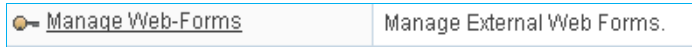




## Web Form Setup

Use Web Forms to capture Leads/Contacts/Accounts. The web form setup is available in the Admin area under Intelstream Module Management:



### Enabling a web form

**Web Form Setup: Manage Web Form.**

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**Web-to-Lead**

Enable Web-to-Lead  1

Web-to-Lead User   2

Web-to-Lead Key  3

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**Web-to-Contact**

Enable Web-to-Contact

Web-to-Contact User

Web-to-Contact Key

---

**Web-to-Account**

Enable Web-to-Account

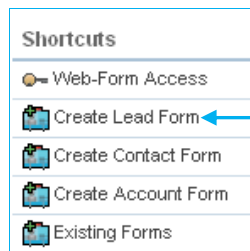
Web-to-Account User

Web-to-Account Key

- To enable a form, check off the appropriate checkbox. [1]
- Select the username the new records will be created by. [2]
- The web to lead key is a security feature to help prevent spam. Only forms submitted from your website will contain this key. You can create your own key, otherwise one will be auto generated when you click the save button. [3]

### Create Form

To generate a web form, click on the Create link in the Shortcuts.



### Create Lead Form: Select fields

Drag and drop lead fields in column 1 & 2

<div style="border: 1px solid blue; padding: 5px;"> <p><b>1</b> Available Fields</p> <ul style="list-style-type: none"> <li>Description</li> <li>Salutation</li> <li>Title</li> <li>Department</li> <li>Do Not Call</li> <li>Home Phone</li> <li>Mobile</li> <li>Office Phone</li> <li>Other Phone</li> <li>Fax</li> <li>Primary Address Street</li> <li>Primary Address City</li> </ul> </div>	<div style="border: 1px solid blue; padding: 5px;"> <p>Lead Form (First Column)</p> <ul style="list-style-type: none"> <li>First Name</li> <li>Last Name *</li> </ul> </div>	<div style="border: 1px solid blue; padding: 5px;"> <p>Lead Form (Second Column)</p> </div>
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Add All Fields **3**

- Available fields are listed in the Available Fields column [1].
  - Click and drag the desired fields to the First Column or the Second Column list [2].
  - To move all the fields, click Add All Fields [3].
  - When you are done, click Next [4].
- Required fields in your system marked with \* must be added to the form.  
➤ 'Account Name' field in Contact Web Form will populate into the Contact Description field.

## Form Properties

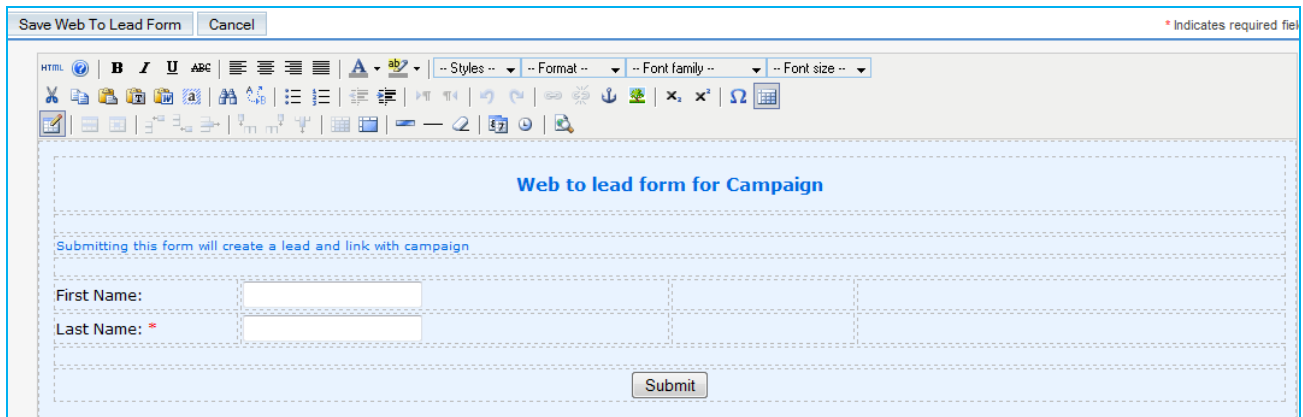
### Create Lead Form: Form properties

Form Header:	<input type="text" value="Web to lead form for Campaign"/>
Form Description:	<input type="text" value="Submitting this form will create a lead and link with campaign"/>
Submit Button Label:	<input type="text" value="Submit"/>
Post URL:	<input type="text" value="http://localhost/sugarcrm/Intelecrm/System/Engineering/Sol"/> <input type="checkbox"/> Edit Post URL?
Redirect URL:	<input type="text" value="http://"/>
Related Campaign:	<input type="text"/> <input type="button" value="Select"/>
Assigned to:*	<input type="text" value="admin"/> <input type="button" value="Select"/>
Form Footer:	<input type="text"/>

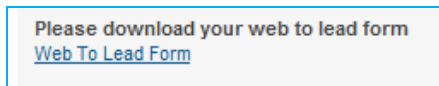
- Enter the following information to create the form:
  - Form Header: the header that will appear on the form

- Form description: Enter a brief description of the form.
- Submit Button Label: The name that will appear on the Submit button on the form.
- Post URL: The location where the information will be stored displays. To edit this information, select the Edit post URL? box and then enter the new location.
- Redirect URL: Enter a redirect URL that will generate a Thank You" message or any other automated message when someone submits the form.
- Related Campaign. Select a campaign if you would like records submitted via the form to be associated with (only available for Leads and Contacts).
- Assigned to: Enter the name of the user who is assigned to this form.
- Form Footer: Enter the form footer, if needed.

To create the form and display it in the TinyMCE Editor, click Generate Form:



Make any desired changes. When you are done, click ‘Save Web to Lead Form’. You will be prompted to download your new form:



Click on this link to test your form and to save it so that you can incorporate it into your website.

### **Previously Created Forms**

To view previously created web forms, click on the ‘Existing Forms’ link in the Shortcuts.