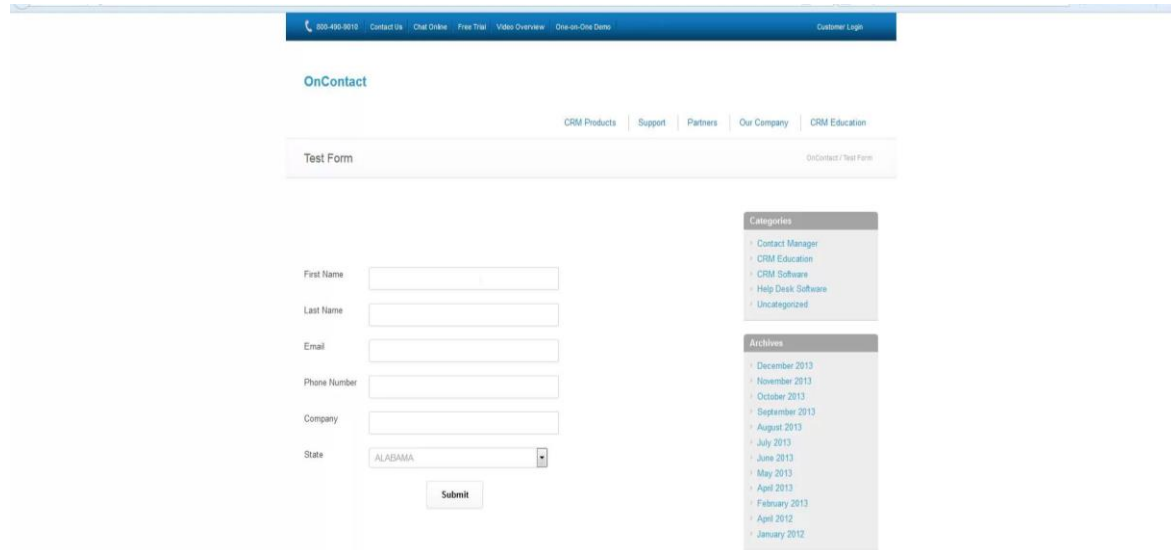
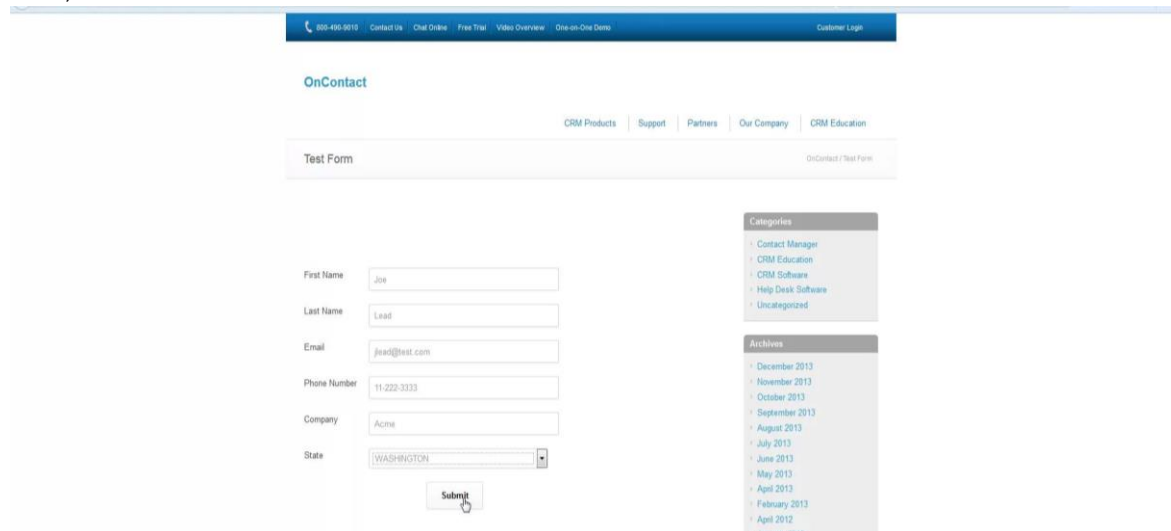


Web Forms

1. Web Forms can be generated via OnContact for your website. Here's an example of a form we created. The form is designed to gather visitor tracking data as well as to create new Lead records in CRM.

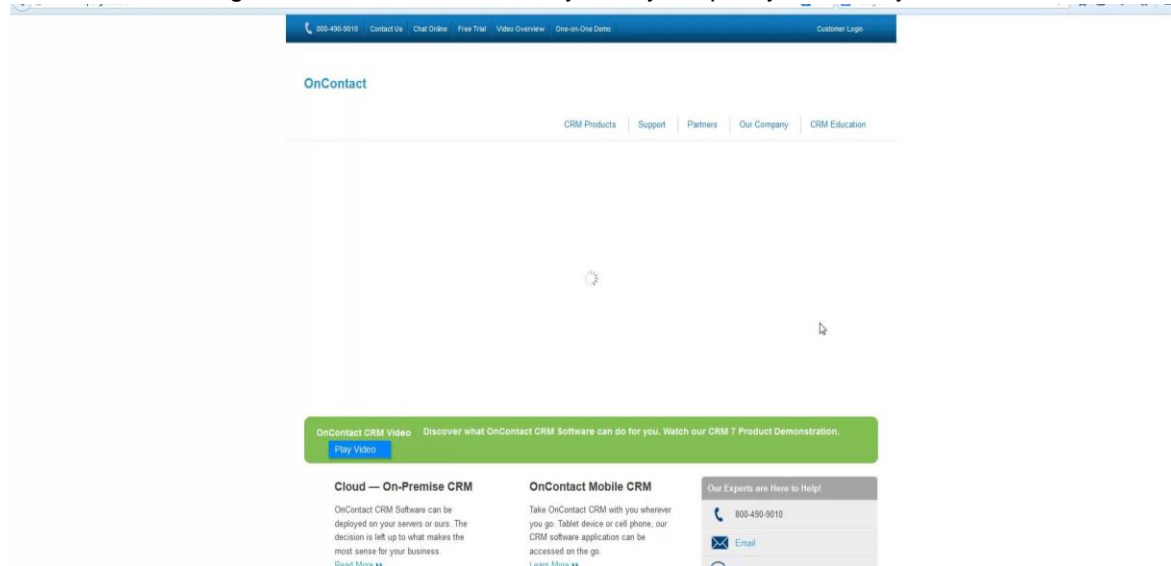


2. The visitor's site activity is tracked using cookies. Then, when they complete and submit the form, a New Lead record is created and the visitor data is available to view.

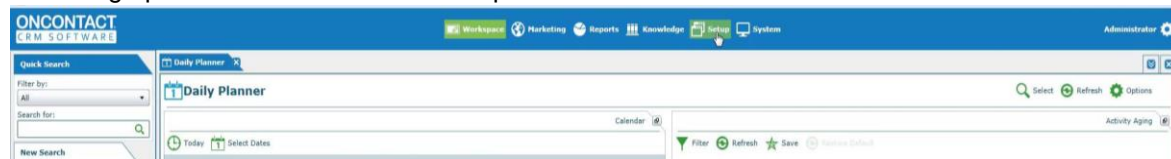


Web Forms

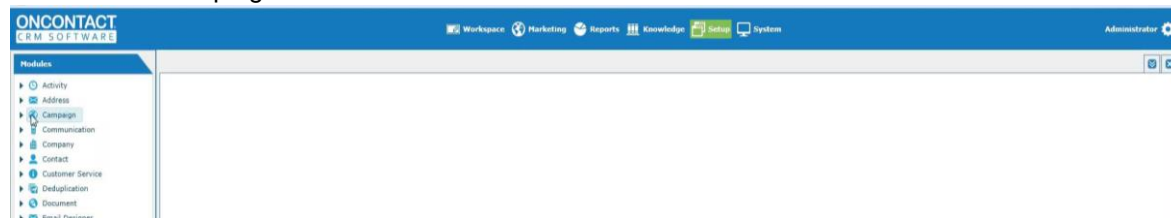
3. The form is designed to return the lead to any URL you specify when they Submit the form.



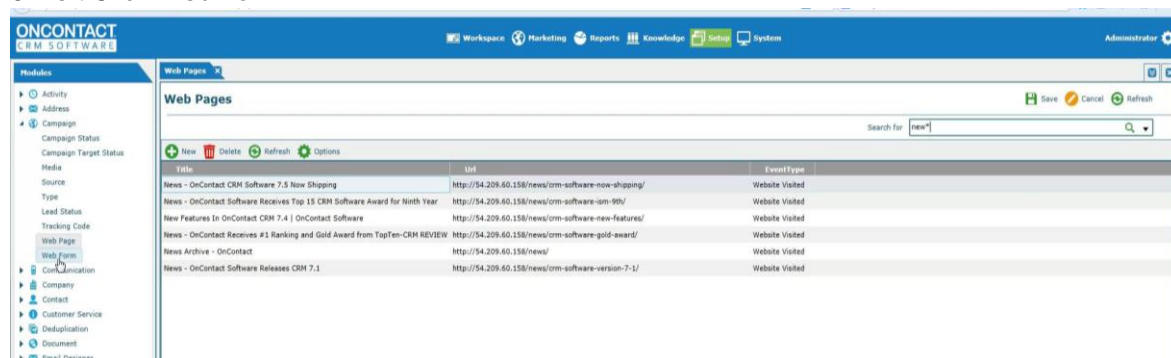
4. Setting up the form is done in the Setup area.



5. Left Click Campaign.

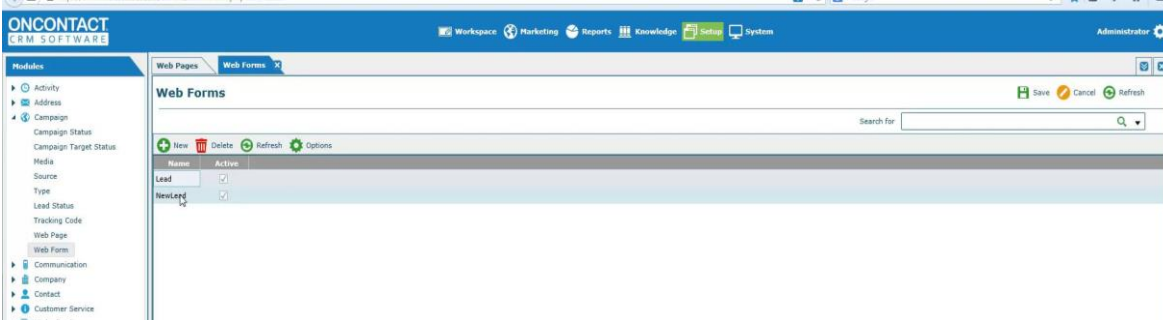


6. Left Click Web Form.

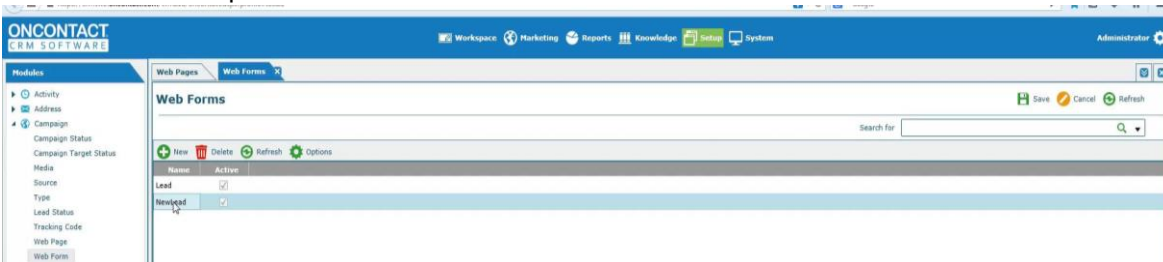


Web Forms

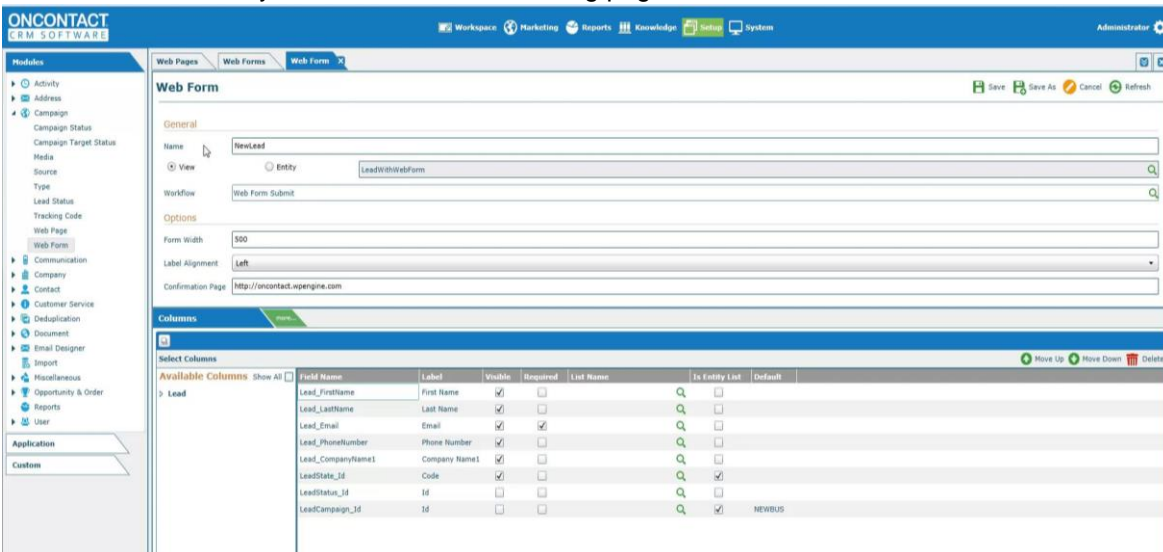
7. Let's look at the form we used to see how it is set up.



8. Double-click to open the form.

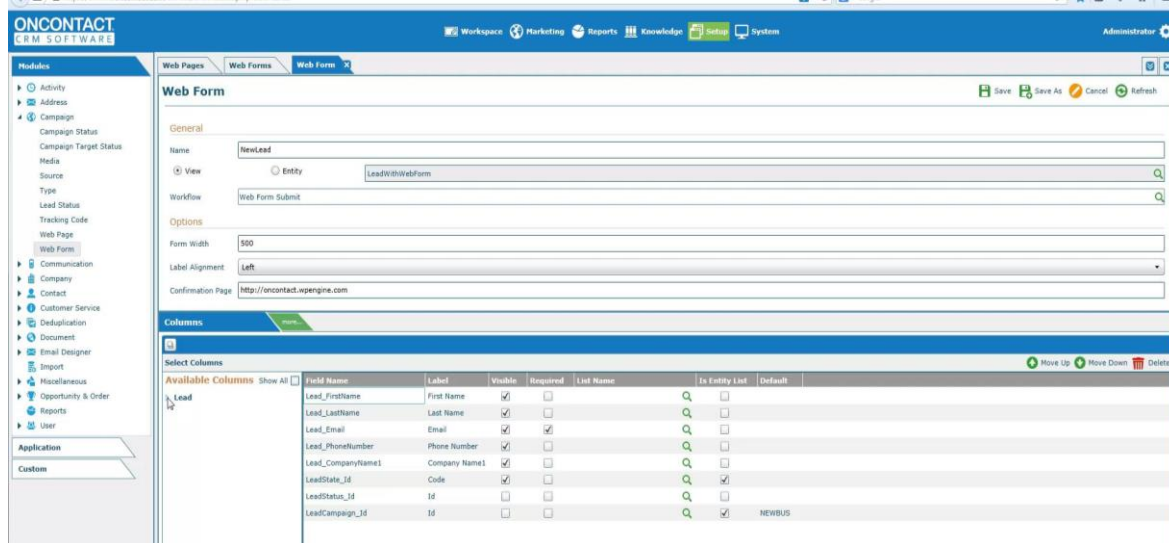


9. Complete the header information. In most cases, the data shown here is going to remain the same. Enter the URL you want to use for a landing page when the User clicks Submit.

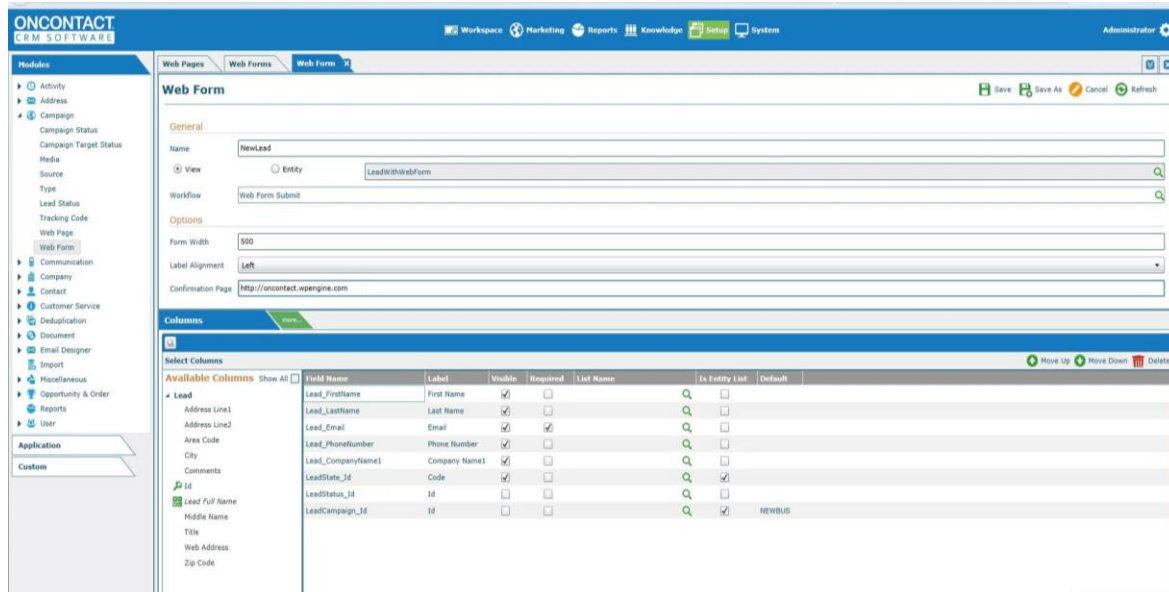


Web Forms

10. Click to expand the Lead fields if you want to add more to the form.

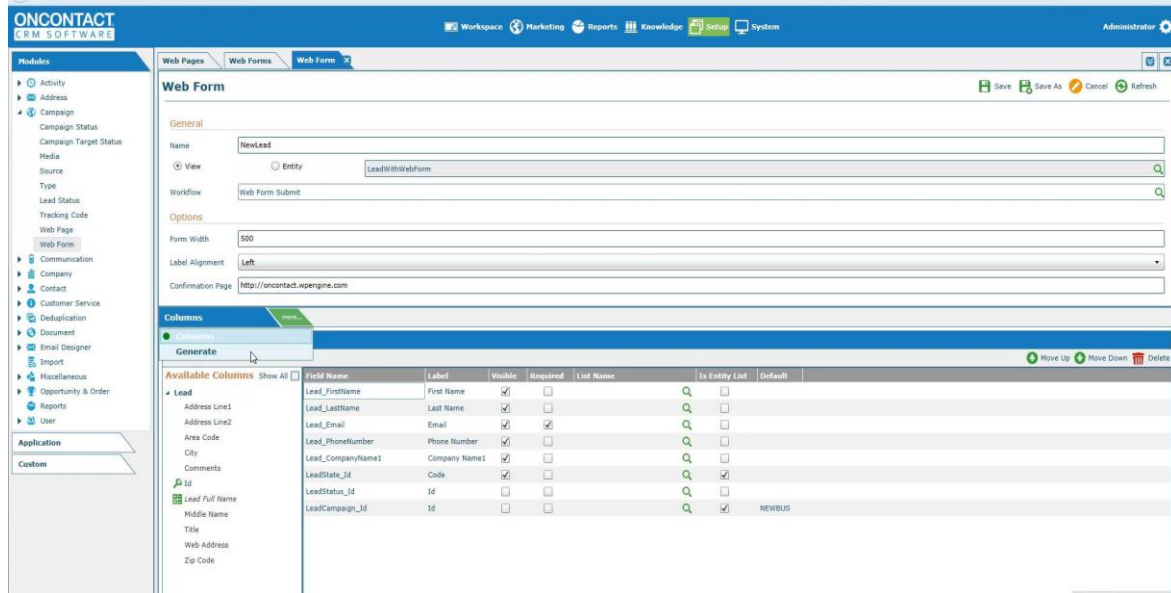


11. Click any field shown on the left side to add it to the form. Mark each field as Visible to the User, or leave unchecked if you do not want it displayed. Notice this example has an invisible field for Campaign so we can link this record to the NewBus Campaign.



Web Forms

12. Left Click to select the Generate tab.



13. Choose whether you have a hosted version of CRM or an on-premise installation. Click to generate the code for the form. You can copy it directly into the html code for your website page.

