Zoom Events / HubSpot Integration Guide

Events

User Guide

→

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- **Workflow triggers**

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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"

Open the app listing and click "Add"

Click "Allow"

Choose an account (if applicable).

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.

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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)

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

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.

Add additional Workflow steps as desired. Click "Review and publish".

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

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.

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.

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.

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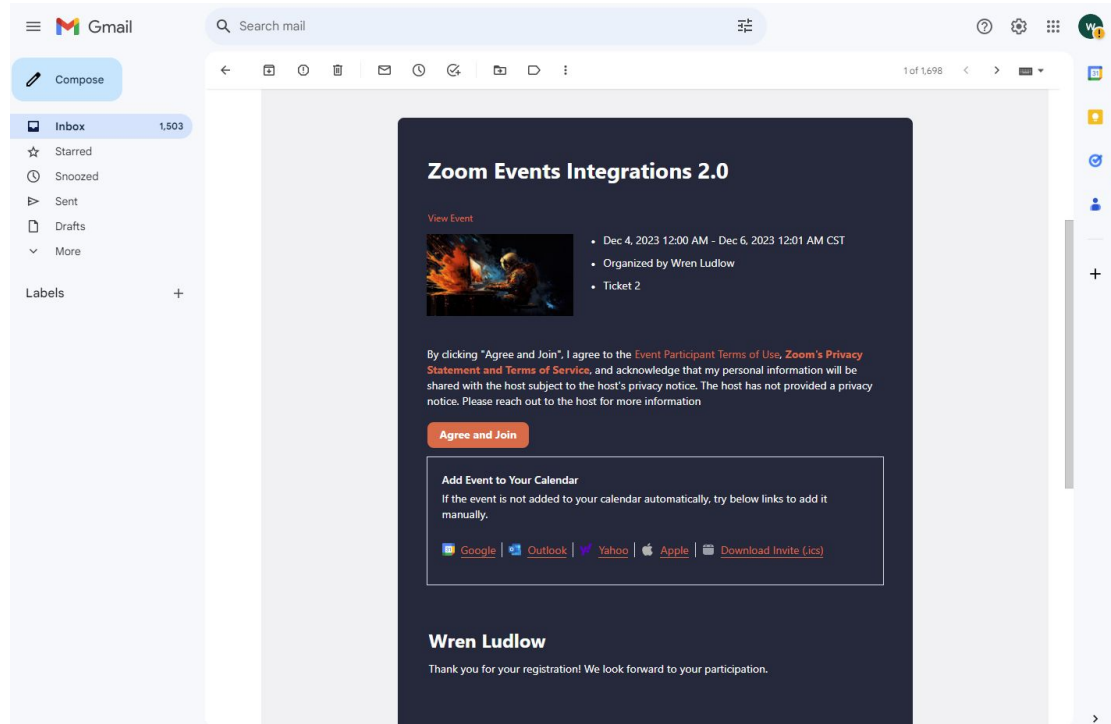
Workflow triggers

Create and publish a HubSpot workflow that will be triggered.

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In the Workflow leave the default "Contact enrollment trigger". The Event trigger will be managed on a separate configuration page.
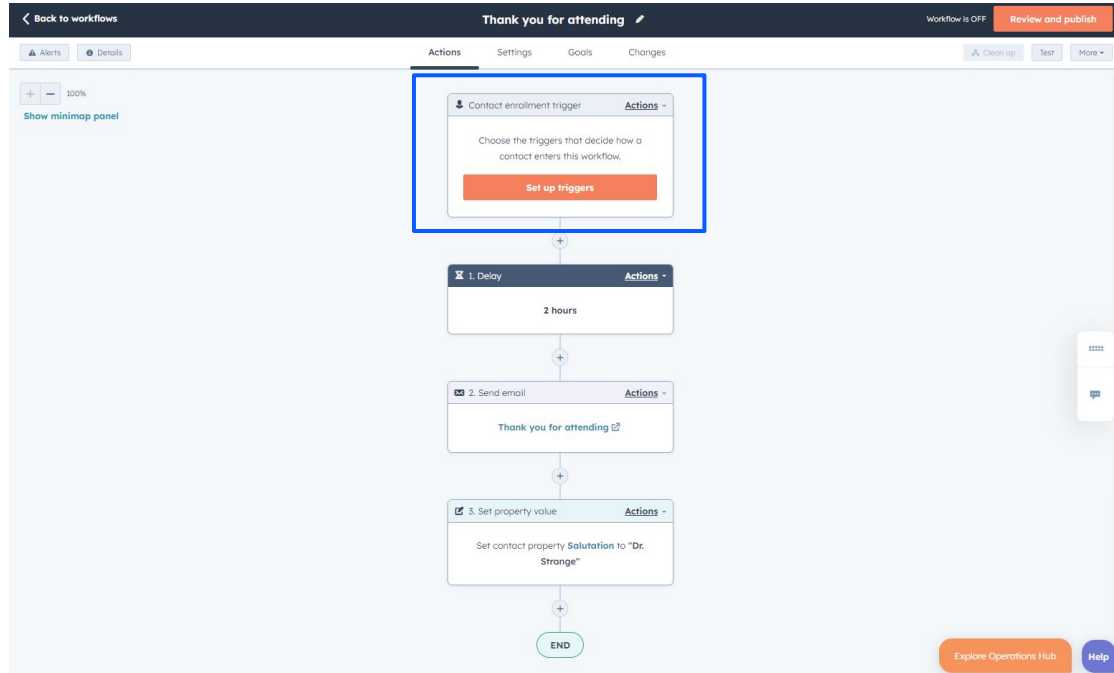
Add any additional workflow steps then review and publish.
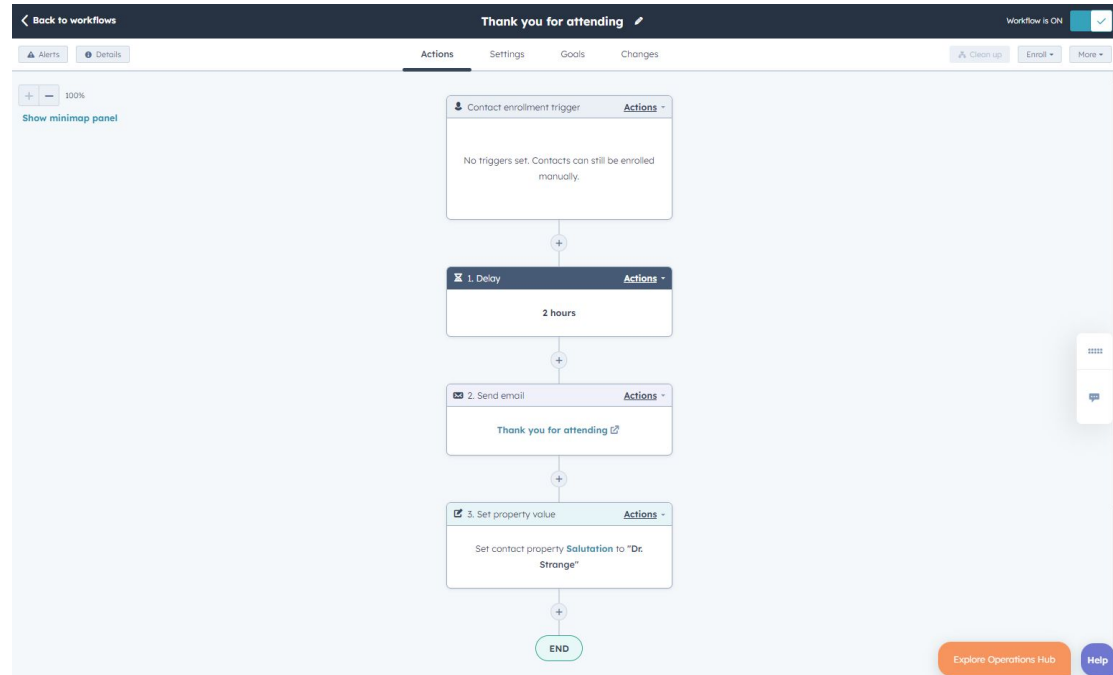
To navigate to the trigger configuration page go to "Settings" and "Connected Apps". Click the app called "ZoomEvents for HubSpot"

Alternatively you can access directly using this URL:

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

Click "Configure Triggers".

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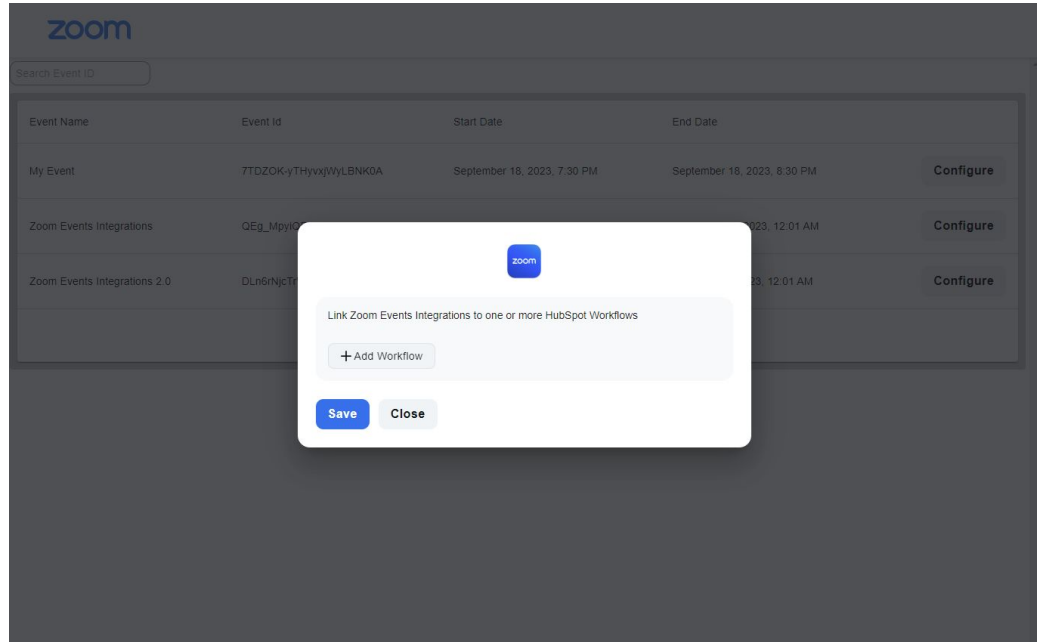
*the Zoom admin who installed the app needs to be added as a hub host. Only events from those hubs will appear
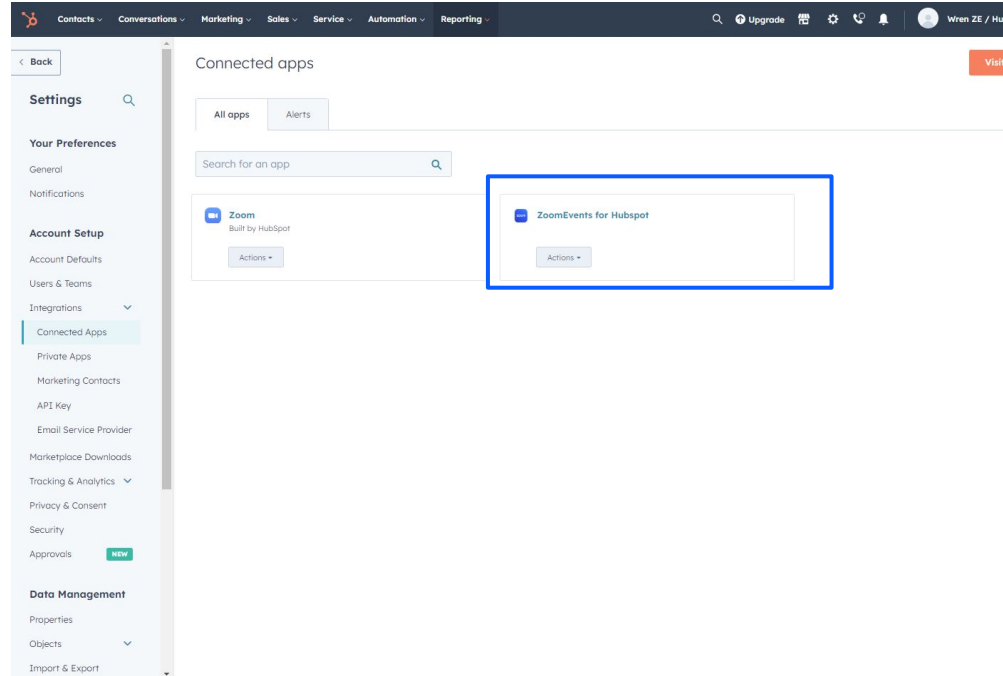
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Search Event ID

Event Name	Event Id	Start Date	End Date	
Integrations Demo 5.0	ivY3fryCSs-JhAi9g3Xgig	September 4, 2023, 10:00 AM	September 8, 2023, 5:00 PM	Configure
My Event	7TDZOK-yTHyvxJWyLBNK0A	September 18, 2023, 7:30 PM	September 18, 2023, 8:30 PM	Configure
Zoom Events Integrations	QEg_MpyiQF6BzCH-72uB5A	November 27, 2023, 12:00 AM	November 29, 2023, 12:01 AM	Configure
Zoom Events Integrations 2.0	DLn6rNjcTrWLHIuqUuFWYQ	December 4, 2023, 12:00 AM	December 6, 2023, 12:01 AM	Configure

Load More Past Events

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

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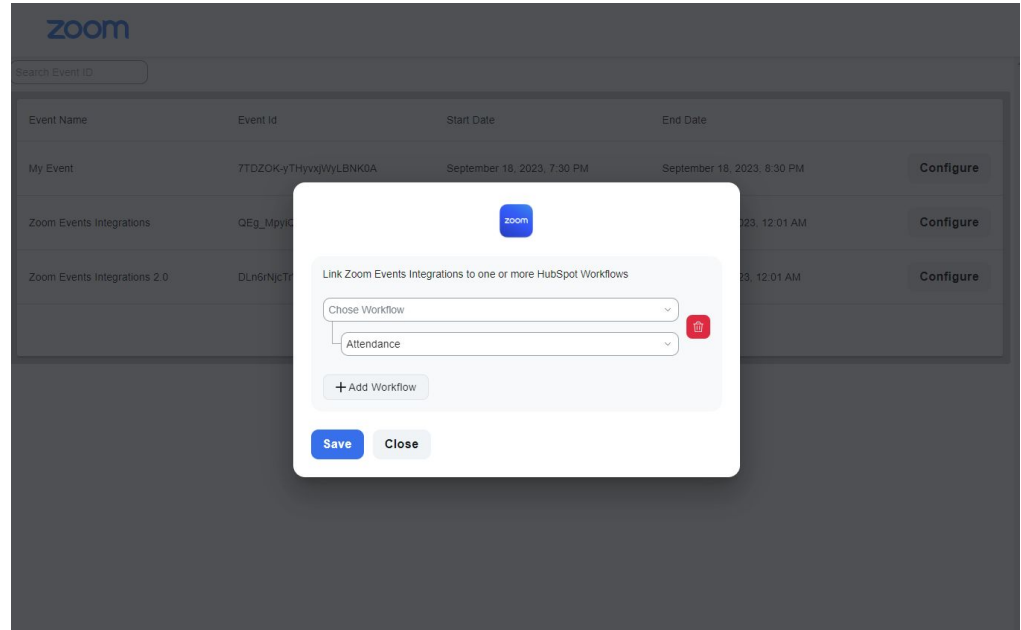
Map up to 5 workflows per event. Each workflow will be triggered based on the trigger type.

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

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.

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.
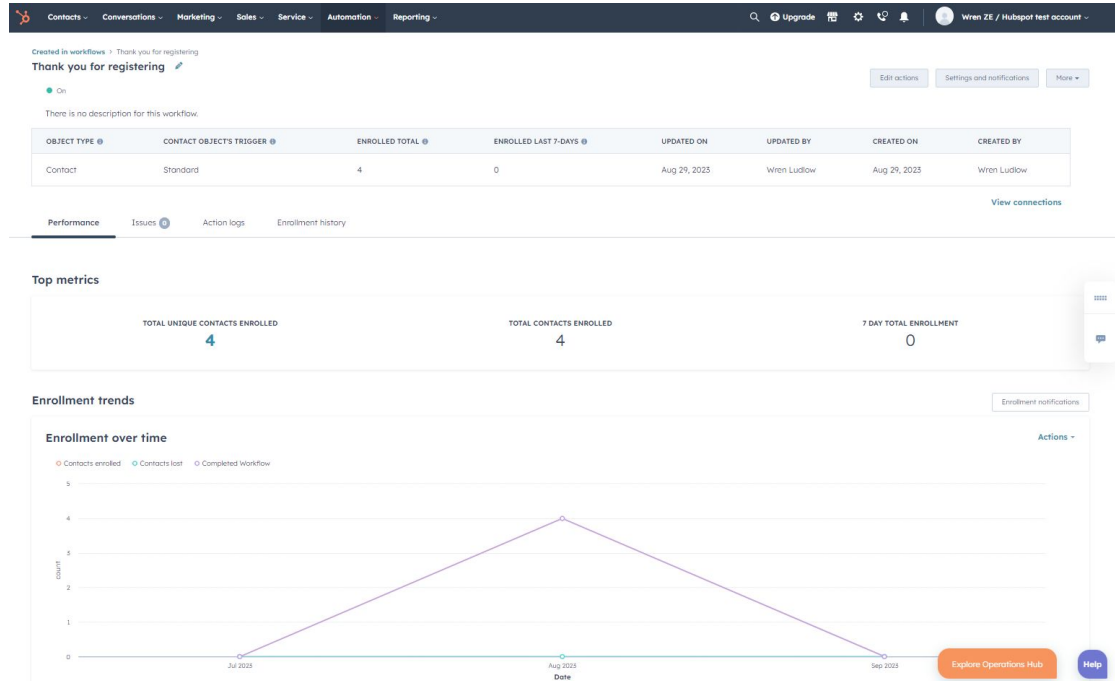
Using HubSpot + Zoom Events for marketing

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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

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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

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Team Chat   Phone   Meetings   Rooms   Events   Contact Center

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Thank you