

Investing.com

# HOSTED WEBINAR — SPECS —



# Airtable Specs

## Required Airtable Information

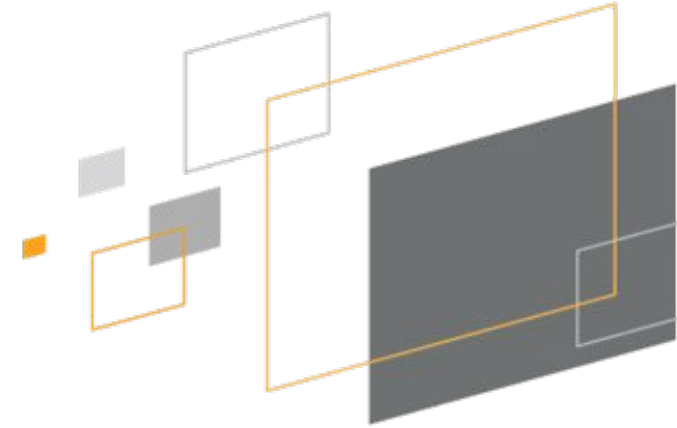
If you choose to use Airtable as your CRM, you need to create an Airtable account and send the following:

1. Personal Access Token
2. Airtable API Endpoint URL
  - Note – if you are using different bases, please provide different API Endpoint URLs.

\*More details are provided from page 4 in the specs.

### Please Note!

- All fields, columns and names should be kept as they are in the template base – You cannot delete any existing columns or change any column names.
- Additional columns can be added, but the specific column names need to be provided to Investing.com for the integration.



# General Webinar Specs

## Specs for Webinar API Integration

1. Fill out the [Webinar – API Integration form](#).

This only needs to be filled once per Brand.

Once the form is filled, we will be able to begin with the integration process. A test lead will be sent in order to confirm a successful integration.

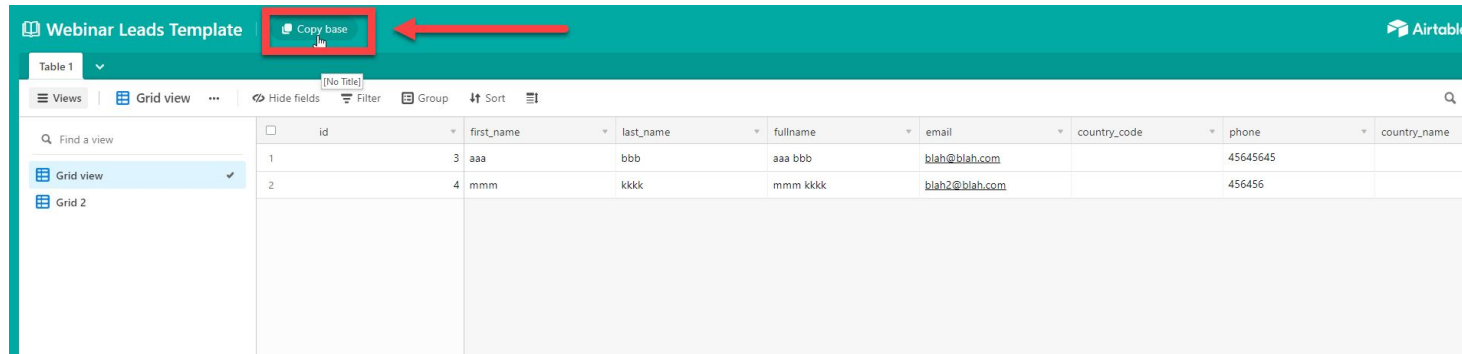
## Additional Information:

- We use PHP coding.
- Whitelist our server:
  - A. The IP: 142.54.23.107
  - B. The server: <http://app2.forexpros.com>

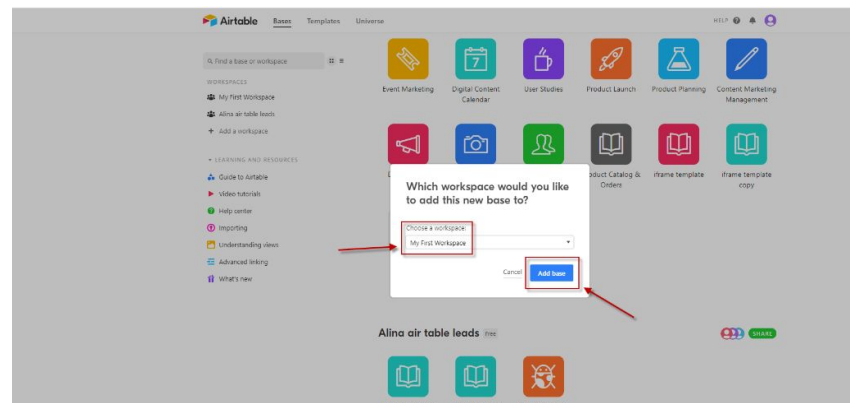
# Setup guide Airtable for Clients

## Flow for Uploading Table “Webinar Leads Template” Via Airtable

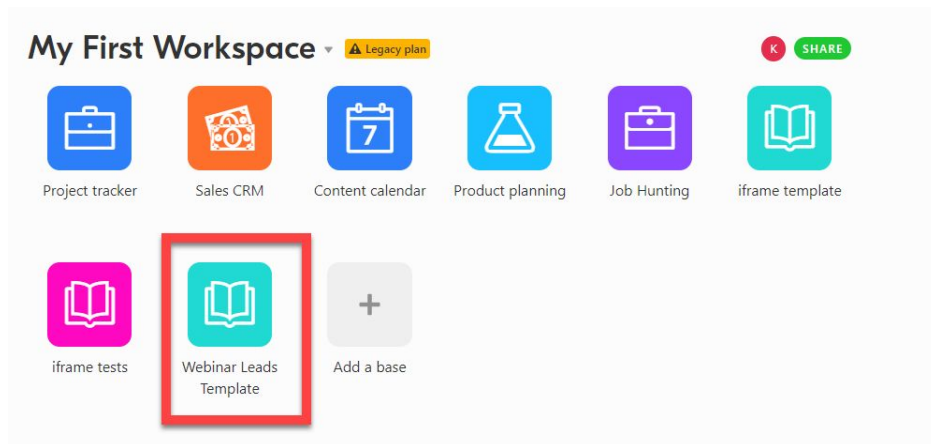
1. Sign up to Airtable - [Create an Airtable account](#)
2. Open the following link in order to copy table template: <https://airtable.com/shrtKtQb3eVmoY90f>
3. Copy table template - Click “copy base” at the top of the page.



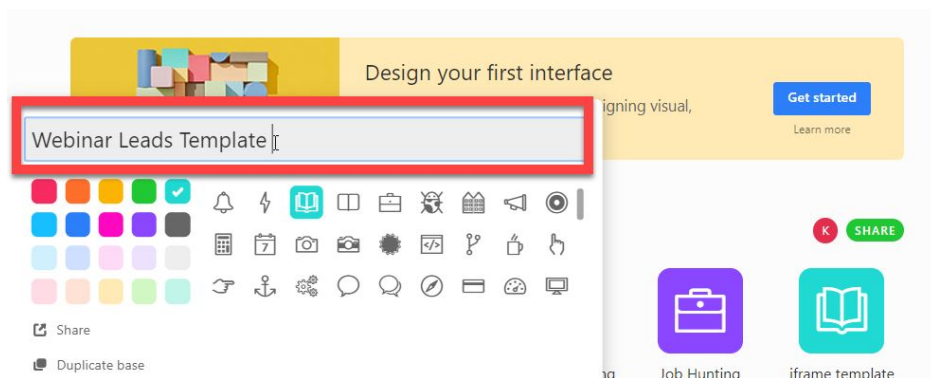
4. A pop-up will appear and ask which workspace the new base should be added to
5. Click on - “Add base”



6. A new base was created:  
\* Make sure the copy was set in your Airtable Environment

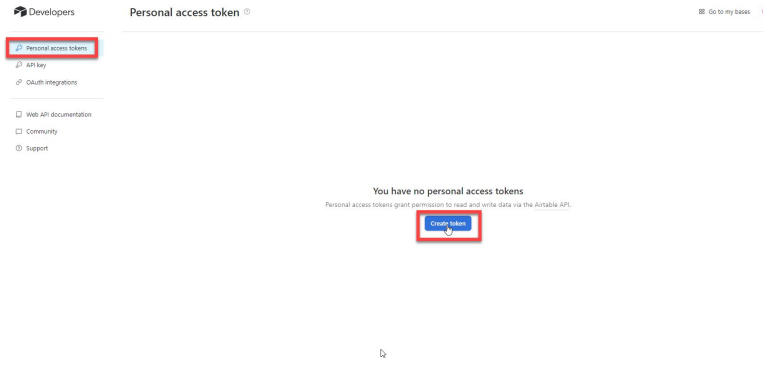
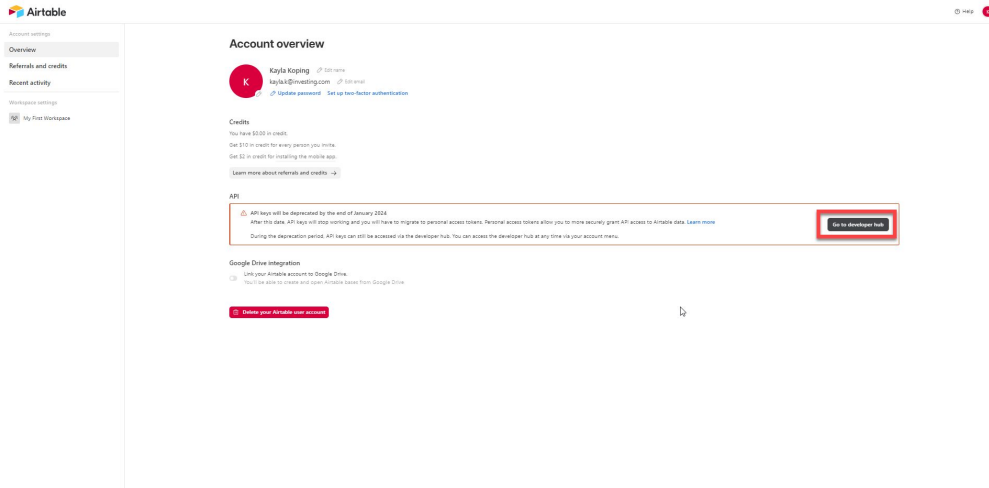


7. In the new base that was created you may change the name of the base only.  
**Please NOTE: DO NOT change any other field settings in the table formatting**



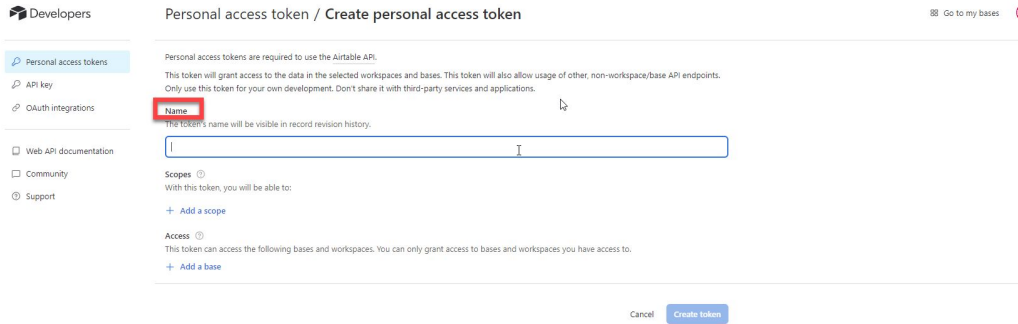
## How to Extract Personal Access Token & Endpoint URL

1. To find your personal access token navigate to your account page.
2. On your account overview page, click on “Go to developer hub”
3. If this is your first time creating your token, choose “Personal access tokens”
4. Click “Create token”



## How to Extract Personal Access Token & Endpoint URL

### 5. Add a unique name for your personal access token



Developers Personal access token / Create personal access token Go to my bases

Personal access tokens are required to use the Airtable API.  
This token will grant access to the data in the selected workspaces and bases. This token will also allow usage of other, non-workspace/base API endpoints.  
Only use this token for your own development. Don't share it with third-party services and applications.

**Name**  
The token's name will be visible in record revision history.

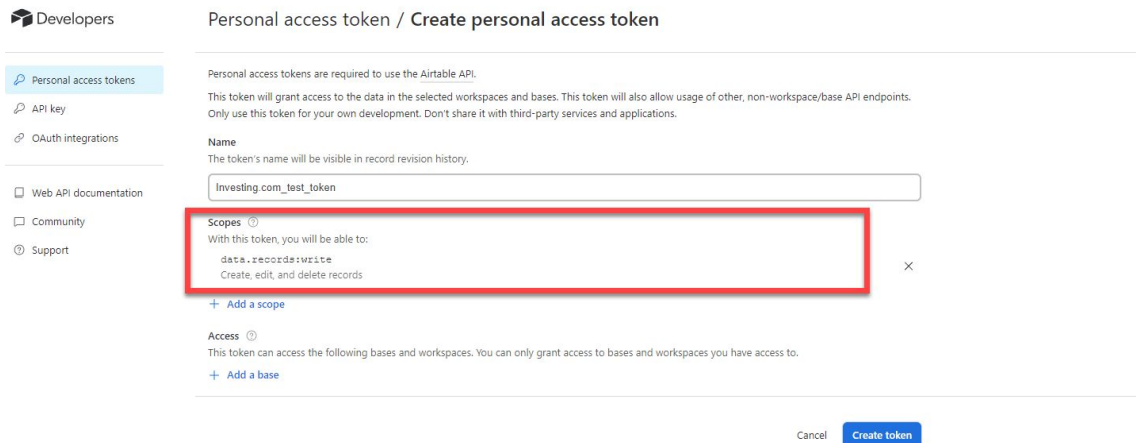
Scopes  
With this token, you will be able to:  
[+ Add a scope](#)

Access  
This token can access the following bases and workspaces. You can only grant access to bases and workspaces you have access to.  
[+ Add a base](#)

[Cancel](#) [Create token](#)

### 6. Add a scope

#### “data.records.write” (create, edit, and delete records)



Developers Personal access token / Create personal access token

Personal access tokens are required to use the Airtable API.  
This token will grant access to the data in the selected workspaces and bases. This token will also allow usage of other, non-workspace/base API endpoints.  
Only use this token for your own development. Don't share it with third-party services and applications.

**Name**  
The token's name will be visible in record revision history.

Investing.com\_test\_token

**Scopes**  
With this token, you will be able to:  
data.records.write  
Create, edit, and delete records

[+ Add a scope](#)

**Access**  
This token can access the following bases and workspaces. You can only grant access to bases and workspaces you have access to.  
[+ Add a base](#)

[Cancel](#) [Create token](#)

## How to Extract Personal Access Token & Endpoint URL

### 7. Add a base

**“All current and future bases in all current and future workspaces”**

This selection is highly recommended in order to have one personal access token for all bases

Developers Personal access token / Investing.com\_test\_token Go to my bases

Personal access tokens  
API key  
Auth integrations

Web API documentation  
Community  
Support

**\* Name**  
The token's name will be visible in record revision history.  
Investing.com\_test\_token

**\* Scopes**  
With this token, you will be able to:  
data.records.write  
Create, edit, and delete records  
[+ Add a scope](#)

**Access**  
This token can access the following bases and workspaces. You can only grant access to bases and workspaces you have access to.  
[+ Add a base](#)

Find a workspace or base

ALL WORKSPACES  
**All current and future bases in all current and future workspaces**

MY FIRST WORKSPACE  
All current and future bases in this workspace  
Project tracker [No Title]  
Sales CRM

[Save changes](#)

Airtable © Airtable Terms Privacy

### 8. Click “Create token”



## How to Extract Personal Access Token & Endpoint URL

9. Your token has been created

**The token will be displayed only once! You will not have access to it again.**

**Copy the entire token and share it with the Premium team.**

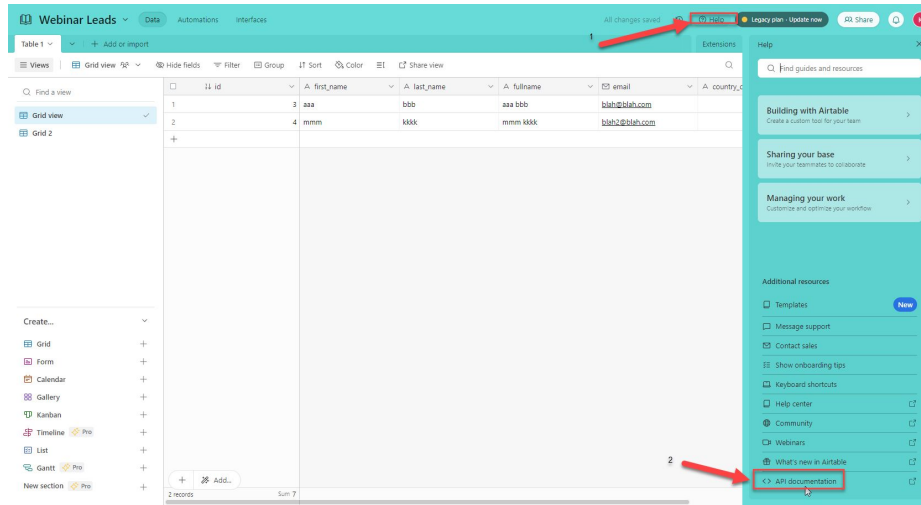
**Store this somewhere safe for future incase you ever need it again!**

The screenshot shows the Airtable Developers interface for creating a personal access token. A modal window titled "Your token has been created" is displayed in the center, containing the following text: "This token will only be shown once. Copy it now and store it in a safe, secure location. Only use this token for your own development. Don't share it with third-party services and applications." Below this text, the token is displayed in a red-bordered box: `patBX5athnXf0gZr8.fD177b315768f24eb6b49439b13c38d03253e95`. A red arrow points to the token. The background interface shows the "Name" field set to "Investing.com\_test\_token" and the "Scopes" section with "data.records:read" selected. The "Create token" button is visible at the bottom right of the modal.

**\*Please do not delete/ edit or regenerate your token without consulting with the Premium team**

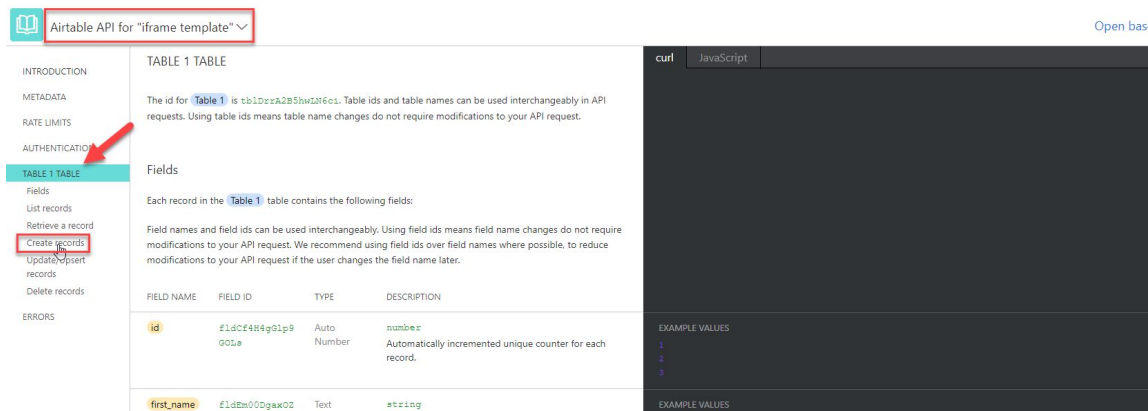
10. In the base that was created, go to the top right corner and click on the icon “Help”

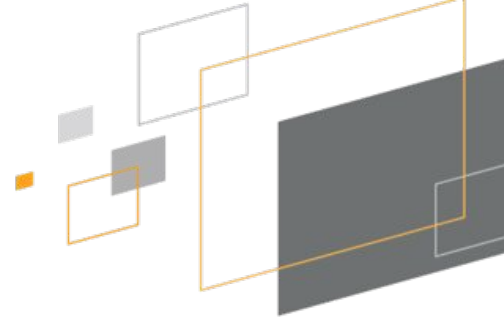
11. Choose – “API documentation” option from the opened list



12. Click on “TABLE 1 TABLE” and continue to “Create records”

\*Check that you are pulling the information for the relevant base (this is shown in the title - Airtable API for [Name of the base] )





13. Under - **EXAMPLE REQUEST** copy the following and send it over to the Premium team.

Parameter to copy:

- Endpoint – (curl -X POST)

**Example of both parameters required:**

- Endpoint - <https://api.airtable.com/v0/appBjVByIaVXr9YIm/Table%201>
- Personal access token - [patBX5athnXf0g zr8.f d177b315768f24eb6b49439b13c38d03253e99658ff3d364a2f6f5e21d7bf79](#)

Airtable API for "iframe template" Open base

INTRODUCTION	Create Table 1 records
METADATA	To create new records, issue a <b>POST</b> request to the <b>Table 1</b> endpoint. Note that table names and table ids can be used interchangeably. Using table ids means table name changes do not require modifications to your API request.
RATE LIMITS	
AUTHENTICATION	Your request body should include an array of up to 10 record objects. Each of these objects should have one key whose value is an inner object containing your record's cell values, keyed by either field name or field id.
TABLE 1 TABLE	
Fields	Returns an array of record objects created if the call succeeded, including record IDs which will uniquely identify the records within <a href="#">iframe template</a> .
List records	
Retrieve a record	
<b>Create records</b>	Values for <b>id</b> and <b>created_time</b> are automatically computed by Airtable and cannot be directly created.
Update/Upsert records	The Airtable API will perform best-effort automatic data conversion from string values if the <b>typecast</b> parameter is passed in ( <a href="#">click to show example</a> ). Automatic conversion is disabled by default to ensure data integrity, but it may be helpful for integrating with 3rd party data sources.
Delete records	
ERRORS	You can also include a single record object at the top level. <a href="#">Click here to show an example</a> .

```
curl -X POST https://api.airtable.com/v0/app8BBhfK1sh5Je7/Table4201 \
  -H "Authorization: Bearer YOUR_SECRET_API_TOKEN" \
  -H "Content-Type: application/json" \
  --data '{
  "records": [
    {
      "fields": {
        "first_name": "aaa",
        "last_name": "bbb",
        "fullname": "aaa bbb",
        "email": "blah@blah.com",
        "phone": "45645645"
      }
    },
    {
      "fields": {
        "first_name": "mmm",
        "last_name": "kkkk",
        "fullname": "mmm kkkk",
        "email": "blah2@blah.com",
        "phone": "456456"
      }
    }
  ]
}
```

# Important Notes

Please pay attention to the following notes

## 1. **Copying Investing's base:**

*The Airtable base needs to be copied from Investing's base.*

*Here is a link to the template file that MUST be uploaded in the client's account : <https://airtable.com/shrtKtQb3eVmoY90f>*

*Creating a new base from scratch won't correspond with Investing's code.*

## 2. **Changing the base template:**

*It's important to keep the Airtable base as it is after copying it – you cannot delete any existing columns or change any column names. You may add additional columns, but you need to provide the specific column names for the integration.*

## 3. **Records limitation:**

*We strongly recommend opening a "Team" account that provides 50,000 Records per base (the FREE account allows 1000 records). The Team account also provides a large option of Priority support response.*

*\*\* For more information use the pricing link: <https://airtable.com/pricing>*

*It is the client's responsibility to open a new base and send the Premium team the Airtable details when reaching the records limit.*

## 4. **Deleting data:**

*Please don't delete any kind of data (leads / records) from the Airtable, even if the leads were transferred to another CRM.*