ZOOM - MasterBase®: Guía de integración

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Índice

Índice	2
Objetivos	3
Alcance	3
Pasos de la integración	4

El presente documento tiene por objeto dar a conocer y explicar, paso a paso, cómo realizar una integración entre Zoom y MasterBase®, a través de Zapier.

Objetivos

Esta integración permitirá:

- Capturar contactos gracias a su inscripción, a través de un formulario, en un webinar realizado en Zoom.
- Que éstos sean creados o actualizados en una base de su cuenta MasterBase®
- Que se les envíe, vía Masterbase[®], un mensaje personalizado con sus particulares datos de conexión al webinar provisto por Zoom.

Alcance

Tiene como ámbito de acción sus cuentas en Zoom, MasterBase® y Zapier.

El formulario de registro se crea en Zoom y, desde la plataforma Zapier, se integra con una cuenta MasterBase®

Pasos de la integración

1.- Ingresar a su cuenta **Zoom** a través de <u>www.zoom.us</u>:

			REQUEST A DEMO	1.888.799.9666	RESOURCES +	SUPPORT
SOLUTIONS - PLANS & PRICING CONTACT SALES		JOIN A MEETING	HOST A MEETIN	G 👻 SIGN IN	SIGN UP, IT	TS FREE
	Sign In					
	Email address					
	marketing@masterbase.com					
	Password					
	den.					
	Sign in					
	eorgot password: @ stay signed in					
	Or, sign in with Google or Facebook					
	New to Zoom? Sign Up Free					

2.- Crear una reunión o webinar a través de la opción:

Meetings > Schedule a Meeting:

				REQUEST A DEMO	1.888.799.5926 R	esources 🕶	SUPPORT
ZOOM SOLUTIONS - PLANS	& PRICING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING	- 🕗	SIGN OUT
Profile Meetings Settings Meetings Recordings Webinars Account Management Account Profile Reports	Upcoming Meetings Previous Meetings Schedule a New Meeting Start Time a	Personal Meeting Room Topic : The user does not To schedule a new m	Meeting (D ave any upcoming meetings, seting click Schedule a Meeting,			Get '	Training
Refer-a-Friend Attend Live Training Video Tutorials Knowledge Base	Save time by scheduling your meetings Microsoft Outlook Plugin Dewnload Add Zoom as an Add-in for Outlook on the web	directly from your calendar.	Firefox Add-on Download				

3.- Completar los campos con la información solicitada para la creación del webinar, incluyendo las opciones de personalización que esta plataforma ofrece.



4.- Ingresar a su cuenta Zapier (www.zapier.com)



5.- Hacer clic en Make a Zap!

zapier		Q	Home	Apps	Explore	Tips & Advice	Upgrade Now	Make a Zap!
Explore Zaps	Task History Connec	ted Accou	unts					
	What Do You Want is Connect this app Q Search for an app It only takes a few	to Auton	nate Tod	l ay? urs (or eve	en days) of	<i>ith this one!</i> Q Search for an app work	Маке	a Zap!
	Popular Zaps for Add Auto you'l mo	All My App new Hubs matically Il have to f	os (1) Spot CRM emailing a first copy (contacts all of your contacts fr	to Masterl contacts is rom your C	Base n't always automatic—usi RM, then add them to you	Following Use This ur	l app 🏠 Zap

6.- Buscar y seleccionar **Zoom**, como se ve en la siguiente imagen:



7.- Acceder a su cuenta Zoom a través de su **API Key** y **API Secret**:

🔆 Connect an Account Zapier - Google Chrome	- 0	×	-
https://zapier.com/engine/auth/start/ZoomDevAPI/		O,	or Q ☆ 🚽
		Î	Zap Disabled. <u>See Details</u>
Allow Zapier to access your Zoom Account?			oom Account
API Key (required) Go to your Zoom Profile page(https://www.zoom.us/profile/setting) to find the Key under the Integration Authentication section.			Test
API Secret (required) Go to your 2000 Profile page(https://www.zoom.us/profile/setting) to find the Secret under the Integration Authentication section. Yes, Continue			Save + Continue
			×

8.- Realizar el test a la cuenta para conocer el estado de las **API** o **web services** del servicio. Luego guardar y continuar:



9.- Escoger entre las opciones Zoom Trigger: **New Registrant**:

Dashboard	*	
Name your zap Add a note 1. TRIGGER Set up this step	Select Zoom Tr	igger
Zoom	Search Zoom Triggers	
Choose Trigger Test This Step	 New Registrant Triggers when a new registrant is added to a web 	pinar.
+ Add a Step	New Meeting Triggers when a new meeting or webinar is creat	ed.
		Save + Continue

10.- Desplegar la opción **Upcoming Webinar** y escoger el webinar que se desea integrar:

Dashboard Set Up Trigger Options or View Task History	举	Zap Disabled. See Details OFF
Name your zap Add a note I. TRIGGER New Registrant	Set up Zoom Registrant	6
Zoom New Registrant Zoom Set Up Options Test This Step	Q Bearch My Webinar 340602161 Capacitación Semanal: Envlos Masivos 380665336 Webinar Interno Novedades y Mejoras 156965060	×
+ Aut a step	Webinar de entrenamiento - Saludo de Cumpleaños 654004186 Webinar: Conozca 10 usos para op, con MasterBase® SmartData 194680 Ø Check Zoom & reload to bring in new choices. Ø Other Options	608

11.- Continuar:

$\underline{\text{Dashboard}} \rightarrow \text{ Set Up Trigger Options or } \underline{\text{View Task History}}$	*	Zap Disabled. See Detail	S OFF
Z Name your zap			
I. TRIGGER ***	Set up Zoom Registrant		
 Zoom New Registrant 	Webinar: Conozca 10 usos para optimizar su personalización, con MasterBase	e® SmartData 🗸	
 Zoom Edit Options 	O Refresh Fields		
Test This Step		Continue	
+ Add a Step	۵ کې ۱		

Material de uso interno, soporte y clientes MasterBase®

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12.- Desplegar el ejemplo de la información que contempla la inscripción del webinar:

Name your zap			
dd a note	Res	zistrant A	
🔞 1. TRIGGER 🥑 🚥	Puli	ed in in 7 mins	^
New Registrant	Q Search		
2.00m	last_name:	Last Name	
New Registrant	start_time:	20180718T090000Z	
Zoom	topic:	Technical Training	
Edit Options	phone:	+1.888.799.9666	
👗 Test This Step	address:	Almaden Boulevard	
	org:	Zoom	
+ Add a Step	join_url:	https://www.zoom.us/j/xxxxxxxx	
	city:	San Jose	
	first_name:	First Name	
	zip:	95113	

13.- Una vez realizada la parte de la integración de Zoom, escoger Add a Step:

Dashboard or View Task History	*			Zap Disabled OFF
/ Name your zap Add a note	=			
💽 1. TRIGGER 🥏 🚥	Almost finished	here!		
New Registrant	PLEASE CHECK THE FOLLOWING: 1. Your Zap currently lacks an Action step. Add one ne	lwe		
Zoom				
New Registrant				
Edit Options				
Test This Step				
+ Add a Step				
			×	/

14.- Buscar y seleccionar MasterBase®:

Dashboard	*	Zap Disabled. See Details
/ Name your zap Add a note	Choose an	Action App
💽 1. TRIGGER 🕙 🚥	Masterbase	~
New Registrant	MasterBase	
 Zoom New Registrant Zoom Edit Options 	MasterBase HubSpot	WordPress Zoom
Test This Step		
Set up this step Get Help	HubSpot (Legacy)	

15.- Acceder a su cuenta MasterBase® con el nombre de cuenta y sus credenciales API.

Las credenciales API se solicitan a través del menú: Configuración > Permisos > Credenciales API

🔆 Connect an Account Zapier - Google Chrome - 🗆 X	- 0 ×
https://zapier.com/engine/auth/start/MasterBaseDevAPI/ Q	야 Q ☆ 🥥 🙆 .
l i	Zap Disabled. See Details
2	
Allow Zapier to access your MasterBase Account?	
Client Account (recu ^{red)} Your client account name is located in your URL when you're logged into Masterbase.	
https://admin.masterbase.com/Main/vxx.xx/ /	- Test
API Username (+ex.+ed) You can generate your API Username/Password in your MasterBase account by hovering over "Configuration", then clicking "Credenciales API". You can visit their site.	Test
API Password (required)	Test
Yes, Continue Cancel	
	Save + Continue
Cet Help	+

16.- Realizar **test** a la cuenta, guardar y continuar:

$\underline{\text{Dashboard}} \ \rightarrow \ \textbf{Choose Account or} \ \underline{\text{View Task History}}$		
✓ Name your zap		
 I. TRIGGER ♥ ··· New Registrant 	Select MasterBase Account	
Zoom	Search your MasterBase Accounts	
New Registrant Zoom Edit Options	MasterBase masterbaseonline@ZapierDMO MasterBaseonline@ZapierDMO added 11 months ago, used in 1 Zap	
Test This Step	MasterBase masterbaseonline@ZapierDMO #2 Test masterbaseonline@ZapierDMO added 11 months ago, used in 17 Zaps	
2. ACTION ··· Create Unique Message	MasterBase masterbaseonline@ZapierDMO #3 masterbaseonline@ZapierDMO added 2 weeks ago, used in 1 Zap Test	
MasterBase Create Unique Message	Connect an Account	
Choose Account Set Up Template Test This Step	Save + Continue	
Get Help	o + 0	+

17.- Escoger entre las opciones MasterBase Action: Create/Update Contact

$\underline{\text{Dashboard}} \ \rightarrow \ \text{Choose Action or } \underline{\text{View Task History}}$	* Zap Dł			
Name your zap Add a note I. TRIGGER New Lead		Select MasterBase Action		
2. ACTION ··· Create/Update Contact		Bearch MasterBase Actions CREATE Create/Update Contact Create or update a contact in a defined list.		
MasterBase Create/Update Contact		Create Unique Message Creates a new unique message.		
Masterbase masterbaseonlin Edit Template Test This Step		SEARCH Find Contact Find an existing contact inside a defined list.		
+ Add a Step		Continue		

18.- Seleccionar los campos a integrar:

$\underline{Dashboard} \ \rightarrow \ \textbf{Set Up Template or} \ \underline{View Task History}$	*	
Add a note	Contact	
•	• Setup Preview Learn more	
2. ACTION Create/lipdate Contact	List (required)	
MasterBase Create/Update Contact	List 1 Email (required)	~
MasterBase masterbaseonlin Edit Template Test This Step	Gender (optional)	Ξo
+ Add a Step	First Name (optional) Get Step 1 test lead: dummy data for first_name	~
▲ Test This Step	Gender (optional) First Name (optional) First Name (optional) Step 1 test lead: dummy data for first_name	× ≣o

19.- Escoger Add a Step:

$\underline{\text{Dashboard}} \ \rightarrow \ \text{Test This Step or} \ \underline{\text{View Task History}}$		*
✓ Name your zap Add a note		A Test contact was sent to MasterBase about 6 months ago.
		SAMPLE FROM MASTERBASE:
f New Lead		Q Search
•		idContact: 29861
🗲 2. ACTION 🛇		Operation:
Create/Update Contact		@Status: CREATED #text: Successfully executed
Ø MasterBase		Validation:
Create/Update Contact		@Status: PASSED
 MasterBase masterbaseonlin Edit Template 		Email: test@fb.com
Test This Step		
+ Add a Step	+	Re-test This Step Of Finish

20.- Buscar MasterBase®:

$\underline{\text{Dashboard}} \ \rightarrow \ \textbf{Choose App or} \ \underline{\text{View Task History}}$		×	¥			Zap Disa
✓ Name your zap Add a note)		Choose	an Action App		
✓ 2. ACTION ② …		Masterbase				~
Create/Update Contact		👌 MasterBase				
MasterBase					_	
Create/Update Contact		~	6			
MasterBase masterbaseonlin						
Edit Template		MasterBase	HubSpot	WordPress	Zoom	
Test This Step						
• 3. ACTION						

21.- Realizar **test** a la cuenta, guardar y continuar:



22.- Escoger entre las opciones Zoom Action: Create Unique Massege

$\underline{ Dashboard} \rightarrow \textbf{Choose Action or } \underline{ View Task History}$		*	Your Zap	is On
Zoom - MasterBase Add a note 1. TRIGGER 🔮	Select MasterBase Action			
New Registrant	Search Mas	sterBase Actions		
Create Unique Message	۲	Create/Update Contact Create or update a contact in a defined list.		
 MasterBase Create Unique Message 	۲	Create Unique Message Creates a new unique message.		
MasterBase masterbaseonlin Edit Template	SEARCH			
Test This Step		Find Contact Find an existing contact inside a defined list.		
+ Add a Step		د	ontinue	

23.- Seleccionar los campos a integrar:

Add a note		
5 2. ACTION 📀		
Create/Update Contact	Set up MasterBase Message	
MasterBase	Setup Preview Learn more	N 📀
Create/Update Contact		
AasterBase masterbaseonlin	From Name (required)	
Edit Template	MasterBase® Webinar	Ξō
🛓 Test This Step	From (required)	
	aduran@mailing.masterbase.com	Ξō
3. ACTION	To (required) To (scample@coomus)	-
📀 Create Unique Message		+
hasterBase	Subject (required)	
🗲 Create Unique Message	Step 1 First Name, gracias por inscribirse al webinar: Conozca 10 usos para optimizar su personalización con MasterBase® SmarData	Ξō
AasterBase masterbaseonlin		
🚍 Set Up Template	Classification (resulted)	
🚊 Test This Step	Commercial	~

24.- Finalizar el **Zap**, indicar un nombre para la integración y activarla.

Awesome! Your Zap is working.
Select a folder 🗸
YOUR ZAP IS ON
While on, this Zap will run instantly when the Zoom New Registrant trigger happens.
See it on your dashboard or Make another Zap

25.- Realizar las **pruebas para asegurarse** de que el zap se configuró correctamente.