

ZFUSION

GETTING STARTED GUIDE



Introduction

In today's ever evolving tech world, being able to accommodate your target audience anywhere is super important. Zoom is a tool that is being used globally amongst teams that want their remote teams and audience members to engage with them in a virtual setting. However, being able to gauge the true success of the events that are hosted through Zoom is critical as well. It is important to have the ability to capture detailed information about your attendees and be able to access it in one location— like your CRM.

Most businesses are using a variety of different tools to accommodate this need. Using too many tools can affect the efficiency and sometimes the accuracy of analyzing the data from your events.

ZFusion is one tool that gives you the ability to capture the data from your Webinars and Meetings in Salesforce.

This integration will help manage your audience interaction, determine the level of engagement occurring during each event, and also provides an environment for you to track the campaign history of your engaged contacts in Salesforce.



Why Integrate?

Salesforce integrations are designed to connect a platform or tool to the suite of Salesforce products. Marketing technology is an essential component for Salesforce integrations. There are many approved integrations including [Predictive Marketing](#), [ZFusion](#), and [Eventbrite Fusion](#) for Salesforce that can be found on the [Salesforce Appexchange](#).

How to integrate ZFusion in your Salesforce

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To get started with ZFusion integration in your Salesforce:

1. Search ZFusion on the [AppExchange](#).
2. Click “**Get it Now**”
3. Select the location where you want to install this package
 - a. **Live Production Environment** – it is highly recommended to schedule time with the Predictive Support Specialist to ensure your integration is set up correctly.
 - b. **Sandbox- Testing/Demo environment.** When downloading an Eventbrite Fusion, you will want to keep in mind that you may be limited on your capabilities–please reach out to our sales team for more information.
4. Reach out to our team at sales@predictive.cc to receive instructions on selecting the proper package that would fit the volume of unique registrants and also paying for the integration. Compared to [Predictive Marketing](#), [ZFusion](#) does provide a **14-Day Free Trial** when you install the app in your Sandbox.
 - a. *Keep in mind this is a paid application for Salesforce, payment for the app covers one single [ZFusion](#) license for your entire staff.*



ZFusion: Zoom and Salesforce Integration

By Predictive Response

Seamlessly integrate Zoom Webinar and Salesforce

★★★★★ 5 Average Rating (2 Reviews)

Supported Features

Lightning Ready Multiple Currencies
Person Accounts

[More Details](#)

Starting at \$49 USD/company/month

Discounts are available for nonprofits

[Pricing Details](#)

ZFusion seamlessly integrates Zoom Webinar and Salesforce. Automatically track your webinar's registrants, attendees and webinar engagement in Salesforce. Pull meaningful webinar reports in Salesforce to learn about your webinar success and audience.

Get It Now

More ▾

Overview

Reviews

More Details

Quick Tip

I would highly recommend scheduling a call with our Sales Team for a walkthrough and our Support team to ensure that your ZFusion application is set up correctly.

[You Can Book A Call Here](#)



What are the benefits of using ZFusion for Salesforce?

Before you make the decision to purchase an app or integration for your CRM you will want to consider the benefits of your selection and also your company's needs and goals. Consider the following questions:

- What piece of information is the most important to collect from Zoom?
- Are you hoping to compare your current events with previous events?
- How do you plan to segment future communication with your audience?

Here are a few benefits of choosing ZFusion as your integration for Zoom and Salesforce:



Track Audience Data

The #1 benefit of using [ZFusion for Salesforce](#) is that you can track your audience attendance data. When you create a Webinar in Zoom it becomes a “Campaign” in Salesforce. Each time an attendee completes a registration for the event, it will automatically create a “Contact” or “Lead” depending on your preference. Each bit of information that the attendee includes, for example; their location, phone numbers and custom questions will be captured in Salesforce.

The screenshot shows a Salesforce contact record for Sharon Harvey with Mobile. The contact is an Active Junior - Land - Accepted, with account name Harvey Account, email harveysharon@gmail.com, and contact owner Esben 2411. The related list quick links include Campaign History (10+), Eventbrite Orders (0), Eventbrite Tickets (0), Zoom Registrations (3), Engagement Activities (10+), Web Page ROI (3), Email ROI (1), Opportunities (2), and Subscriber Choices (0). The details section shows the contact's name, account name, title, lead source, contact type, and predictive information.

Related List Quick Links
Campaign History (10+)
Eventbrite Orders (0)
Eventbrite Tickets (0)
Zoom Registrations (3)
Engagement Activities (10+)
Web Page ROI (3)
Email ROI (1)
Opportunities (2)
Subscriber Choices (0)

Details	
Name	Sharon Harvey with Mobile
Account Name	Harvey Account
Title	Active Junior - Land - Accepted
Lead Source	Eventbrite
Contact Type	VIP
Predictive	

If your contacts in Salesforce attend more than one event throughout the year that is hosted on Zoom, each individual registration that contact completes will be captured under Campaign history and broken down under ZFusion registration.

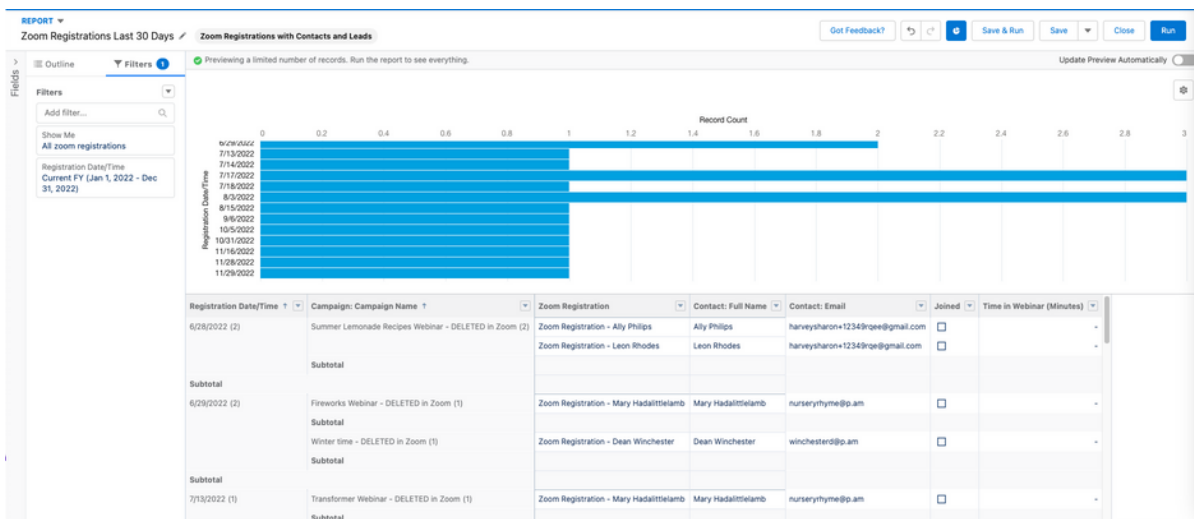
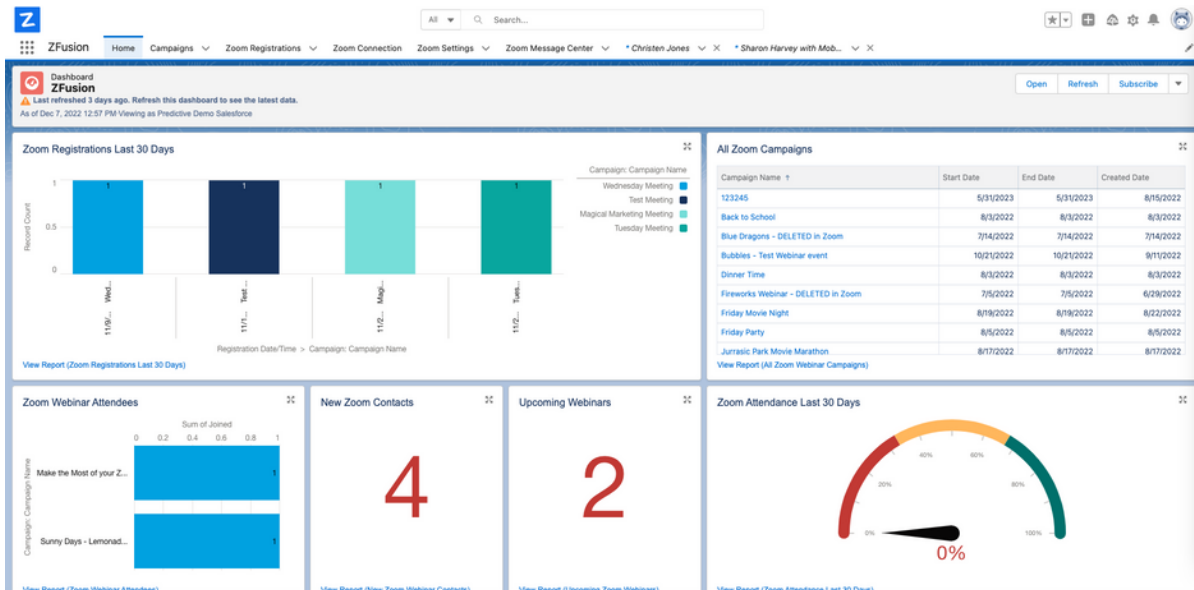
The screenshot shows the Zoom Registrations (3) list in Salesforce. The list contains three items, each with a checkbox, a Zoom Registration link, a Campaign name, a Registration Date/Time, a Registration Status, a Joined checkbox, and a Time in W... dropdown.

	Zoom Registration	Campaign	Registration Date/Time	Registration Status	Joined	Time in W...
1	☐ Zoom Registration - Eilyn Arnold	Salads for Everyone	8/15/2022 1:59 PM	Approved	☐	
2	☐ Zoom Registration - Sharon Harvey	Make the Most of your Zoom Data	9/2/2022 6:38 PM	Approved	☒	0
3	☐ Zoom Registration - Sharon Harvey	Test 221031	10/31/2022 5:03 AM	Approved	☐	



Monitor The Success Of Your Events

The next benefit of using [ZFusion](#), is that you are able to track and monitor the ROI of your events. Our pre-built dashboard you can track your tickets created from Zoom Webinars and Meetings from the last 30 days, the number of new contacts created from Zoom Registrations, and true attendance data. You can use the functionality of Salesforce to manipulate some of the fields, for example expanding the view of Zoom Webinar and Meeting Attendance to reflect the entire year.



Communicate with your audience before and after your next event

By using [ZFusion](#) for Salesforce, you have the ability to create segmented campaigns with the information you collected from your events. Using [Predictive Marketing](#) and [ZFusion](#) together allows you to send meaningful updates and reminders to your audience members that purchased a ticket, and to send a follow up “Thank-You” to them after they attended your event.

