HubSpot Integration for Alchemer Workflow

The HubSpot Integration for Alchemer Workflow is available on our enterprise plans. If you are interested in this integration, please contact us for more information.

What it is

The HubSpot Integration for Alchemer Workflow is a powerful suite of actions that lets you create, update, get, or upsert HubSpot records directly within an automated Workflow. This set of integrations brings core HubSpot functionality—previously available in surveys—into Alchemer Workflow, now enhanced with support for AND/OR logic in your conditions.

△ OAuth Scope Requirements

To enable the HubSpot integration features described in this article, your connected HubSpot account must grant access to the following OAuth scopes:

- crm.objects.companies.read / .write
- crm.objects.contacts.read / .write
- crm.objects.custom.read / .write
- crm.objects.deals.read / .write

These scopes power the integration's ability to read and update HubSpot records from Alchemer Workflow and Alchemer Survey. Missing scopes may result in connection issues or incomplete data syncing.

☑ Make sure these are included when authorizing the integration.

Why it matters

Connecting your HubSpot data with your customer feedback workflow helps you act faster and smarter. Whether you're creating a new contact, updating existing records, or retrieving key information to personalize an experience, this integration ensures your HubSpot data stays current and actionable. With streamlined automation, you can now drive deeper personalization, improve response follow-up, and enhance lead or customer management—all without manual effort.

How it works

You can add one of four HubSpot Workflow actions:

- Create record Add new records to HubSpot when a Workflow is triggered.
- Update record Modify existing HubSpot data based on Workflow inputs.
- Get record Retrieve specific data from HubSpot to use in your Workflow.
- **Upsert contact** Create a contact if it doesn't exist, or update it if it does.

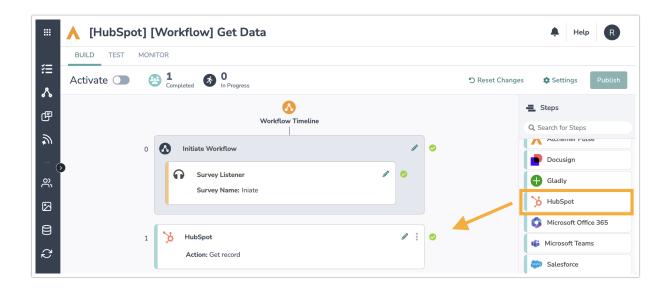
Each action includes flexible field mapping and conditional logic, allowing you to tailor automation to your business needs.

Adding a HubSpot Step to your Workflow

1. Create a Workflow in Alchemer and select your initiator.

For more information on building Workflows in Alchemer refer to the following documentation:

- Getting Started with Alchemer Workflow
- Building a Workflow
- 2. When you are ready to add the HubSpot step to your Workflow, drag the Hubspot step from the Steps Library under Connections.

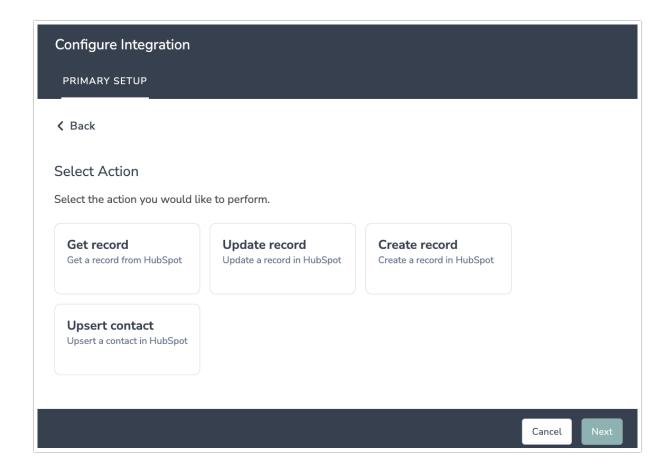


3. Click the pencil icon to configure your Excel integration step.



- 4. Select the action you would like to perform:
 - HubSpot: Upsert contact. Jump to section.

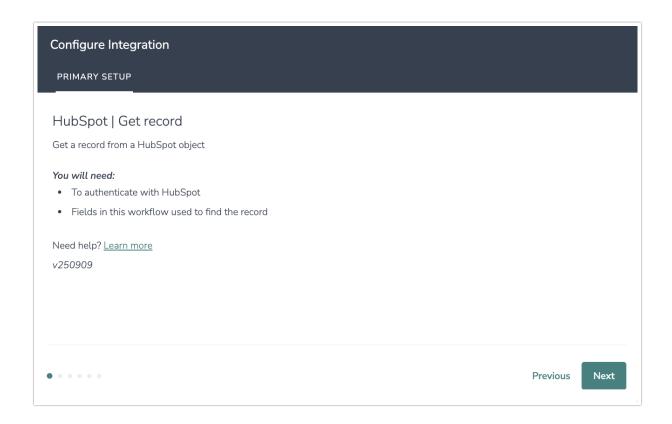
- HubSpot: Create record. Jump to section.
- HubSpot: Update record. Jump to section.
- HubSpot: Get record. Jump to section.



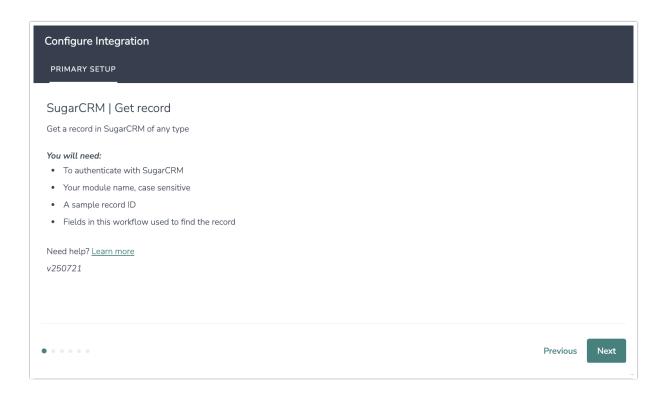
HubSpot | Get a record

You will need:

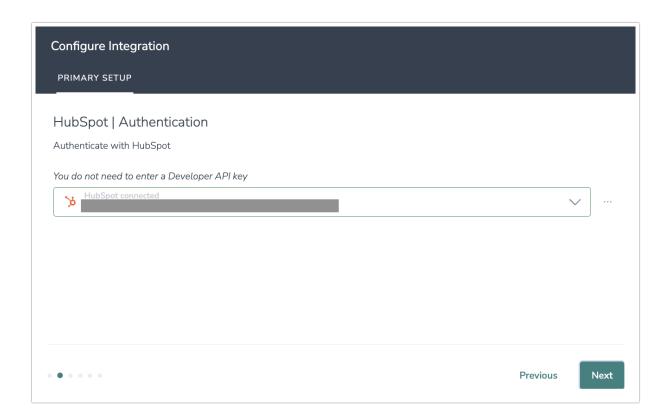
- To authenticate with HubSpot
- Fields in this workflow used to find the record
- 1. Select "Get record | Get a record from HubSpot" as your action.



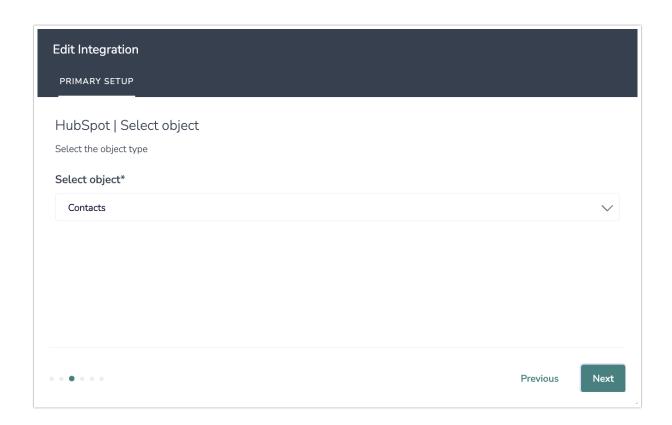
2. Click "Next" on the integration overview screen.



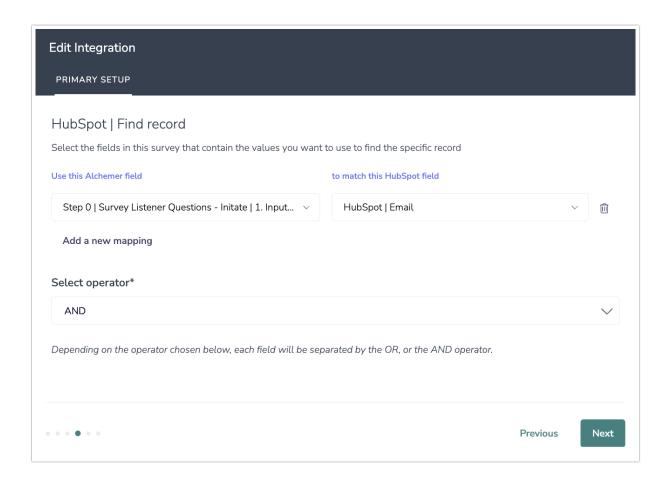
3. Authenticate with your HubSpot account. Click add a new account. Once complete, return to the setup wizard in Alchemer.



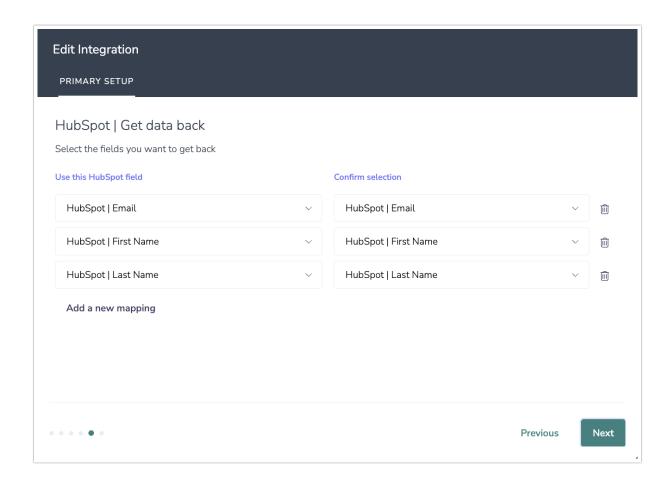
4. Select the object type you would like to use.



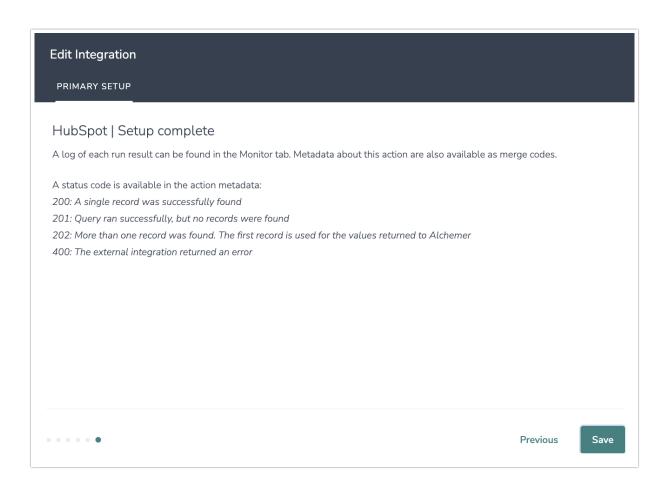
5. Select the fields in this survey that contain the values you want to use to find the specific record.



6. Select the fields you want to get back.



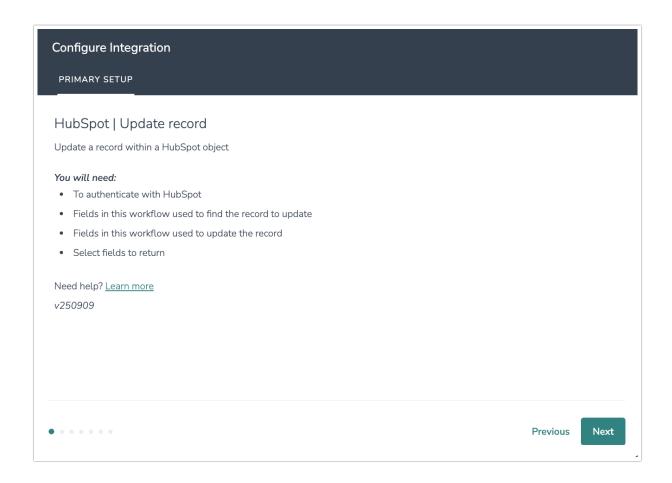
7. Setup complete | A log of each run can be found in the Monitor tab. Metadata about this action is also available as merge codes.



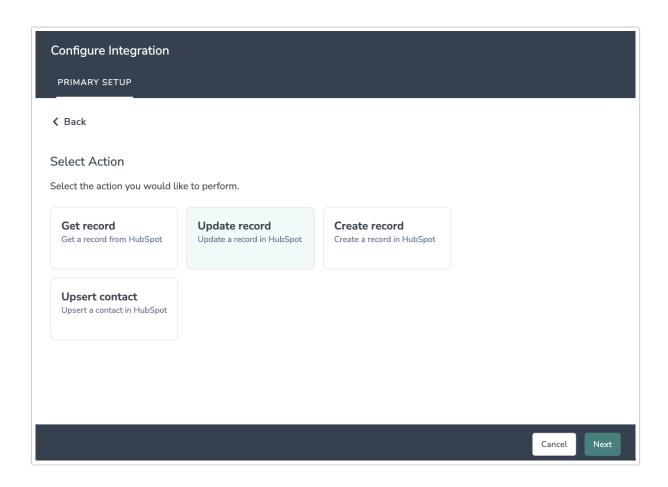
HubSpot | Update a record

You will need:

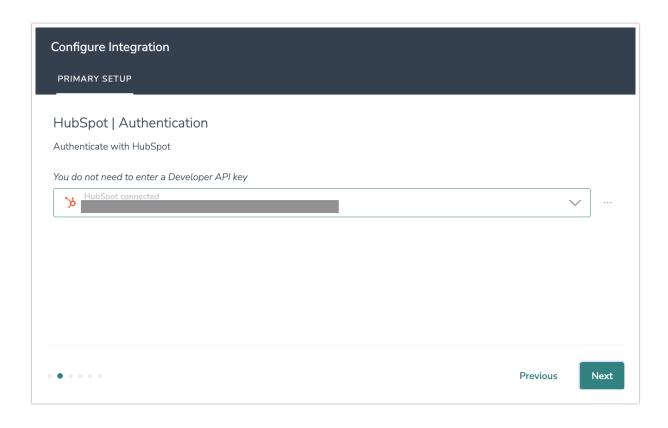
- To authenticate with HubSpot
- Fields in this workflow used to find the record to update
- Fields in this workflow used to update the record
- Select fields to return



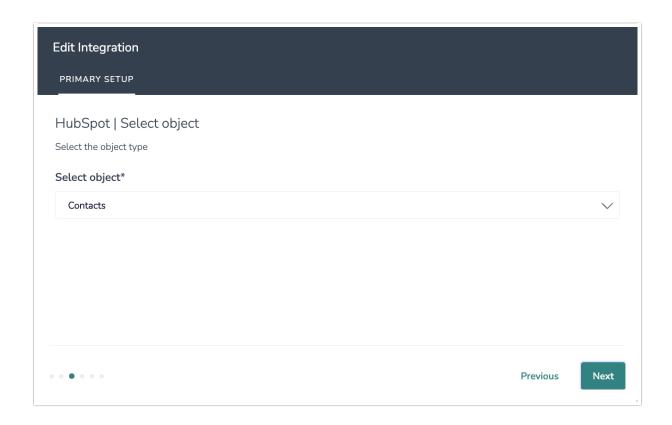
1. Select "Update record | Update a record in HubSpot" as your action.



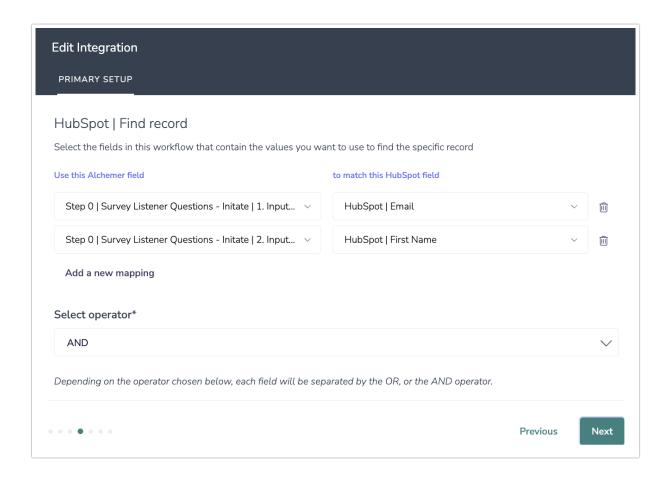
2. Authenticate with your HubSpot account. Click add a new account. Once complete, return to the setup wizard in Alchemer.



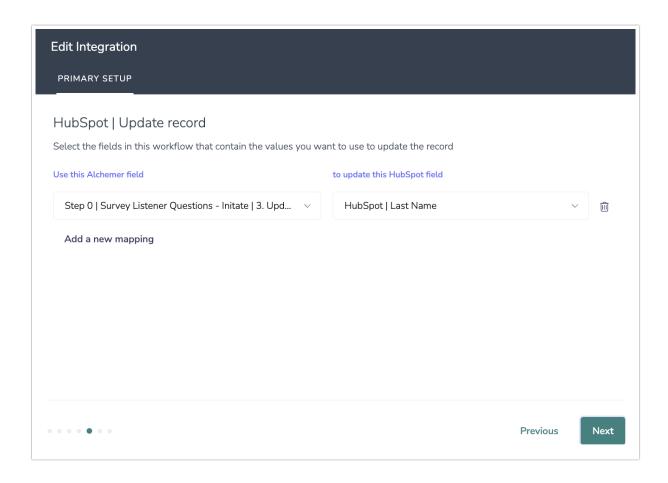
3. Select the object type you would like to use.



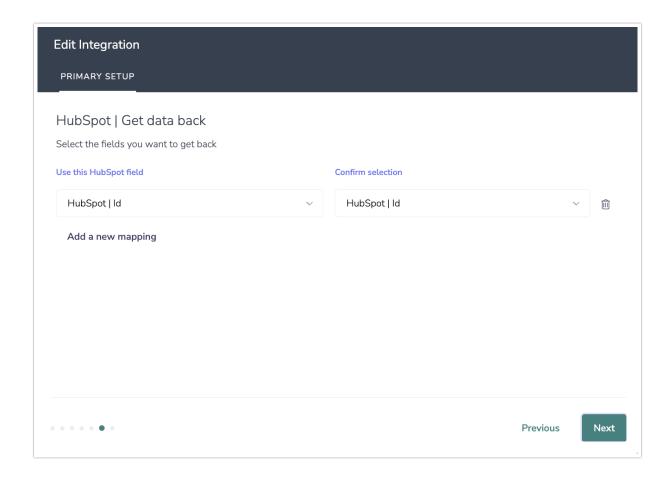
4. Select the fields in this workflow that contain the values you want to use to find the specific record.



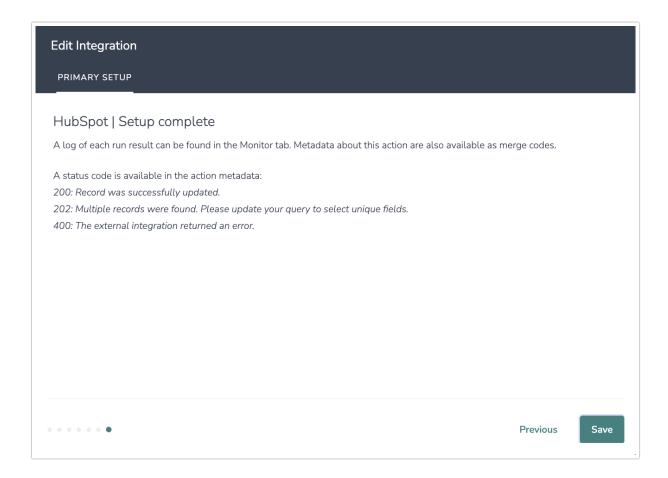
5. Select the fields in this survey that contain the values you want to use to update the record.



6. Select the fields you want to get back.



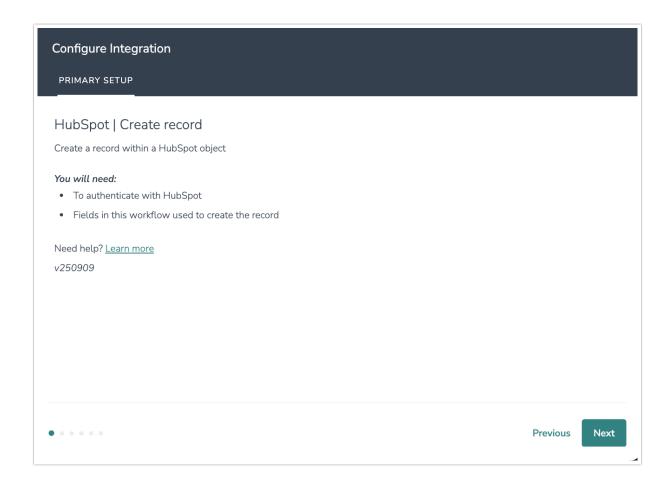
7. Setup complete | A log of each run can be found in the Monitor tab. Metadata about this action is also available as merge codes.



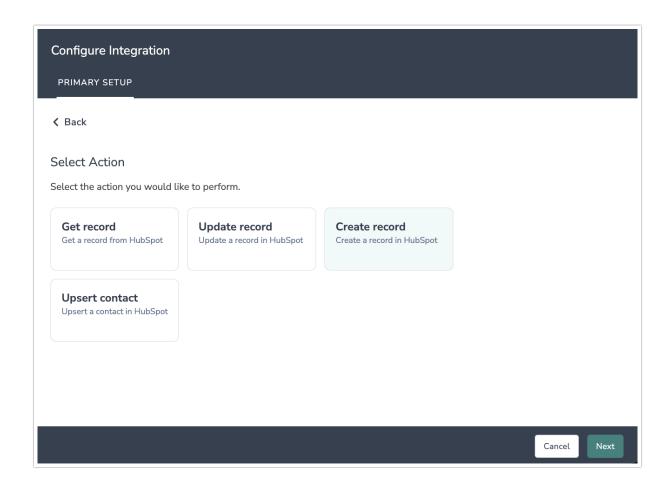
HubSpot | Create a record

You will need:

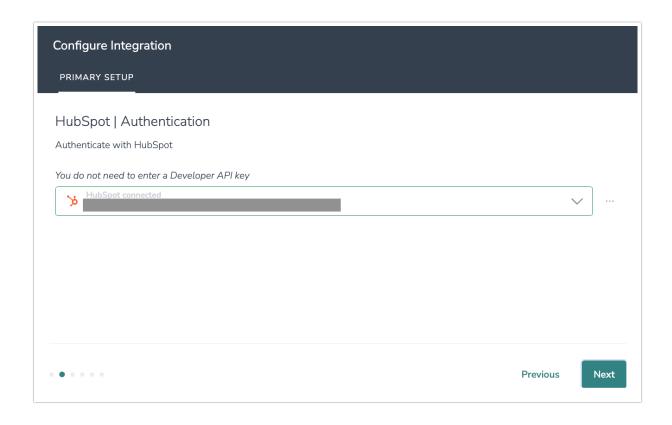
- To authenticate with HubSpot
- Fields in this workflow used to create the record



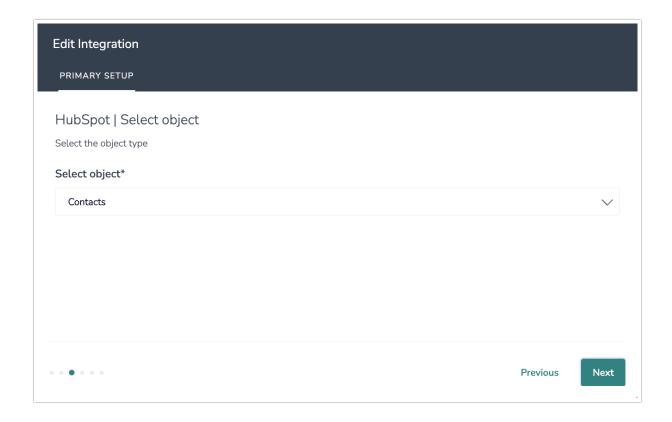
1. Select "Create record | Create a record in HubSpot" as your action.



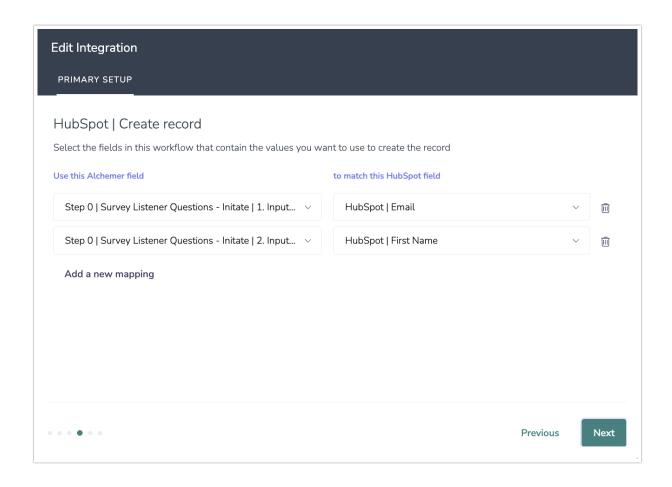
2. Authenticate with your HubSpot account. Click add a new account. Once complete, return to the setup wizard in Alchemer.



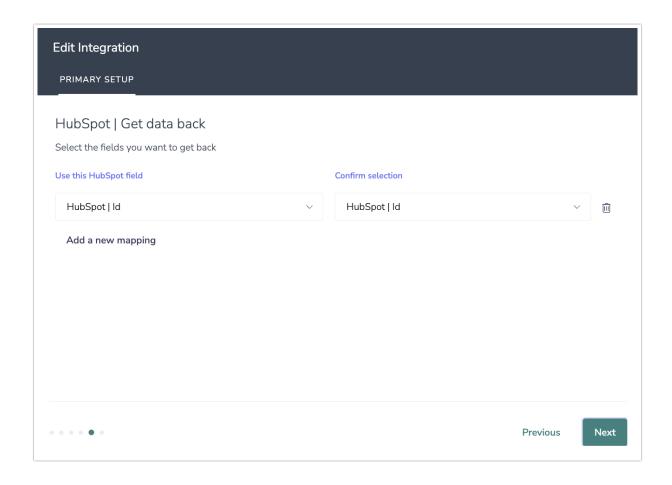
3. Select the object type you would like to use.



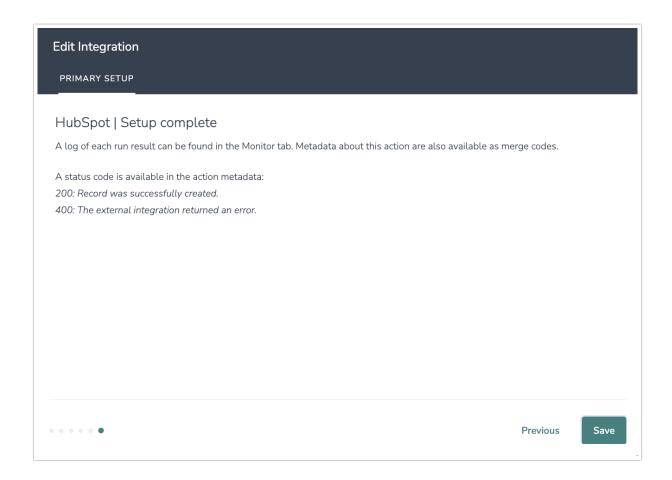
4. Select the fields in this workflow that contain the values you want to use to create the record.



5. Select the fields you want to get back.



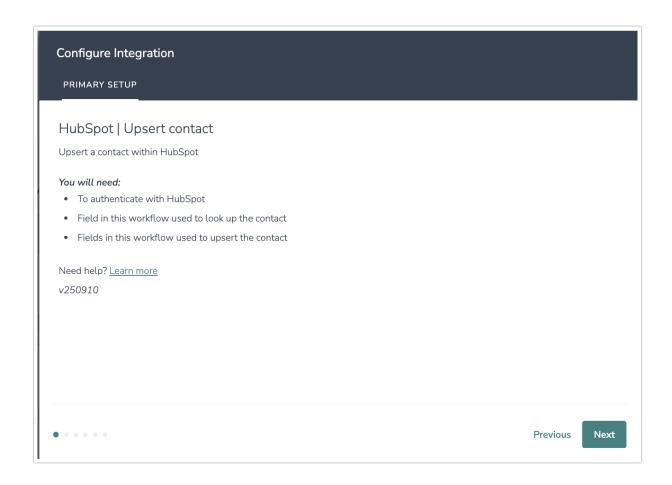
6. Setup complete | A log of each run can be found in the Monitor tab. Metadata about this action is also available as merge codes.



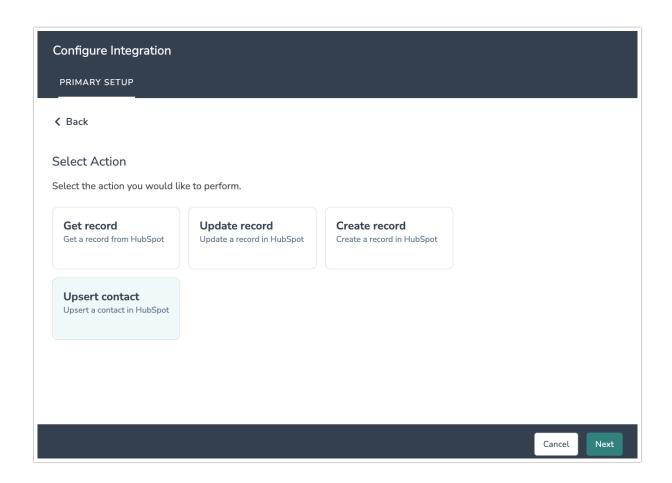
HubSpot | Upsert a contact

You will need:

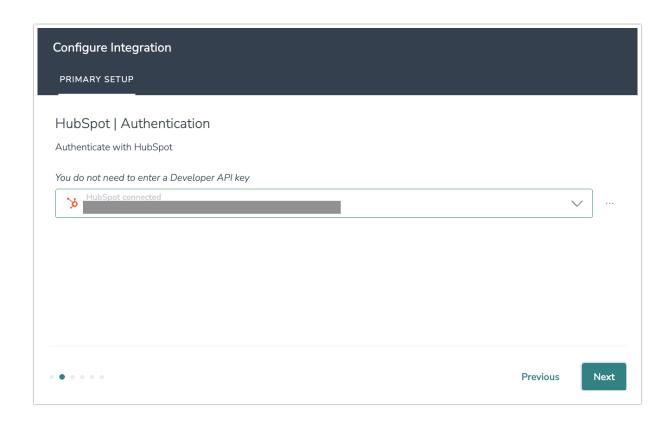
- To authenticate with HubSpot
- Fields in this workflow used to look up the contact
- Fields in the workflow used to upsert the contact



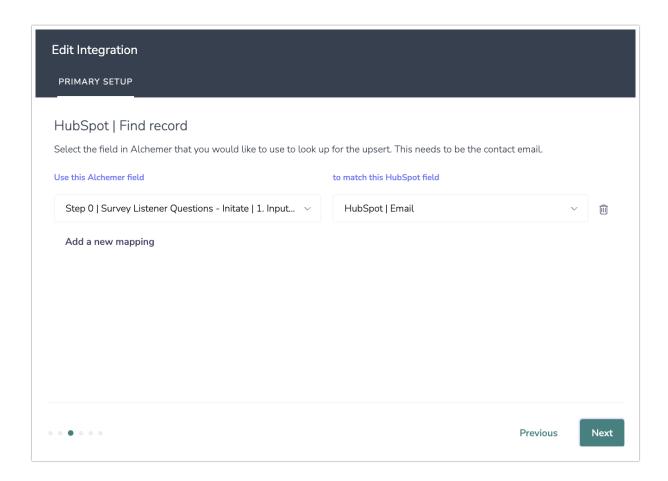
1. Select "Upsert contact | Upsert contact in HubSpot" as your action.



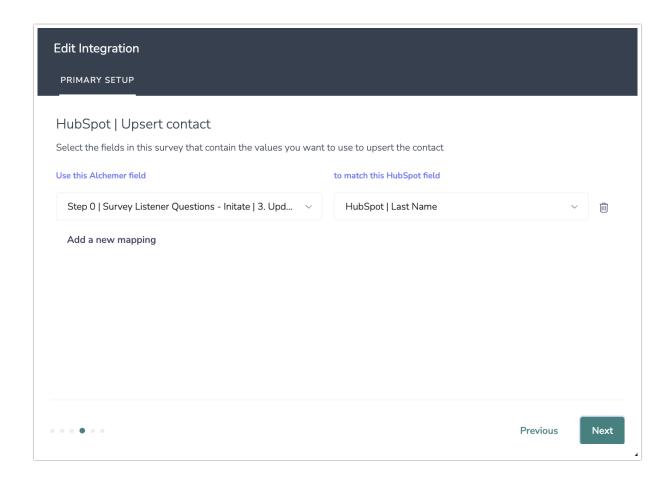
2. Authenticate with your HubSpot account. Click add a new account. Once complete, return to the setup wizard in Alchemer.



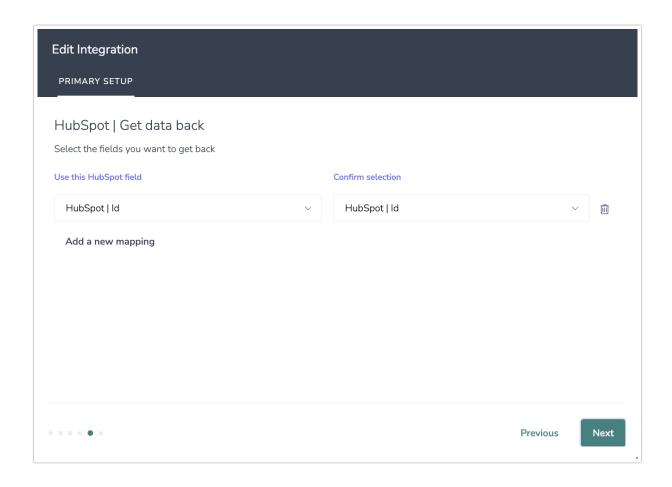
3. Select the field in Alchemer that you would like to use to look up for the upsert. This needs to be the contact email.



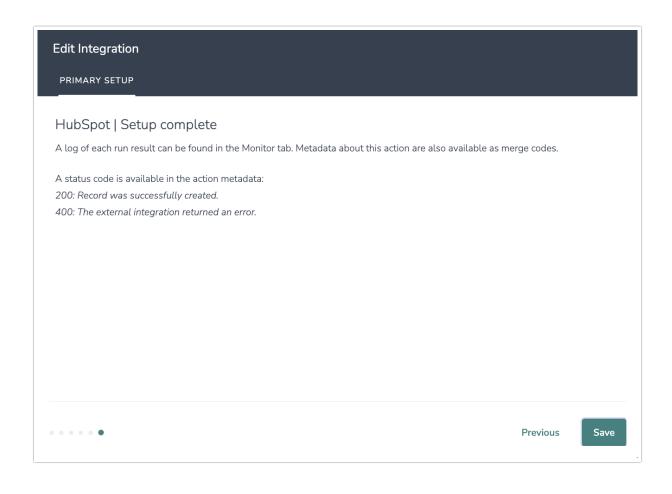
4. Select the fields in this survey that contain the values you want to use to upsert the contact.



5. Select the fields you want to get back.



6. Setup complete | A log of each run can be found in the Monitor tab. Metadata about this action is also available as merge codes.



▶ This integration doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles