Investing.com

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 API Integration process. A test lead will be sent in order to confirm a successful integration.

Webinar and Presenter Information

2. Fill out the [Webinar Information form](#)

This needs to be filled out once per webinar.

Once we have established a successful integration, we will be able to take the relevant webinar information live.

The presenter information only needs to be filled once per presenter per site. If the information has already been provided for a specific site, no need to fill this again.

*Kindly note that the description may be revised by Investing.com consideration.
*All webinar dates and times are subject to Investing.com approval.

Additional Information:

- We use PHP coding.
- Whitelist our server:

A. The IP: 142.54.23.107

B. The server: http://app2.forexpros.com

Please Note!

Webinar/ Presenter title cannot contain the following words:

- Broker Name
- CFDs
- Forex
- Options
- Spread Betting

Webinar/ Presenter description cannot contain the following words:

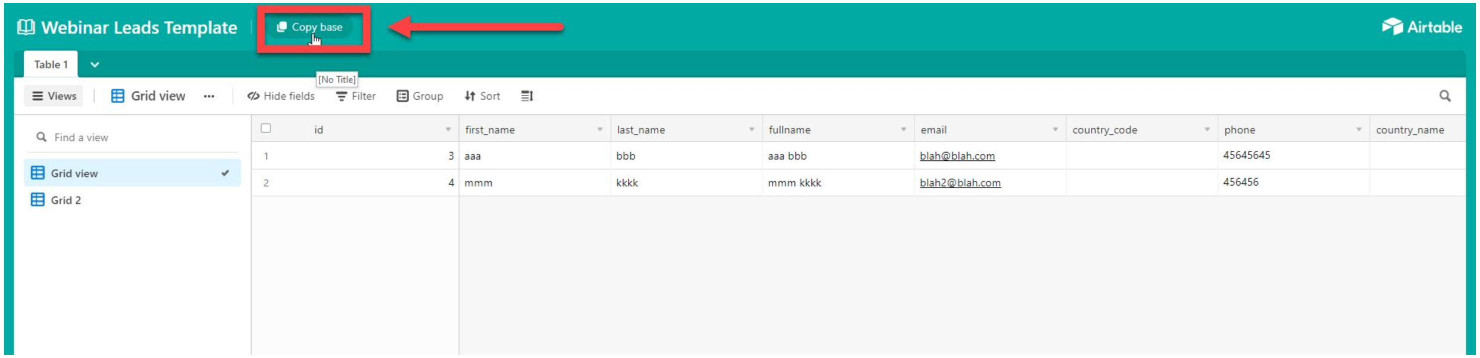
- CFDs
- Forex
- Options
- Spread Betting

Presenter Logo should not contain any broker branding/ company logos.

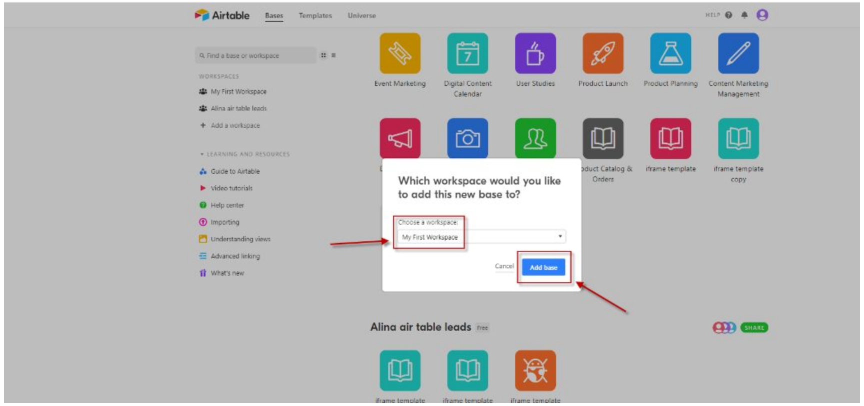
Setup guide Airtable for Clients

Flow for Uploading Table “Webinar Leads Template” Via Airtable

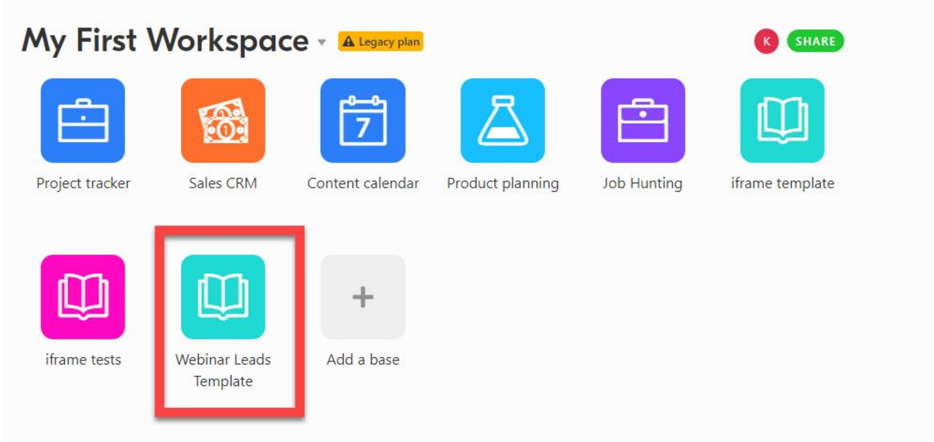
1. Sign up to Airtable - Create an Airtable account
2. Open the following link in order to copy table template: https://airtable.com/shrtKtQb3eVmoY90f
3. Copy table template - Click “copy base” at the top of the page.



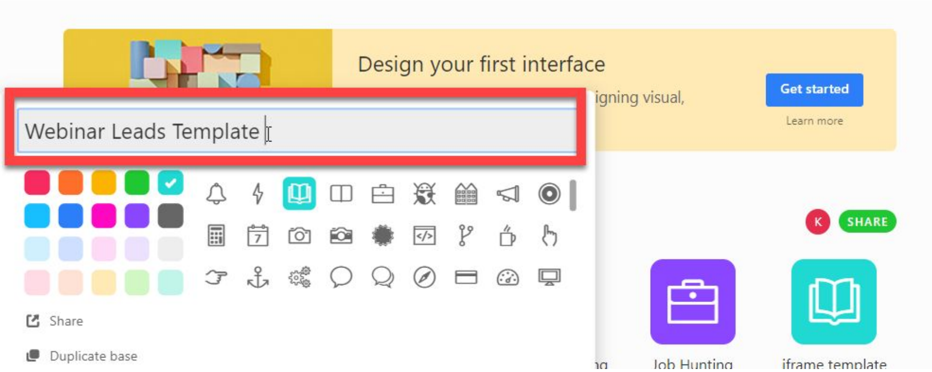
4. A pop-up will appear and ask which workspace the new base should be added to
5. Click on - “Add base”



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

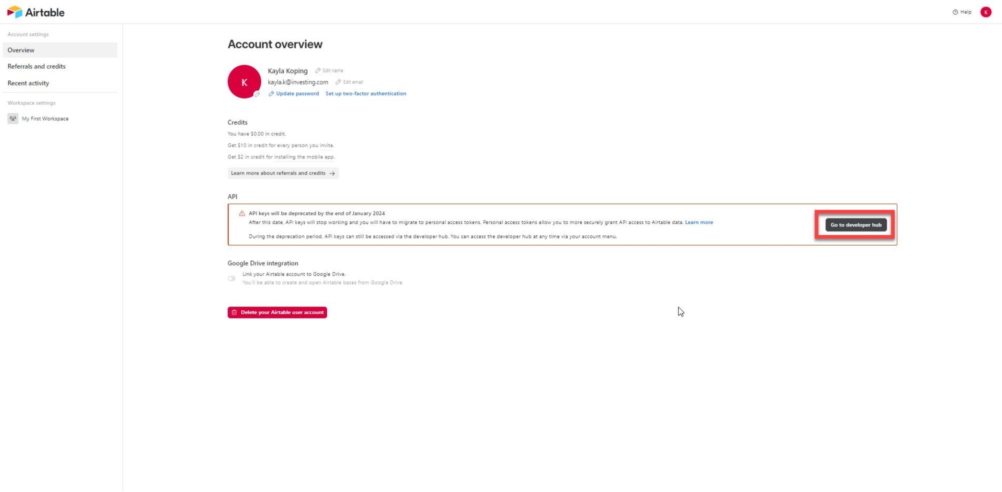


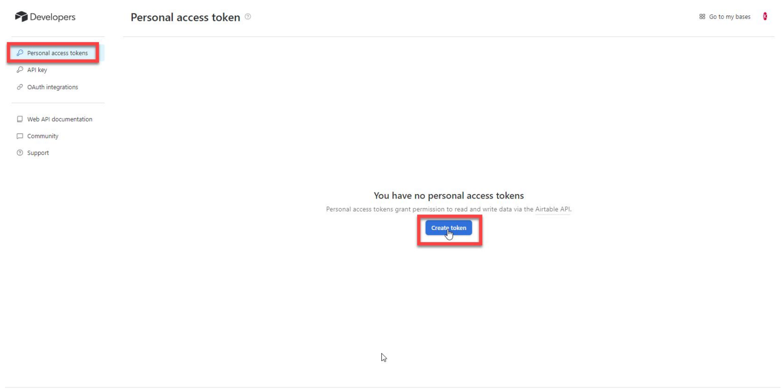
7. In the new base that was created you may change the name of the base only.
   Please NOTE: DO NOT change any other field settings in the table formatting



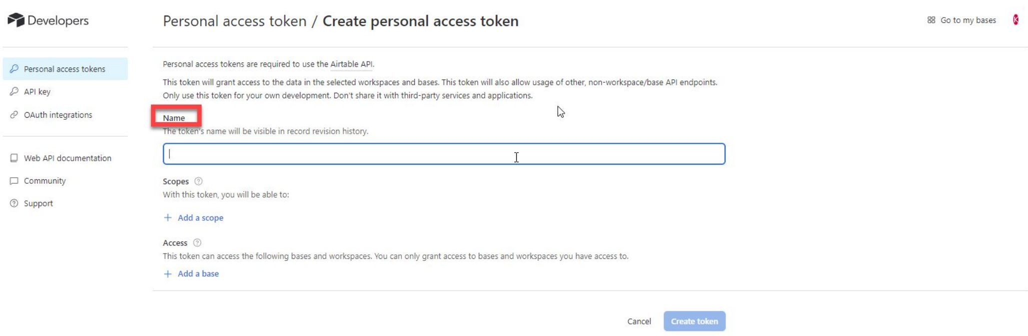
How to Extract Personal Access Token & Endpoint URL

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”



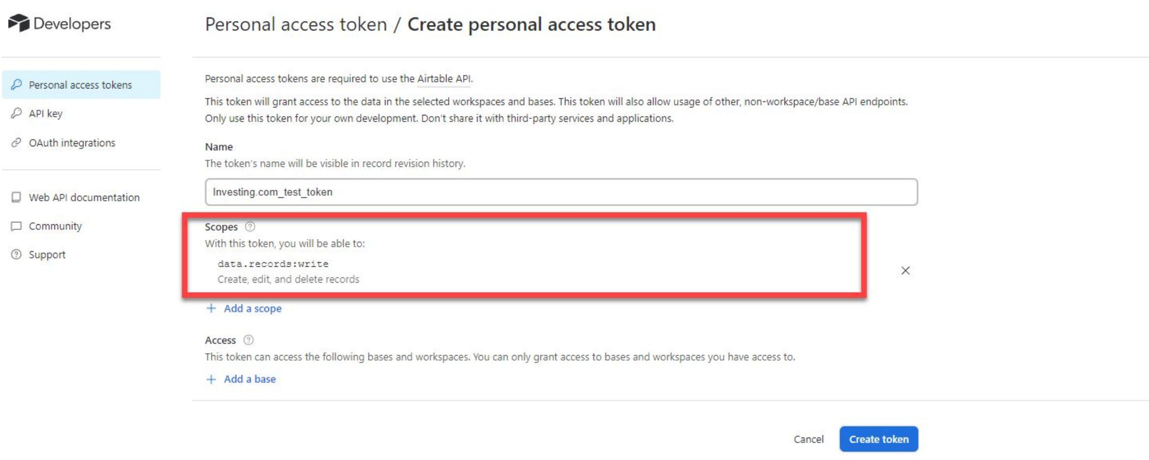


5. Add a unique name for your personal access token



6. Add a scope

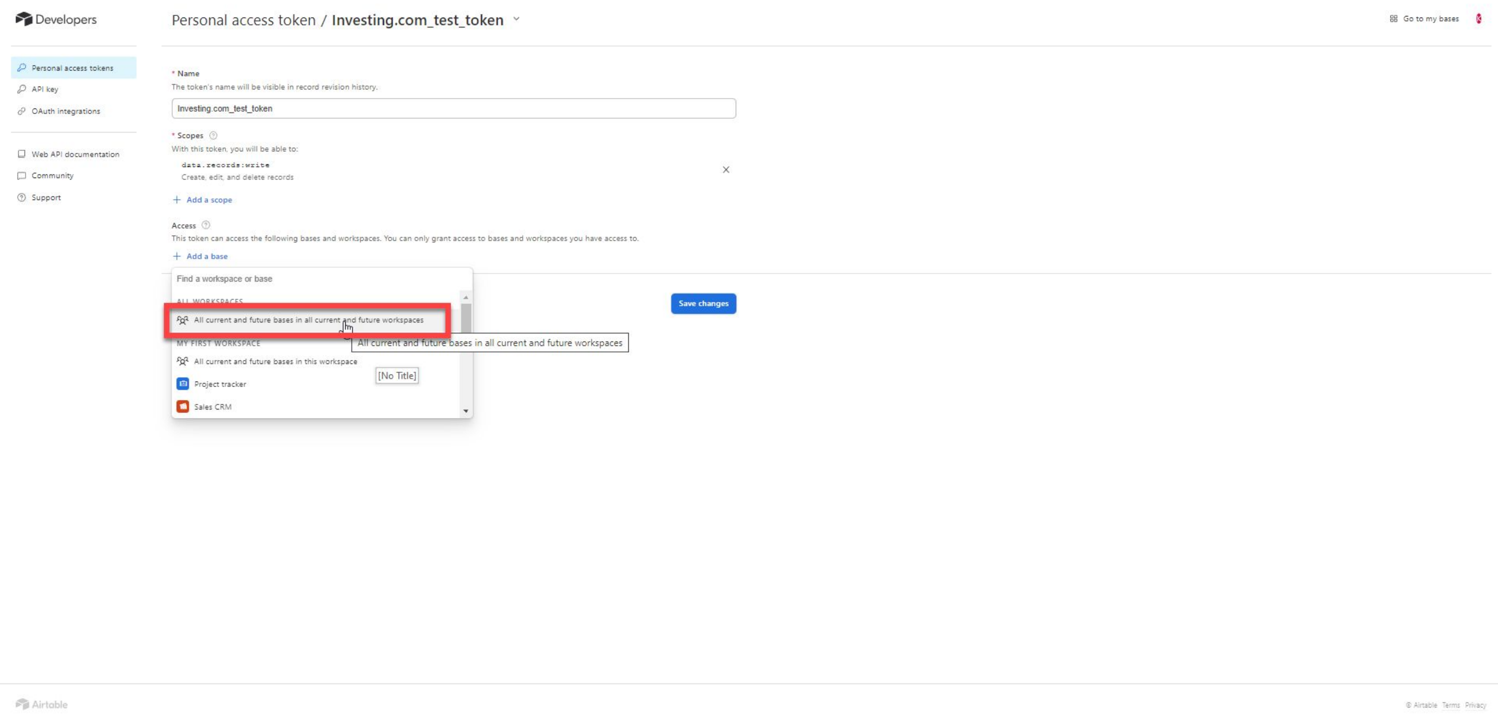
"data.records.write" (create, edit, and delete records)



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



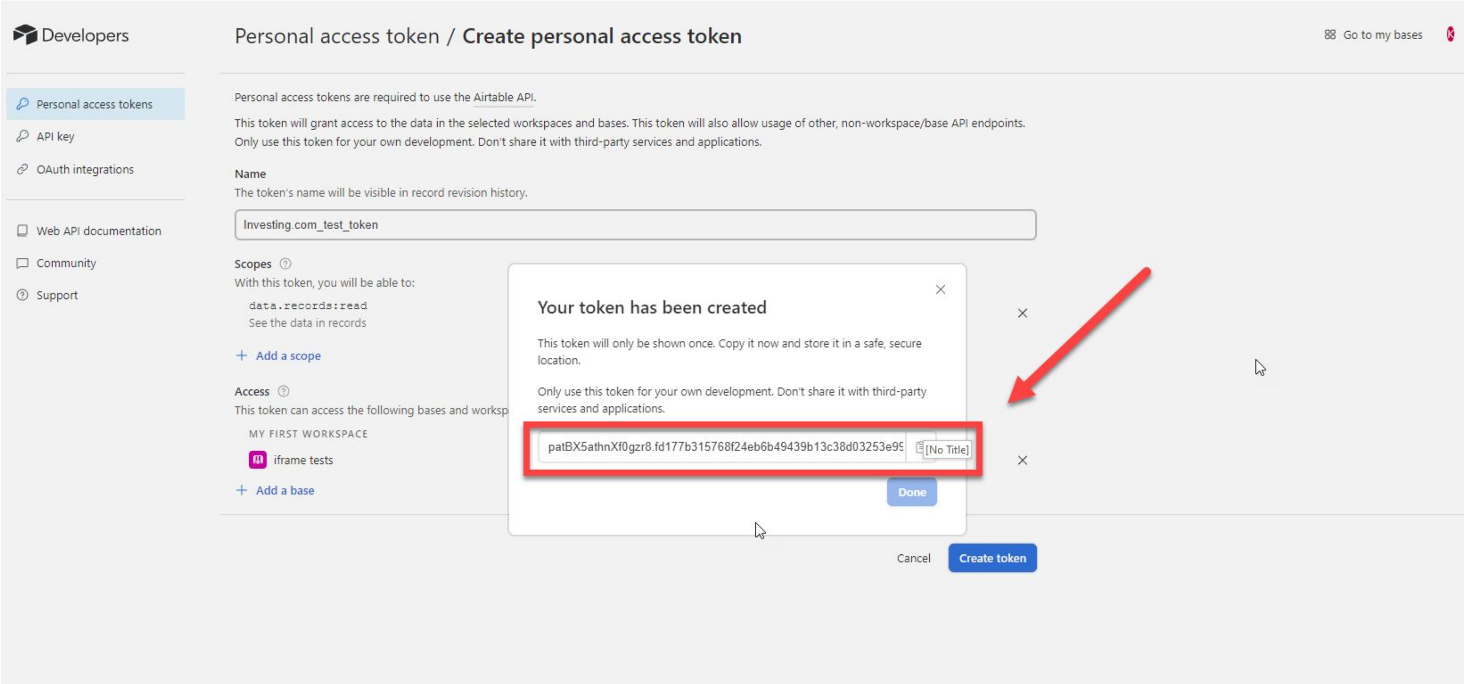
8. Click “Create token”

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.

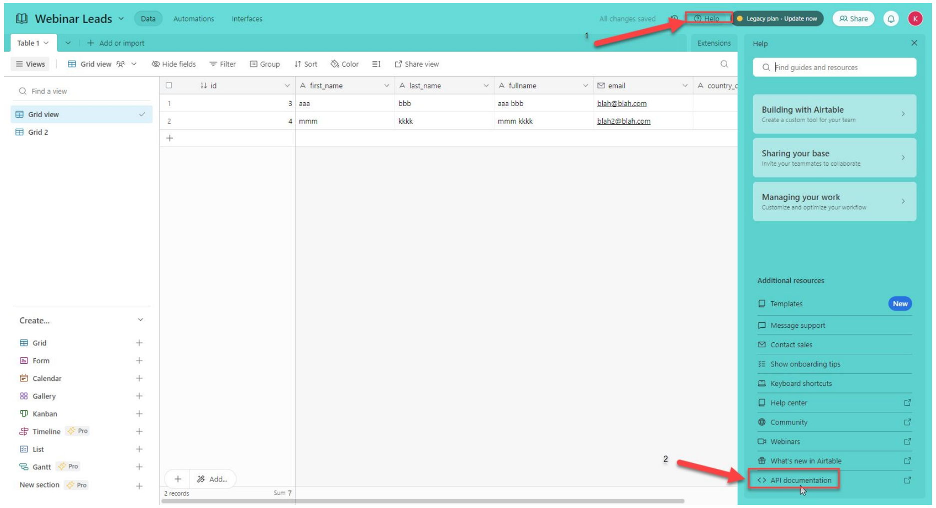
Store this somewhere safe for future incase you ever need it again!



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

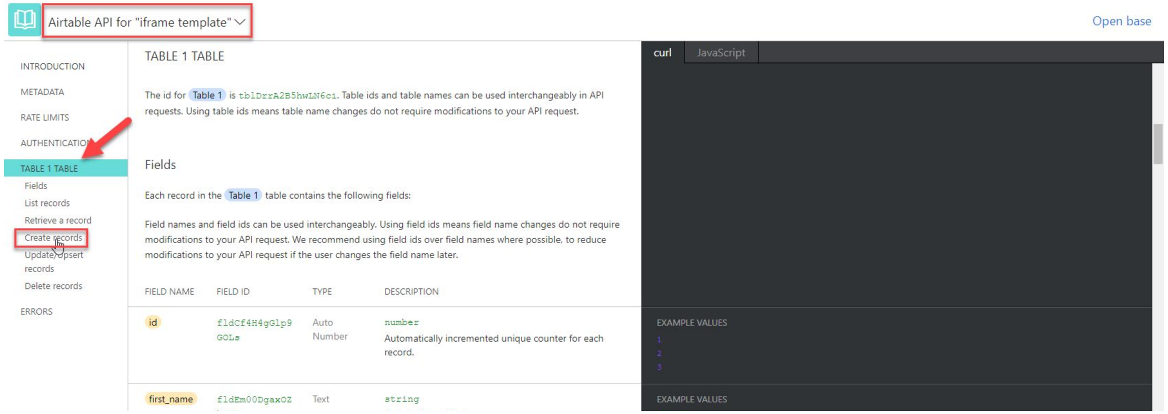
10. In the base that was created, go to the top right corner and click on the icon “Help”

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])



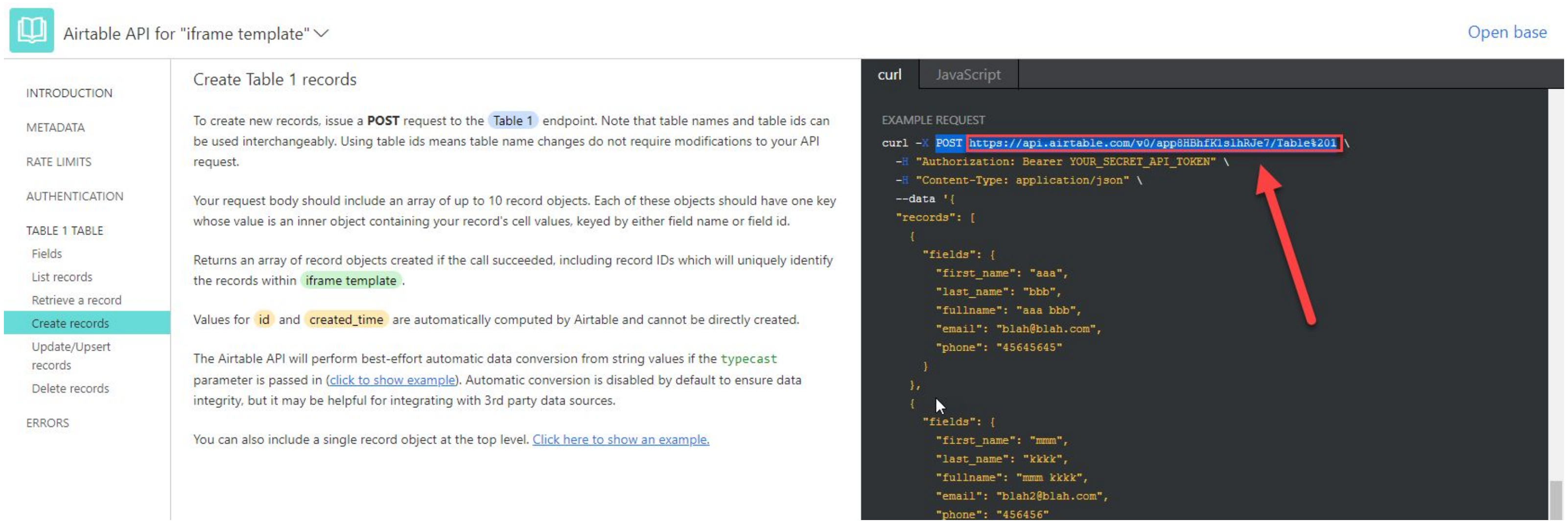
13. Under - **EXAMPLE REQUEST** copy the following and send it over to the Premium team.

Parameter to copy:

- Endpoint – (curl –X POST)

Example of both parameters required:

- Endpoint - https://api.airtable.com/v0/appBjVByIaVXr9YIm/Table%201
- Personal access token - patBX5athnXf0gzr8.fd177b315768f24eb6b49439b13c38d03253e99658ff3d364a2f6f5e21d7bf79



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.