

Install Zoom Revenue Accelerator for Creatio

Zoom Revenue Accelerator connector for Creatio seamlessly integrates ZRA with Creatio, ensuring that key meeting insights, transcripts, and engagement data are automatically linked to the relevant activities and contacts in your CRM. This connector enhances sales efficiency by providing direct access to conversation intelligence, helping teams make data-driven decisions faster.

The app has the following key features:

- Syncs meeting summaries, transcripts, and insights from ZRA with corresponding activities in Creatio.
- Automatically associates meeting insights with contacts and accounts based on meeting and participant data.
- Captures engagement scores, sentiment scores, and key conversation moments directly in Creatio for improved deal tracking.

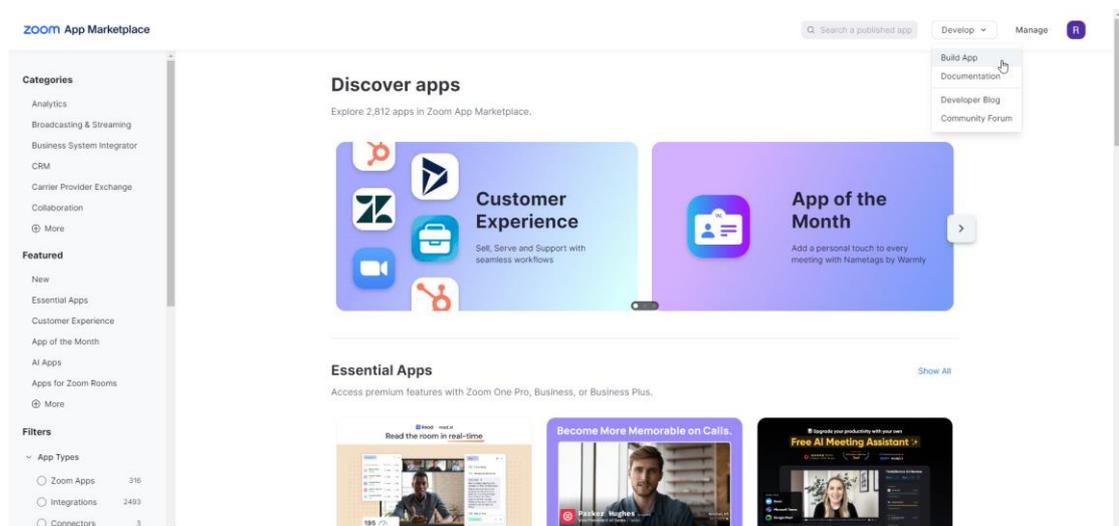
Connect ZRA to Creatio

Create Zoom API keys and add them to Creatio

Note. The setup must be performed by the user included in “System administrator” role.

If Zoom Meeting connector for Creatio is already configured for the current Creatio website, extend the number of scopes from step #9 and webhook events from step #15 only. At the end, re-authenticate all users that must receive new scopes (step #22).

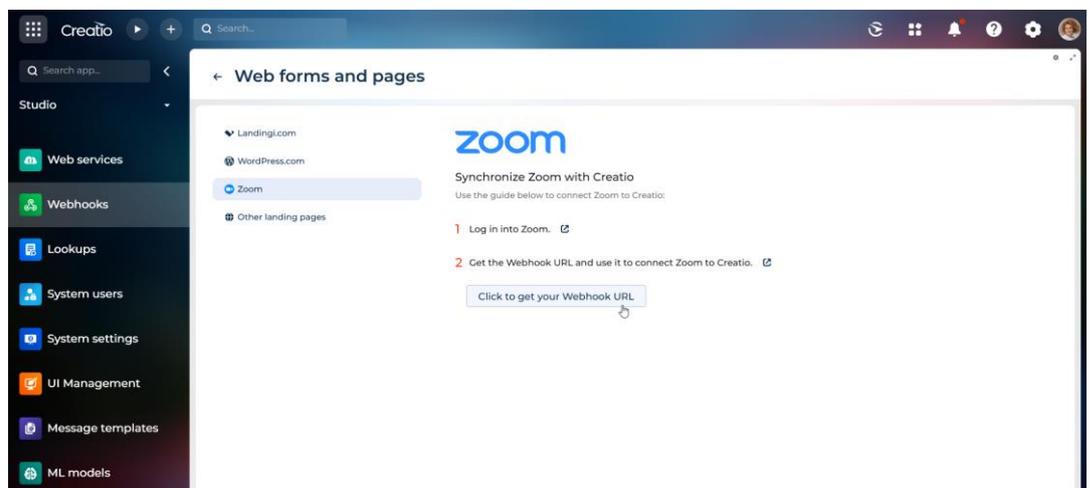
1. Open the Zoom App Marketplace: <https://marketplace.zoom.us/>
2. Open the [*Develop*] block in the top right → [*Build App*].



3. Select “General app”.
4. Enter an arbitrary name of the integration in the [Name] field in the top left. For example, “Creatio app.”
5. Make sure the app will not be published on Zoom App Marketplace and is marked as “User-managed”.
6. Enter the redirect URL of the Zoom Revenue Accelerator connector in the [OAuth Redirect URL] field. Use the following format:
<https://sitename.domain.com>
7. Enter the same URL in the [Add allow list] field.
8. Go to the [Scopes] tab → [Add Scopes].
9. Select and apply the following scopes

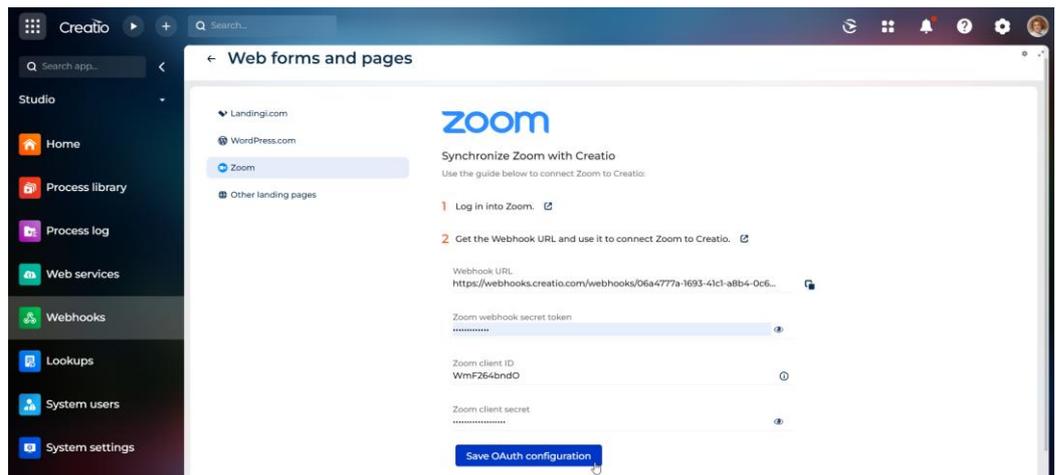
Scope	Description
Meeting	
meeting:read:meeting	View a meeting
Recording	
cloud_recording:read:recording	View a recording
Zoom Revenue Accelerator	
zra:read:conversations	Read conversation
zra:read:conversation_participants	View conversation participants
zra:read:conversation_analysis	View conversation analysis
zra:read:list_conversations	View conversations
User	
user:read:user	View a user

10. Go to the [Access] tab and activate [Event Subscription] block.
11. Click [Add New Event Subscription].
12. Select the "Webhook" Webhook Method.
13. Enter an arbitrary name of the integration in the [Subscription name] field.
14. Click [Add Events].
15. Add the following necessary events:
 - I. "Revenue Accelerator" type
 - "Revenue Accelerator conversations analysis completed"
16. Fill out the "Event notification endpoint URL" field. To receive the URL:
 - I. Open Creatio.
 - II. Go to the [Webhooks] section.
 - III. Open the [Help] tab → "Webhook URL."
 - IV. Get the Webhook URL. To do this, click "Zoom" → "Click to get your Webhook URL".

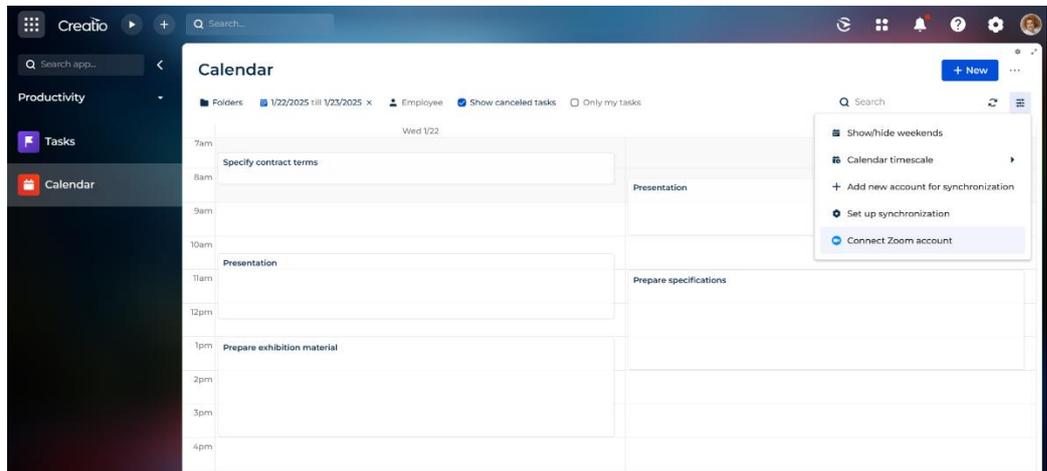


Webhook URL is copied automatically. Do not close this page.

- V. Come back to Zoom App settings and fill out the *"Event notification endpoint URL"* field using copied value.
17. Save the settings.
 18. Fill out the settings in Creatio using corresponding values from Zoom settings:
 - I. Copy the *"Secret Token"* value and paste it into the *"Zoom webhook secret token"* field on the *"Access"* tab.
 - II. Copy the *"Client Id"* value on the left and paste it into the *"Zoom client id"* field.
 - III. Copy the *"Client secret"* value on the left and paste it into the *"Zoom client secret"* field.



19. Save your OAuth configuration.
20. Click *"Authenticate in Zoom"* and follow the instructions until the end.
21. Specify the user account under which all ZRA requests will be authenticated and executed in the *"Zoom. ZRA Admin User"* (*"MrktZRAAdminUser"* code) system setting.
22. Users that do not have the *"System administrator"* role must proceed with the authentication by following these steps:
 - I. Open the [*Calendar*] section.
 - II. Go to the [*Calendar settings*] menu item → [*Connect Zoom account*] and follow the instructions until the end.



Since all configuration steps are done, Creatio will process ZRA data as soon as meeting will be finished and processed in ZRA by incoming webhooks.

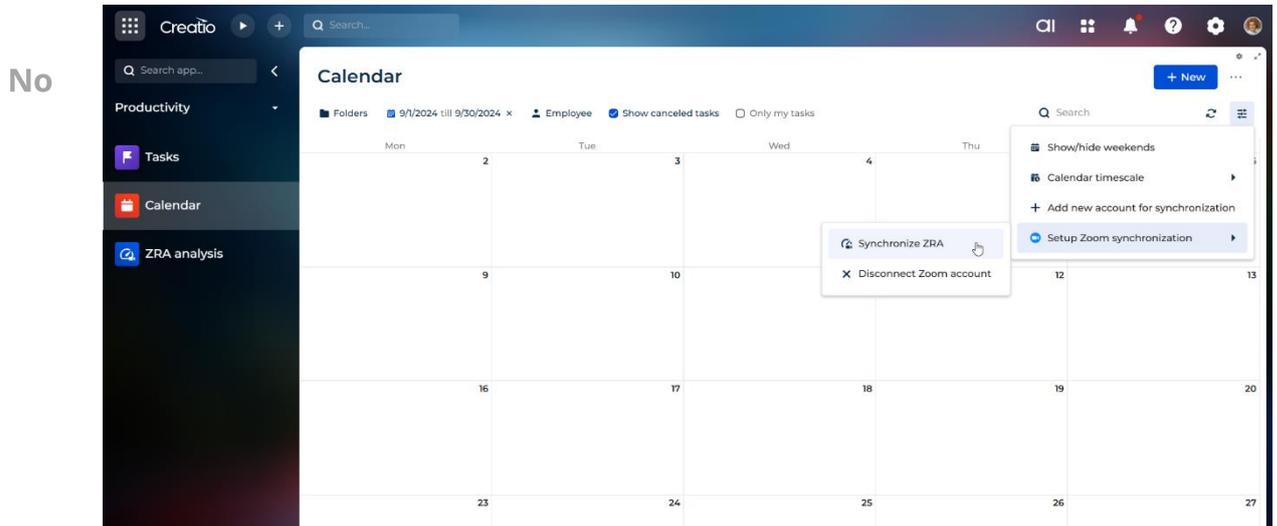
If you want to stop the processing of all incoming webhooks from ZRA turn off the “Zoom. Enable Revenue Accelerator synchronization” (“MrktZoomEnableZRASync” code) system setting.

Creatio will create a new activity record based on ZRA insights if no corresponding records exist.

To turn this off, use the “Zoom. Create activity from ZRA conversation” (“MrktCreateActivityFromZRAConversation” code) system setting.

Synchronize historical ZRA insights with Creatio Calendar

1. Open the [Calendar] section.
2. Click [Calendar settings] → [Connect Zoom account]. This opens a window.
3. Select synchronization period → “Synchronize.”



Contact search rules

The app searches contacts that match meeting participants using the following rules:

1. by email
2. by matching email address with ContactCommunication records where the number matches the email address, communication type is "Email", and the communication type is not marked as deleted
3. by Full name, First name, Last name, or Middle name

Manage the procedure in the “Zoom Revenue Accelerator. Contact search rules” lookup.