How to Integrate Zoom with HubSpot

Requirements:

   Hubspot:

      Product: HubSpot Marketing
      Subscription: Basic, Professional & Enterprise
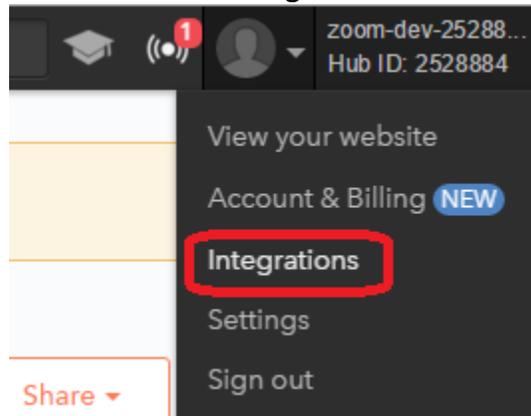
   Zoom:

      Pro Account with Webinar License
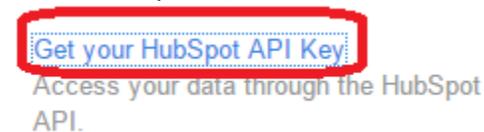   Admin access to your Zoom Account.

Setting up the Integration:

1. **Configure the HubSpot API Key on Zoom**

   a. Login to your HubSpot account and from the HubSpot Dashboard, choose **Account Menu > Integrations**


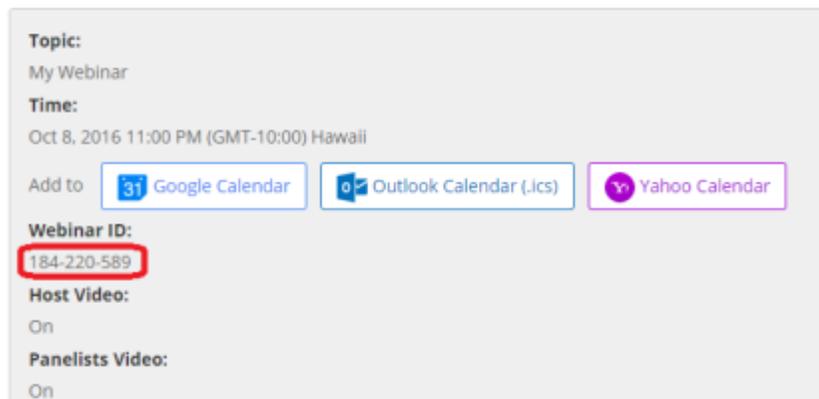   b. On the left panel, click on "Get Your HubSpot API Key"

c. Click **View Key**

Your HubSpot API Key

Welcome to the HubSpot API! Our API gives your applications and integrations the ability to leverage the APIs that power HubSpot.

Your HubSpot API key provides access to your HubSpot portal, so do not freely distribute it. Each key is specific to a portal, not a user. We currently allow for only one key at a time. If needed, you may deactivate your HubSpot API key and generate a new one.

To get started using the HubSpot APIs, please visit https://developers.hubspot.com.

View Key

d. Copy the API Key
e. Login to your Zoom Account and Navigate to **Integrations** on the left panel.
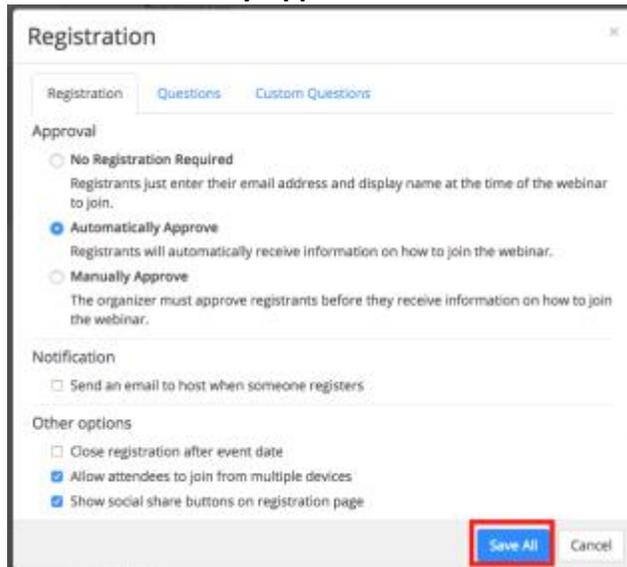f. Click Configure for HubSpot and paste the API Key and click **Save**

HubSpot API Key   f427de9b-403f-45a9-a0b7-98a3e2f87c87

Save Changes   Cancel
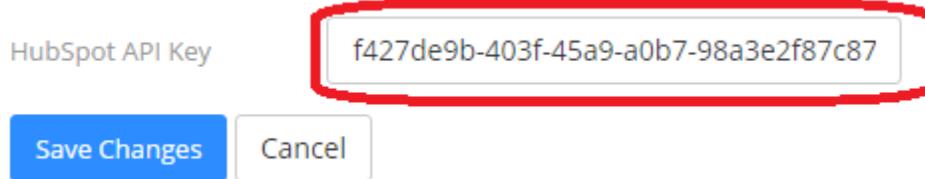
2. **Schedule a Webinar**

a. Login to your Zoom account and schedule a webinar with registration. For information on how to schedule a Webinar, please see this link:
https://support.zoom.us/hc/en-us/articles/204619915-Scheduling-a-Webinar-with-Registration

b. Once you have scheduled your Webinar, copy the Webinar ID (9 digit number) for use on a later step.

Manage "My Webinar"

Topic:
My Webinar
Time:
Oct 8, 2016 11:00 PM (GMT-10:00) Hawaii

Add to   [31] Google Calendar   [O] Outlook Calendar (.ics)   [Y!] Yahoo Calendar

Webinar ID:
184-220-589
Host Video:
On
Panelists Video:
On

c. Scroll down to the **Invite Attendees** section and click **Edit** on the right. Make sure **Automatically Approve** is selected. Once confirmed, click **Save All**.
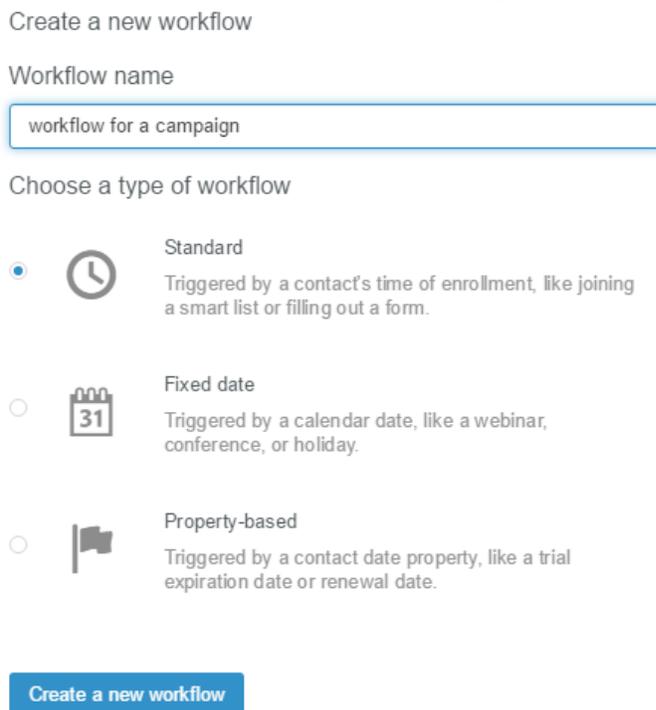

d. Scroll down to **Email Settings,** click **Edit** next to the **Confirmation Email to Registrants: Send Upon Registration**. Uncheck the option to **Send Confirmation Email to Registrants** and click **Save.** (If you do not want to automate emails from HubSpot and would prefer to have Zoom send the confirmation email, you can leave this setting as is).
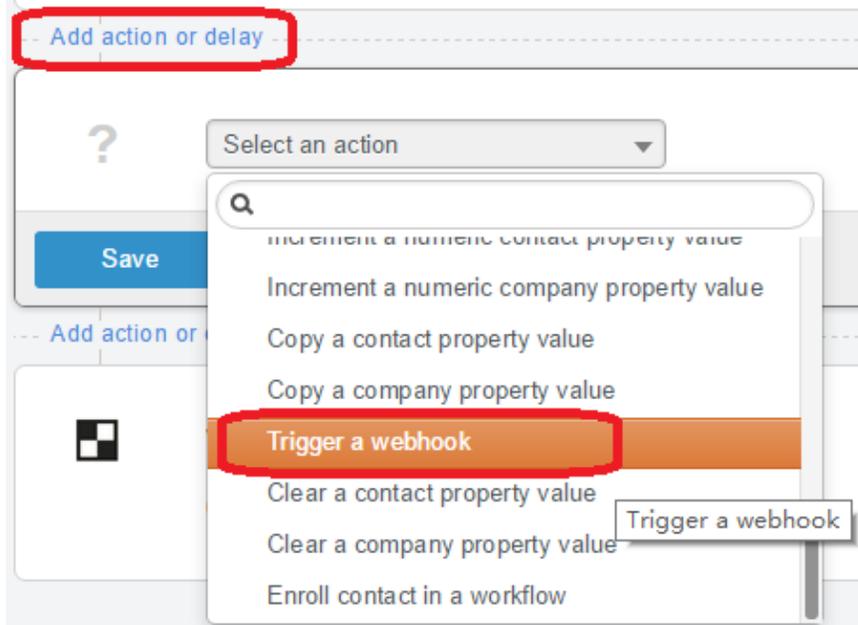
3. **Configure the Workflow**
    a. Login to HubSpot and choose **Contact > Workflows**
   b. Create a new Workflow for your Campaign

c. Add any desired actions
d. Add an Action and choose **Trigger a webhook**


e. Select **POST** for the HTTP method and enter the Webhook URL. The URL will be formatted at https://zoom.us/hubspot/webhook?webinar_id=[WebinarID] (Replace [WebinarID] with the Webinar ID from Step 2b)
f. Add another Action and choose **Delay**. Set the delay for 5 minutes. (The delay is to make sure that the registrant's unique Join Link is correctly added to the contact information page).
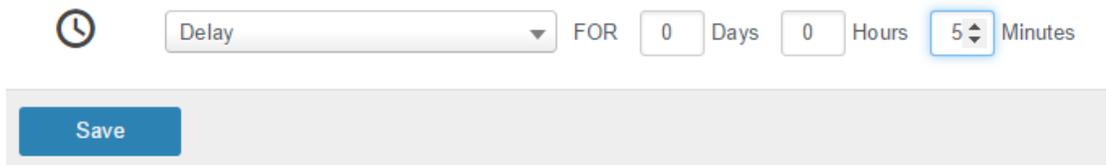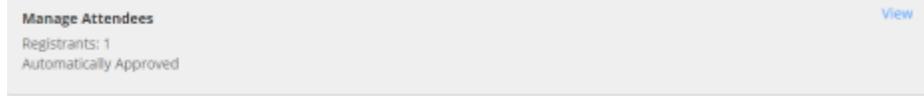

4. Testing the Workflow
a. Click the **Test** link and choose an existing Contact
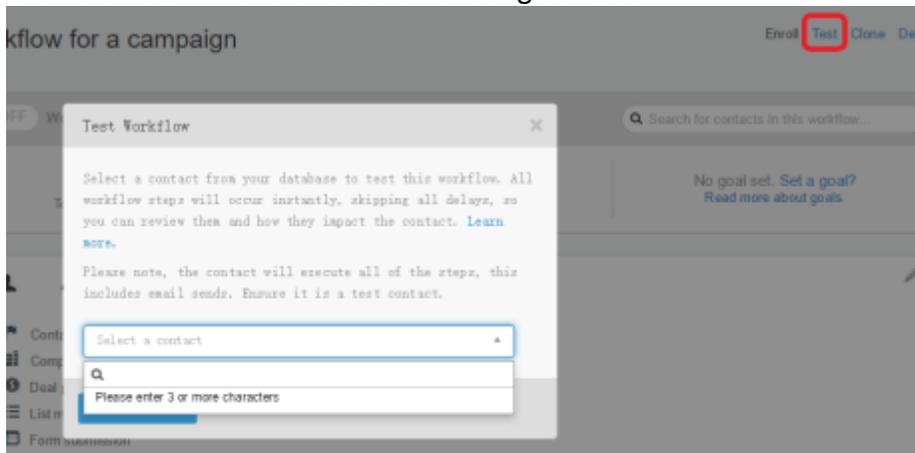
b. Go back to your Zoom Account and navigate to the Webinar you setup. Scroll down to the **Manage Attendees** section and verify that the registrant appears.


c. Return to **HubSpot** and view the Contact's information.
d. Click on **View All Properties** and scroll down to Webinar Join Link. Make sure this is populated with the unique join link.
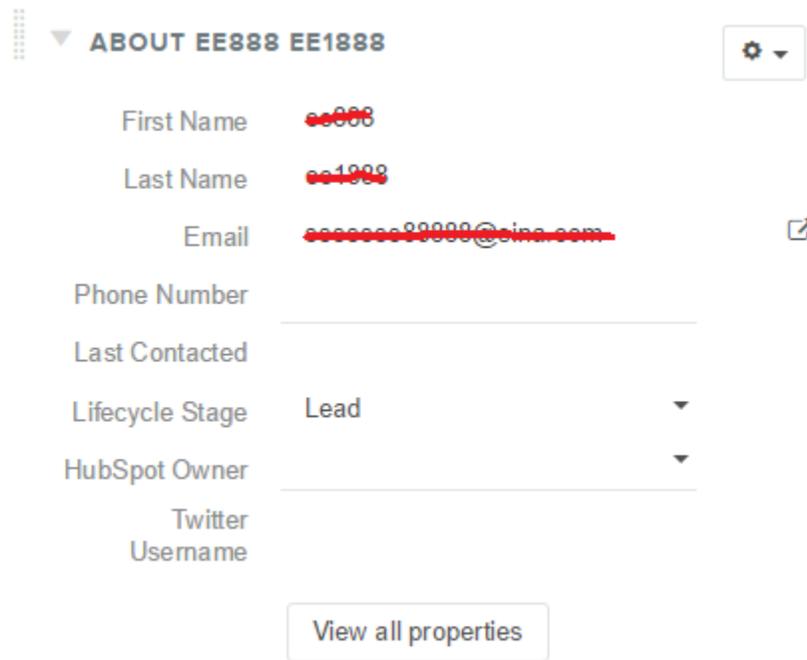
5. Sending Custom Confirmation Emails
a. Create an Email in **Hubspot** to send out to registrants. In the main body of the email, click **Insert > Personalization Token**

b. Choose **Contact** for the Category and choose **Webinar Join Link** for the Token.
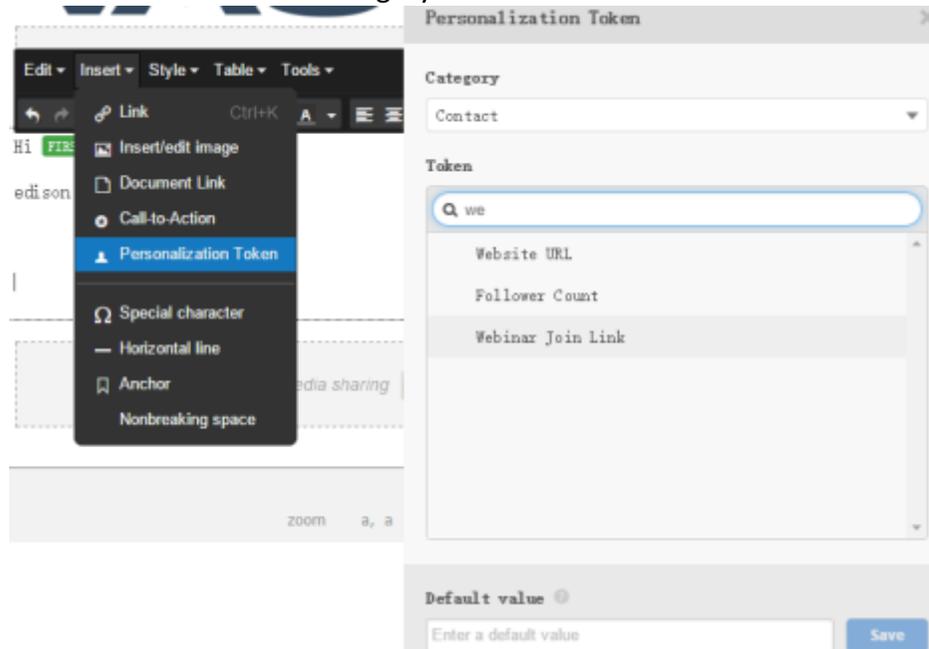
c. You should now see the URL for the Webinar, this will not necessarily be a link. In order to make this a link, you will need to change the source code.
d. Click the **</>** button to edit the source.
e. You should see code that looks like: <p> {{contact.webinar_joinlink}}</p>
f. Change this to
   {{contact.webinar_joinlink}}
g. To test out the link, click **Review**