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Description

It allows you to have multiple Public Forms. Advanced users can create separate HTML, CSS and JS files. Unsubscribe/subscribe functionality option. Email addresses that have unsubscribed will be entered into a new entity Consent.

Version: v7+

Installation

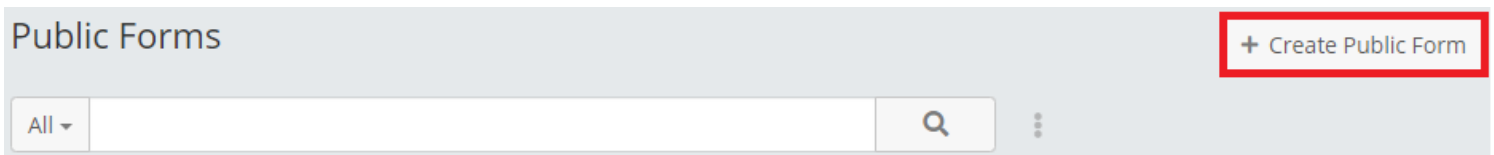
In order to install EspoCRM extension:

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 a Public Form

1. Go to the Public Forms Entity and click on "Create Public Form".



2. Fill the form with data:

- Enable Form (if yes, your form will be visible)
- Name;
- File Type (if you want to have a form to post data to CRM you have to choose "HTML + submit form data" other File Types are explained in next Documentation section - page 4);
- Custom Domain (your page name);
- Destination CRM URL;
- Api Key (Look at note);
- Select an entity you are going to use for posting data;
- Available fields in Entity (fields you are going to post in selected entity).;
- Thank You Message Template;
- Form Template. Your form HTML. **But keep in mind that 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.**
- Disabled Message (This message will be displayed if the "Enable Form" is false)

Save a Public Form.

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.

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>

Enable Form



Name *

Form to Lead

File Type ⓘ

HTML + submit form data

Custom Domain ⓘ

Lead

Form Url

Destination Url *

https://osomcrm.com

Api Key *

0effc1b190197106653c84ee8fba22e8

Entity *

Lead

Available Fields In Entity *

firstName * lastName * emailAddress * description *
phoneNumber *

Thank You Message Template *



Thank you, we have received your information!

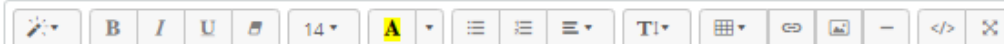
Form Template

```
<form>
<label for="firstName">First Name:</label>
<input type="text" id="firstName" name="firstName"><br>

<label for="lastName">Last Name:</label>
<input type="text" id="lastName" name="lastName"><br>

<label for="emailAddress">Email Address:</label>
<input type="email" id="emailAddress" name="emailAddress"><br>
```

Disabled Message



Form is disabled

3. After save you will get your page url in "Form Url" field.

Enable Form



Name

Form to Lead

Custom Domain ⓘ

Lead

File Type ⓘ

HTML + submit form data

Form Url

https://osomcrm.com/Lead



4. Click on generated url and you will get your form. Fill the form and submit your data. Data have arrived at destination CRM.

First Name:

Last Name:

Email Address:

Description:

Phone Number:

Leads > Paula Mann

Edit ...

Overview

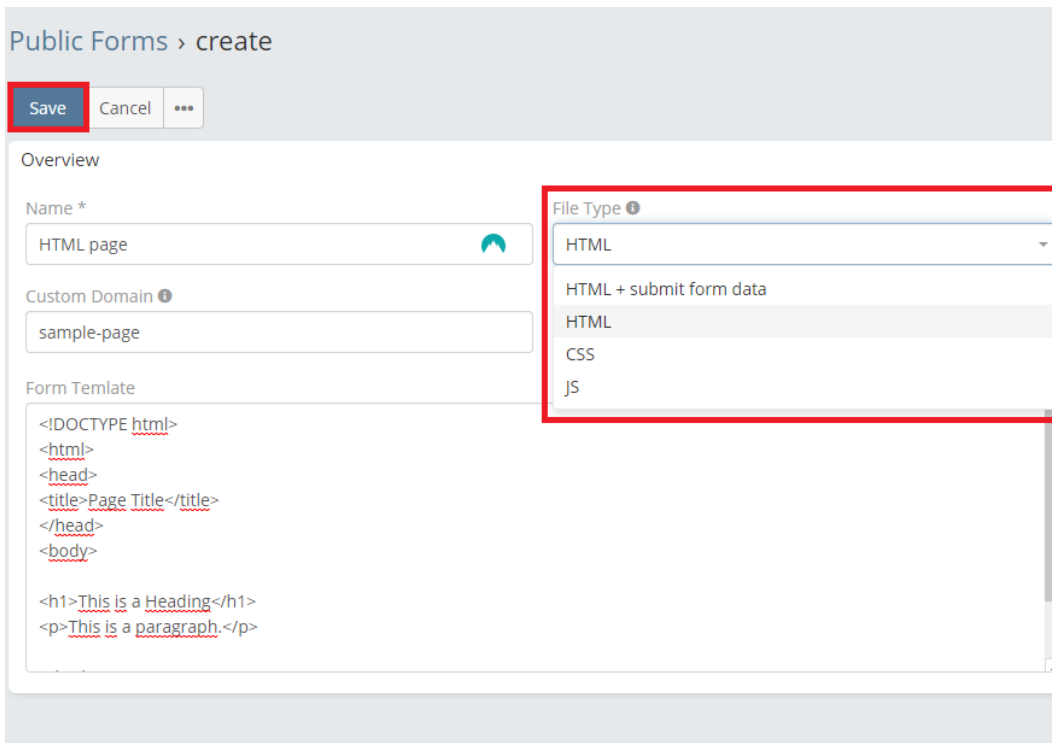
Name	Paula Mann	Account Name	None
Email	cyqiwpah@mailinator.com	Phone	+1 (504) 853-9922 Mobile
Title	None	Website	None
Address	None		

Details

Status	New	Source	None
Opportunity Amount	None	Campaign	None
Industry	None		
Description	Et elit quia quia q		

Other Public pages options

1. In public Forms Entity you can create HTML, CSS, JS files. If you want to create HTML page in "File Type" choose a HTML. Define "Custom Domain" and in "Form Template" field write your HTML content. Save it.



Public Forms > create

Save Cancel ...

Overview

Name *
HTML page

Custom Domain ⓘ
sample-page

Form Template

```
<!DOCTYPE html>
<html>
<head>
<title>Page Title</title>
</head>
<body>

<h1>This is a Heading</h1>
<p>This is a paragraph.</p>

</body>
</html>
```

File Type ⓘ
HTML
HTML + submit form data
HTML
CSS
JS

2. Click on generated url and you will see your HTML page.

Overview

Name

HTML page

Custom Domain ⓘ

sample-page

File Type ⓘ

HTML

Form Url

<http://osomcrm.com/sample-page>

3. You can build CSS and JS files and include it in your public pages.

Unsubscribe/Subscribe Page

1. Create new Public Form. In Custom Domain field type your page name, File Type choose "Unsubscribe", Entity choose "Consent", select Available Fields In Entity (remember your form inputs should be named as CRM fields, submit button as "sendForm"). Fill the other data.

Enable Form

Name *

File Type ⁱ

Custom Domain ⁱ

Form Url

Destination Url *

Api Key *

Entity *

Available Fields In Entity *

Thank You Message Template *
 Thank you, we have received your information!

Form Template

```
<form style="max-width: 400px; margin: 0 auto; font-family: Arial, sans-serif;">
  <label for="emailAddress" style="display: block; margin-bottom: 5px;">Email Address:</label>
  <input type="email" id="emailAddress" name="emailAddress" style="width: 20%; padding: 8px; border: 1px solid #ccc; border-radius: 4px; margin-bottom: 10px;">
  <input style="display: none;" name="emailAddressesOptedOut" type="checkbox" value="1" class="input-field" checked>
  <label for="unsubscribeReason" style="display: block; margin-bottom: 5px;">Unsubscribe reason:</label>
  <select name="unsubscribeReason" style="width: 20%; padding: 8px; border: 1px solid #ccc; border-radius: 4px;">
  <option value="option1" style="padding: 8px;">I don't want it anymore</option>
```

Disabled Message
 Page is disabled



2. Go to Subscribe Again Page tab. In Custom Domain Subscribe type your page name, in Subscribe Again Button Name enter the label you want to name the button. Save it.

Public Forms > unsubscribe/subscribe

Save Cancel ...

Overview **Subscribe Again Page**

Subscribe Again Page

Custom Domain Subscribe * ? Subscribe Url ...

Subscribe Again Button Name *

Thank You Message Template Subscribe *

Thank you, we have received your information!

3. Go to Email Templates entity and create new one. On the right side you will see a Consent panel. This panel contains an unsubscribe url with information. You should modify this url with your data (capital letters explanation should be changed):

- PUBLIC_FORM_NAME - your unsubscribe page name;
- LANGUAGE - what language consent you expect e.g. lt, en, gb;
- YOUR_CAMPAIGN_ID - your CRM campaign ID;
- YOUR_CAMPAIGN_NAME - your CRM campaign name;
- YOUR_CONTENT_ID - your email template ID;
- YOUR_CONTENT_NAME - your email template name;

Insert a link with your modified url. Save it. In our example created Unsubscribe form url will look like this:

<https://osomcrm.com/unsubscribe?language=lt&action=Opt-Out&campaignId=648b3201088982cc6&campaignName=My-Campaign&contentId=63e9bf9f436e9cbc8&contentName=Unsubscribe>

Now send an email to user using this template.

Email Templates > Unsubscribe

Save Cancel ...

Name * One-off

Category

Subject

Placeholders

Body

For Unsubscribe click here:

Attachments HTML

Assigned User

Teams

Created Today 15:39 > Admin


Info

Available placeholders:

- {today} – Today's date
- {now} – Current date & time
- {currentYear} – Current Year
- {optOutUrl} – URL for an unsubscribe link
- {optOutLink} – an unsubscribe link

Consent

```
https://osomcrm.com/PUBLIC_FORM_NAME?
language=LANGUAGE&action=Opt-
Out&campaignId=YOUR_CAMPAIGN_ID&campaignName=
YOUR_CAMPAIGN_NAME&contentId=YOUR_CONTENT_ID&
contentName=YOUR_CONTENT_NAME
```



4. When the user receives the email and clicks on the link in it, the form you created will open.

Email Address:

Unsubscribe reason:

5. After submit Consent will be created with data which you specified in url, data what the user filled in the form and Opted-Out email address.

Consents > 00001

Edit ...

Overview

Name	00001	Email	koveh@mailinator.com	Action	Opt-Out
First Name	None	Last Name	None		
Contact	None	Lead	None		
Unsubscribe Reason	Other	Description	None		
Campaign Name	My-Campaign	Campaign Id	648b3201088982cc6		
Content Name	Unsubscribe	Content Id	63e9bf9f436e9cbc8		
Source	None	Source Url	None		
Ip Address	None	Language	It		
		Phone	None		

6. When user submits a form Thank You Message will appear with button which allows you to resubscribe.

Thank you, we have received your information!

Subscribe Again



7. After resubscribe Consent will be created with data which you specified in url and Opted-In email address.

Consents > 00002

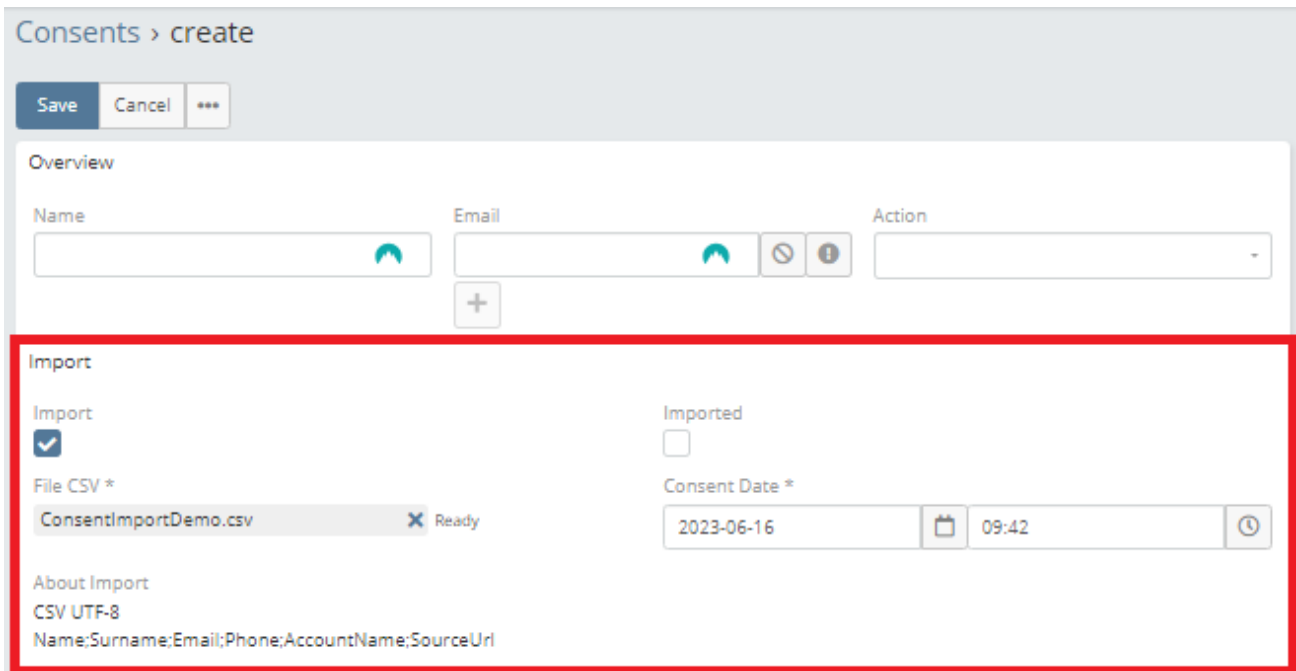
Edit ...

Overview

Name	00002	Email	koveh@mailinator.com	Action	Opt-In
First Name	None	Last Name	None		
Contact	None	Lead	None		
Unsubscribe Reason	None	Description	None		
Campaign Name	My-Campaign	Campaign Id	648b3201088982cc6		
Content Name	Unsubscribe	Content Id	63e9bf9f436e9cbc8		
Source	None	Source Url	None		
Ip Address	None	Language	It		
		Phone	None		

Consent Import

1. For Consent import create new Consent, click on Import checkbox, add your CSV file in File CSV field, select a Consent Date. Save it. About Import field shows structure of CSV file.



Consents > create

Save Cancel ...

Overview

Name Email Action

Import

Import Imported

File CSV * Ready

Consent Date *

About Import

CSV UTF-8

Name;Surname;Email;Phone;AccountName;SourceUrl

2. CSV file structure:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Name;Surname;email@gmail.com;+1(504)853-8877;NameSurname;www.osomcrm.com											
2	John;Smith;john@gmail.com;+1(504)853-9922;JohnSmith;www.osomcrm.com											
3	Paula;Mann;paula@gmail.com;+1(504)853-6633;PaulaMann;www.osomcrm.com											
4												



3. Imported Consent will be created.

Consents > email@gmail.com

Edit ⋮

Overview

Name	email@gmail.com	Email	email@gmail.com	Action	None
First Name	Name	Last Name	Surname		
Contact	None	Lead	None		
Unsubscribe Reason	None	Description	None		
Campaign Name	None	Campaign Id	None		
Content Name	None	Content Id	None		
Source	None	Source Uri	www.osomcrm.com		
Ip Address	None	Language	None		
		Phone	+1(504)853-8877		

Import

Import	<input type="checkbox"/>	Imported	<input checked="" type="checkbox"/>
		Consent Date	Today 09:42