

# **crm-now/PS Webforms**

## **Webdesigner Manual**



*Second Edition*



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# crm-now/PS Webforms: Webdesigner Manual

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## Revision History

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## Second Edition

Revision 02 2011-06-15

New Web Site Interface

crm-now GmbH, [www.crm-now.com](http://www.crm-now.com)

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## Table of Contents

Chapter 1. Using Webforms .....	<i>1</i>
1.1. The Main Principle .....	<i>1</i>
1.2. Integrating Webforms .....	<i>2</i>
1.2.1. Preparations .....	<i>2</i>
1.2.2. Installation and tests .....	<i>3</i>
Chapter 2. Support .....	<i>5</i>

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## Chapter 1. Using Webforms

This manual addresses users who design websites and who are familiar with the basic functions of the CRM system. It describes how designers of commercial websites may use Webforms for leads in order to transfer data from potential customers directly from your website to the CRM. The software described in this manual is provided for free within the scope of Open Source licensing and must be used in accordance with these conditions. By downloading the program, you will obtain the license.

### Version and edition of the manual

You can find the version of the edition on page two of this manual. The first three digits identify the document whereas the subsequent three digits represent the version number. The version number will be increased in each new release of the software. The last digit indicates the edition within a software version.

### 1.1. The Main Principle

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Webforms are software packages which make it possible to transfer data directly from a website to the CRM system. The following describes the mode of operation:

- A web designer integrates the available code into a website and generates a contact form. If necessary, adjustments of the design will be made.
- A potential customer types her/his data into the contact form at your website.
- The data of the potential customer are transferred to the CRM and generate a lead.
- The lead will be assigned to a CRM user for further treatment.

The following figure shows an example:

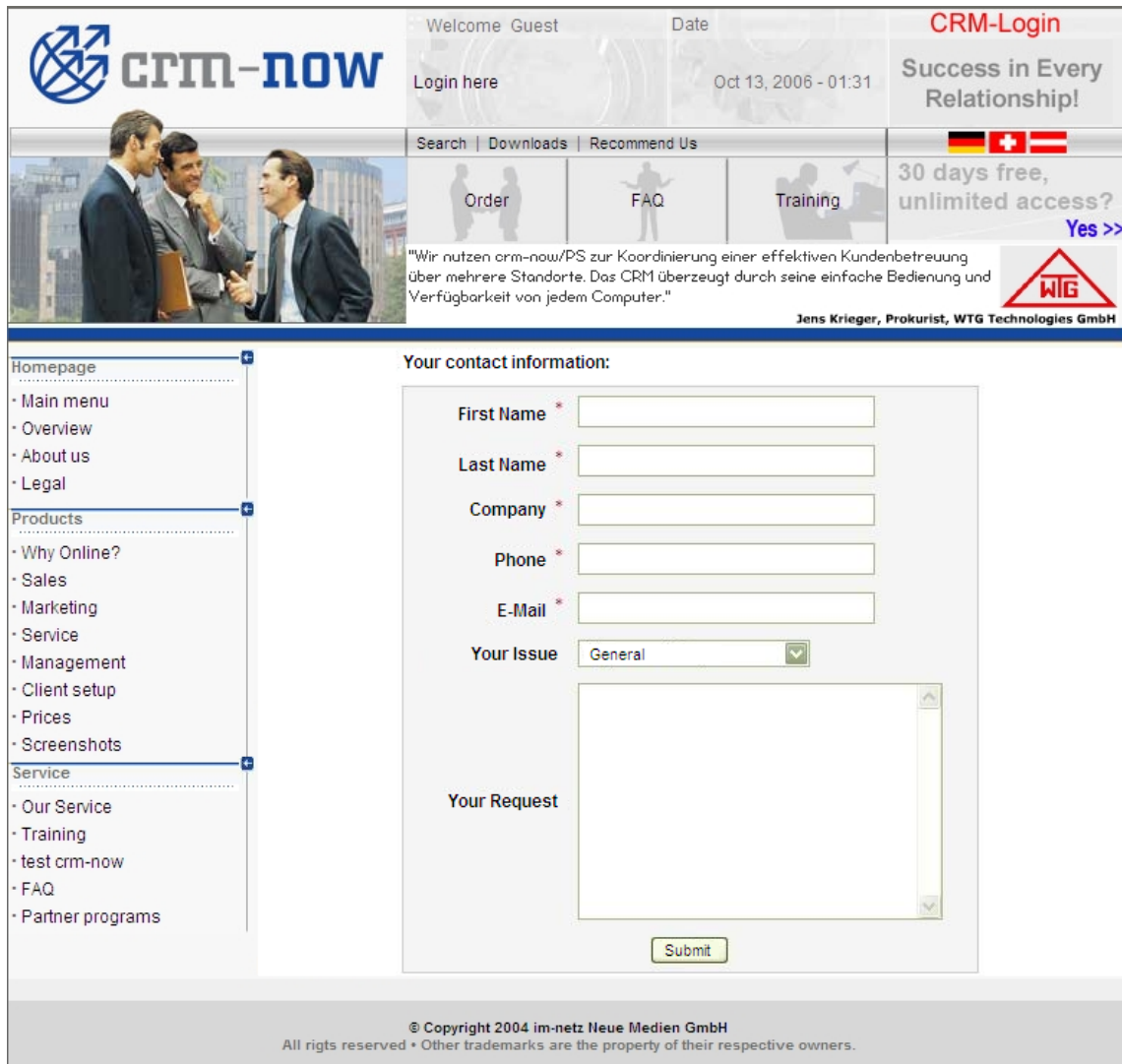


Figure 1.1. Example

## 1.2. Integrating Webforms

In a first step, download the source code of the program. You will find the file under the **[Help]** tab at your CRM system.

### 1.2.1. Preparations

The provided code includes all necessary parts for the transfer of data from a web based application to the CRM. The code is delivered in PHP. PHP is a scripting language which can be embedded in HTML sites and support its purposes. For further information on PHP check: [www.php.net](http://www.php.net)

Please note the following guidelines:



- You may work on your website with PHP versions equal or better than 4.2.x
- The server must provide the wget function.

Experienced PHP developer may use other functions than wget of course.

Furthermore, you need the following information:

1. a CRM user name which suppose to be the owner of a transferred Lead. This information will get stored at your CRM.
2. a web URL which suppose to be the target after a transmission to the CRM has been completed correctly. This information will get stored at your CRM.
3. a web URL which suppose to be the target after a transmission to the CRM has failed. This information will get stored at your CRM.
4. a secret CRM access key, provided by crm-now.

### 1.2.2. Installation and tests

Download the source code. The following procedure is recommended:

1. Unpack and store the program unchanged at your web site in order to test its functionality.
2. Contact crm-now to get the secret CRM access key.



#### **Important**

The program sample prevents the display of the secret key at a web site. No matter what modifications you do to the code you must make sure that the key will never get to a web site.

3. Open the program with a text editor.
  - Look for the appKey at line 29. Replace the key by the new secret key.
  - Look for the appKey at line 40. Replace 'https://crm.crm-now.de' by the URL of your CRM system
4. Store your modification at the server, contact crm-now and request the releases of the webform function.
5. Test you system by generating sample Leads.
6. Modify the contact form design as you need it.

The target URL's for successful or faulty data transmissions are optional.

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## Chapter 2. Support

The crm-now team will support you working on the CRM system and the webforms. If you have questions, hints or wishes, feel free to send an e-mail to:

[support@crm-now.de](mailto:support@crm-now.de)

You may contact crm-now at:

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