Creating a New Webhook

Webhooks are auto-triggered actions such as an email sent when a lead is matched.

Step 1

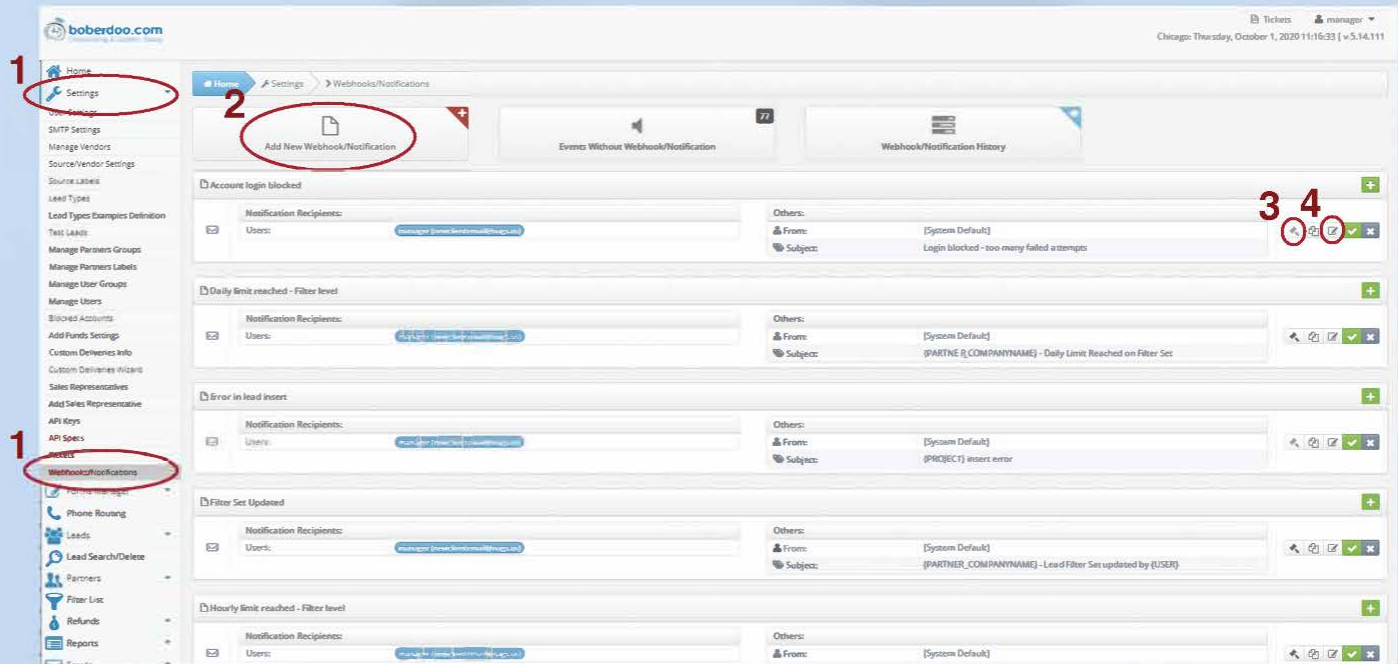In the Settings tab, select the Webhooks/Notifications subtab.

Step 2

Create new webhooks from the selection of standard and customized webhooks.

Step 3

Use the Rules tool (gavel icon) to apply and manage special instructions for the triggered event.

Step 4

View and edit existing webhooks with the Edit tool (pencil icon).

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Editing a Webhook

In the Edit Mode the webhook settings are managed. This example shows the New Lead Matched webhook.

Step 1

Manage the recipient(s) of the webhook as well as what will be displayed in the email's Name From, Email From, Reply To, and Subject.

Step 2

Magic strings allow you to compose the content with dynamic format that inserts specific data related to the event.
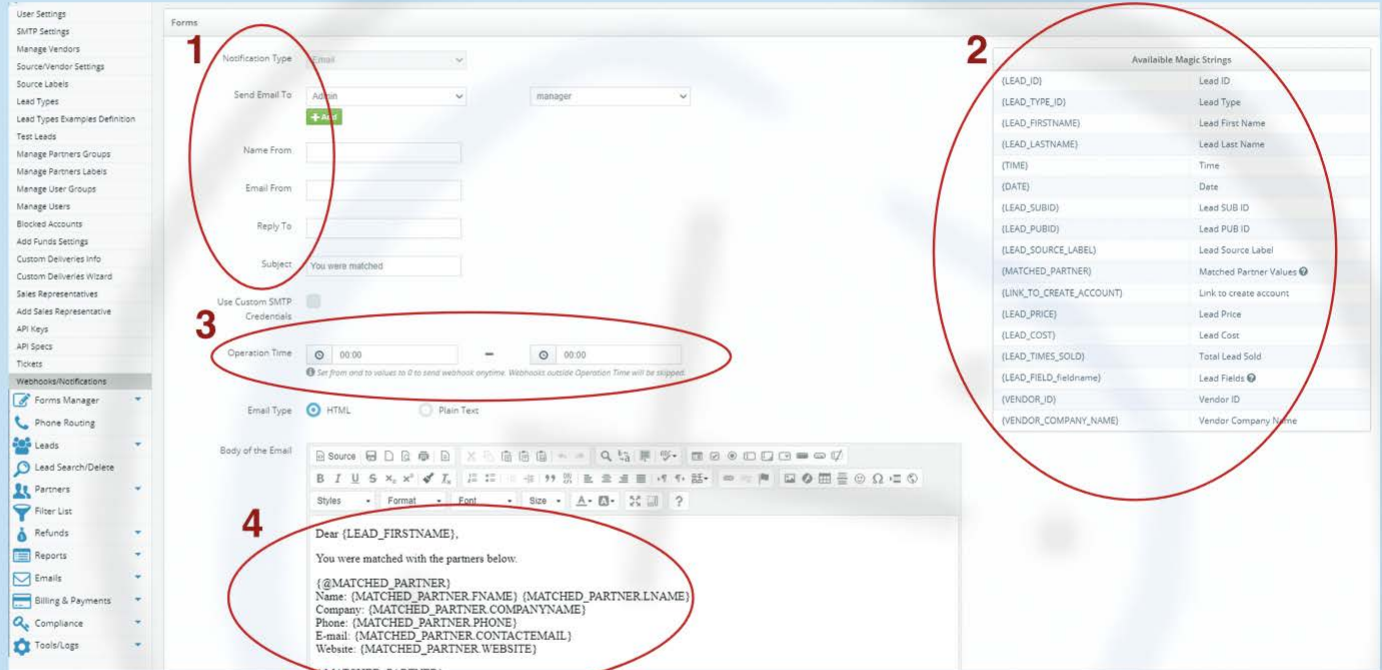
Step 3

Operation Time enables the schedule whether the webhook is active or inactive.

Step 4

Compose the static content with your magic strings in this space.

Remember to scroll to the bottom and click Save before exiting the editor.

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