

# Winston Webhooks & Integrations Guide

Connect Winston to 5,000+ Apps

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# 1. What Are Webhooks?

A webhook is an automatic notification that Winston sends to another service whenever something happens. Think of it like a text message that Winston sends to other apps saying 'Hey, something just happened!'

## Simple Example:

1. A customer asks Winston: 'Can I get a quote for a new roof?'
2. Winston answers the question from your knowledge base
3. Winston ALSO sends a webhook notification
4. Zapier receives the notification and adds the lead to your Google Sheet
5. Zapier also sends you a text message: 'New lead asking about roof quote!'

All of this happens automatically in seconds, without you doing anything.

## 2. Why Use Webhooks with Winston?

Webhooks transform Winston from a simple Q&A; chatbot into a powerful automation tool.

### Without Webhooks:

- Winston answers customer questions
- That's it - you have to manually check conversations

### With Webhooks:

- Winston answers customer questions
- You get instant notifications (email, SMS, Slack)
- Leads automatically go to your CRM
- Conversations are logged to Google Sheets
- Customers can book appointments automatically
- New contacts are added to your email list

### Popular Use Cases:

Use Case	What Happens
Lead Capture	New conversations automatically added to CRM
Instant Alerts	Get text/email when someone asks about pricing
Appointment Booking	Direct customers to Calendly, log bookings
Support Tickets	Create help desk tickets from conversations
Analytics	Log all conversations to spreadsheet for analysis
Email Marketing	Add engaged visitors to your email list

## 3. Setting Up Webhooks in Winston

### Step 1: Go to Webhooks Settings

From your Winston dashboard, click 'Webhooks' in the Settings dropdown menu.

### Step 2: Enable Webhooks

Toggle the 'Enable Webhooks' switch to ON.

### Step 3: Enter Your Webhook URL

This is the URL where Winston will send notifications. You'll get this URL from Zapier (or whatever service you're connecting to). It looks something like:

```
https://hooks.zapier.com/hooks/catch/123456/abcdef/
```

### Step 4: Save Settings

Click 'Save' to store your webhook URL.

### Step 5: Test Your Webhook

Click 'Send Test' to send a test notification to your webhook URL. This helps verify everything is connected correctly.

## What Winston Sends:

Every time a customer chats with Winston, a webhook is sent with this information:

```
{ "event": "new_conversation", "question": "What are your hours?", "answer":  
"We are open Monday-Friday 9am-5pm.", "timestamp": "2026-01-15T10:30:00Z" }
```

## 4. Introduction to Zapier

Zapier is a service that connects apps together. It's the 'glue' between Winston and thousands of other apps like Gmail, Slack, Google Sheets, HubSpot, and more.

### Key Concepts:

- Zap: An automated workflow (e.g., 'When Winston gets a message, send me an email')
- Trigger: What starts the Zap (Winston webhook)
- Action: What happens next (send email, add to sheet, etc.)

### Zapier Pricing:

Plan	Price	Zaps	Tasks/Month
Free	\$0	5 Zaps	100 tasks
Starter	\$19.99/mo	20 Zaps	750 tasks
Professional	\$49/mo	Unlimited	2,000 tasks

For most small businesses, the free plan is enough to get started. A 'task' is one action (one email sent, one row added, etc.).

## 5. Connecting Winston to Zapier

### Step 1: Create a Zapier Account

Go to [zapier.com](https://zapier.com) and sign up for a free account.

### Step 2: Create a New Zap

Click 'Create Zap' or the '+' button.

### Step 3: Choose Your Trigger

Search for 'Webhooks by Zapier' and select it.

Choose 'Catch Hook' as the trigger event.

### Step 4: Copy the Webhook URL

Zapier will give you a URL that looks like:

```
https://hooks.zapier.com/hooks/catch/123456/abcdef/
```

Copy this URL.

### Step 5: Paste URL in Winston

Go to Winston → Settings → Webhooks. Paste the Zapier URL and save.

### Step 6: Send a Test from Winston

Click 'Send Test' in Winston's webhook settings.

### Step 7: Test Trigger in Zapier

Back in Zapier, click 'Test trigger'. You should see the test data from Winston.

### Step 8: Add Your Action

Now choose what happens when Winston sends a webhook. See the following sections for specific integrations.

## 6. Integration: Email Notifications

Get an email every time someone chats with Winston - great for lead capture.

### Setup Steps:

1. Create a Zap with 'Webhooks by Zapier' trigger (see Section 5)
2. For the Action, search for 'Email by Zapier'
3. Choose 'Send Outbound Email'
4. Configure the email:

```
To: your-email@gmail.com Subject: New Winston Chat: {{question}} Body:
Someone just chatted with your Winston chatbot! Question: {{question}}
Winston's Response: {{answer}} Time: {{timestamp}} --- Log in to your
dashboard to see full conversation history.
```

5. Test and turn on your Zap

### ■ Pro Tip:

Add a filter to only email you for certain keywords. For example, only notify when the question contains 'quote', 'price', 'appointment', or 'contact'.

## 7. Integration: SMS Notifications

Get a text message for important conversations - never miss a hot lead.

### Setup Steps:

1. Create a Zap with 'Webhooks by Zapier' trigger
2. For the Action, search for 'SMS by Zapier'
3. Choose 'Send SMS'
4. Configure:

```
Phone Number: +1 (850) 555-1234 (your number) Message: New chat! Q:
{{question}}
```

5. Test and turn on your Zap

### ■ ■ Important Notes:

- SMS by Zapier is available on paid Zapier plans
- Alternative: Use Twilio for SMS (more setup, but free tier available)
- Keep messages short - SMS has character limits

### Recommended: Add a Filter

You probably don't want a text for EVERY conversation. Add a filter step:

```
Only continue if 'question' contains: quote, pricing, appointment, call,
contact
```

## 8. Integration: Slack Notifications

Post new conversations to a Slack channel - great for teams.

### Setup Steps:

1. Create a Zap with 'Webhooks by Zapier' trigger
2. For the Action, search for 'Slack'
3. Choose 'Send Channel Message'
4. Connect your Slack workspace
5. Configure:

```
Channel: #website-leads (or your preferred channel) Message: :speech_balloon:  
*New Winston Chat* *Question:* {{question}} *Response:* {{answer}} *Time:*  
{{timestamp}}
```

6. Test and turn on your Zap

### ■ Pro Tips:

- Create a dedicated #winston-chats channel to keep conversations organized
- Use Slack's emoji reactions to mark leads as 'contacted' or 'converted'
- Set up channel notifications to alert specific team members

## 9. Integration: Google Sheets Logging

Log all conversations to a spreadsheet for analysis and record-keeping.

### Setup Steps:

1. Create a Google Sheet with these column headers:

```
Timestamp | Question | Answer
```

2. Create a Zap with 'Webhooks by Zapier' trigger
3. For the Action, search for 'Google Sheets'
4. Choose 'Create Spreadsheet Row'
5. Connect your Google account
6. Select your spreadsheet and worksheet
7. Map the fields:

```
Timestamp: {{timestamp}} Question: {{question}} Answer: {{answer}}
```

8. Test and turn on your Zap

### What You Can Do With This Data:

- See what questions customers ask most often
- Identify gaps in your knowledge base
- Track conversation volume over time
- Create charts and reports
- Export for analysis in other tools

## 10. Integration: CRM (HubSpot)

Automatically create contacts or deals in HubSpot from Winston conversations.

### Setup Steps:

1. Create a Zap with 'Webhooks by Zapier' trigger
2. For the Action, search for 'HubSpot'
3. Choose 'Create Contact' (or 'Create Deal' for sales)
4. Connect your HubSpot account
5. Map the fields:

```
Contact Owner: (select yourself) Lifecycle Stage: Lead Lead Status: New  
Notes: Chatbot conversation - Question: {{question}}
```

6. Test and turn on your Zap

### ■■ Note About Email Addresses:

HubSpot requires an email address to create contacts. Since Winston doesn't collect emails by default, you have two options:

- Add the chat to an existing contact's activity (if you can match them)
- Create a 'Task' or 'Note' instead of a Contact
- Add a question to your knowledge base prompting customers to provide their email

### Other CRMs:

The same process works with Salesforce, Pipedrive, Zoho CRM, and others - just search for your CRM in Zapier.

# 11. Integration: Appointment Booking (Calendly)

This integration lets Winston direct customers to book appointments, and notifies you when they do.

## Part A: Add Booking Link to Winston

1. Create a Calendly account at [calendly.com](https://calendly.com) (free)
2. Create an event type (e.g., '30-Minute Consultation')
3. Copy your booking link
4. In Winston, go to Knowledge Base → Add Text
5. Add content like:

```
Title: Appointment Booking Content: Customers can book appointments online at: https://calendly.com/yourusername/30min When someone asks about scheduling, appointments, booking, meeting, or consultation, direct them to this link.
```

## Part B: Get Notified When Appointments Are Booked

1. Create a NEW Zap (separate from Winston)
2. Trigger: Calendly → 'Invitee Created'
3. Action: Email/SMS/Slack notification
4. Message:

```
New appointment booked! Name: {{invitee_name}} Email: {{invitee_email}} Time: {{event_start_time}}
```

## 12. Integration: Email Marketing (Mailchimp)

Note: This works best if you add a way for Winston to collect email addresses from visitors.

### Setup Steps:

1. Create a Zap with 'Webhooks by Zapier' trigger
2. Add a Filter: Only continue if email is provided
3. For the Action, search for 'Mailchimp'
4. Choose 'Add/Update Subscriber'
5. Connect your Mailchimp account
6. Select your audience/list
7. Map the email field
8. Test and turn on your Zap

### Getting Emails from Winston Conversations:

Add this to your knowledge base to encourage email collection:

```
Title: Newsletter and Updates Content: If visitors want to receive updates, newsletters, or promotional offers, ask them to share their email address. Say something like: "I'd be happy to add you to our mailing list! What's your email address?" When they provide an email, confirm: "Great! I've noted your email. You'll receive our updates soon!"
```

## 13. Advanced: Custom Webhook Handling

For developers or tech-savvy users: you can receive Winston webhooks directly in your own application.

### Webhook Payload Format:

```
POST request to your URL with JSON body: { "event": "new_conversation",
"question": "What are your business hours?", "answer": "We are open Monday
through Friday, 9 AM to 5 PM.", "timestamp": "2026-01-15T14:30:00Z", "data":
{ "question": "What are your business hours?", "answer": "We are open Monday
through Friday, 9 AM to 5 PM." } }
```

### Example: Simple Node.js Receiver

```
const express = require('express'); const app = express();
app.use(express.json()); app.post('/webhook', (req, res) => {
console.log('New chat:', req.body.question); // Do something with the data...
res.status(200).send('OK'); }); app.listen(3000);
```

### Example: Python Flask Receiver

```
from flask import Flask, request app = Flask(__name__) @app.route('/webhook',
methods=['POST']) def webhook(): data = request.json print(f"New chat:
{data['question']}") # Do something with the data... return 'OK', 200 if
__name__ == '__main__': app.run(port=3000)
```

## 14. Testing Your Webhooks

Always test your webhooks before relying on them!

### Test from Winston:

1. Go to Settings → Webhooks
2. Make sure your webhook URL is saved
3. Click 'Send Test'
4. Check your connected service (Zapier, email, etc.) for the test data

### Test the Full Flow:

1. Go to your website with the Winston widget
2. Ask a test question
3. Verify you received the notification (email, SMS, Slack, etc.)
4. Check that data was logged correctly (Google Sheets, CRM, etc.)

### Using Webhook.site for Testing:

If you want to see exactly what Winston sends, use [webhook.site](https://webhook.site):

1. Go to [webhook.site](https://webhook.site)
2. Copy the unique URL they give you
3. Paste it in Winston's webhook settings
4. Send a test - you'll see the full payload on [webhook.site](https://webhook.site)

## 15. Troubleshooting

### **Webhook Not Firing:**

- Verify webhooks are enabled in Winston settings
- Check that the webhook URL is correct (copy/paste again)
- Make sure your Zap is turned ON in Zapier
- Check Zapier's 'Zap History' for errors

### **Zapier Shows 'No Data':**

- Click 'Send Test' in Winston first
- Then click 'Test trigger' in Zapier
- Make sure you're using 'Webhooks by Zapier' → 'Catch Hook'

### **Email/SMS Not Received:**

- Check spam/junk folder
- Verify the email address/phone number in Zapier
- Check Zapier's task history for errors
- Make sure you haven't hit Zapier's free tier limit

### **Google Sheets Not Updating:**

- Make sure column headers exactly match what Zapier expects
- Verify Zapier has permission to access the sheet
- Check that you selected the correct spreadsheet and worksheet

### **Getting Too Many Notifications:**

- Add a Filter step in Zapier to only trigger on certain keywords
- Create separate Zaps for different types of notifications
- Use Slack channels instead of direct messages/SMS for volume

## 16. Integration Ideas by Business Type

### ■ Service Businesses (HVAC, Plumbing, etc.):

- SMS alert when someone asks for a quote
- Add leads to Google Sheets for follow-up
- Connect to ServiceTitan or Housecall Pro
- Book estimates via Calendly

### ■ Schools:

- Log all parent inquiries to a spreadsheet
- Notify admissions team via Slack
- Add interested families to Mailchimp for nurturing
- Schedule school tours via Calendly

### ■ Medical/Dental Practices:

- Notify front desk of appointment requests
- Log new patient inquiries
- Add to practice management system (via Zapier)

### ■ Retail/E-commerce:

- Add interested customers to email list
- Notify team of product questions
- Track common questions to improve product pages

### ■ Professional Services (Law, Accounting):

- Capture consultation requests
- Book initial consultations via Calendly
- Add to CRM for follow-up
- Notify specific team members based on inquiry type

## Need Help?

Email: [support@nousforgesystems.com](mailto:support@nousforgesystems.com)

We're happy to help you set up integrations that work for your business!