

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.

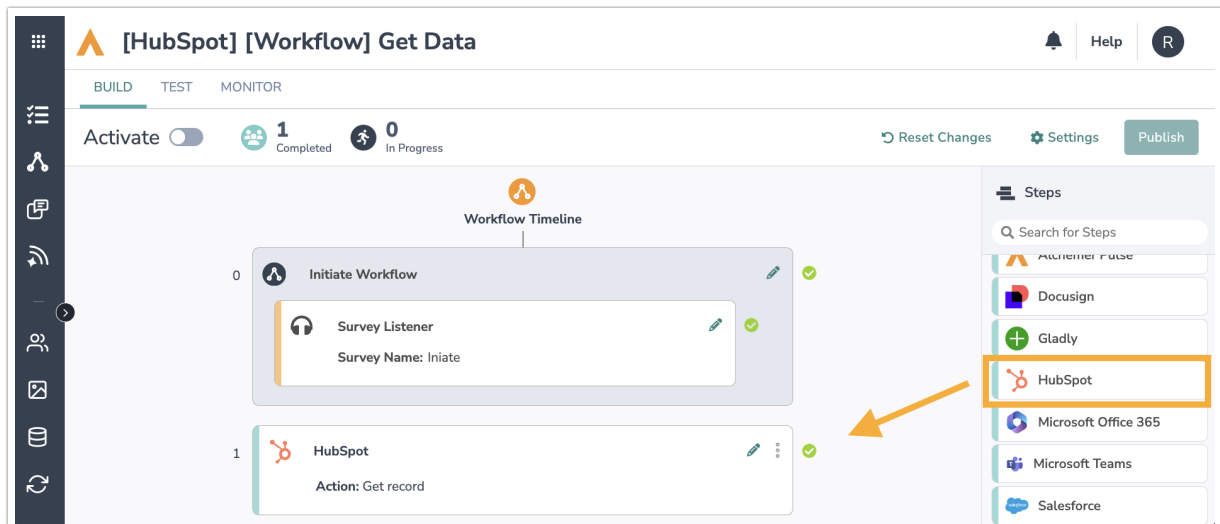
Adding a HubSpot Step to your Workflow

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.](#)

Configure Integration

PRIMARY SETUP

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Select Action

Select the action you would like to perform.

Get record
Get a record from HubSpot

Update record
Update a record in HubSpot

Create record
Create a record in HubSpot

Upsert contact
Upsert a contact in HubSpot

[Cancel](#) [Next](#)

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.

Configure Integration

PRIMARY SETUP

HubSpot | Get record


Get a record from a HubSpot object

You will need:

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

Need help? [Learn more](#)

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

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PRIMARY SETUP

SugarCRM | Get record


Get a record in SugarCRM of any type

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this workflow used to find the record

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


Configure Integration

PRIMARY SETUP

HubSpot | Authentication

Authenticate with HubSpot

You do not need to enter a Developer API key

 HubSpot connected ▼ ⋮

Progress indicator: 1 of 5 steps (1st step active)

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

Edit Integration

PRIMARY SETUP

HubSpot | Select object

Select the object type

Select object*

▼

Progress indicator: 2 of 5 steps (2nd step active)

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

Edit Integration

PRIMARY SETUP

HubSpot | Find record

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

Use this Alchemer field

to match this HubSpot field

Step 0 | Survey Listener Questions - Initiate | 1. Input... ▾

HubSpot | Email ▾



Add a new mapping

Select operator*

AND ▾

Depending on the operator chosen below, each field will be separated by the OR, or the AND operator.



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6. Select the fields you want to get back.

Edit Integration

PRIMARY SETUP

HubSpot | Get data back

Select the fields you want to get back

Use this HubSpot field

Confirm selection

HubSpot | Email



HubSpot | Email



HubSpot | First Name



HubSpot | First Name



HubSpot | Last Name



HubSpot | Last Name



Add a new mapping



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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.

Edit Integration

PRIMARY SETUP

HubSpot | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

200: A single record was successfully found

201: Query ran successfully, but no records were found

202: More than one record was found. The first record is used for the values returned to Alchemer

400: The external integration returned an error



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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

Configure Integration

PRIMARY SETUP

HubSpot | Update record

Update a record within a HubSpot object

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

Need help? [Learn more](#)

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

Configure Integration

PRIMARY SETUP

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Select Action

Select the action you would like to perform.

Get record
Get a record from HubSpot

Update record
Update a record in HubSpot

Create record
Create a record in HubSpot

Upsert contact
Upsert a contact in HubSpot

[Cancel](#) [Next](#)

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


Configure Integration

PRIMARY SETUP

HubSpot | Authentication

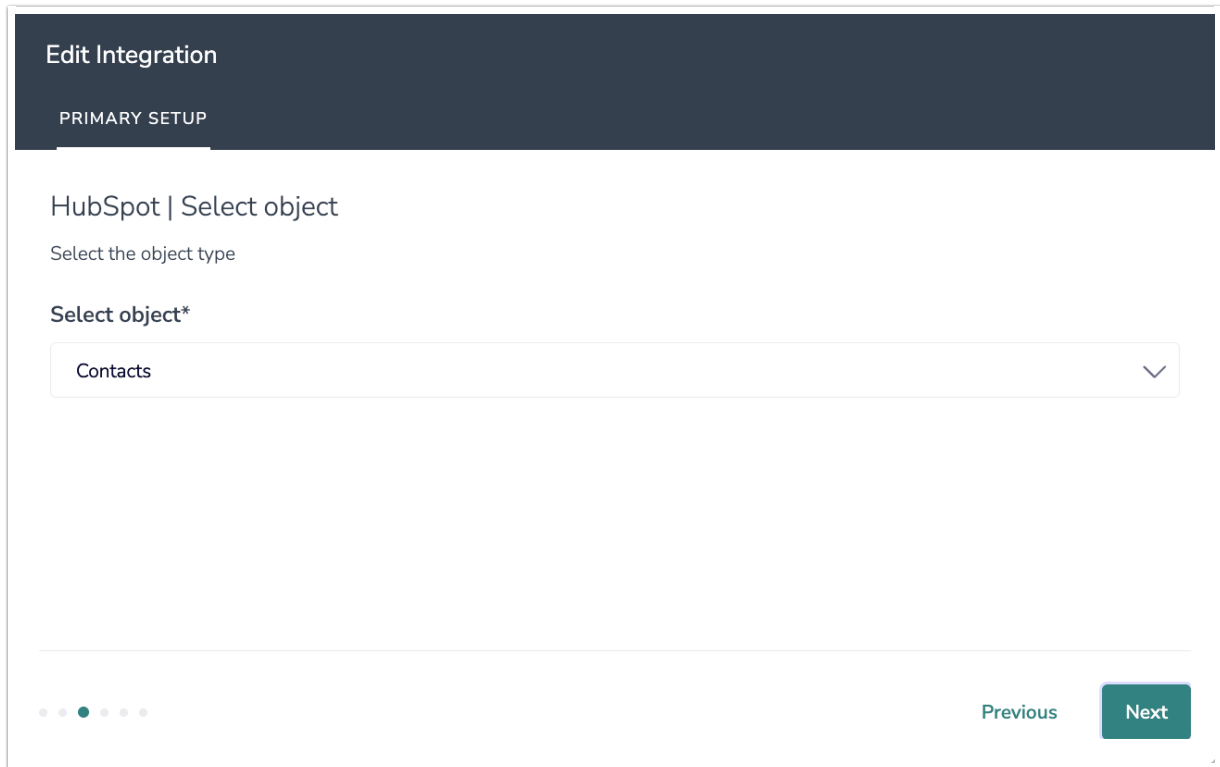
Authenticate with HubSpot

You do not need to enter a Developer API key

 HubSpot connected ▼ ...

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



Edit Integration

PRIMARY SETUP

HubSpot | Select object

Select the object type

Select object*

Contacts

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The screenshot shows a dark blue header with the text 'Edit Integration' and 'PRIMARY SETUP'. Below this is a white content area with the title 'HubSpot | Select object' and the instruction 'Select the object type'. A dropdown menu labeled 'Select object*' is open, showing 'Contacts' as the selected option. At the bottom of the form, there are five small dots for progress, with the second dot from the left being filled. To the right of the dots are two buttons: 'Previous' and 'Next', with 'Next' being a dark teal button.

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

Edit Integration

PRIMARY SETUP

HubSpot | Find record

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

Use this Alchemer field

to match this HubSpot field

Step 0 | Survey Listener Questions - Initiate | 1. Input... ▾

HubSpot | Email ▾



Step 0 | Survey Listener Questions - Initiate | 2. Input... ▾

HubSpot | First Name ▾



Add a new mapping

Select operator*

AND ▾

Depending on the operator chosen below, each field will be separated by the OR, or the AND operator.



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

Edit Integration

PRIMARY SETUP

HubSpot | Update record

Select the fields in this workflow that contain the values you want to use to update the record

Use this Alchemer field

to update this HubSpot field

Step 0 | Survey Listener Questions - Initiate | 3. Upd... ▾

HubSpot | Last Name ▾



Add a new mapping



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6. Select the fields you want to get back.


Edit Integration

PRIMARY SETUP

HubSpot | Get data back

Select the fields you want to get back

[Use this HubSpot field](#) [Confirm selection](#)

HubSpot Id	HubSpot Id	
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[Add a new mapping](#)

Progress indicator: 5 dots, 4th dot active

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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.

Edit Integration

PRIMARY SETUP

HubSpot | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

200: Record was successfully updated.

202: Multiple records were found. Please update your query to select unique fields.

400: The external integration returned an error.



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HubSpot | Create a record

You will need:

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

Configure Integration

PRIMARY SETUP

HubSpot | Create record

Create a record within a HubSpot object

You will need:

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

Need help? [Learn more](#)

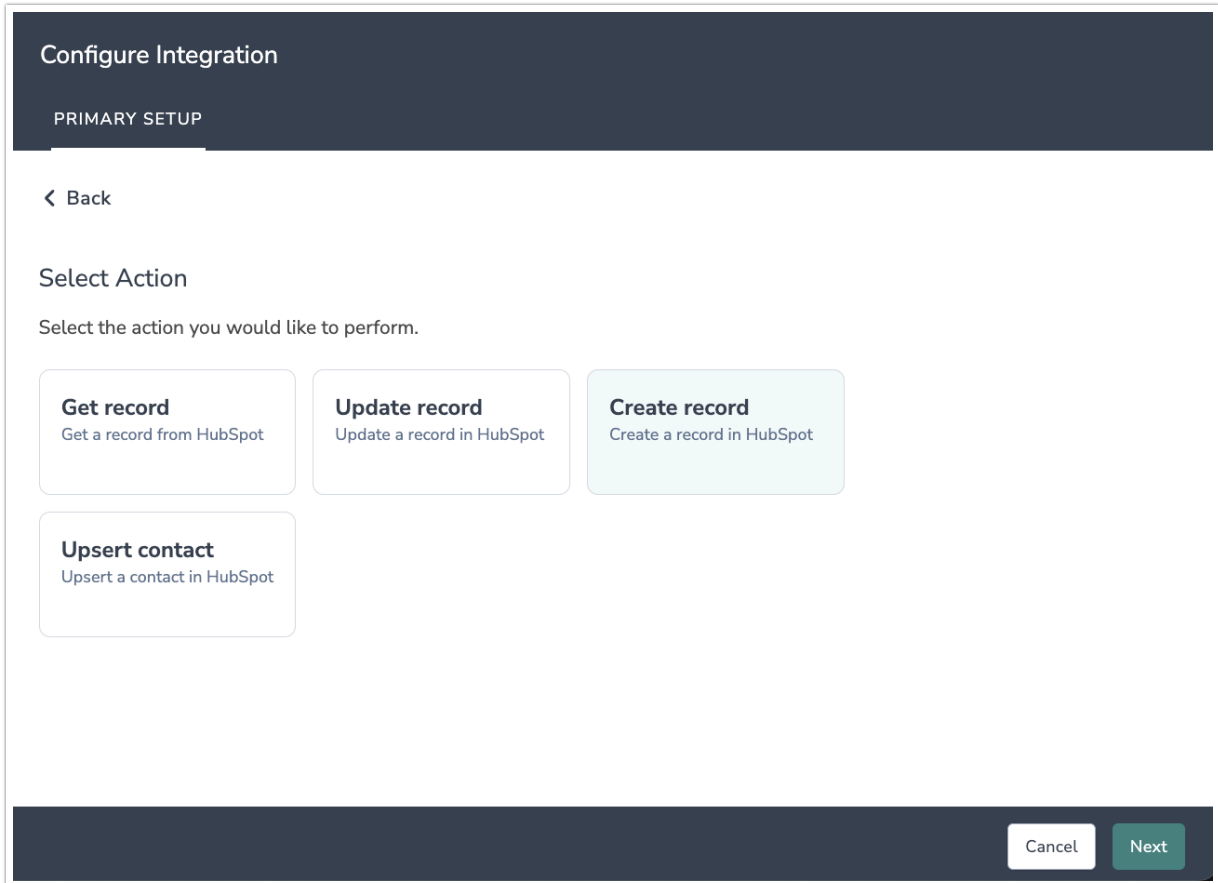
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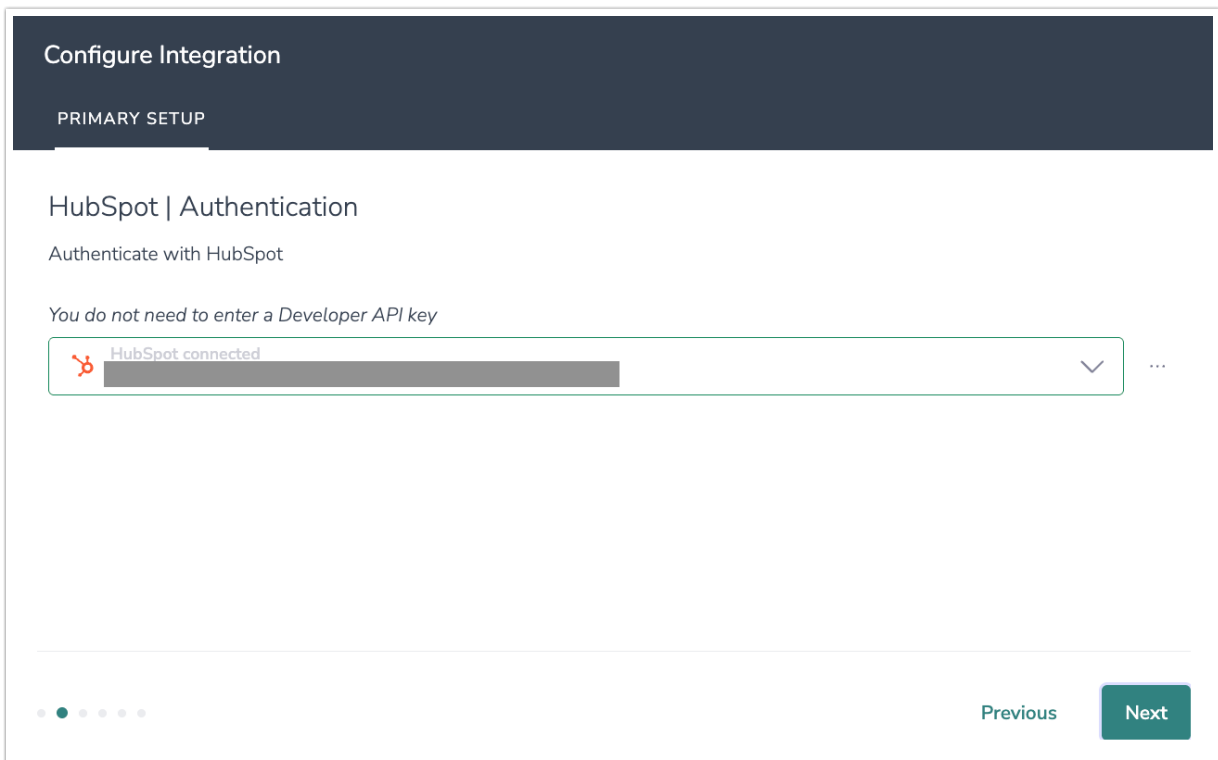
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1. Select "Create record | Create a record in HubSpot" as your action.



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.

The screenshot shows a dark blue header with the text "Edit Integration" and "PRIMARY SETUP" below it. The main content area is white and contains the text "HubSpot | Select object" followed by "Select the object type". Below this is a label "Select object*" and a dropdown menu with "Contacts" selected and a downward arrow. At the bottom left, there are five dots, with the second one filled. At the bottom right, there are two buttons: "Previous" and "Next".

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

Edit Integration

PRIMARY SETUP

HubSpot | Create record

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

Use this Alchemer field

to match this HubSpot field

Step 0 | Survey Listener Questions - Initiate | 1. Input... ▾

HubSpot | Email ▾



Step 0 | Survey Listener Questions - Initiate | 2. Input... ▾

HubSpot | First Name ▾



Add a new mapping



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5. Select the fields you want to get back.


Edit Integration

PRIMARY SETUP

HubSpot | Get data back

Select the fields you want to get back

Use this HubSpot field Confirm selection

HubSpot Id	HubSpot Id	
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Add a new mapping

Progress indicator: 5 dots, 3rd dot highlighted

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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.

Edit Integration

PRIMARY SETUP

HubSpot | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

200: Record was successfully created.

400: The external integration returned an error.



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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

Configure Integration

PRIMARY SETUP

HubSpot | Upsert contact

Upsert a contact within HubSpot

You will need:

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

Need help? [Learn more](#)

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

Configure Integration

PRIMARY SETUP

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Select Action

Select the action you would like to perform.

Get record
Get a record from HubSpot

Update record
Update a record in HubSpot

Create record
Create a record in HubSpot

Upsert contact
Upsert a contact in HubSpot

[Cancel](#) [Next](#)

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


Configure Integration

PRIMARY SETUP

HubSpot | Authentication

Authenticate with HubSpot

You do not need to enter a Developer API key

 HubSpot connected ▼ ...

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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.


Edit Integration

PRIMARY SETUP

HubSpot | Find record

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

Use this Alchemer field to match this HubSpot field

Step 0 Survey Listener Questions - Initiate 1. Input..	HubSpot Email	
--	-----------------	---

[Add a new mapping](#)

Progress indicator: 5 dots, 2nd dot highlighted

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

Edit Integration

PRIMARY SETUP

HubSpot | Upsert contact

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

Use this Alchemer field

to match this HubSpot field

Step 0 | Survey Listener Questions - Initiate | 3. Upd... ▾

HubSpot | Last Name ▾



Add a new mapping



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5. Select the fields you want to get back.

Edit Integration

PRIMARY SETUP

HubSpot | Get data back

Select the fields you want to get back

Use this HubSpot field

Confirm selection

HubSpot | Id



HubSpot | Id



Add a new mapping



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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.

Edit Integration

PRIMARY SETUP

HubSpot | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

200: Record was successfully created.

400: The external integration returned an error.



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

Related Articles