contacts based on event or session attendance

Common Errors

Common HubSpot Integration errors

- Events are not visible in the Zoom app configuration
 - ◆ Installation admin is not added as a Hub host in Zoom Events with a saved hub host profile
 - ◆ HubSpot user does not have a Zoom account under the account admin who installed the app
- Contacts from HubSpot workflow are not registered for the event
 - ◆ An incorrect Event ID or Ticket Type ID
 - ◆ Ticket is deleted or no longer valid
 - ◆ Unpublished or invalid event
 - ◆ There is a “required” event or ticket field in Zoom Events not passed from HubSpot
- Registrants or attendees not enrolled through a trigger
 - ◆ There is a workflow error or the workflow is unpublished
 - ◆ Incorrect workflow mapping
 - ◆ Registration or attendance activity has not occurred yet



Thank you

zoom