Osom CRM
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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+

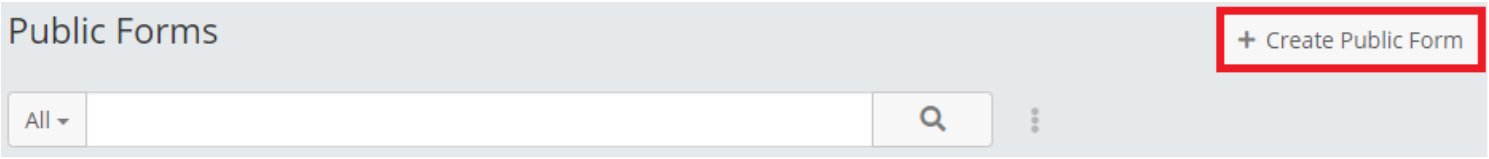
Installation

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 desination 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

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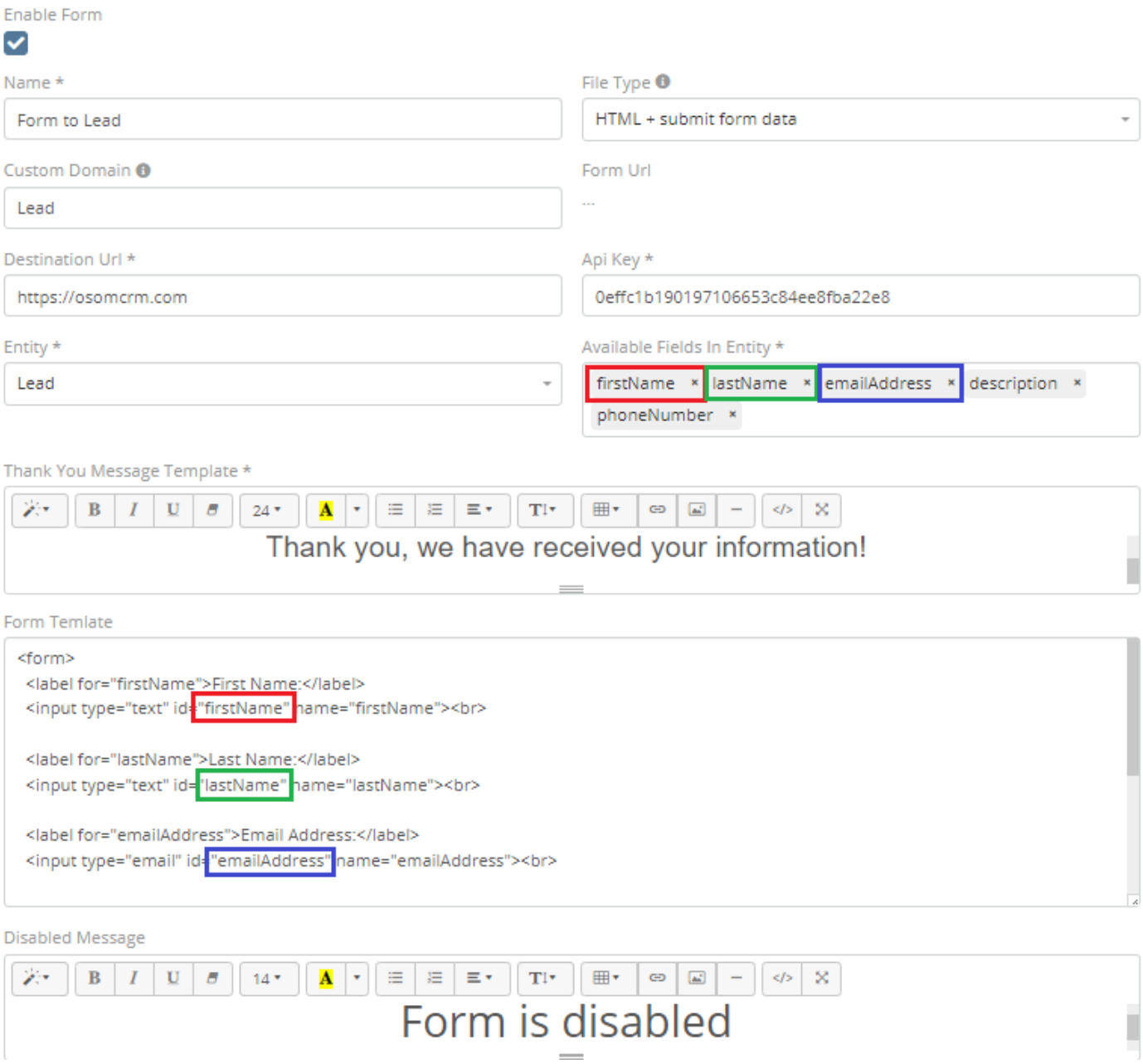

3. After save you will get your page url in "Form Url" field.

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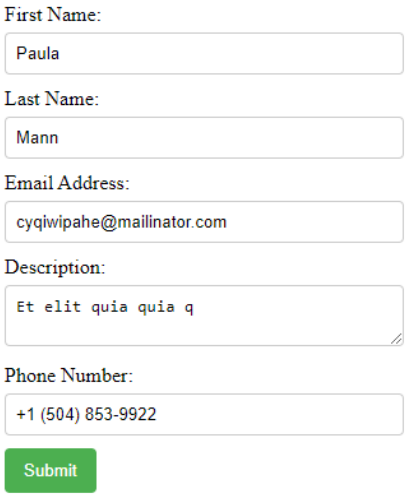
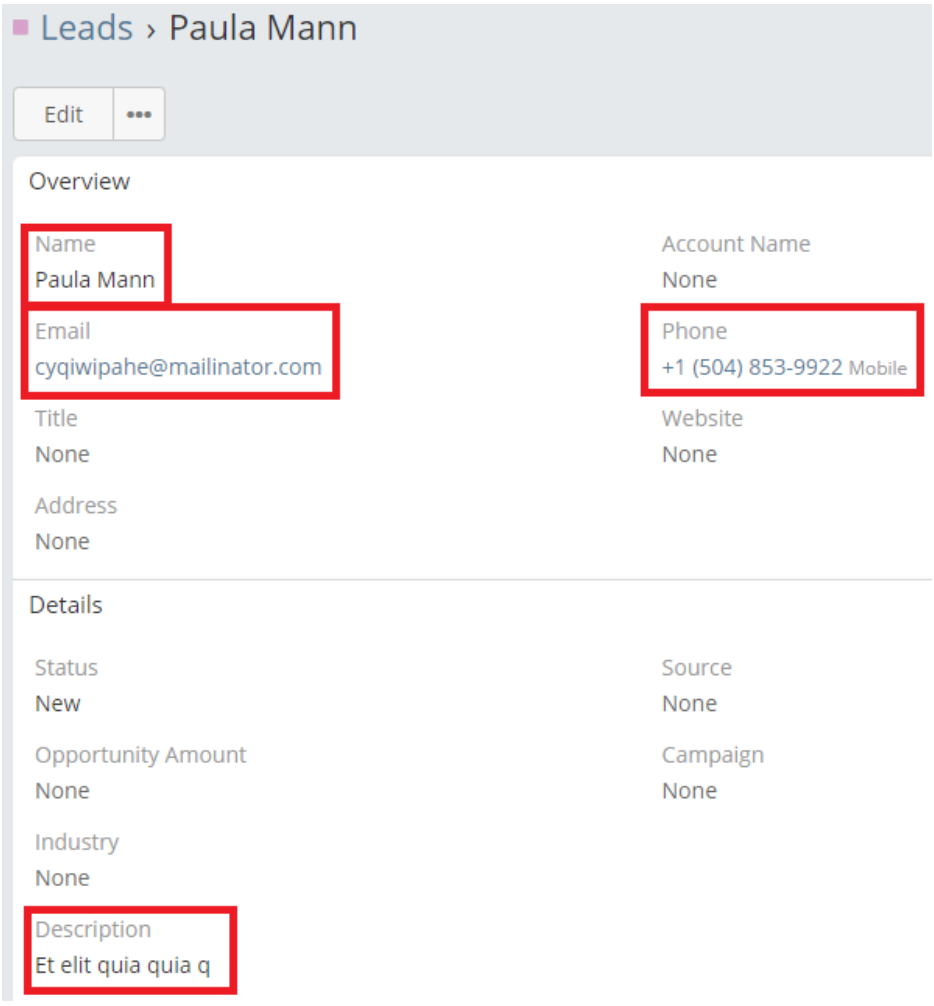
4. Click on generated url and you will get your form. Fill the form and submit your data. Data have arrived at destination CRM.





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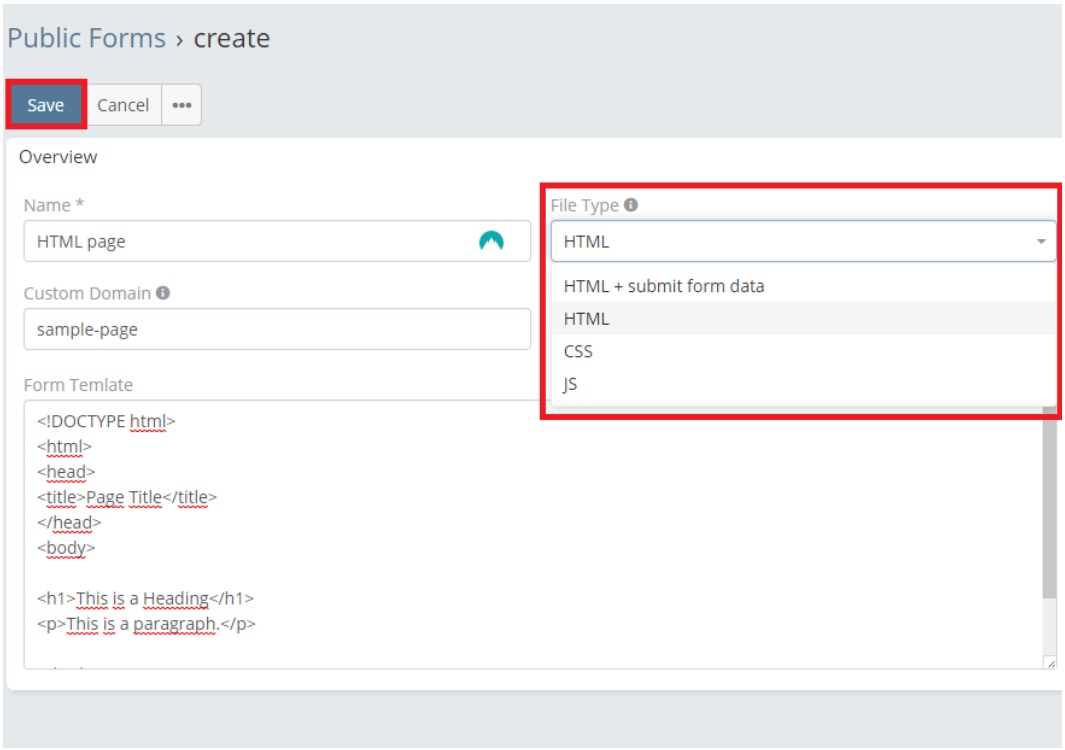
Other Public pages options

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.



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

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

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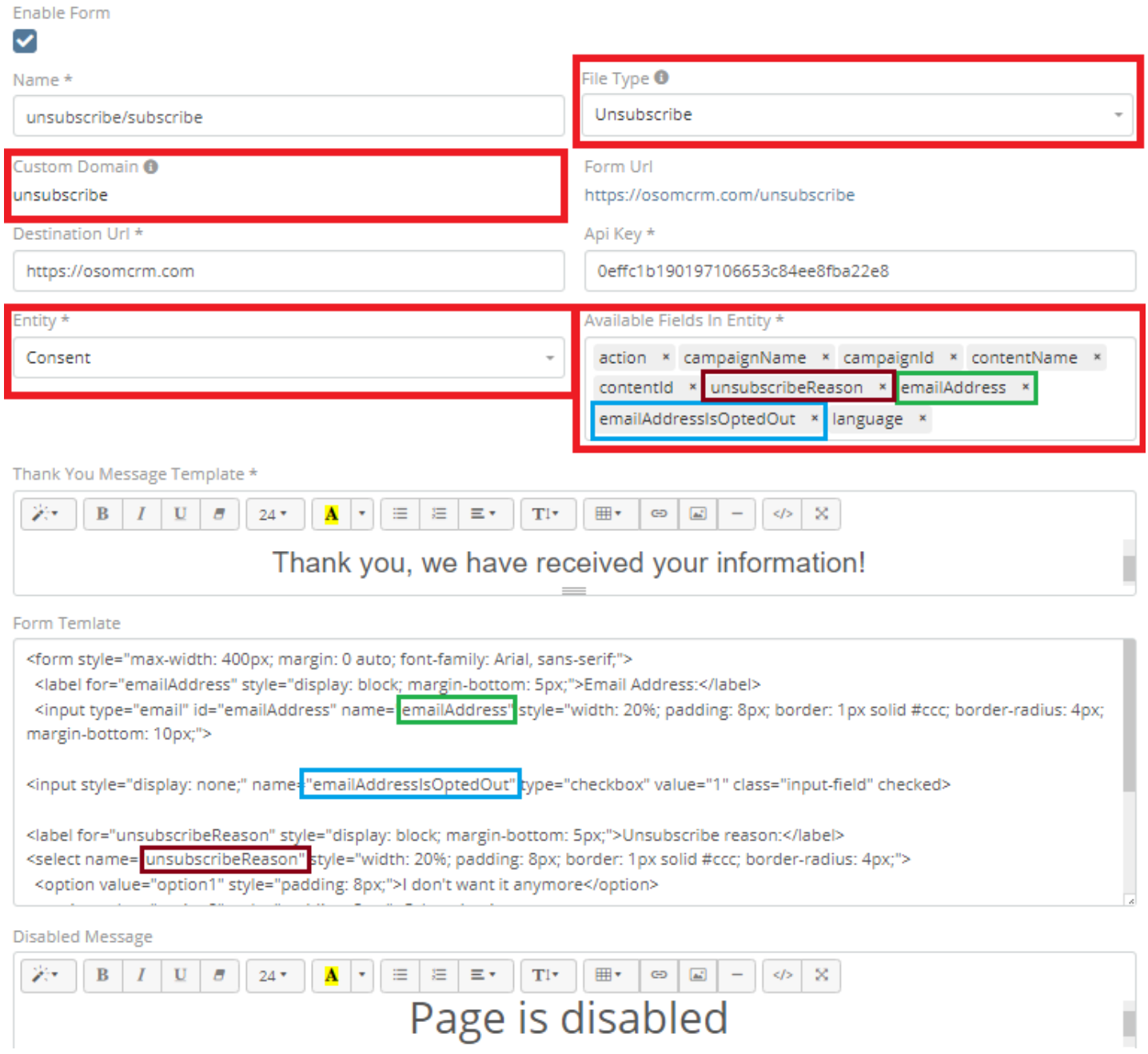
Unsubscribe/Subscribe Page

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.



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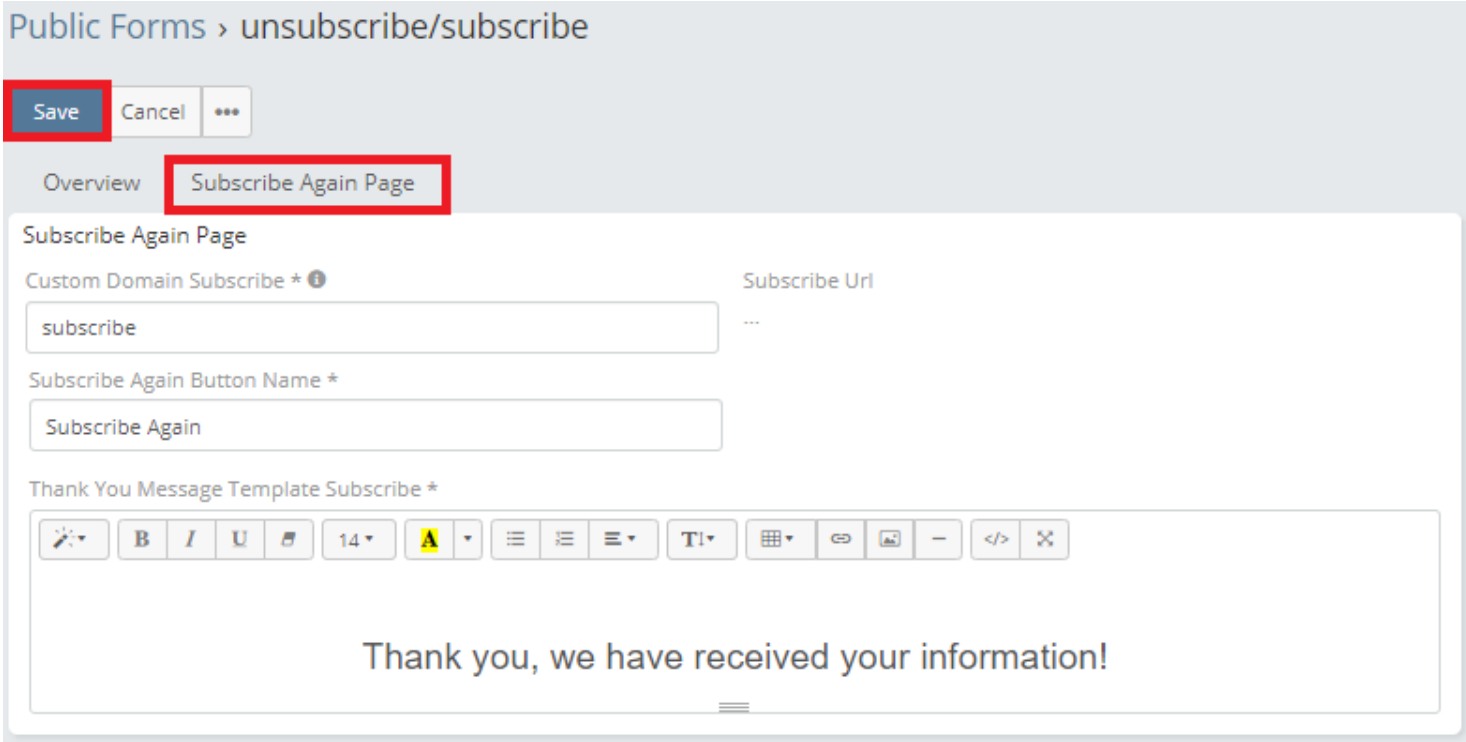
2. Go to Subscribe Again Page tab. In Custom Domain Subscribe type your page name, in Subscribe Again Button Name enter the label you want to name the button. Save it.



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.

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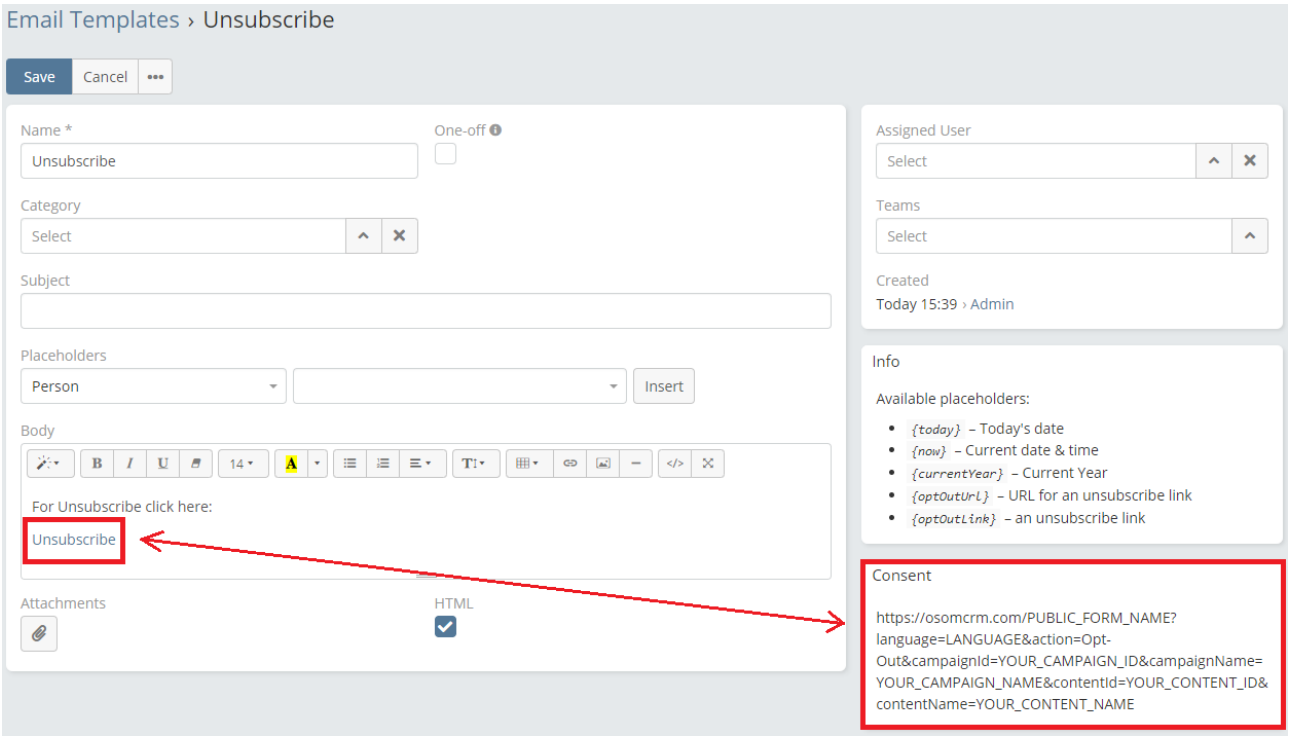

4. When the user receives the email and clicks on the link in it, the form you created will open.

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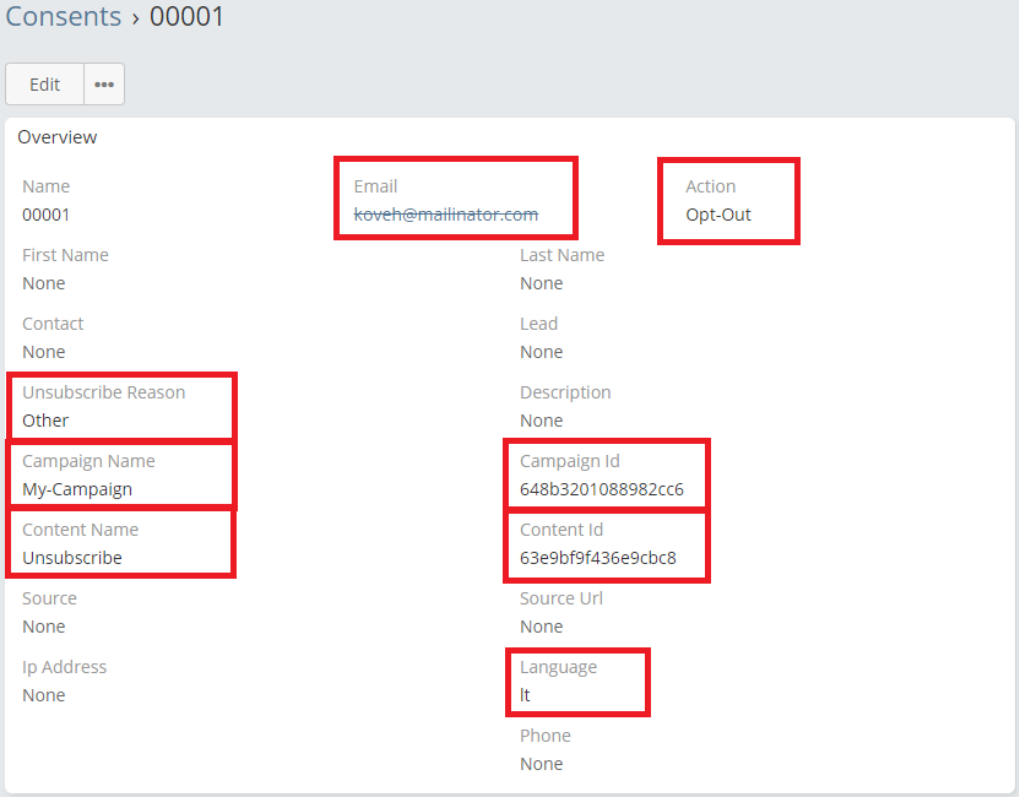
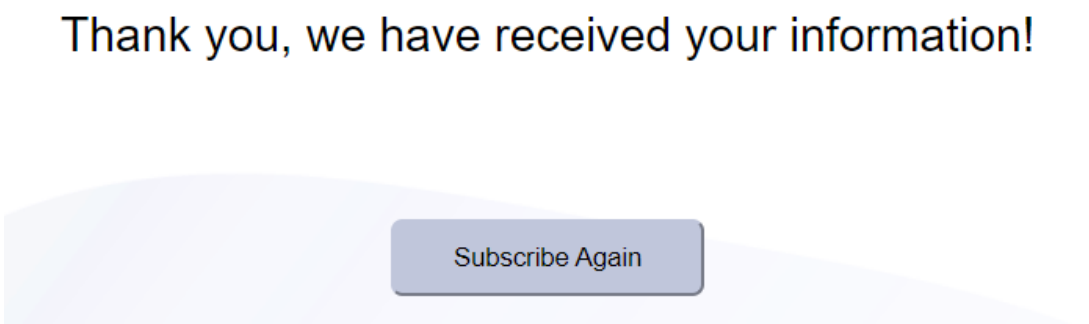
5. After submit Consent will be created with data which you specified in url, data what the user filled in the form and Opted-Out email address.



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



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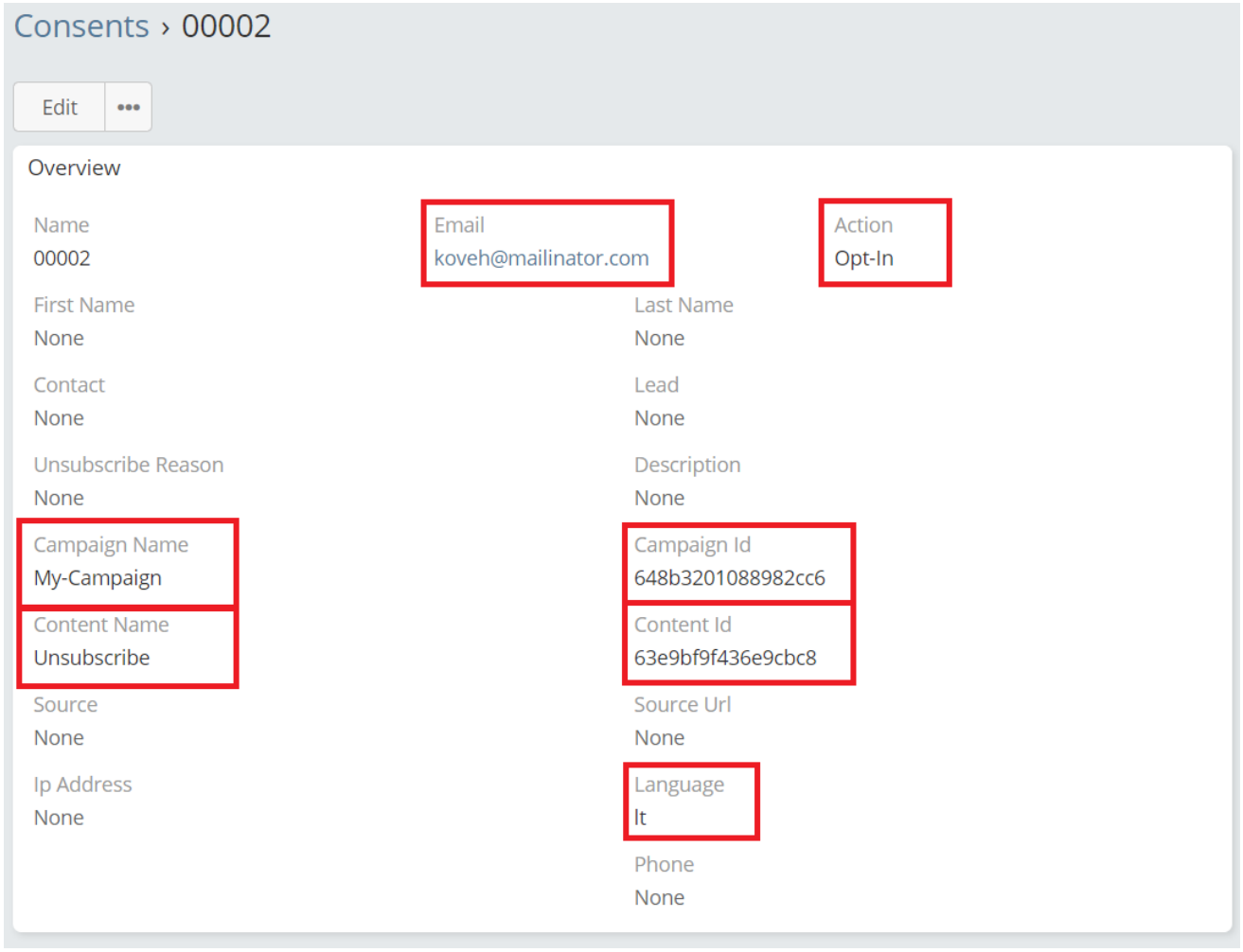
7. After resubscribe Consent will be created with data which you specified in url and Opted-In email address.



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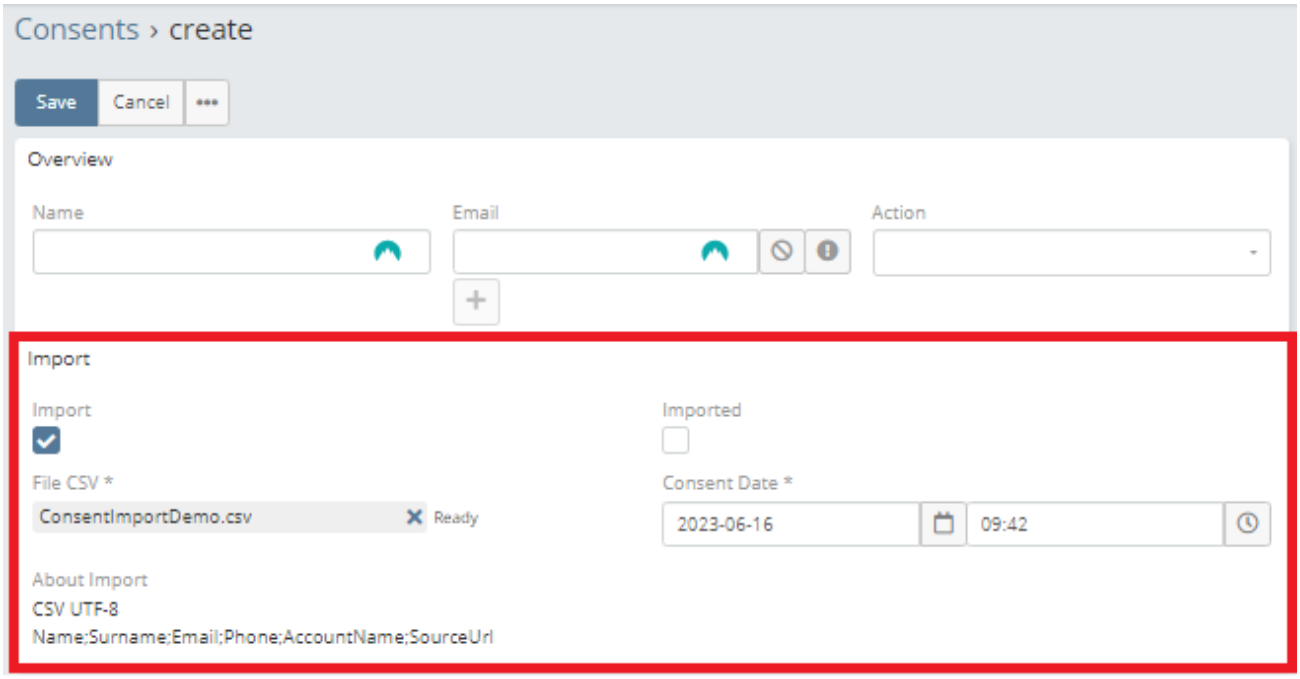
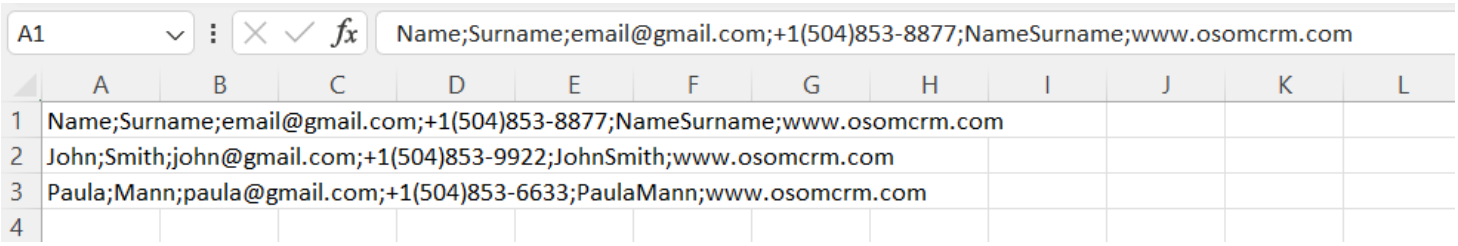
Consent Import

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.



2. CSV file structure:



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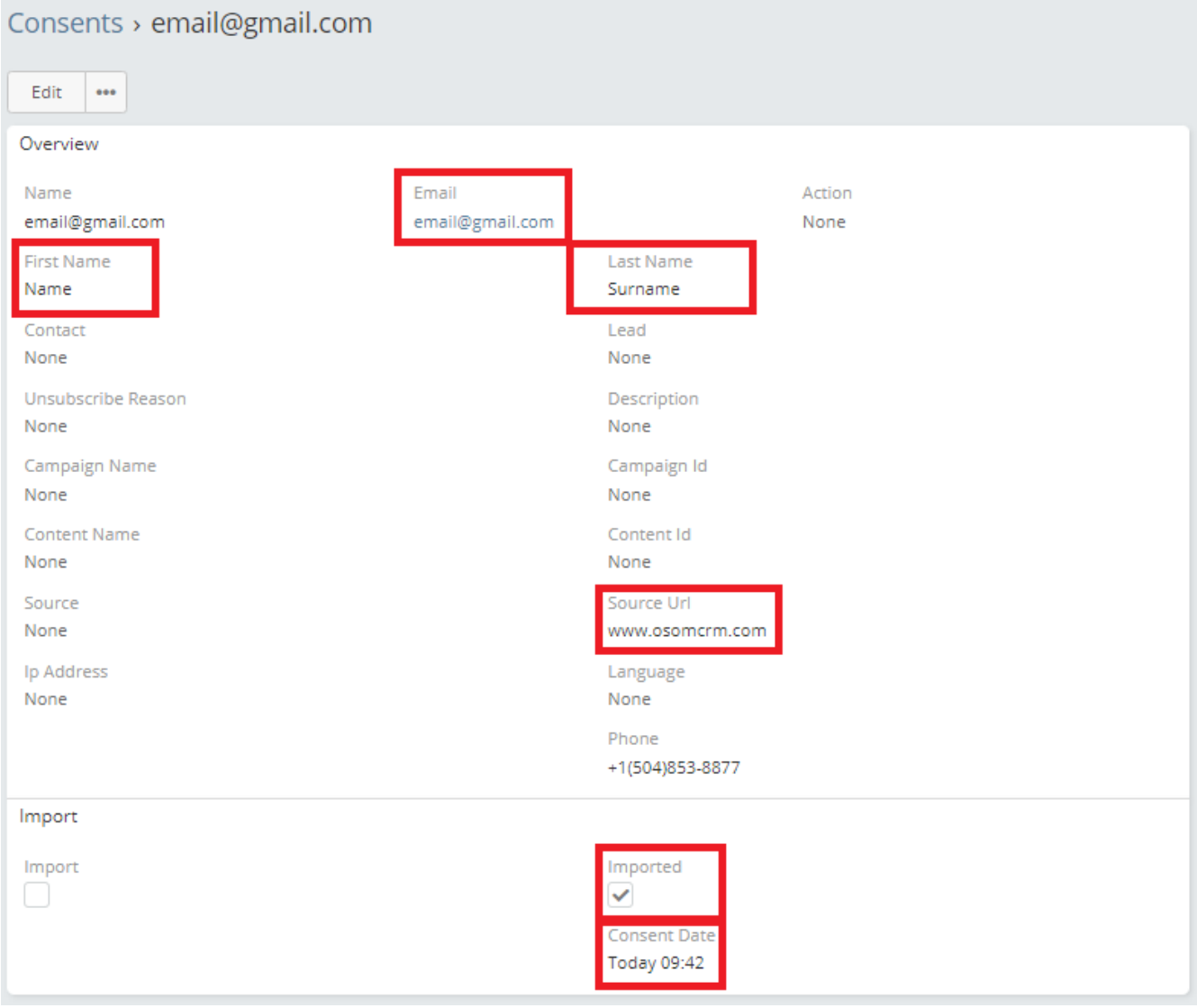
3. Imported Consent will be created.