

Description

Provides the ability to send external form data to selected Entity.

Version: v7+

Installation

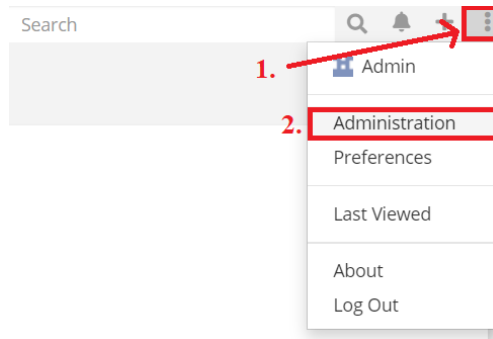
In order to install EspoCRM extension:

1. Login as an administrator.
2. Go to Administration > Extensions.
3. Upload your extension package (zip file).
4. Click Install button.









You can find more information here: <https://docs.espocrm.com/administration/extensions/>

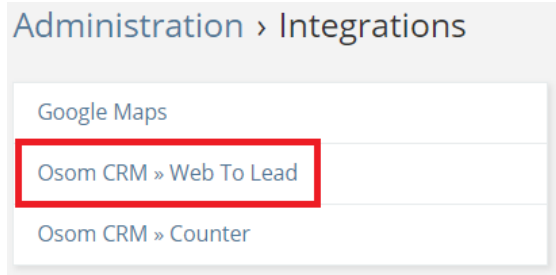
Setting up an Integration

1. Go to the administrator panel.



2. Go to the Integration section.

System	
 Settings	System settings of application.
 User Interface	Configure UI.
 Authentication	Authentication settings.
 Scheduled Jobs	Jobs which are executed by cron.
 Currency	Currency settings and rates.
 Notifications	In-app and email notification settings.
 Integrations	Integration with third-party services.
 Extensions	Install or uninstall extensions.



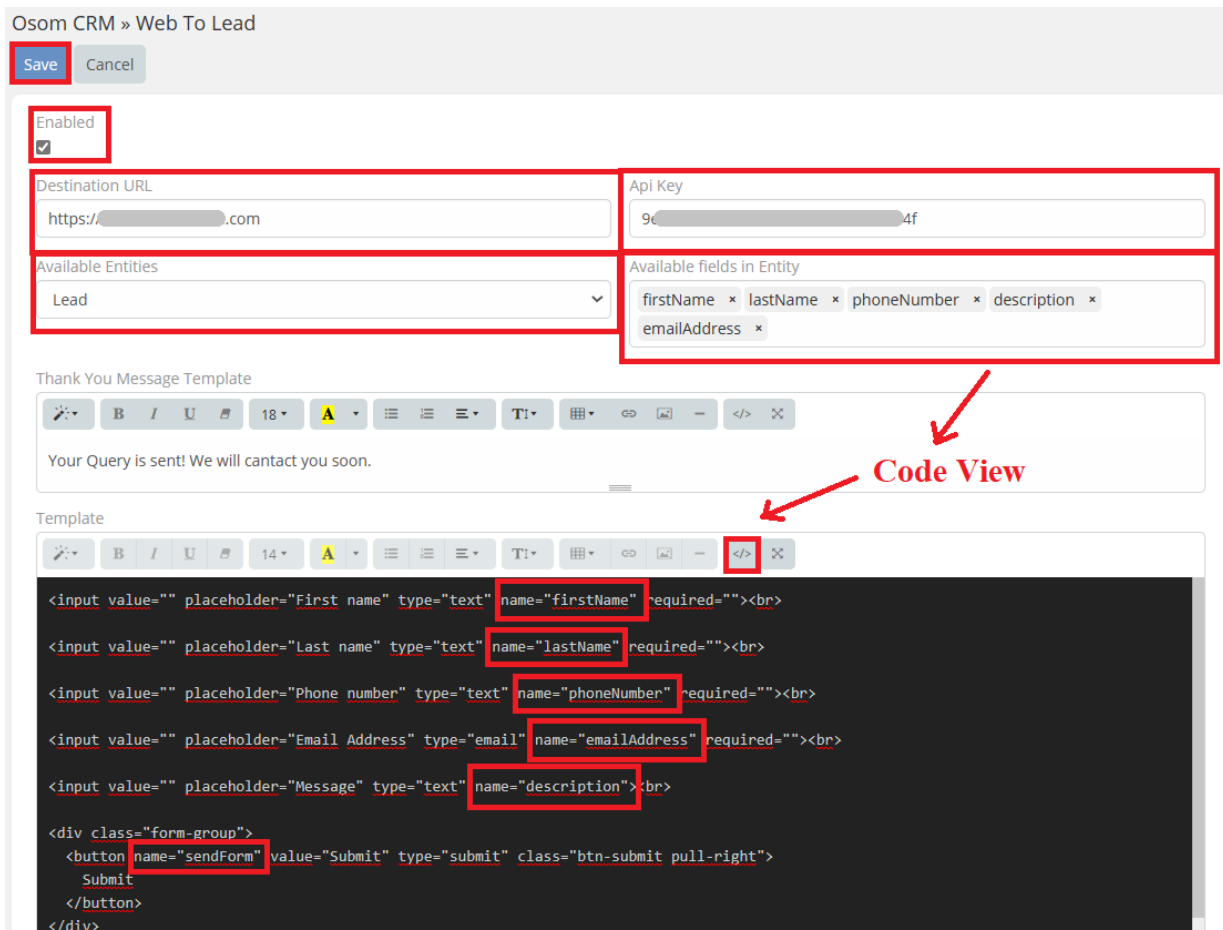
3. Click on Osom CRM » Web To Lead.

4. Tick on Enabled checkbox. Fill the form with destination CRM URL and Api Key (Look at note). Select an entity you are going to use for posting data ('Available Entities') and choose fields you are going to post in selected entity ('Available fields in Entity').

If you are sending data to another CRM, please have in mind that you will be able to choose entity names that are on your CRM. If a destination CRM has an entity, which you do not have in your CRM - you will not be able to choose that entity from the list unless you create an entity in your CRM with the same name as it is in the destination CRM.

After an extension installation you have an examples of Thank You Message Template and Form Template. You can modify it as you wish. **But keep in mind that on Code View (Template section) in 'input' tags you need to specify original selected entity fields names which you selected in the 'Available fields in Entity' field. Button has to be named as 'sendForm'. Otherwise, your data will not be sent.** Save an Integration.

NOTE: you need to have API user credentials to whom you want to send data. Make sure your API user role has 'Create' and 'Read' access to selected Entity. More information: <https://docs.espocrm.com/administration/users-management/#api>



Osom CRM » Web To Lead

Save Cancel

Enabled

Destination URL Api Key

Available Entities Available fields in Entity

Thank You Message Template

Your Query is sent! We will contact you soon.

Template

```

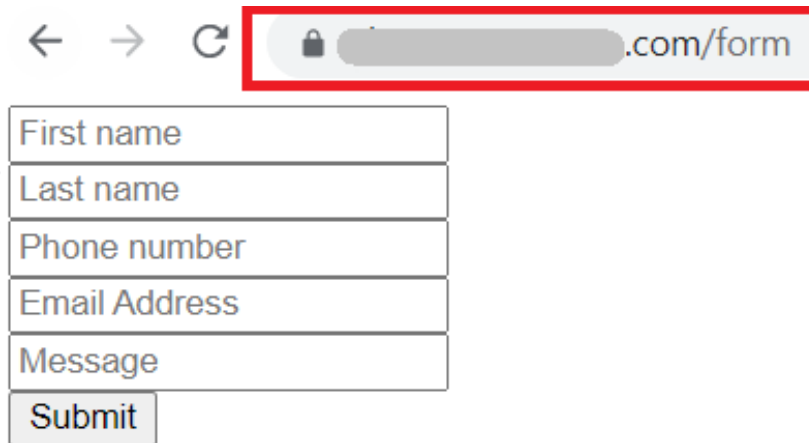
<input value="" placeholder="First name" type="text" name="firstName" required=""><br>
<input value="" placeholder="Last name" type="text" name="lastName" required=""><br>
<input value="" placeholder="Phone number" type="text" name="phoneNumber" required=""><br>
<input value="" placeholder="Email Address" type="email" name="emailAddress" required=""><br>
<input value="" placeholder="Message" type="text" name="description"><br>
<div class="form-group">
  <button name="sendForm" value="Submit" type="submit" class="btn-submit pull-right">
    Submit
  </button>
</div>

```

Code View

Sending data to Lead

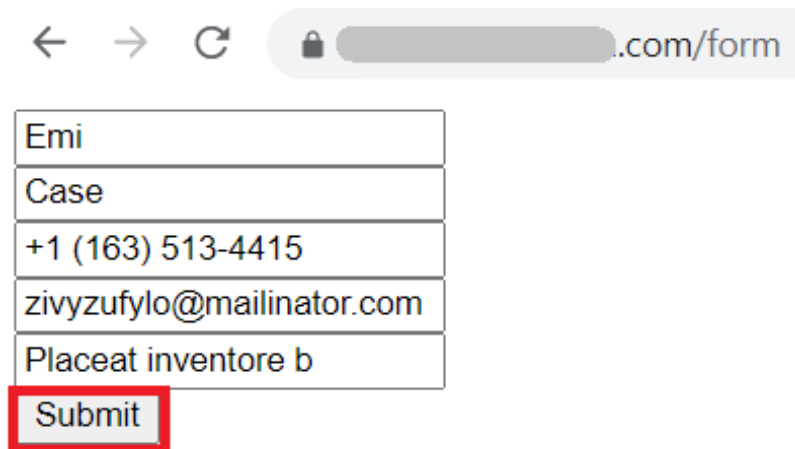
1. Go to your CRM url /form. You will see the form.



← → ↻ 🔒 [redacted].com/form

First name
Last name
Phone number
Email Address
Message
Submit

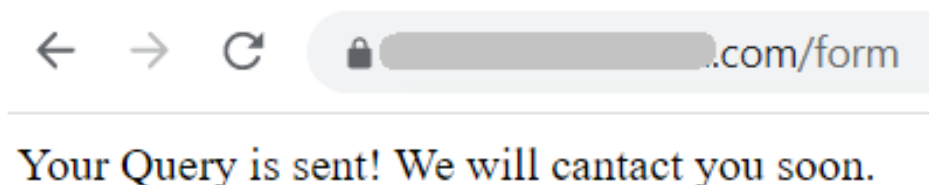
2. Fill the form with data and click on Submit.



← → ↻ 🔒 [redacted].com/form

Emi
Case
+1 (163) 513-4415
zivyzufylo@mailinator.com
Placeat inventore b
Submit

3. After Submit you will see Thank You Message.



← → ↻ 🔒 [redacted].com/form

Your Query is sent! We will contact you soon.



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Laisves str. 3, Vilnius, LT-04215, Lithuania
laimonas@osomcrm.com
www.osomcrm.com

4. The data arrived at your destination CRM.

Leads + Create Lead

All

Total: 77

Name	Status	Email	Assigned User	Created At
Emi Case	New	zivyzyfylo@mailinator.com		Today 11:31

Leads > Emi Case

Edit

Overview

Name	Emi Case	Account Name	None
Email	zivyzyfylo@mailinator.com	Phone	+1 (163) 513-4415 Mobile
Title	None	Website	None
Address	None		

Details

Status	New	Source	None
Opportunity Amount	None	Campaign	None
Industry	None		
Description	Placeat inventore b		