

# How to Setup **Zapier**

## Zapier Integration

*Reference this document when integrating your CRM into Lead Marvels Platform via Zapier.*

### Requirements:

- Zapier Starter Plan (minimum). If you use more than 3 of the premium apps, you must have Zapier Professional Plan. Visit your Zapier Dashboard to determine your Plan level, and upgrade if needed: <https://zapier.com/app/dashboard>
- Admin access to your CRM. Most integrations require an API Key and/or specific credentials that are only visible to the CRM Administrator User.
- At least one landing page on a Lead Marvels hosted website that has been approved and published live.
- If you are unsure whether your Lead Marvels landing page is live, contact your Lead Marvels Account Representative.

### Vocabulary:

**Webhook:** a specific/unique endpoint url used by Lead Marvels to push the form data to.

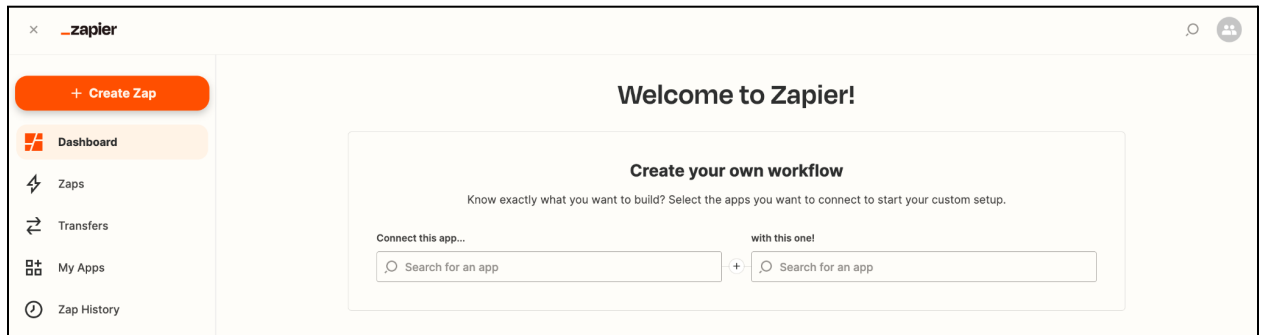
- *Important to note if the webhook is offer-specific, we will need a new webhook per offer/landing page. If we can dynamically pass the offer title or distinguishing parameter associated with the offer, that is preferable.*

**Trigger:** Your trigger is what kicks off the automated process between your apps. In our example, the trigger is a lead coming in through Lead Marvels via a webhook.

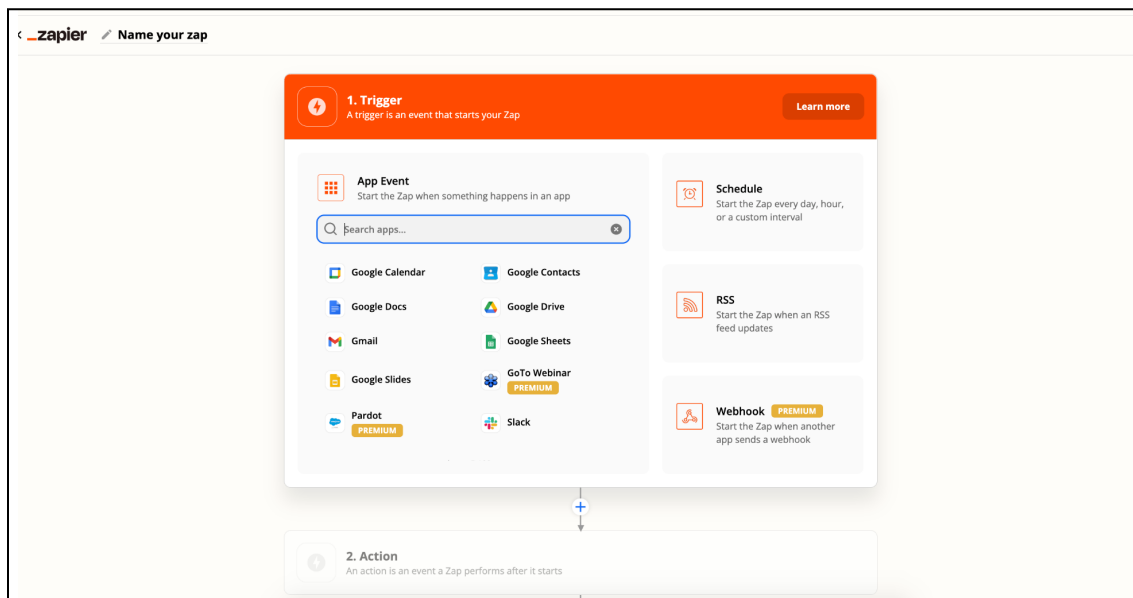
**Zap:** a zap is when your trigger causes an action. In our example, the action is to create a new contact in our CRM.

## How to create a Zap

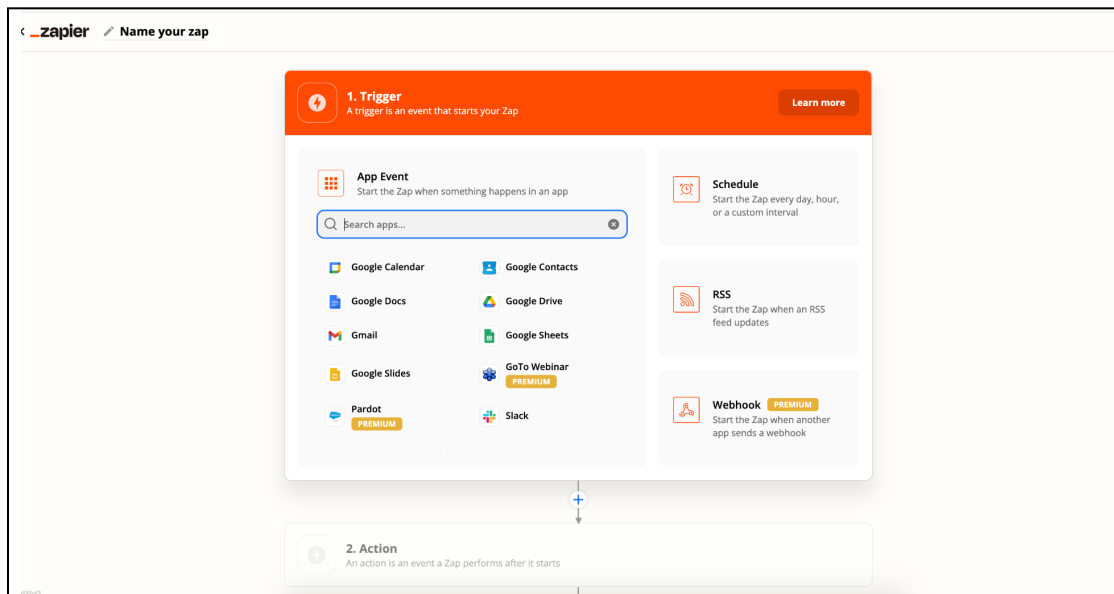
1. Log in to zapier.com
2. Click Create Zap



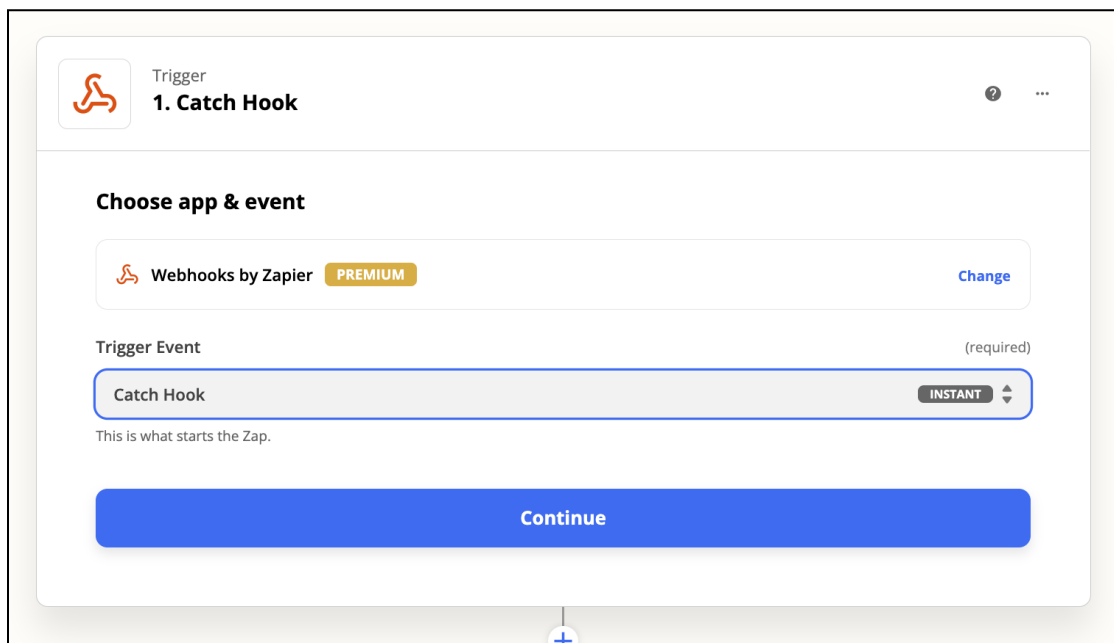
3. Name Your Zap: This is especially important to do if multiple zaps are being created.



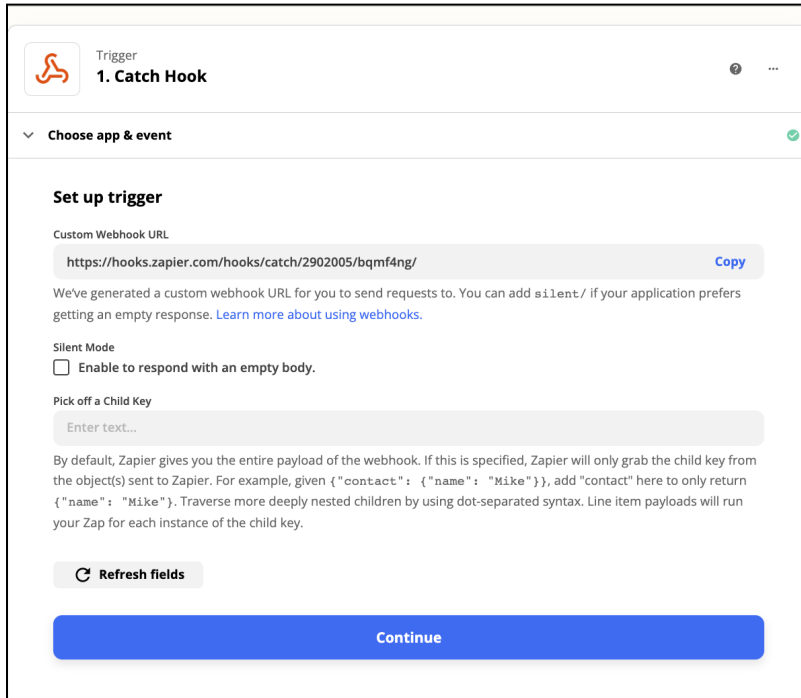
#### 4. Choose Trigger → Web Hook



#### 5. Choose Trigger Event: Catch Hook → Click Continue



6. Copy the Custom Webhook URL and send it to your Lead Marvels Account Representative → Click Continue



Trigger  
1. Catch Hook

▼ Choose app & event

**Set up trigger**

Custom Webhook URL

`https://hooks.zapier.com/hooks/catch/2902005/bqmf4ng/` [Copy](#)

We've generated a custom webhook URL for you to send requests to. You can add `silent/` if your application prefers getting an empty response. [Learn more about using webhooks.](#)

Silent Mode  
☐ Enable to respond with an empty body.

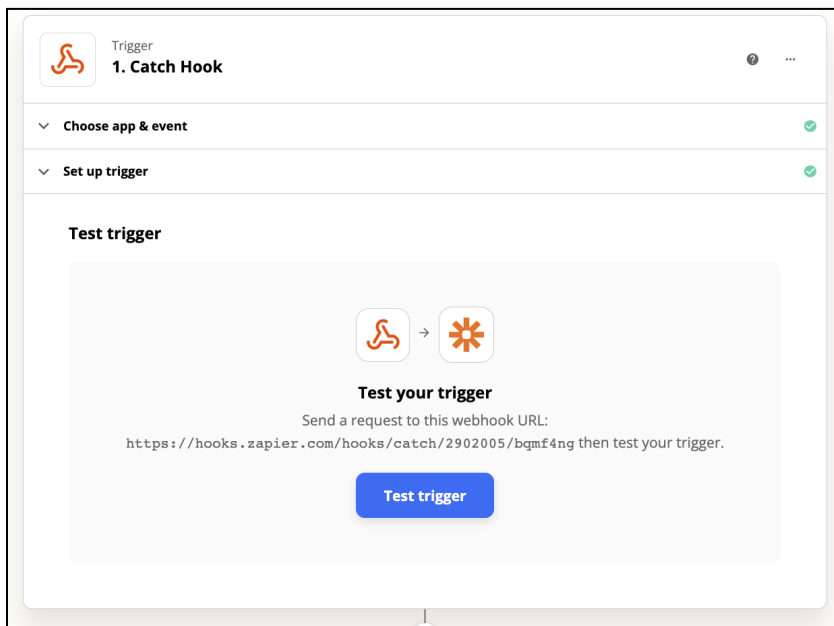
Pick off a Child Key  
Enter text...

By default, Zapier gives you the entire payload of the webhook. If this is specified, Zapier will only grab the child key from the object(s) sent to Zapier. For example, given `{ "contact": { "name": "Mike" } }`, add "contact" here to only return `{ "name": "Mike" }`. Traverse more deeply nested children by using dot-separated syntax. Line item payloads will run your Zap for each instance of the child key.

[Refresh fields](#)

[Continue](#)

Once you have sent the webhook url over to the Lead Marvels Account Rep, they will apply it to the Landing Page and submit a test.



Trigger  
1. Catch Hook

▼ Choose app & event

▼ Set up trigger

**Test trigger**

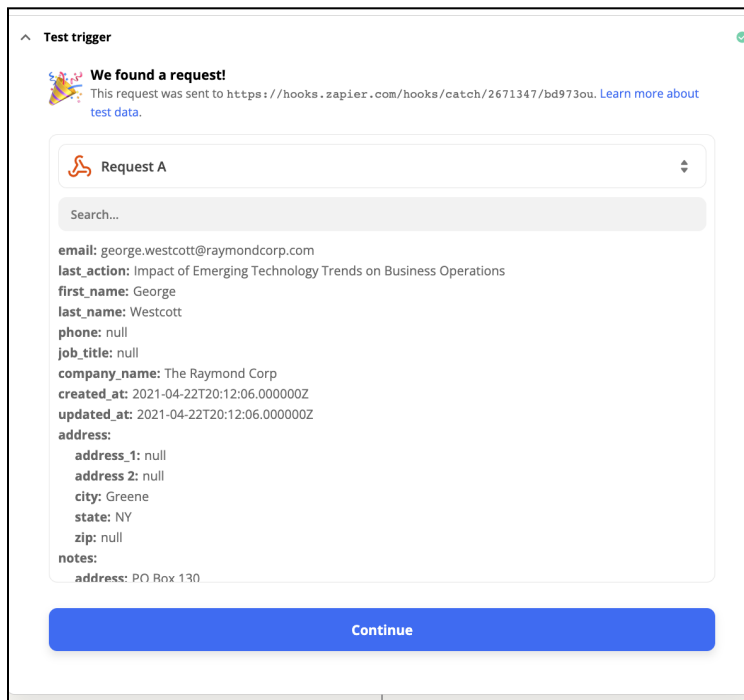
 → 

**Test your trigger**

Send a request to this webhook URL:  
`https://hooks.zapier.com/hooks/catch/2902005/bqmf4ng` then test your trigger.

[Test trigger](#)

7. Once you receive If successful, you should see the following: → Click Continue



**Test trigger**

**We found a request!**  
This request was sent to <https://hooks.zapier.com/hooks/catch/2671347/bd973ou>. [Learn more about test data.](#)

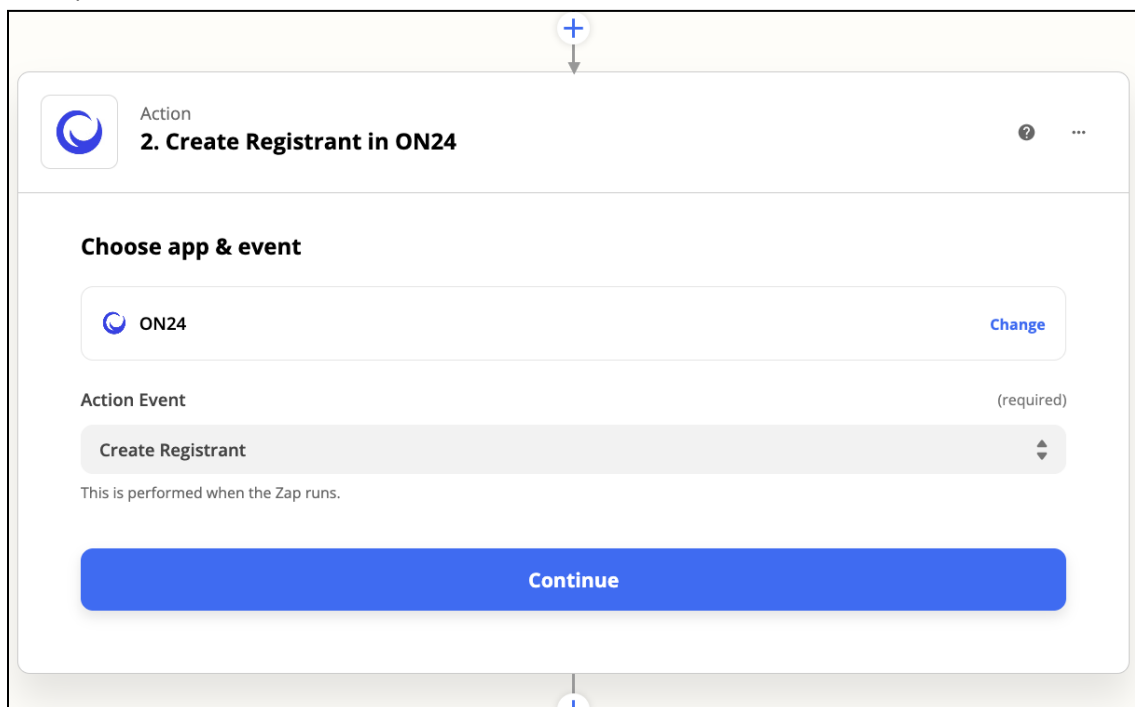
**Request A**

Search...

**email:** george.westcott@raymondcorp.com  
**last\_action:** Impact of Emerging Technology Trends on Business Operations  
**first\_name:** George  
**last\_name:** Westcott  
**phone:** null  
**job\_title:** null  
**company\_name:** The Raymond Corp  
**created\_at:** 2021-04-22T20:12:06.000000Z  
**updated\_at:** 2021-04-22T20:12:06.000000Z  
**address:**  
  **address\_1:** null  
  **address\_2:** null  
  **city:** Greene  
  **state:** NY  
  **zip:** null  
**notes:**  
  **address:** PO Box 130

**Continue**

8. Choose an Action: In this case, we will be creating a registrant in On24 (a sample CRM).



**Action**

**2. Create Registrant in ON24**

**Choose app & event**

**ON24** [Change](#)

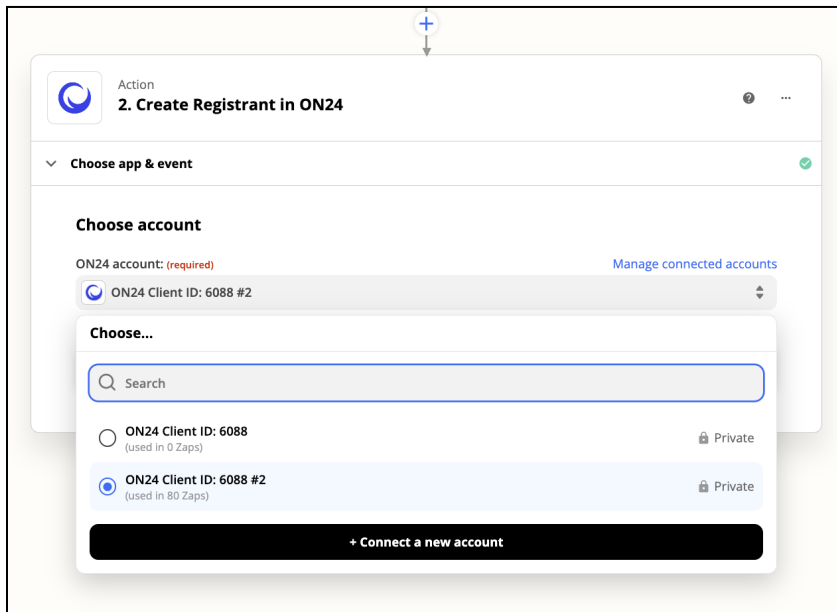
**Action Event** (required)

**Create Registrant**

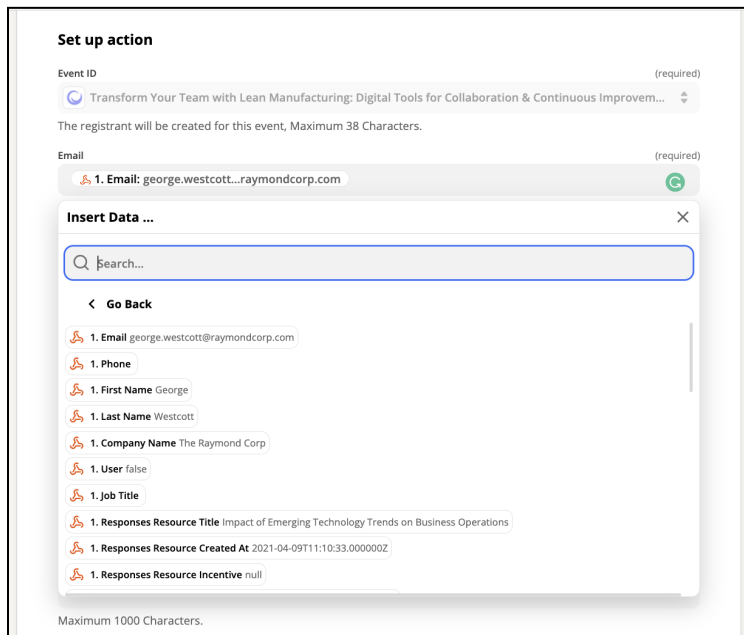
This is performed when the Zap runs.

**Continue**

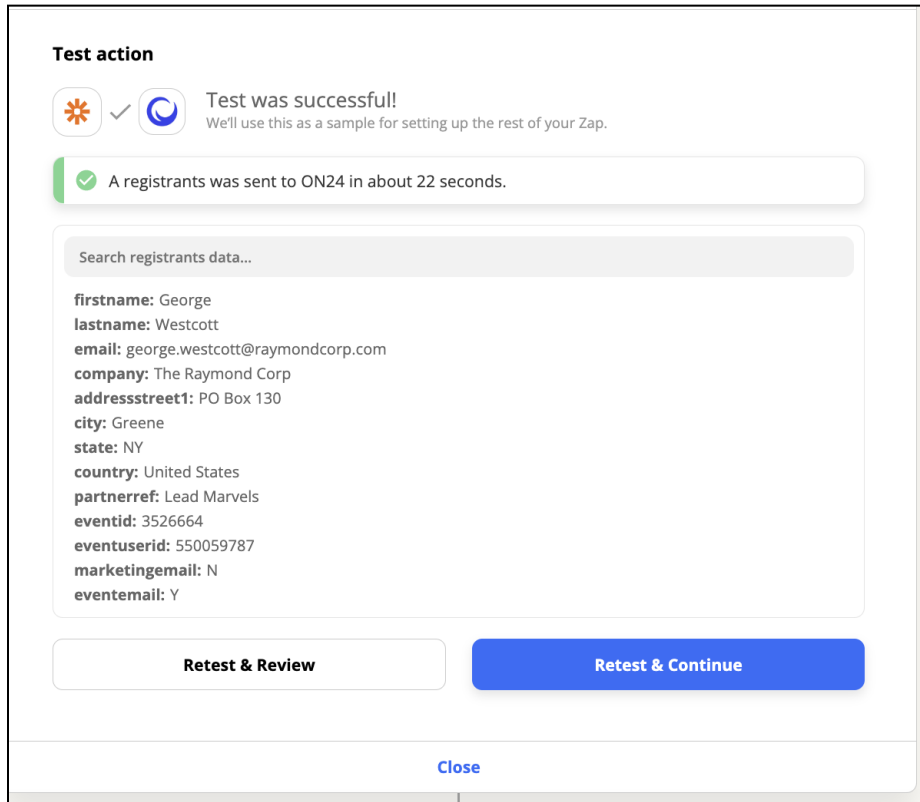
9. Enter Credentials to your CRM: At this point you should see a pop up to integrate with your CRM. Depending on your CRM Application, different login credentials will be required.



10. Set up action: At this point you will populate all required fields with the information passed via webhook. If you do not see the field you are looking for, you can either search for the field name or select 'see more' at the bottom to see all passed fields → Click Continue.



11. Test Action: Once all fields are populated, you are ready to test! Click Test and Review. If successful, you will see a success message like the one below.



12. At this point you should go into your CRM and confirm the information passed in the test presents as intended in your CRM. Make sure all fields are mapped correctly. If so, you are ready to turn your webhook on! If you are not prompted to turn the zap on, look at the top right corner of your screen to see a toggle on/off button.

