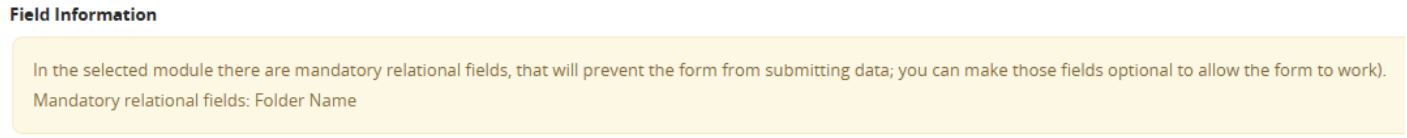
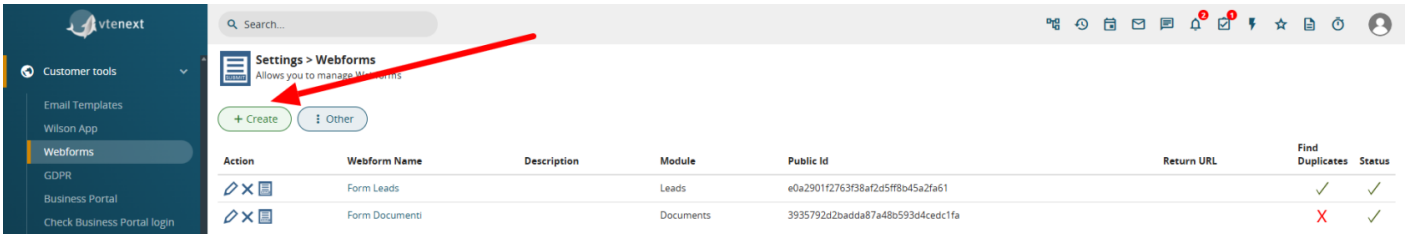
18.2 Webforms

Through the vtenext Webforms tool it is possible to create a web form to embed in your website, for example the classic “Contact Us” form. The data entered in the webform will be automatically sent to the CRM into the selected destination module. Basically, you can create a Webform for almost all modules available in the CRM, including all custom modules created from **Settings > Module Builder**. The only modules excluded from this feature are those that contain the product block, such as **Quotes, Sales Orders, Invoices, Purchase Orders, and DDTs**.

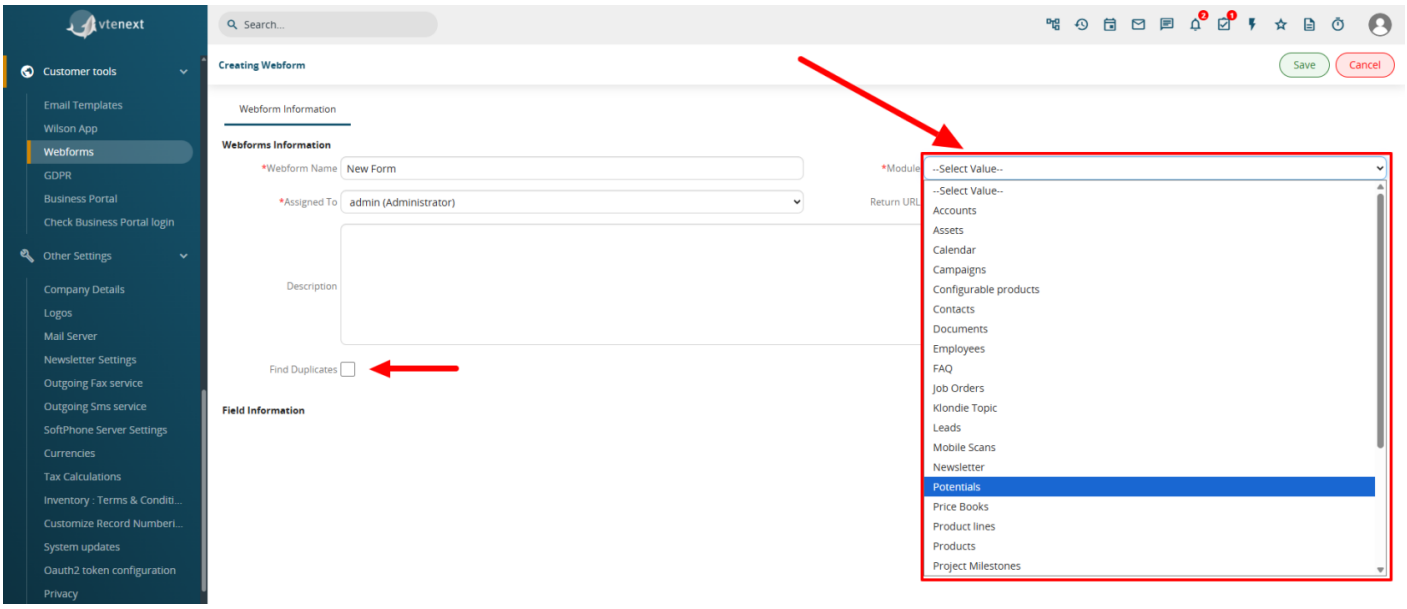
WARNING: if you create a Webform for a module that contains mandatory related fields, those fields will prevent the form from submitting data. Therefore, those fields must be set as optional to allow the form to work properly.
For example, in the Contacts module the related field **Account Name** might be mandatory. This field must be set as “not mandatory” from **Settings > Module Manager > Accounts > Layout Editor** to ensure the form works correctly. If you still need that field to be mandatory, you can manage this through **User Profile permissions** instead.



Warning that allows you to see whether there are mandatory related fields to be checked

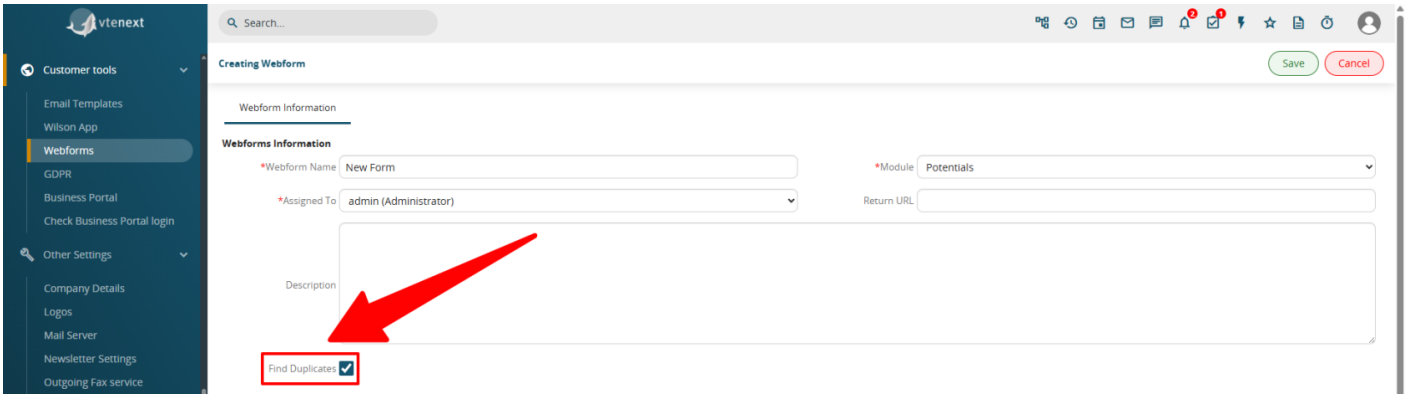


Main Webforms creation page



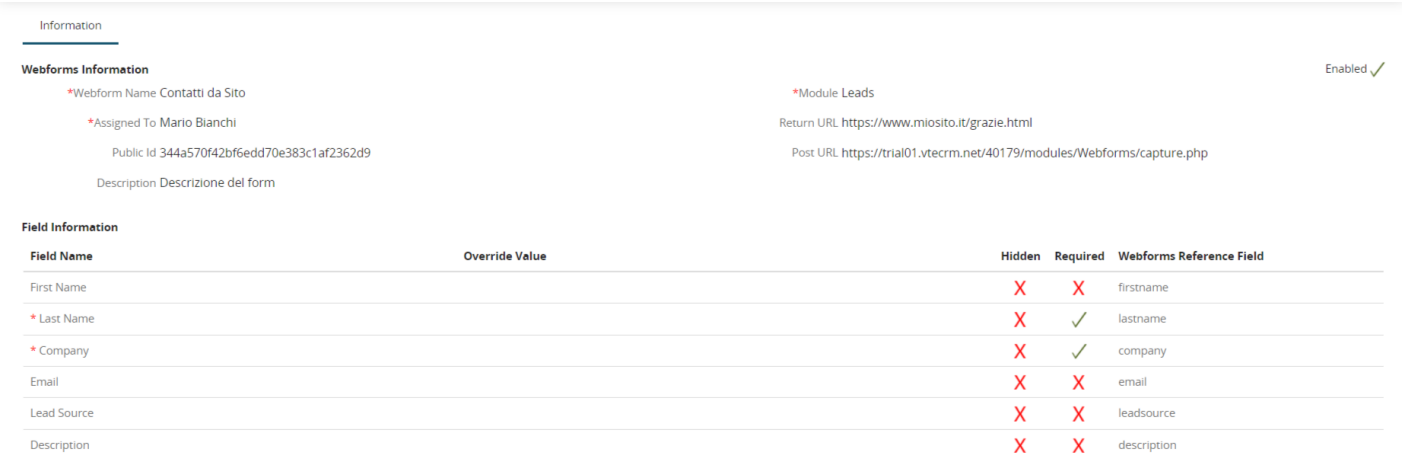
Creating a Webform – note the ability to choose from the various modules available in the CRM

It is also possible to enable the **“Find Duplicates”** function for the entries submitted through the related Webform. This function is directly linked to the saved mappings available in the duplicate management of the relevant module. For further information on this topic, see Chapter **“3.5.5 Save Mapping.”**



Find Duplicates during Webform submission

To create a new webform, from Settings > Webforms, click on the button 



- Assigned to --> vtenext user that will manage the lead
- Return URL --> By clicking on the confirm of the webform, the user will be redirected to the address here indicated

Once you have created the form by selecting all the desired fields and determining which ones are mandatory, you can click on VIEW FORM at the top right to access a window that reveals the HTML code to copy and paste onto the desired website page (or landing page). This HTML code is not formatted and will need to be managed with CSS files by your webmaster.

ATTENTION: Any changes made to the web form fields in the CRM require that the HTML code be re-uploaded to the site.

HOW TO RECEIVE NOTIFICATIONS UPON RECEIVING NEW LEADS.

During the form creation process, it is necessary to choose the LEAD SOURCE field and determine the desired default source (e.g., WebSite). This field should be set as hidden. This way, you can create a filter in the lead module that filters leads coming from the WebSite source and set up the notification bell on that filter.

At this point, every time someone fills out the form on the site, a new lead will be automatically created and the CRM will notify you with a notification.

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