



# WP LEADS Builder FOR ANY CRM PRO

*Version 1.2*



WP Leads Builder For Any CRM Pro is used to capture Leads, Contacts for Famous CRMs ( Vtiger , Sugar , Sales Force , Zoho ). This document consist of description, feature, installation procedure and change log of our plugin.

## Description

WP Leads Builder For Any CRM Pro is a common plugin that can handle VTiger, sugar crm, zoho crm and Sales force to capture or build leads directly from your wordpress site. Now you can generate forms directly in wordpress admin without any complicated html web forms. Generate web forms via user friendly plugin interface in few simple clicks as a short code. Use the short code which in turn used as a form in post, page or widget to convert your traffic/visitors as high potential leads to favourite CRM.

## More Information

- Choose your crm in plugin settings
- Configure you CRM with API details
- Fetch fields from CRM module
- Set up form fields in form builder
- Use the short code any where in post, page or site wide widget
- Wait watch leads get captured to crm
- It is so that simple as above
- Added to this you can convert your wordpress members as CRM contact

## Plugin Details \*\*\*\*\*

Author : Smackcoders  
Author URL : [Smackcoders Site](#)  
version : 1.2

## Product URL

[WP Leads Builder For Any CRM Pro](#)

## Wiki Page Link

[WP Leads Builder For Any CRM Pro](#)

## Demo Link

[WP Leads Builder For Any CRM Pro](#)

Username : demoadmin

Password : demo123

## CHANGE LOG

- 1.2  
1. Contact form 7 and Ninja form support added  
2. Zoho crm bugs fixed
- 1.1  
1. Multi Language support added.  
2. Google Caphca changed to version 2  
3. Google Captcha Enabling disabling for individual forms added  
4. Sync User to Lead / Contact added  
5. Mapping User fields to Lead/Contact fields added

1.0.0 Tested and found works well without any issues.

## UPGRADE NOTICE

- 1.2  
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1.0.0 Initial release of plugin.



## Features

- Currently supports 4 CRM Vtiger, sugarcrm, salesforce, and zoho crm
- Generate unlimited forms as short codes
- Manage, edit, update, create and delete short codes
- Can switch to any crm at any time
- Sync all new and existing users as contact
- Choose to skip or update duplicates
- Enable Email alerts for each captured data with details
- Can add one email id apart from default admin if enabled
- Option to get success, failure or bot
- Option create form from selected crm leads and contacts module fields
- Forms can be used as post/page and widget.
- Choose Duplicates to skip, update the records
- Assign each form under any crm user
- Custom message for success and failed submissions
- Custom url redirection as specified by post id
- Google captcha support to avoid spam.
- Google Captcha version 2 supported.
- Multiple Language support ( English default , French , Dutch , Russian , Italian ).
- Capture wordpress User in Lead/Contact module with field mapping option

### Our Premium Products

\*\*\*\*\*

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[Xero vtigercrm 6 Integration](#)

[Vtigercrm 6 Magento Bidirectional Connector](#)

[Vtiger 6 Google Calendar Sync](#)

[HR Payroll Management System](#)

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\*\*\*\*\*

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[Free WP Google SEO Author Snippet](#)

[Free Sugar Themes](#)

[Free Orange HRM Themes](#)

[Free Vtiger CRM Themes](#)

For More Products [click here](#)

### SUPPORT

Mail Us:

[support@smackcoders.com](mailto:support@smackcoders.com)

## **Common CRM Pro:**

### **Installation:**

1. WP Leads Builder for any CRM Pro is very easy to install like other simple wordpress plugins.
2. Unzip the file '**wp-leads-builder-for-any-crm-pro**'.
3. Upload the '**wp-leads-builder-for-any-crm-pro**' directory to '/wp-content/plugins/' directory.
4. Go to WP Admin >> **Plugins** >> **Installed Plugins**.
5. Now activate the plugin as prompted.
6. Once installed and activated, you can see a new menu '**WP Leads Builder For Any CRM Pro**' in the admin menu left navigation panel.

### **Configuration:**

#### **a)WP Tiger Pro**

#### **VtigerCRM Settings**

1. By clicking the "**WP Leads Builder for any CRM Pro**" you can access the settings page as given below.
2. Enter your Vtiger Url, Vtiger Username, Vtiger Access Key . The vtiger Url is the path location to your VTiger CRM.

You can get the access key from VtigerCRM. Login to Vtiger >> Administrator >> My Preferences >> User Advanced options.

3. Capture User Registration field is enabling sync users to CRM Contacts.



Calendar Leads Organizations Contacts Opportunities Products Documents Tickets All

vtiger All Records Type keyword and press enter Advanced

Administrator

My Preferences  
Viewing user details "Administrator"

Change Password Edit

▼ User Login & Role

User Name	admin	Admin	Yes
Primary Email	admin@admin.com	Status	Active
First Name		Last Name	Administrator
Default Lead View	Today	Role	CEO

▼ Calendar Settings

Reminder Interval	1 Minute	Starting Day of the week	Sunday
Default Call Duration (Mins)	5	Other Event Duration (Mins)	5
Default Calendar View	This Week	Date Format	mm-dd-yyyy
Calendar Hour Format	12	Day starts at	12:00 AM
Time Zone	(UTC) Coordinated Universal Time, Greenwich Mean Time		

▼ Currency and Number Field Configuration

Currency	USA, Dollars	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	,
Symbol Placement	\$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	Yes		

▼ More Information

Title	Fax		
Department	Other Email		
Office Phone	Secondary Email		
Mobile Phone	Reports To		
Home Phone	Secondary Phone		
Signature	Documents		
Internal Mail Composer	Yes	Theme	softed
Language	US English	Default Record View	Summary
Left Panel Hide	No	Row Height	medium

▼ User Address

Street Address	Country
City	Postal Code
State	

▼ User Photograph

Upload Photograph

▼ User Advanced Options

Access Key	CSHPsrCSQgbKy8jS
------------	------------------

Tag Cloud Display

Tag Cloud	✓ Shown
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Powered by vtiger CRM 6.0.0 © 2004 - 2014 vtiger.com | Read License | Privacy Policy

#### 4. Next **Email Notification,**

- a) Enable the “**Email All Captured Data**”
- b) Enter the email id
- c) Choose the radio button such as Success, Failure or Both.

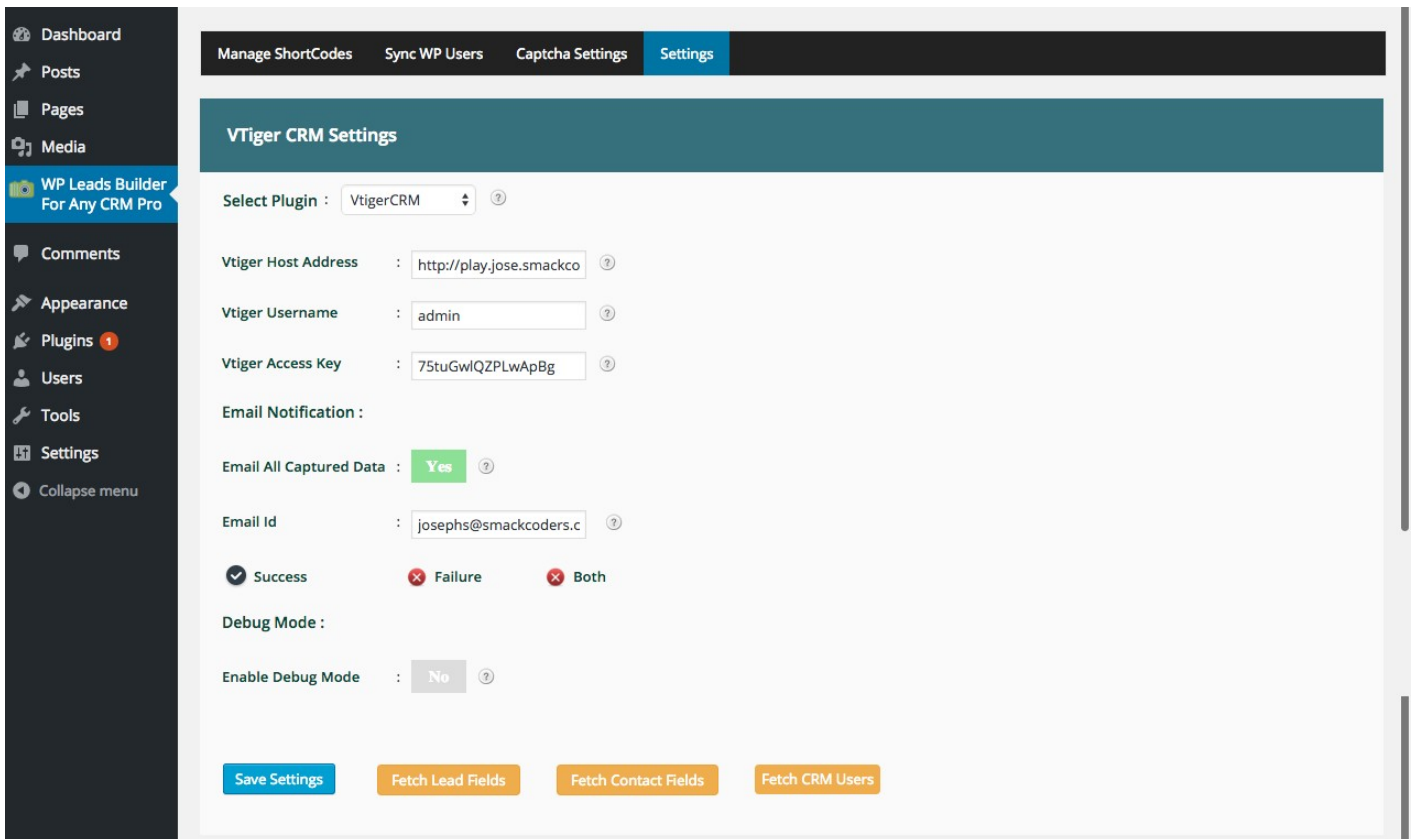
Email All Captured Data fields is enable to get emails for each form feed with details are Success or failed or both.

5. Click Save Settings.

6. Click “Fetch Lead Fields” to fetch the CRM Lead fields.

7. Click “Fetch Contact Fields” to fetch the CRM contact Fields.

8. Click “Fetch CRM Users” to Fetch the all the CRM users.



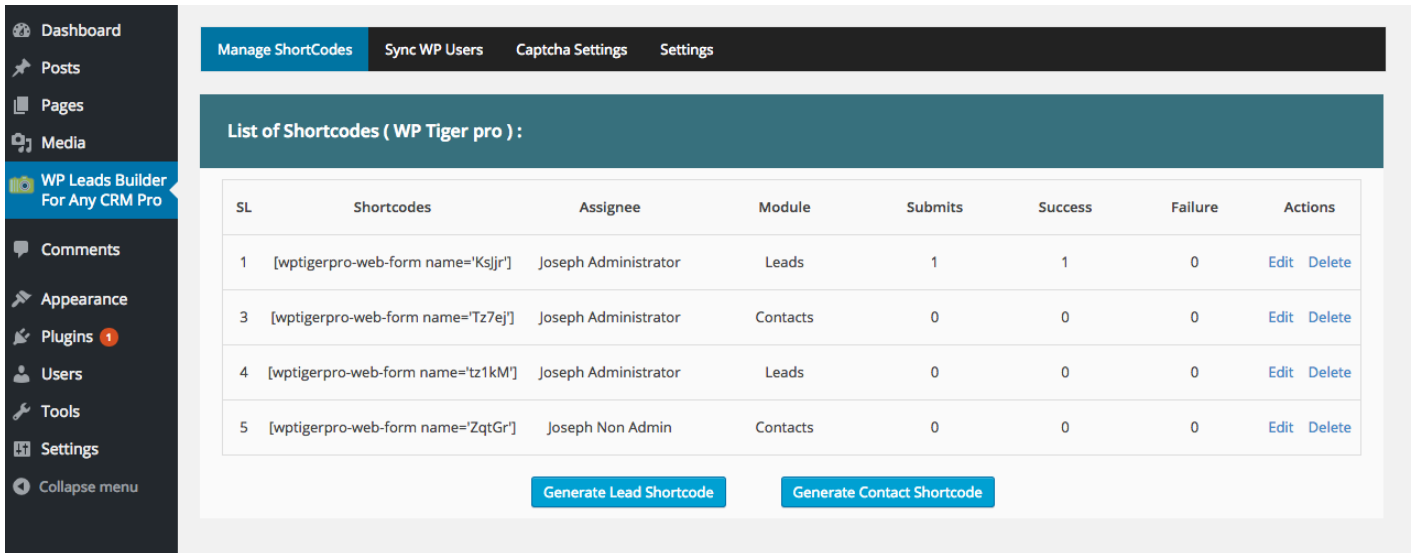
The screenshot displays the 'VTiger CRM Settings' page. The left sidebar contains navigation links: Dashboard, Posts, Pages, Media, WP Leads Builder For Any CRM Pro, Comments, Appearance, Plugins (1), Users, Tools, Settings, and Collapse menu. The main content area has a top navigation bar with 'Manage ShortCodes', 'Sync WP Users', 'Captcha Settings', and 'Settings'. Below this, the 'VTiger CRM Settings' section includes:

- Select Plugin: VtigerCRM
- Vtiger Host Address: http://play.jose.smackco
- Vtiger Username: admin
- Vtiger Access Key: 75tuGwIQZPLwApBg
- Email Notification:
  - Email All Captured Data: Yes
  - Email Id: josephs@smackcoders.c
  - Success (checked), Failure, Both
- Debug Mode:
  - Enable Debug Mode: No

At the bottom, there are four buttons: 'Save Settings', 'Fetch Lead Fields', 'Fetch Contact Fields', and 'Fetch CRM Users'.

## Form Builder

1. Go to Manage Shortcode Page. Click “Generate Lead Shortcode” or “Generate Contact Shortcode” button to create Form Shortcode. It will redirect you to edit shortcode page.



The screenshot shows the WP Leads Builder dashboard. On the left is a dark sidebar menu with options: Dashboard, Posts, Pages, Media, WP Leads Builder For Any CRM Pro (highlighted), Comments, Appearance, Plugins (with a red notification badge), Users, Tools, Settings, and Collapse menu. The main content area has a top navigation bar with 'Manage ShortCodes', 'Sync WP Users', 'Captcha Settings', and 'Settings'. Below this is a teal header 'List of Shortcodes ( WP Tiger pro ) :'. A table lists five shortcodes with columns for SL, Shortcodes, Assignee, Module, Submits, Success, Failure, and Actions. At the bottom of the table are two buttons: 'Generate Lead Shortcode' and 'Generate Contact Shortcode'.

SL	Shortcodes	Assignee	Module	Submits	Success	Failure	Actions
1	[wptigerpro-web-form name='Ksjjr']	Joseph Administrator	Leads	1	1	0	<a href="#">Edit</a> <a href="#">Delete</a>
3	[wptigerpro-web-form name='Tz7ej']	Joseph Administrator	Contacts	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
4	[wptigerpro-web-form name='tz1kM']	Joseph Administrator	Leads	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
5	[wptigerpro-web-form name='ZqtGr']	Joseph Non Admin	Contacts	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>

## 2. There you can Edit Form and form field settings

a) From Form Settings we can change form properties like Form Type, Form Duplicate record Handling , Assigned User , Error Message while submission Error, Success Message , Redirect url, Enabling/Disabling Google Recaptcha.

b) From Field Settings we can change the form field properties.

Steps to change the form field properties

- i) Select the Field you wanted to change the property.
- ii) Click Bulk Action select box and Choose any action you wanted to do
- iii) Then Click Apply to apply the changes you make on fields
- iv) Update order, Display Label will not need the checkboxes to get updated.
- v) For update order and Display Label make the changes to the fields.
- vi) Click the Bulk Action Select box.
- vii) Then choose Update Order or Display Label Option.
- viii) Then Click Apply to apply the changes you made on that fields.



CRM Type : VtigerCRM   Module Type : Leads

[wptigerpro-web-form name='Ksjjr']

Form Settings :

Form Type :

Duplicate handling :  Skip    Update    None

Assign Leads to User :

Error Message Submission :  ?

Success Message Submission :  ?

Enable URL Redirection :  Yes    ?

Enable Google Captcha :  Yes ?

Form Options ▲

Field Settings :

Bulk Actions

<input type="checkbox"/>	Field Name	Show Field	Order	Mandatory	Field Label Display
<input type="checkbox"/>	Salutation	No	<input type="text" value="1"/>	No	<input type="text" value="Salutation"/>
<input type="checkbox"/>	First Name	Yes	<input type="text" value="2"/>	Yes	<input type="text" value="First Name"/>
<input type="checkbox"/>	Primary Phone	No	<input type="text" value="3"/>	No	<input type="text" value="Primary Phone"/>
<input checked="" type="checkbox"/>	Last Name *	Yes	<input type="text" value="4"/>	Yes	<input type="text" value="Last Name"/>
<input type="checkbox"/>	Mobile Phone	No	<input type="text" value="5"/>	No	<input type="text" value="Mobile Phone"/>
<input type="checkbox"/>	Company	No	<input type="text" value="6"/>	No	<input type="text" value="Company"/>
<input type="checkbox"/>	Fax	No	<input type="text" value="7"/>	No	<input type="text" value="Fax"/>
<input type="checkbox"/>	Designation	No	<input type="text" value="8"/>	No	<input type="text" value="Designation"/>
<input type="checkbox"/>	Primary Email	No	<input type="text" value="9"/>	No	<input type="text" value="Primary Email"/>
<input type="checkbox"/>	Lead Source	No	<input type="text" value="10"/>	No	<input type="text" value="Lead Source"/>
<input type="checkbox"/>	Website	No	<input type="text" value="11"/>	No	<input type="text" value="Website"/>
<input type="checkbox"/>	Industry	No	<input type="text" value="12"/>	No	<input type="text" value="Industry"/>
<input type="checkbox"/>	Lead Status	No	<input type="text" value="13"/>	No	<input type="text" value="Lead Status"/>
<input type="checkbox"/>	Annual Revenue	No	<input type="text" value="14"/>	No	<input type="text" value="Annual Revenue"/>
<input type="checkbox"/>	Rating	No	<input type="text" value="15"/>	No	<input type="text" value="Rating"/>
<input type="checkbox"/>	Number of Employees	No	<input type="text" value="16"/>	No	<input type="text" value="Number of Employees"/>
<input type="checkbox"/>	Secondary Email	No	<input type="text" value="17"/>	No	<input type="text" value="Secondary Email"/>
<input type="checkbox"/>	Street	No	<input type="text" value="18"/>	No	<input type="text" value="Street"/>
<input type="checkbox"/>	Postal Code	No	<input type="text" value="19"/>	No	<input type="text" value="Postal Code"/>
<input type="checkbox"/>	City	No	<input type="text" value="20"/>	No	<input type="text" value="City"/>
<input type="checkbox"/>	Country	No	<input type="text" value="21"/>	No	<input type="text" value="Country"/>
<input type="checkbox"/>	State	No	<input type="text" value="22"/>	No	<input type="text" value="State"/>
<input type="checkbox"/>	PO Box	No	<input type="text" value="23"/>	No	<input type="text" value="PO Box"/>
<input type="checkbox"/>	Description	No	<input type="text" value="24"/>	No	<input type="text" value="Description"/>
<input type="checkbox"/>	Email Opt Out	No	<input type="text" value="25"/>	No	<input type="text" value="Email Opt Out"/>

3. You can click “**Edit**” to edit Shortcode form and field settings from “Manage shortcodes Tab”
4. You can delete the shortcode from “Manage shortcodes Tab”
4. By default all fetched fields are active. You may select the fieldname you want to enable it and click “**Save Field Settings**”.
5. You can change the field order by specifying the position of the field.
6. You can enable the mandatory field checkbox to make a form field mandatory.

For ex: Refer the screenshot shown below to enable the First name as Mandatory field

<input type="checkbox"/>	Field Name	Show Field	Order	Mandatory	Field Label Display
<input type="checkbox"/>	First Name	Yes	1	Yes	First Name
<input checked="" type="checkbox"/>	Last Name *	✓	2	<input checked="" type="checkbox"/>	Last Name
<input checked="" type="checkbox"/>	Company *	✓	3	<input checked="" type="checkbox"/>	Company
<input type="checkbox"/>	Salutation	No	4	No	Salutation
<input type="checkbox"/>	Phone	No	5	No	Primary Phone

## NEW POST

🕒 SEPTEMBER 3, 2014 👤 ADMIN 💬 LEAVE A COMMENT ✎ EDIT

Here the firstname is a mandatory

First Name *	<input type="text"/>
Primary Phone	<input type="text"/>
Last Name *	<input type="text"/>
Mobile Phone	<input type="text"/>
<input type="submit" value="SUBMIT"/>	

### Form Settings:

- a) Form type : **Post** or **Widget**.

b) If you want enable the Duplicate Handling means enable it such as **Skip** or **Update** or **None**

c) Assign Leads to User : For ex: Administrator.

In vtiger if you are creating so many users means it will comes under the “**Assign Leads to User**” dropdown boxes.

d) Error Message Submission: For ex: Submission failed.

Customize the form submission error message using the “**Error Message Submission**” field.

Success Message Submission : For ex: Thank you for submitting.

Customize the form submission success message using the “**Success Message Submission**” field.

e) Enable Google Captcha :

If you enable the Google Captcha means while you submitting the form the Google captcha is displayed.

f) Enable URL redirection:

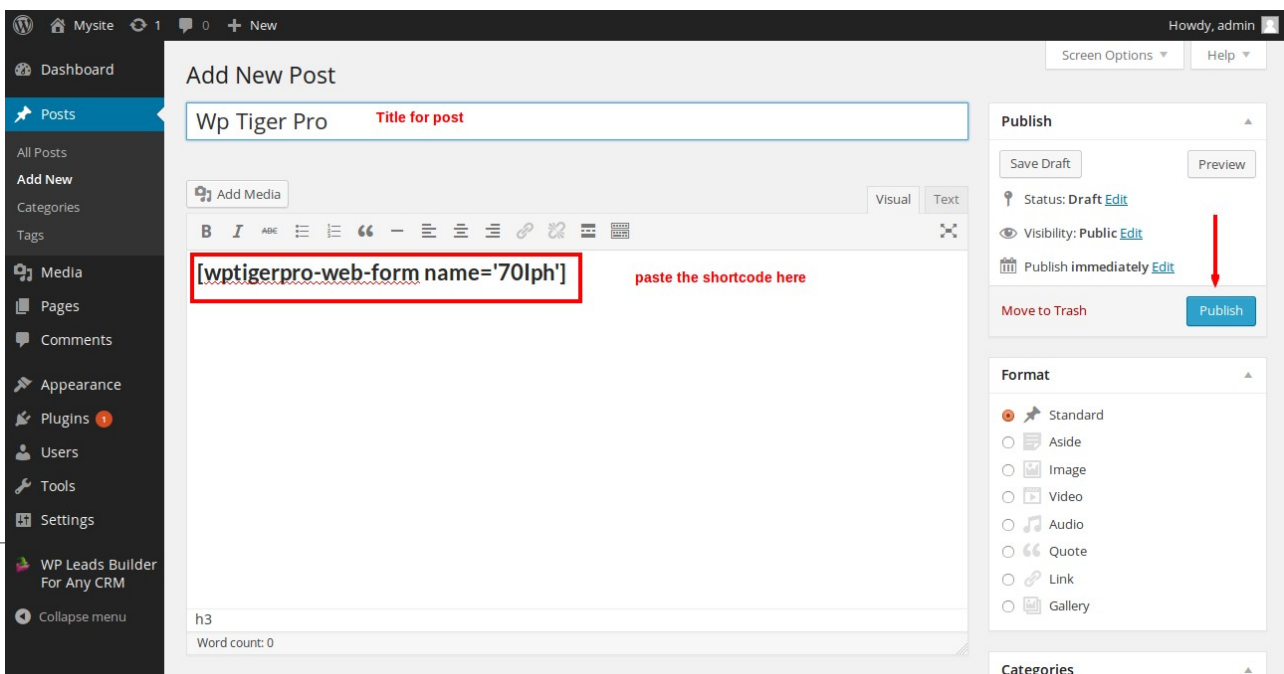
Page or post id of URL to Redirect on success.

7. Click “**Save Field Settings**”.

## Shortcode:


1. To generate the form in a page or post use the short code as [wptigerpro-web-form name='70lph']

and click publish as shown in below figure.



2. Click View post.
3. The form is displayed in the sample page with selected fields and mandatory fields.
4. Data are entered in the fields and click submit button. The data are stored in leads of vtigerCRM.

## Vtiger Lead Form

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Company *	<input type="text"/>
Last Name *	<input type="text"/>
	<input type="checkbox"/> I'm not a robot  reCAPTCHA <a href="#">Privacy</a> - <a href="#">Terms</a>
	<input type="submit" value="SUBMIT"/>

5. The same procedure is done for 'Contact fields'. Here the data are stored in contacts of vtigerCRM.
6. For widgets also same process but you have to enable Form Type as “**Widget**” in dropdown box.
7. Go to 'WP-Admin panel >> Appearance >> Widgets'.
8. Text tab is activated and choose the area to display the widget form.
9. Now paste the generated short code in the Text area and save it.

10. View the post. The widget form is shown in the selected area of the WP-Admin panel.

## VTIGER LEAD CAPTURE

First Name \*

Last Name \*

Company \*

Last Name \*

I'm not a robot



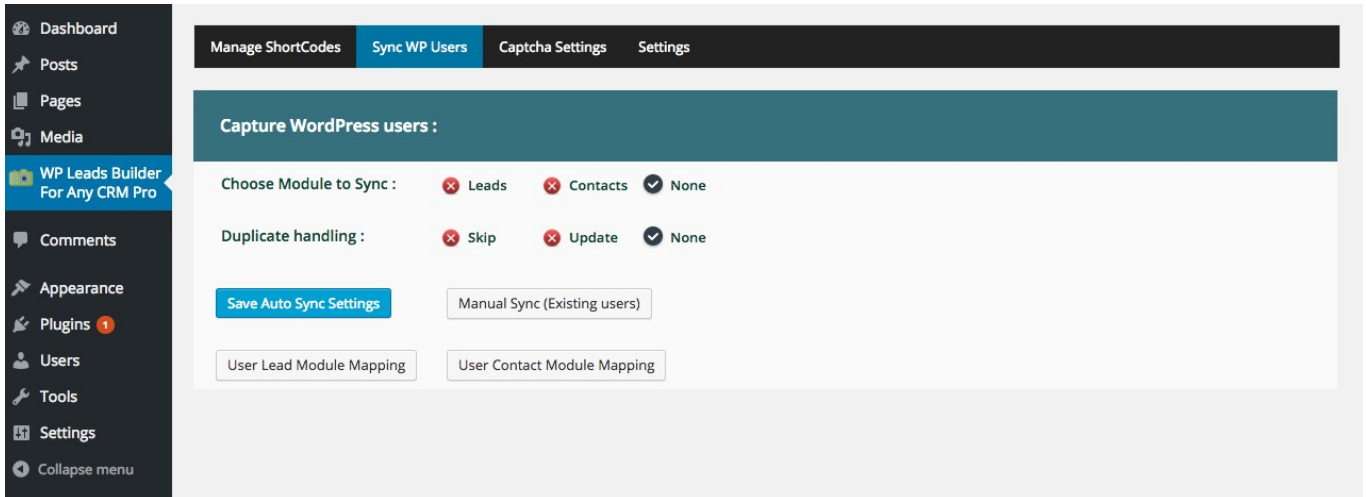
reCAPTCHA  
Privacy - Terms

**SUBMIT**

## SynSync WP Users

- Select any option in 'Choose Module to Sync' to capture the wordpress users as the selected modules record.
- Duplicate handling can be done by choosing any of these radio button.

- None will create a new contacts based on the email.
- Skip will skip the record based on the email.
- Update will update the record based on the email.
- Now 'Manual Sync (Existing users)' button is activated to sync all wordpress user to Contacts.



Dashboard | Posts | Pages | Media | **WP Leads Builder For Any CRM Pro** | Comments | Appearance | Plugins 1 | Users | Tools | Settings | Collapse menu

Manage ShortCodes | **Sync WP Users** | Captcha Settings | Settings

### Capture WordPress users :

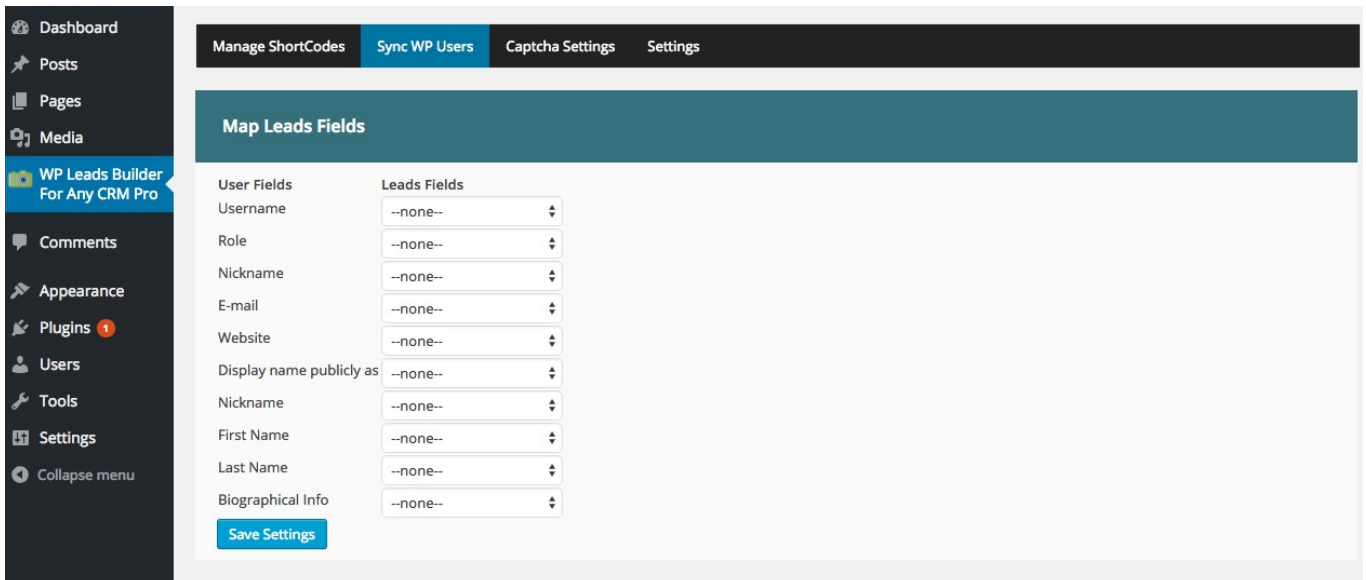
Choose Module to Sync :  Leads  Contacts  None

Duplicate handling :  Skip  Update  None

[Save Auto Sync Settings](#) [Manual Sync \(Existing users\)](#)

[User Lead Module Mapping](#) [User Contact Module Mapping](#)

- User Lead Module Mapping Maps the Leads Fields with wordpress userfield. So that the respective User Field will be posted on CRM Lead Fields.



Dashboard | Posts | Pages | Media | **WP Leads Builder For Any CRM Pro** | Comments | Appearance | Plugins 1 | Users | Tools | Settings | Collapse menu

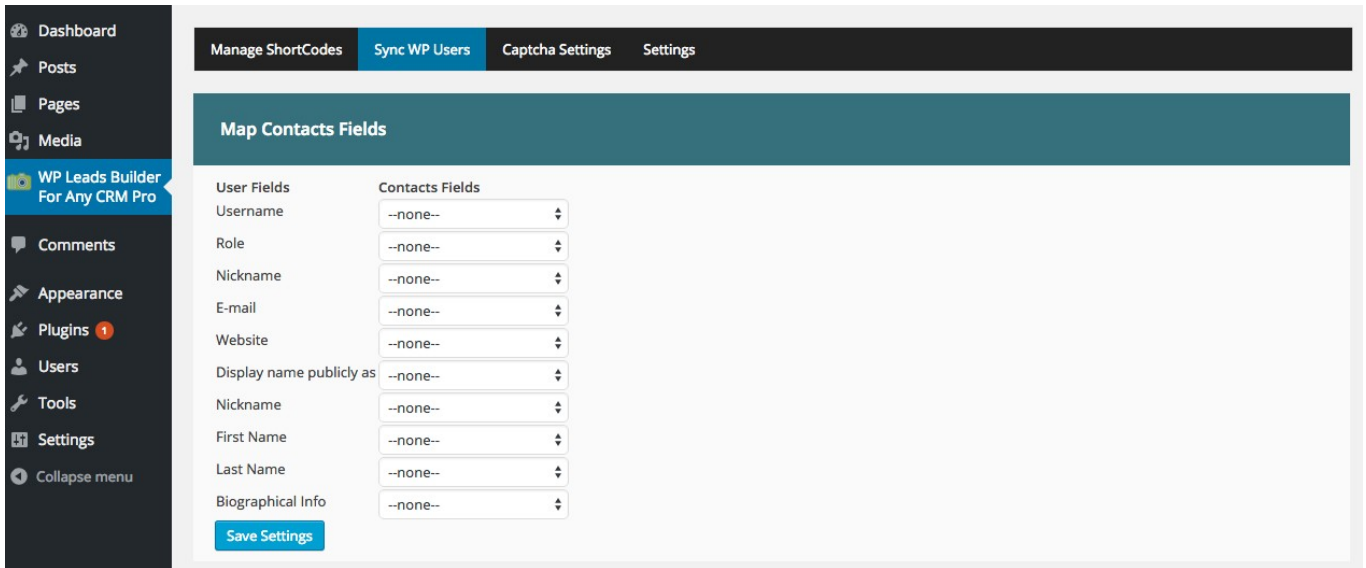
Manage ShortCodes | **Sync WP Users** | Captcha Settings | Settings

### Map Leads Fields

User Fields	Leads Fields
Username	--none--
Role	--none--
Nickname	--none--
E-mail	--none--
Website	--none--
Display name publicly as	--none--
Nickname	--none--
First Name	--none--
Last Name	--none--
Biographical Info	--none--

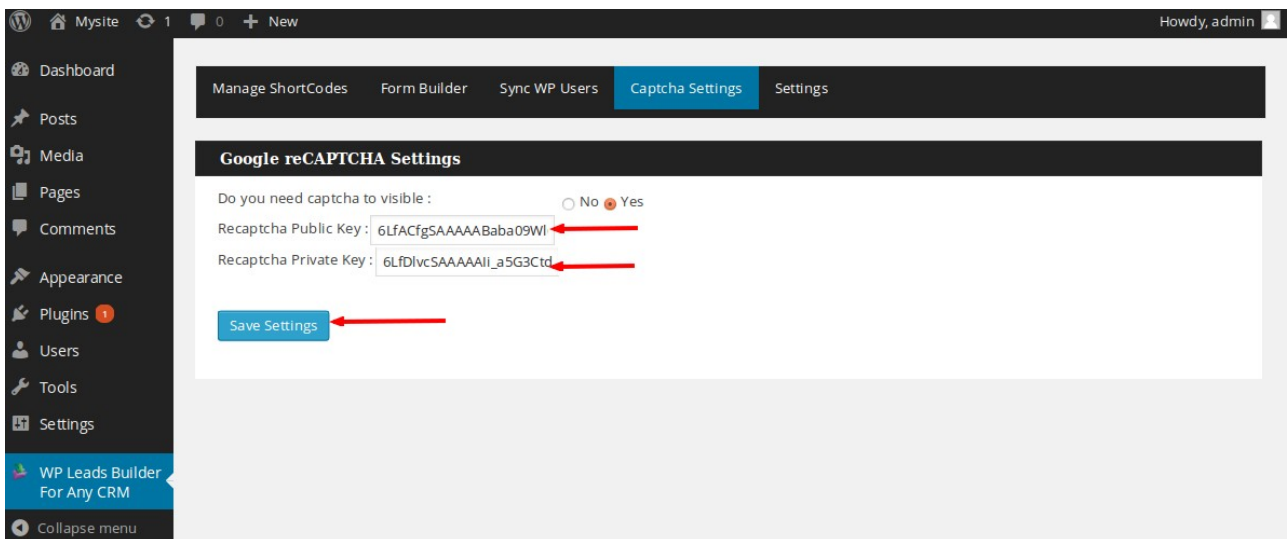
[Save Settings](#)

- User Contact Mapping maps the Contact fields with wordpress User Field. So that the respective Field will be posted on CRM Contact Fields.



## Captcha Settings:

- If you enable captcha enter the public key and private key details.
- Save the settings.



To get a free account please visit <http://www.google.com/recaptcha> and create it.

HOME

Get reCAPTCHA

My account

Protect your email

Resources: docs &amp; plugins

Domain Name:

reCAPTCHA will work on these domains and subdomains.

Public Key: 6LfACfgSAAAAA 0IN4vX1M3UOjdPtjB

Use this in the JavaScript code that is served to your users

Private Key: 6LfACfgSAAAAA 8i6AP\_N7eKK-beFwC

Use this when communicating between your server and our server.  
Be sure to keep it a secret.[Delete these keys](#)Resources: [reCAPTCHA plugins and libraries](#)  
[reCAPTCHA API Documentation](#)Now what? [SUBSCRIBE](#) to important reCAPTCHA service announcements.

Install reCAPTCHA on your site. This is done in two parts. First, you need to add some HTML that displays the reCAPTCHA widget. Second, you need to configure your form to contact our servers to verify reCAPTCHA solutions. Here are specific instructions for: [PHP](#) and [MediaWiki](#). For other environments, visit our [resources page](#).

If you need help, post your questions in the [reCAPTCHA forum](#).

## b)WP Sugar Pro

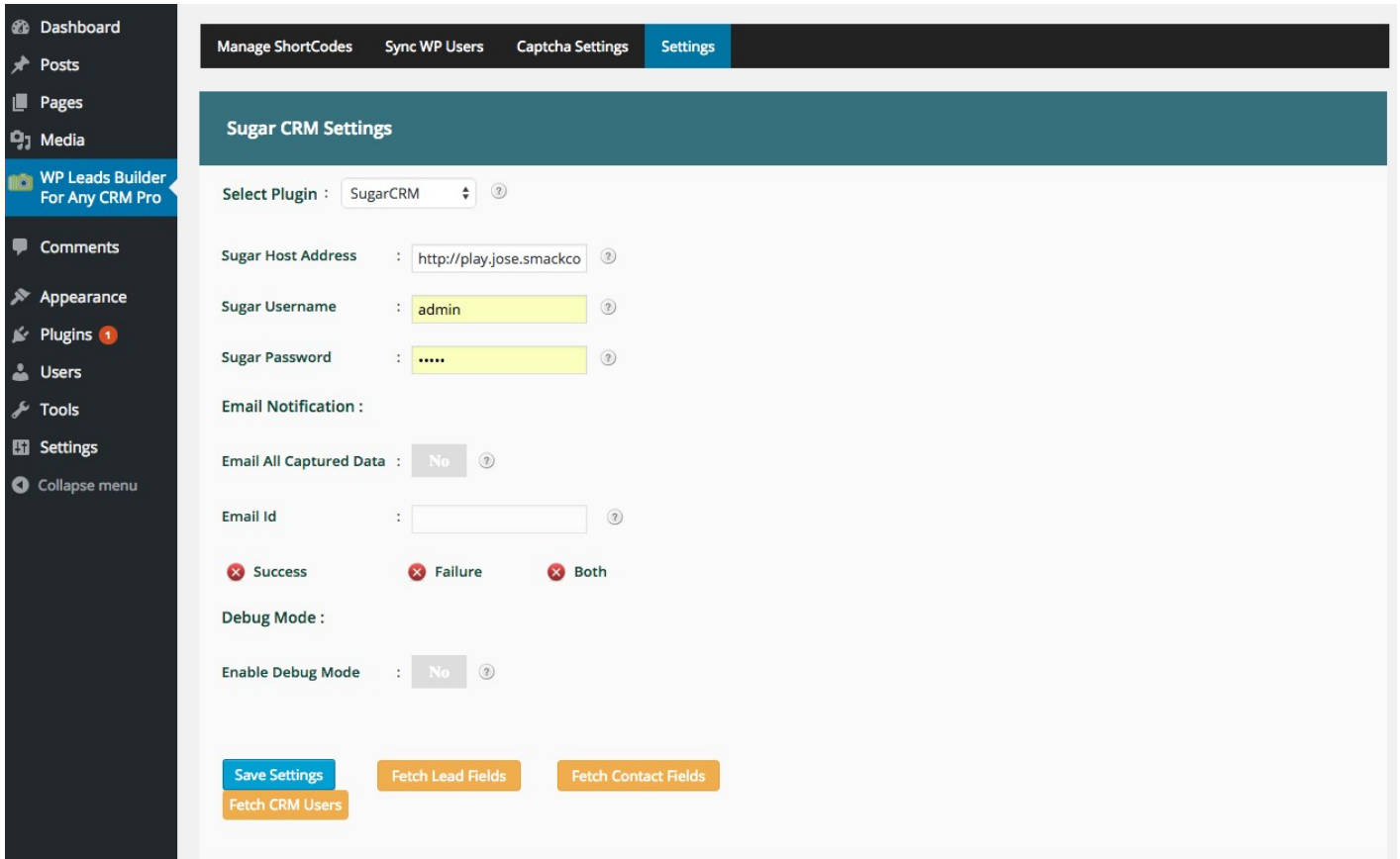
### Sugar CRM Settings

1. By clicking the “**WP Leads Builder for any CRM Pro**” you can access the settings page and you have to enable as “**WP Sugar Pro**” as given below.
2. Enter your Sugar Host address, Sugar Username, Sugar Password. The Sugar Host Address (URL) is the path location to demo Sugar CRM.
3. Capture User Registration field is enabling sync users to CRM Contacts.
4. Next **Email Notification**,
  - a) Enable the “**Email All Captured Data**”.
  - b) Enter the email id.
  - c) Choose the radio button such as Success, Failure or Both.



Email All Captured Data fields is enable to get emails for each form feed with details are Success or failed or both.

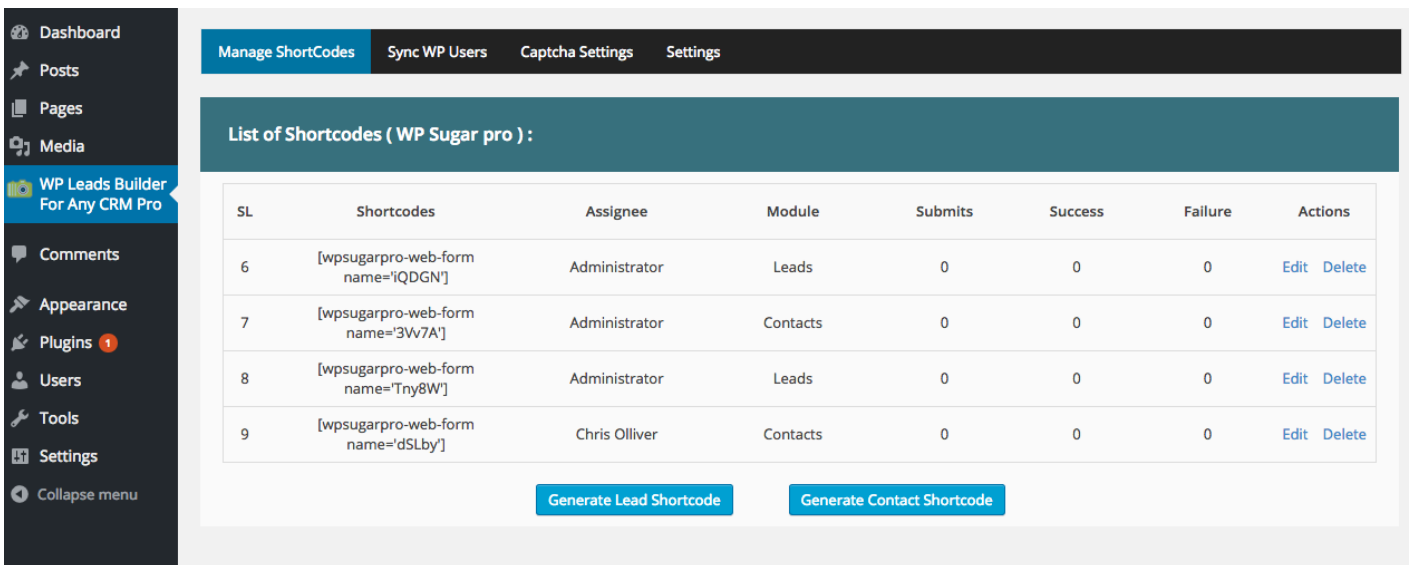
5. Click Save Settings.



The screenshot shows the 'Sugar CRM Settings' page in a WordPress dashboard. The left sidebar contains navigation options: Dashboard, Posts, Pages, Media, WP Leads Builder For Any CRM Pro (highlighted), Comments, Appearance, Plugins (1), Users, Tools, Settings, and Collapse menu. The main content area has tabs for Manage ShortCodes, Sync WP Users, Captcha Settings, and Settings (selected). The settings include:

- Select Plugin: SugarCRM
- Sugar Host Address: http://play.jose.smackco
- Sugar Username: admin
- Sugar Password: [masked]
- Email Notification:
  - Email All Captured Data: No
  - Email Id: [input field]
  - Success, Failure, Both (radio buttons)
- Debug Mode:
  - Enable Debug Mode: No

Buttons at the bottom: Save Settings, Fetch Lead Fields, Fetch Contact Fields, and Fetch CRM Users.



The screenshot shows the 'List of Shortcodes (WP Sugar pro)' page. The left sidebar is identical to the previous screenshot. The main content area has tabs for Manage ShortCodes, Sync WP Users, Captcha Settings, and Settings (selected). The page displays a table of shortcodes:

SL	Shortcodes	Assignee	Module	Submits	Success	Failure	Actions
6	[wpsugarpro-web-form name='iQDGN']	Administrator	Leads	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
7	[wpsugarpro-web-form name='3W7A']	Administrator	Contacts	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
8	[wpsugarpro-web-form name='Tny8W']	Administrator	Leads	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
9	[wpsugarpro-web-form name='dSLby']	Chris Olliver	Contacts	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>

Buttons at the bottom: Generate Lead Shortcode and Generate Contact Shortcode.

- Dashboard
- Posts
- Pages
- Media
- WP Leads Builder For Any CRM Pro
- Comments
- Appearance
- Plugins 1
- Users
- Tools
- Settings
- Collapse menu

CRM Type : SugarCRM   Module Type : Contacts

[wpsugarpro-web-form name='3Vv7A']

Form Settings :

Form Type :

Duplicate handling :  Skip    Update    None

Assign Contacts to User :

Error Message Submission :

Success Message Submission :

Enable URL Redirection :  Yes  

Enable Google Captcha :  Yes

Save Form Settings

Form Options ▲

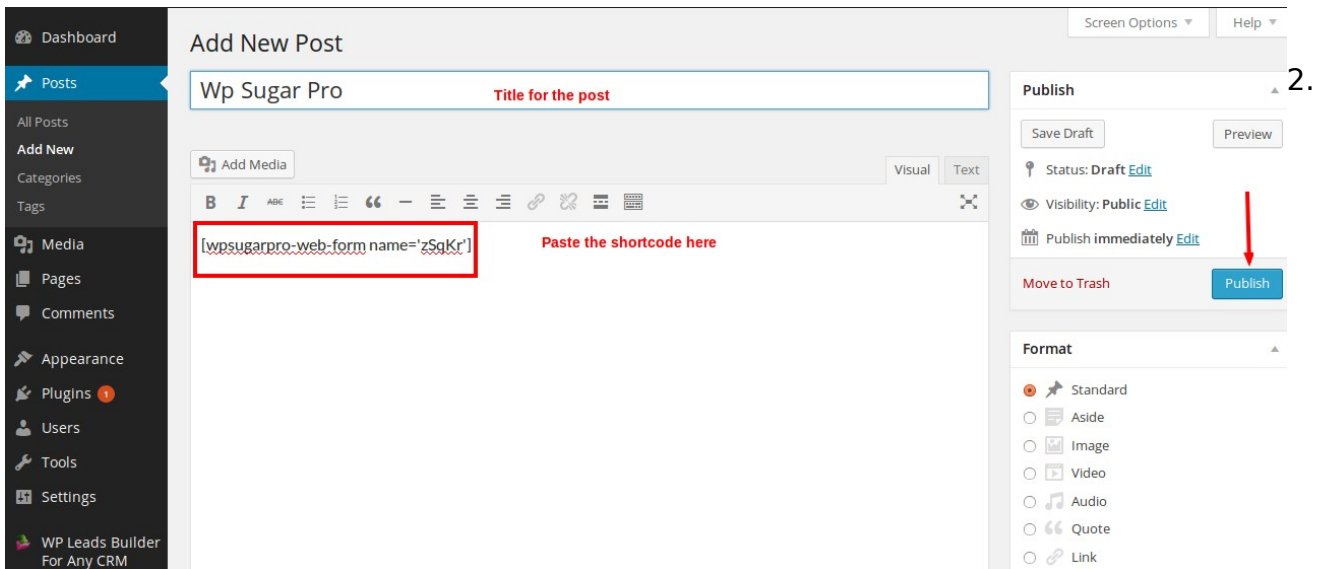
Field Settings :

Bulk Actions

<input type="checkbox"/>	Field Name	Show Field	Order	Mandatory	Field Label Display
<input type="checkbox"/>	First Name:	Yes	<input type="text" value="1"/>	No	<input type="text" value="First Name:"/>
<input checked="" type="checkbox"/>	Last Name: *	<span style="color: green;">✔</span>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	<input type="text" value="Last Name:"/>
<input type="checkbox"/>	Email Address:	Yes	<input type="text" value="3"/>	No	<input type="text" value="Email Address:"/>
<input type="checkbox"/>	Date Created	No	<input type="text" value="4"/>	No	<input type="text" value="Date Created"/>
<input type="checkbox"/>	Date Modified:	No	<input type="text" value="5"/>	No	<input type="text" value="Date Modified:"/>
<input type="checkbox"/>	Description:	No	<input type="text" value="6"/>	No	<input type="text" value="Description:"/>
<input type="checkbox"/>	Deleted	No	<input type="text" value="7"/>	No	<input type="text" value="Deleted"/>
<input type="checkbox"/>	Salutation:	No	<input type="text" value="8"/>	No	<input type="text" value="Salutation:"/>
<input type="checkbox"/>	Title:	No	<input type="text" value="9"/>	No	<input type="text" value="Title:"/>
<input type="checkbox"/>	Department:	No	<input type="text" value="10"/>	No	<input type="text" value="Department:"/>
<input type="checkbox"/>	Do Not Call:	No	<input type="text" value="11"/>	No	<input type="text" value="Do Not Call:"/>
<input type="checkbox"/>	Home:	No	<input type="text" value="12"/>	No	<input type="text" value="Home:"/>
<input type="checkbox"/>	Mobile:	No	<input type="text" value="13"/>	No	<input type="text" value="Mobile:"/>
<input type="checkbox"/>	Office Phone:	No	<input type="text" value="14"/>	No	<input type="text" value="Office Phone:"/>
<input type="checkbox"/>	Other Phone:	No	<input type="text" value="15"/>	No	<input type="text" value="Other Phone:"/>
<input type="checkbox"/>	Fax:	No	<input type="text" value="16"/>	No	<input type="text" value="Fax:"/>
<input type="checkbox"/>	Other Email:	No	<input type="text" value="17"/>	No	<input type="text" value="Other Email:"/>
<input type="checkbox"/>	Primary Address Street:	No	<input type="text" value="18"/>	No	<input type="text" value="Primary Address Street:"/>
<input type="checkbox"/>	Primary Address City:	No	<input type="text" value="19"/>	No	<input type="text" value="Primary Address City:"/>
<input type="checkbox"/>	Primary Address State:	No	<input type="text" value="20"/>	No	<input type="text" value="Primary Address State:"/>
<input type="checkbox"/>	Primary Address Postal Code:	No	<input type="text" value="21"/>	No	<input type="text" value="Primary Address Postal ("/>
<input type="checkbox"/>	Primary Address Country:	No	<input type="text" value="22"/>	No	<input type="text" value="Primary Address Countr"/>
<input type="checkbox"/>	Alternate Address Street:	No	<input type="text" value="23"/>	No	<input type="text" value="Alternate Address Street"/>
<input type="checkbox"/>	Alternate Address City:	No	<input type="text" value="24"/>	No	<input type="text" value="Alternate Address City:"/>
<input type="checkbox"/>	Alternate Address State:	No	<input type="text" value="25"/>	No	<input type="text" value="Alternate Address State:"/>
<input type="checkbox"/>	Alternate Address Postal Code:	No	<input type="text" value="26"/>	No	<input type="text" value="Alternate Address Postal"/>
<input type="checkbox"/>	Alternate Address Country:	No	<input type="text" value="27"/>	No	<input type="text" value="Alternate Address Count"/>
<input type="checkbox"/>	Assistant:	No	<input type="text" value="28"/>	No	<input type="text" value="Assistant"/>

## Shortcodes:

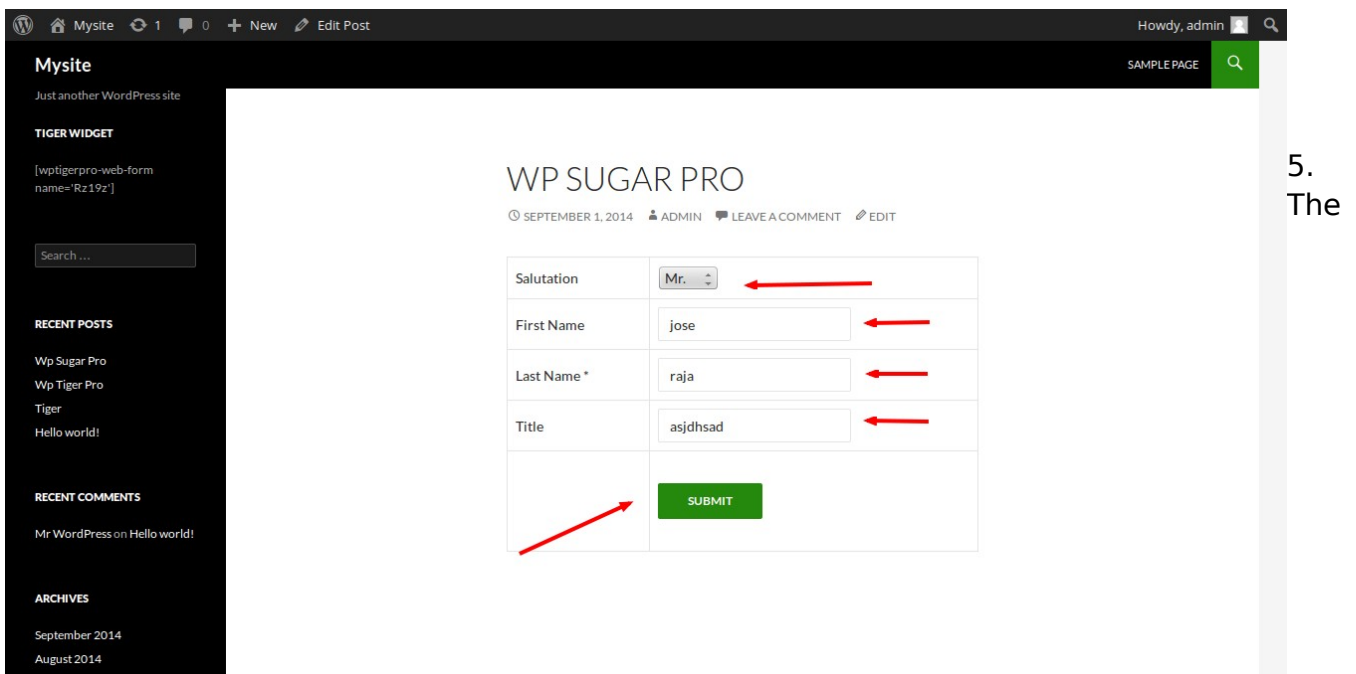
1. To generate the form in a page or post use the short code as [wpsugarpro-web-form name='zSqKr'] and click publish as shown in below figure.



Click View post.

3. The form is displayed in the sample page with selected fields and mandatory fields.

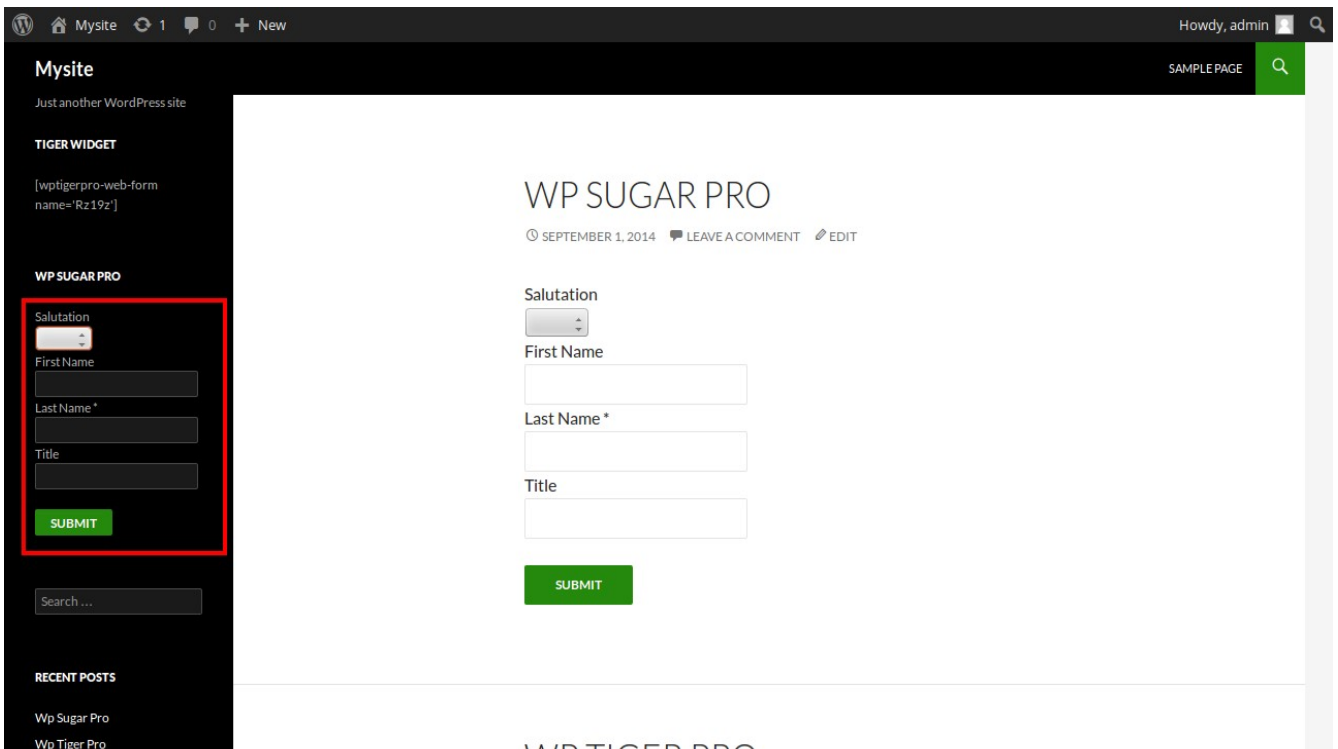
4. Data are entered in the fields and click submit button. The data are stored in leads of sugar CRM.



same procedure is done for 'Contact fields'. Here the datas are stored in contacts of sugar CRM.

6. For widgets also same process but you have to enable Form Type as **“Widget”** in dropdown box.

7. Go to 'WP-Admin panel >> Appearance >> Widgets'.
8. Text tab is activated and choose the area to display the widget form.
9. Now paste the generated short code in the Text area and save it.
10. View the post. The widget form is shown in the selected area of the WP-Admin panel.



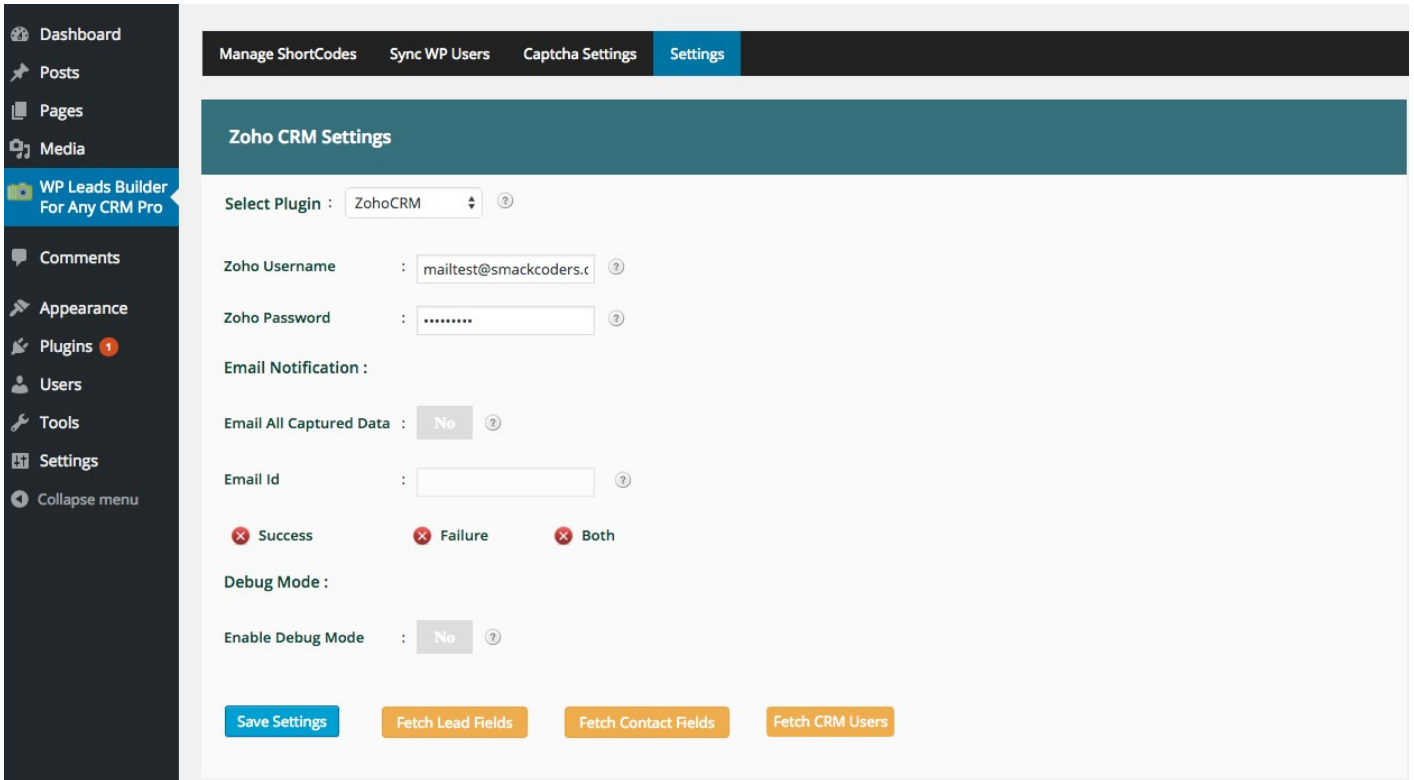
## c) WP Zoho Pro

### Zoho CRM Settings

1. By clicking the **“WP Leads Builder for any CRM Pro”** you can access the settings page as given below and you have to enable as **“WP zoho Pro”**.
2. Enter your Zoho Username, Zoho Password.
3. Capture User Registration field is enabling sync users to CRM Contacts.
4. Next **Email Notification**,
  - a) Enable the **“Email All Captured Data”**.
  - b) Enter the email id.
  - c) Choose the radio button such as Success, Failure or Both.

Email All Captured Data fields is enable to get emails for each form feed with details are Success or failed or both.

5. Click Save Settings.



The screenshot displays the 'Zoho CRM Settings' page within a WordPress dashboard. The left sidebar contains navigation options: Dashboard, Posts, Pages, Media, WP Leads Builder (highlighted), Comments, Appearance, Plugins (1), Users, Tools, Settings, and Collapse menu. The main content area has a top navigation bar with 'Manage ShortCodes', 'Sync WP Users', 'Captcha Settings', and 'Settings' (selected). Below this is the 'Zoho CRM Settings' section, which includes:

- Select Plugin :** A dropdown menu set to 'ZohoCRM'.
- Zoho Username :** A text input field containing 'mailtoest@smackcoders.c'.
- Zoho Password :** A password input field with masked characters.
- Email Notification :**
  - Email All Captured Data :** A toggle switch set to 'No'.
  - Email Id :** An empty text input field.
  - Selections:** Three radio buttons labeled 'Success', 'Failure', and 'Both', all of which are currently unselected.
- Debug Mode :**
  - Enable Debug Mode :** A toggle switch set to 'No'.

At the bottom of the settings area, there are four buttons: 'Save Settings' (blue), 'Fetch Lead Fields' (orange), 'Fetch Contact Fields' (orange), and 'Fetch CRM Users' (orange).

CRM Type : ZohoCRM   Module Type : Leads

[wpzohopro-web-form name='AH53W']

Form Settings :

Form Type :

Duplicate handling :  Skip    Update    None

Assign Leads to User :

Error Message Submission :

Success Message Submission :

Enable URL Redirection :   

Enable Google Captcha :

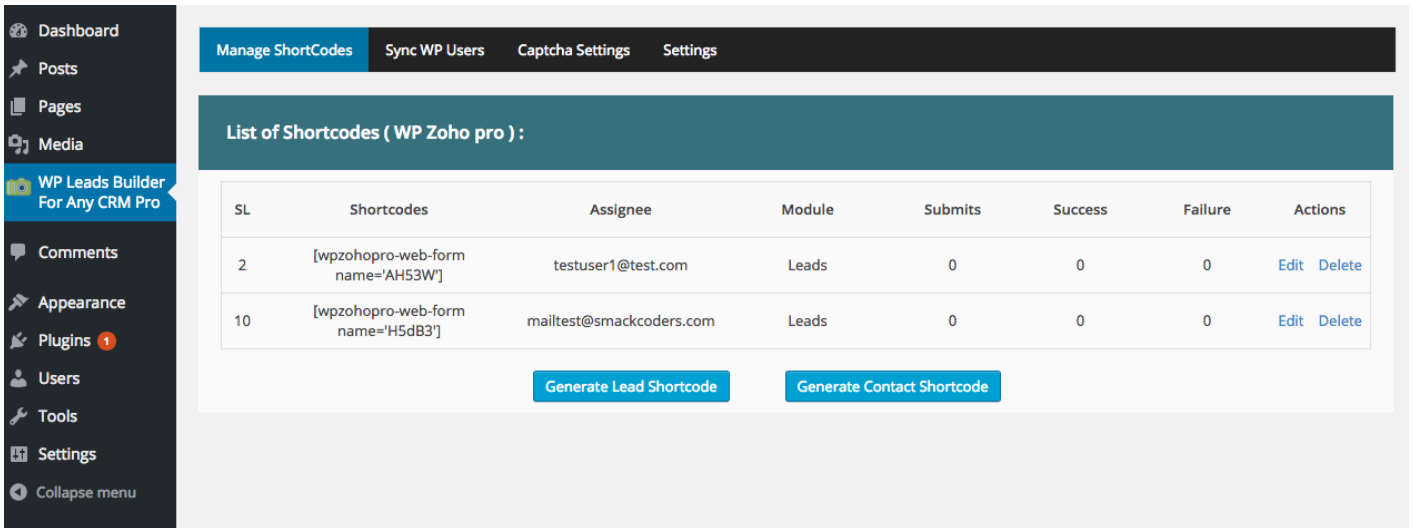
[Save Form Settings](#)

Form Options

Field Settings :

Bulk Actions    [Apply](#)

<input type="checkbox"/>	Field Name	Show Field	Order	Mandatory	Field Label Display
<input type="checkbox"/>	First Name	Yes	1	No	First Name
<input type="checkbox"/>	Email	Yes	2	No	Email
<input checked="" type="checkbox"/>	Last Name *	Yes	3	Yes	Last Name
<input checked="" type="checkbox"/>	Company *	Yes	4	Yes	Company
<input type="checkbox"/>	Date Created	No	5	No	Date Created
<input type="checkbox"/>	Date Modified:	No	6	No	Date Modified
<input type="checkbox"/>	Description	No	7	No	Description:
<input type="checkbox"/>	Deleted	No	8	No	Deleted
<input type="checkbox"/>	Title	No	9	No	Title
<input type="checkbox"/>	Phone	No	10	No	Phone
<input type="checkbox"/>	Fax	No	11	No	Fax
<input type="checkbox"/>	Mobile	No	12	No	Mobile
<input type="checkbox"/>	Department	No	13	No	Department:
<input type="checkbox"/>	Lead Source	No	14	No	Lead Source
<input type="checkbox"/>	Do Not Call:	No	15	No	Do Not Call:
<input type="checkbox"/>	Home:	No	16	No	Home Phone:
<input type="checkbox"/>	Lead Status	No	17	No	Lead Status
<input type="checkbox"/>	Industry	No	18	No	Industry
<input type="checkbox"/>	Mobile:	No	19	No	Mobile:
<input type="checkbox"/>	Office Phone:	No	20	No	Office Phone:
<input type="checkbox"/>	No of Employees	No	21	No	No of Employees
<input type="checkbox"/>	Other Phone:	No	22	No	Other Phone:
<input type="checkbox"/>	Annual Revenue	No	23	No	Annual Revenue
<input type="checkbox"/>	Fax:	No	24	No	Fax:
<input type="checkbox"/>	Rating	No	25	No	Rating
<input type="checkbox"/>	Email Address:	No	26	No	Email Address:
<input type="checkbox"/>	Email Opt Out	No	27	No	Email Opt Out
<input type="checkbox"/>	Other Email:	No	28	No	Other Email:
<input type="checkbox"/>	Skype ID	No	29	No	Skype ID
<input type="checkbox"/>	Salutation	No	30	No	Salutation
<input type="checkbox"/>	Primary Address Street:	No	31	No	Primary Address Street
<input type="checkbox"/>	Primary Address City:	No	32	No	Primary Address City
<input type="checkbox"/>	Twitter	No	33	No	Twitter
<input type="checkbox"/>	Primary Address State:	No	34	No	Primary Address State
<input type="checkbox"/>	Secondary Email	No	35	No	Secondary Email
<input type="checkbox"/>	Primary Address Postal Code:	No	36	No	Primary Address Postalc
<input type="checkbox"/>	Last Activity Time	No	37	No	Last Activity Time
<input type="checkbox"/>	Street	No	38	No	Street
<input type="checkbox"/>	Primary Address Country:	No	39	No	Primary Address Countr:
<input type="checkbox"/>	City	No	40	No	City
<input type="checkbox"/>	Alternate Address Street:	No	41	No	Alt Address Street
<input type="checkbox"/>	State	No	42	No	State
<input type="checkbox"/>	Alternate Address City:	No	43	No	Alt Address City
<input type="checkbox"/>	Alternate Address State:	No	44	No	Alt Address State
<input type="checkbox"/>	Zip Code	No	45	No	Zip Code
<input type="checkbox"/>	Country	No	46	No	Country
<input type="checkbox"/>	Alternate Address Postal Code:	No	47	No	Alt Address Postalcode
<input type="checkbox"/>	Alternate Address Country:	No	48	No	Alt Address Country
<input type="checkbox"/>	Assistant	No	49	No	Assistant
<input type="checkbox"/>	Assistant Phone:	No	50	No	Assistant Phone
<input type="checkbox"/>	Converted	No	51	No	Converted
<input type="checkbox"/>	Referred By:	No	52	No	Referred By:
<input type="checkbox"/>	Lead Source Description:	No	53	No	Lead Source Description
<input type="checkbox"/>	Status:	No	54	No	Status:
<input type="checkbox"/>	Status Description:	No	55	No	Status Description:
<input type="checkbox"/>	Account Name:	No	56	No	Account Name:
<input type="checkbox"/>	Account Description	No	57	No	Account Description



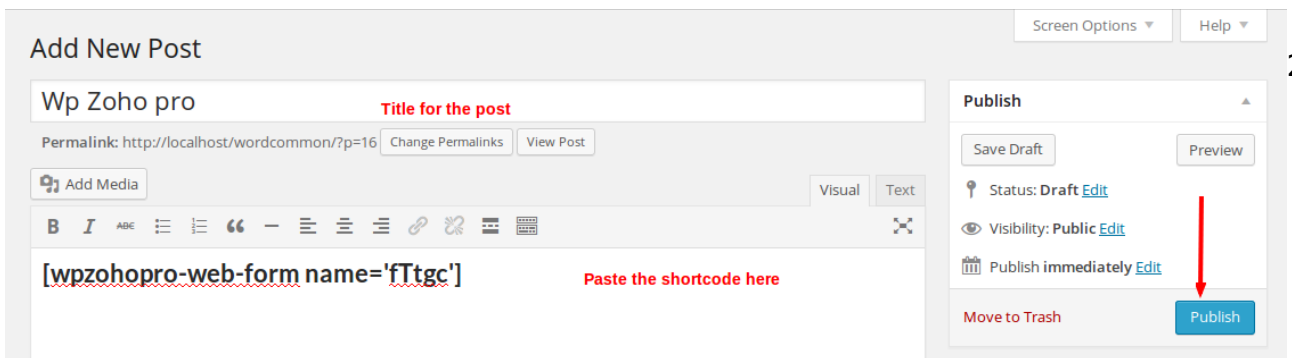
The dashboard shows a sidebar with navigation options: Dashboard, Posts, Pages, Media, WP Leads Builder For Any CRM Pro (highlighted), Comments, Appearance, Plugins (1), Users, Tools, Settings, and Collapse menu. The main content area has tabs for Manage ShortCodes, Sync WP Users, Captcha Settings, and Settings. Below the tabs is a section titled "List of Shortcodes ( WP Zoho pro ):" containing a table with columns: SL, Shortcodes, Assignee, Module, Submits, Success, Failure, and Actions.

SL	Shortcodes	Assignee	Module	Submits	Success	Failure	Actions
2	[wpzohopro-web-form name='AH53W']	testuser1@test.com	Leads	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>
10	[wpzohopro-web-form name='H5dB3']	mailtest@smackcoders.com	Leads	0	0	0	<a href="#">Edit</a> <a href="#">Delete</a>

Below the table are two buttons: "Generate Lead Shortcode" and "Generate Contact Shortcode".

### Shortcodes:

1. To generate the form in a page or post use the short code as [wpzohopro-web-form name='fTtgc'] and click publish as shown in below. Click View post.

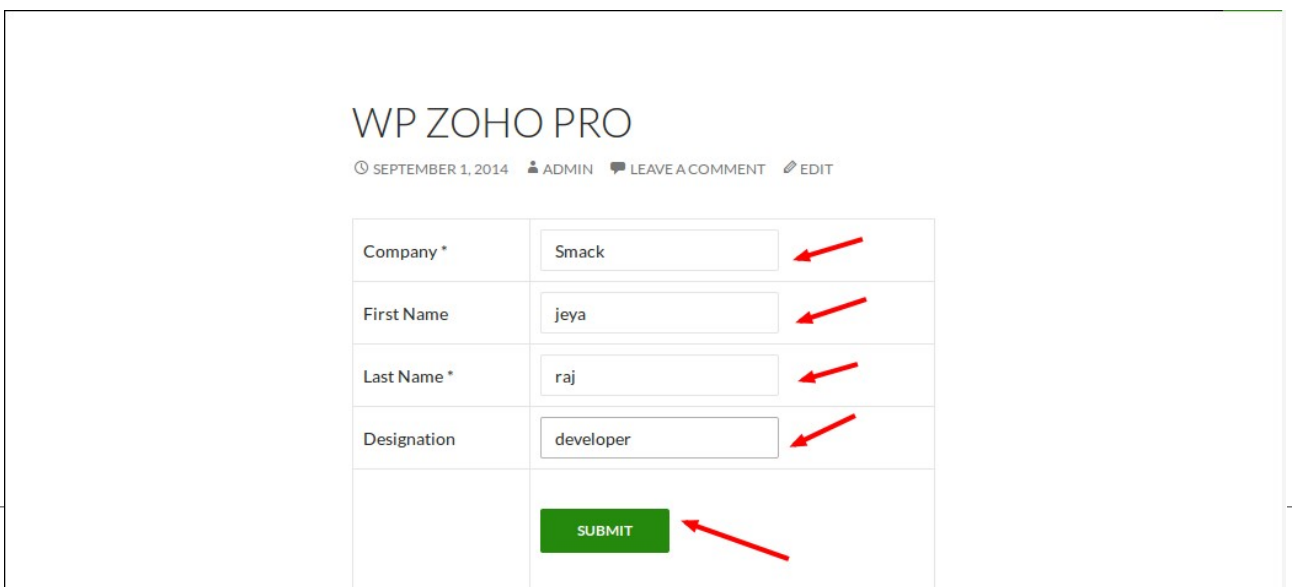


The screenshot shows the "Add New Post" editor. The title is "Wp Zoho pro". The permalink is "http://localhost/wordcommon/?p=16". The text area contains the shortcode "[wpzohopro-web-form name='fTtgc']". The "Publish" sidebar on the right shows "Status: Draft", "Visibility: Public", and "Publish immediately". A red arrow points to the "Publish" button.

Click View Post.

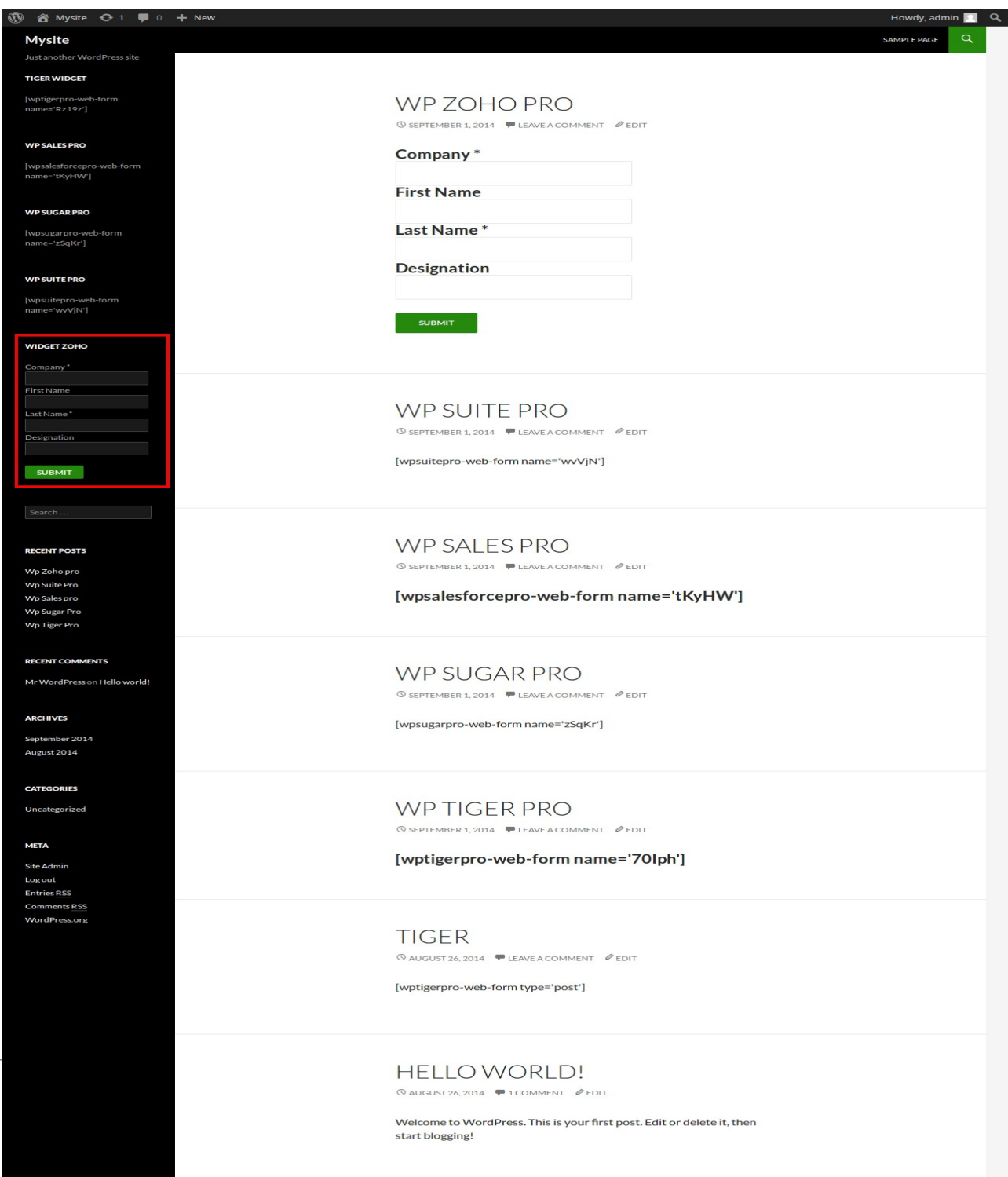
3. The form is displayed in the sample page with selected fields and mandatory fields.

4. Data are entered in the fields and click submit button. The data are stored in leads of zoho CRM.



The screenshot shows the "WP ZOHO PRO" form. The title is "WP ZOHO PRO" and the date is "SEPTEMBER 1, 2014". The form has the following fields: "Company \*" (filled with "Smack"), "First Name" (filled with "jeya"), "Last Name \*" (filled with "raj"), and "Designation" (filled with "developer"). A green "SUBMIT" button is at the bottom. Red arrows point to each field and the submit button.

5. The same procedure is done for 'Contact fields'. Here the datas are stored in contacts of zoho CRM.
6. For widgets also same process but you have to enable Form Type as **“Widget”** in dropdown box.
7. Go to 'WP-Admin panel >> Appearance >> Widgets'.
8. Text tab is activated and choose the area to display the widget form.
9. Now paste the generated short code in the Text area and save it.
10. View the post. The widget form is shown in the selected area of the WP-Admin panel.



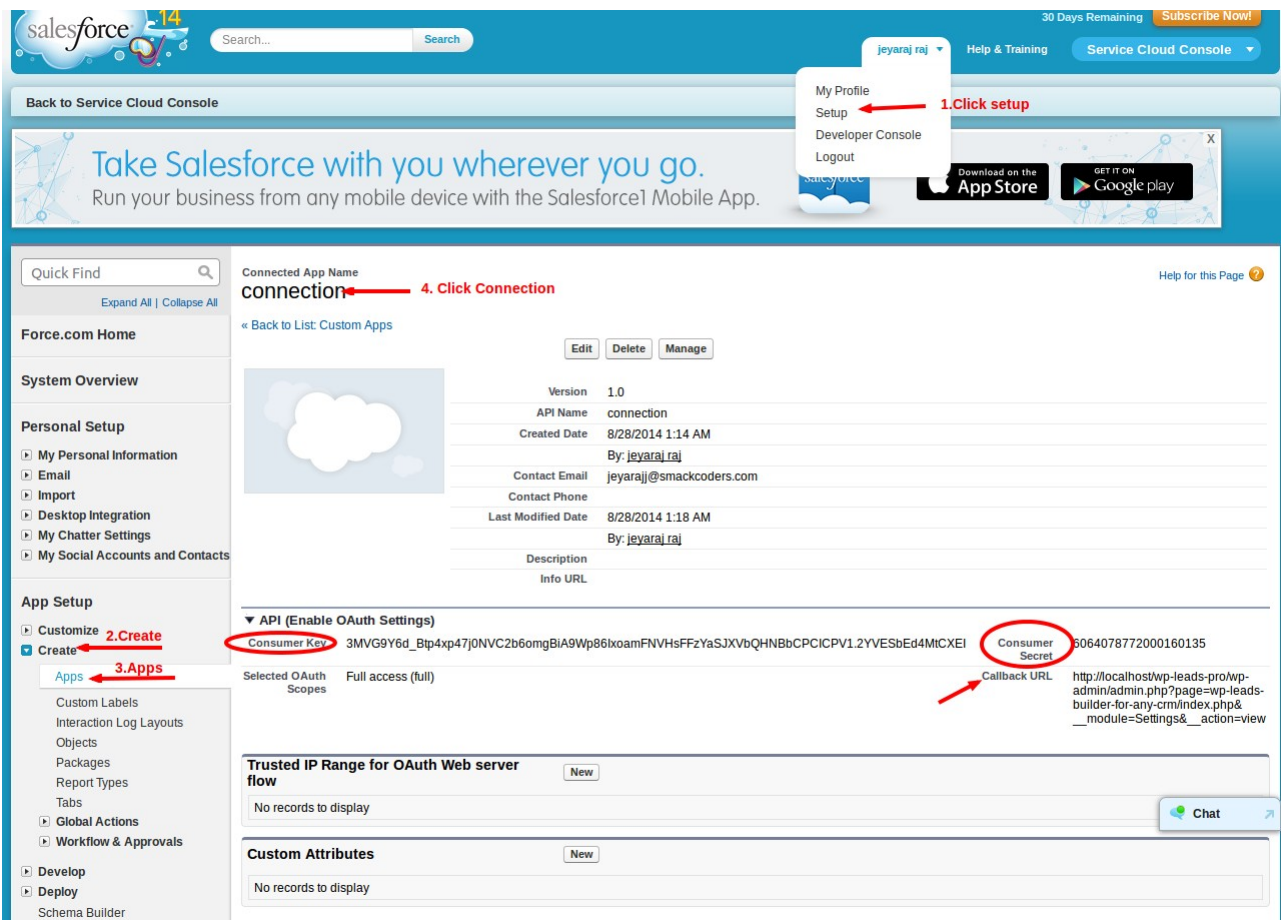
The screenshot shows a WordPress admin interface. On the left is a dark sidebar with a list of widget codes under the heading 'WIDGET Zoho'. The code for the 'WIDGET Zoho' is highlighted with a red box: `[wpsuitepro-web-form name='wvJN']`. Below this are codes for 'WP SALES PRO', 'WP SUGAR PRO', and 'WP TIGER PRO'. The main content area displays the rendered forms for these widgets. The 'WP Zoho PRO' form is at the top, followed by 'WP SUITE PRO', 'WP SALES PRO', 'WP SUGAR PRO', 'WP TIGER PRO', and 'HELLO WORLD!'. Each form has input fields for Company, First Name, Last Name, and Designation, and a green 'SUBMIT' button. The 'WP TIGER PRO' form has a dropdown menu for 'Form Type' set to 'post'.



## d) WP Salesforce pro

### Salesforce CRM Settings

1. By clicking the **“WP Leads Builder for any CRM Pro”** you can access the settings page and you have to enable as **“WP Salesforce pro”** as given below.
2. Enter your Consumer Key, Consumer Secret , Callback URL.
3. To get the Consumer key, Consumer Secret and Callback URL you have to login into Salesforce.
4. In Salesforce, go to Setup >> Create >> Apps >> connection. There is a consumer key and consumer secret and Callback URL.



Quick Find

Expand All | Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Accounts and Contacts

App Setup

- Customize **2. Create**
- 3. Apps**
- Apps
- Custom Labels
- Interaction Log Layouts
- Objects
- Packages
- Report Types
- Tabs
- Global Actions
- Workflow & Approvals
- Develop
- Deploy
- Schema Builder

Connected App Name **connection** **4. Click Connection**

« Back to List: Custom Apps

Edit Delete Manage

Version 1.0

API Name connection

Created Date 8/28/2014 1:14 AM

By: jeyaraj.raj

Contact Email jeyaraj@smackcoders.com

Contact Phone

Last Modified Date 8/28/2014 1:18 AM

By: jeyaraj.raj

Description

Info URL

▼ API (Enable OAuth Settings)

**Consumer Key** 3MVG9Y6d\_Btp4xp47j0NVC2b6omgBIa9Wp86ixomFNVHsFFzYaSjXVbQHNbCPCICPV1.2YVESbEd4MICXEI

**Consumer Secret** 8064078772000160135

Selected OAuth Scopes Full access (full)

Callback URL http://localhost/wp-leads-pro/wp-admin/admin.php?page=wp-leads-builder-for-any-crm/index.php&\_\_module=Settings&\_\_action=view

Trusted IP Range for OAuth Web server flow **New**

No records to display

Custom Attributes **New**

No records to display

Chat

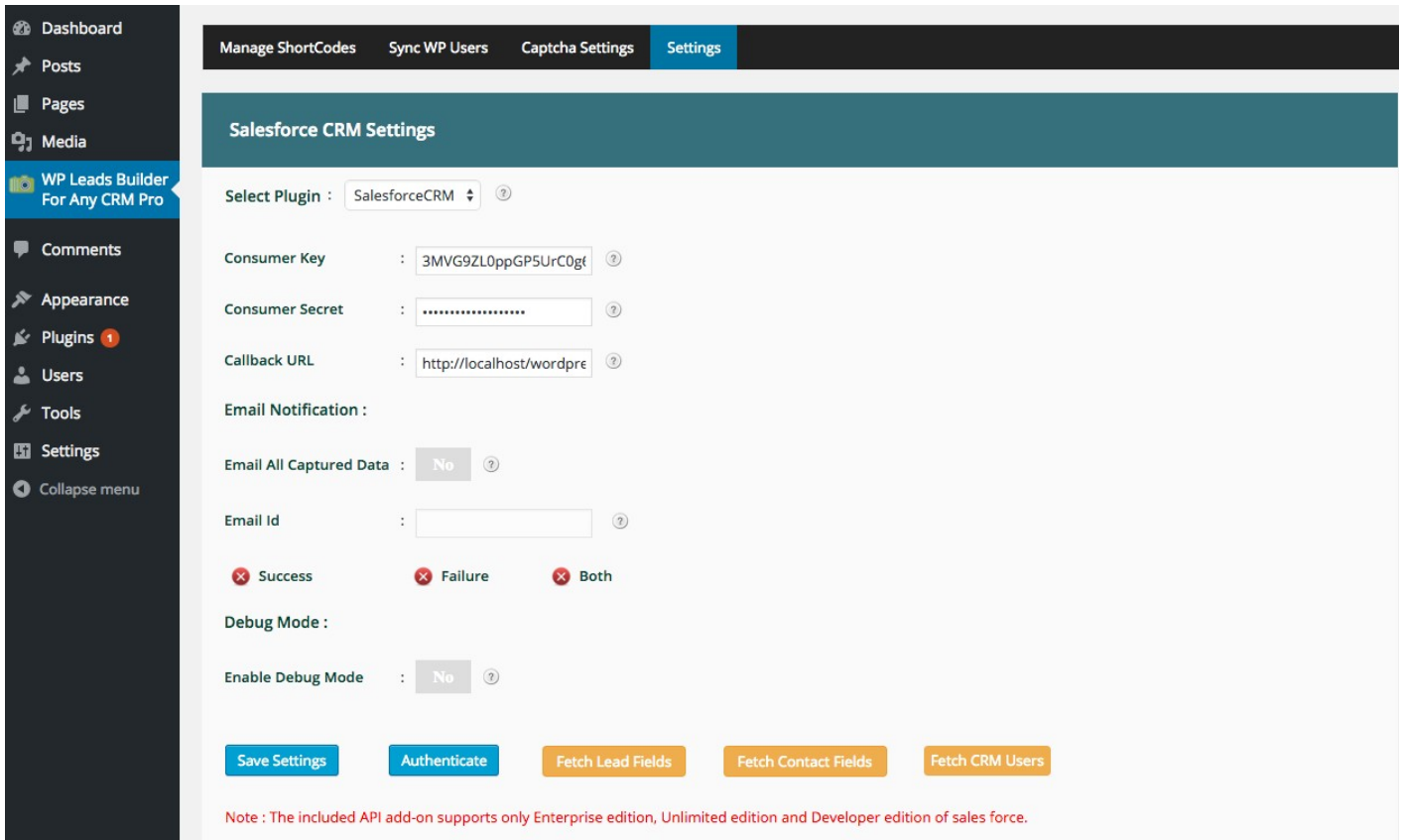
**Note:**

For Callback URL. Copy your site URL and paste it in Salesforce.

**`http://siteurl/wp-admin/admin.php?page=wp-leads-builder-for-any-crm/index.php&__module=Settings&__action=view`**

5. Click Save settings. Then Click Authenticate.

6. After giving the “Authenticate” the url is redirected from Salesforce to your Wordpress site.



The screenshot shows the WordPress dashboard with the 'WP Leads Builder For Any CRM Pro' settings page open. The 'Settings' tab is selected in the top navigation bar. The page title is 'Salesforce CRM Settings'. The 'Select Plugin' dropdown is set to 'SalesforceCRM'. The 'Consumer Key' field contains '3MVG9ZL0ppGP5UrC0gf'. The 'Consumer Secret' field is masked with dots. The 'Callback URL' field contains 'http://localhost/wordpre'. Under 'Email Notification', the 'Email All Captured Data' toggle is set to 'No'. The 'Email Id' field is empty. There are three radio buttons for 'Success', 'Failure', and 'Both', all of which are currently unselected. Under 'Debug Mode', the 'Enable Debug Mode' toggle is set to 'No'. At the bottom, there are five buttons: 'Save Settings', 'Authenticate', 'Fetch Lead Fields', 'Fetch Contact Fields', and 'Fetch CRM Users'. A note at the bottom states: 'Note : The included API add-on supports only Enterprise edition, Unlimited edition and Developer edition of sales force.'

wordpress4testing 0 + New Howdy, admin

Dashboard | Posts | Media | Pages | Comments | Appearance | Plugins | Users | Tools | Settings

WP Leads Builder For Any CRM Pro | WP Sugar Pro | Collapse menu

---

Manage ShortCodes | Form Builder | Sync WP Users | Captcha Settings | Settings

**Field Settings Saved**

CRM Type : SalesforceCRM    Module Type : Contact    [Fetch CRM Fields](#)

[wpsalesforcepro-web-form name='cAwGM']

<input type="checkbox"/>	Field Name	Show Field	Order	Mandatory	Field Label Display
<input checked="" type="checkbox"/>	Last Name *	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	Last Name
<input checked="" type="checkbox"/>	First Name	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	First Name
<input checked="" type="checkbox"/>	Salutation	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	Salutation
<input type="checkbox"/>	Title	<input type="checkbox"/>	4	<input type="checkbox"/>	Title
<input checked="" type="checkbox"/>	Company *	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	Company
<input type="checkbox"/>	Street	<input type="checkbox"/>	6	<input type="checkbox"/>	Street
<input type="checkbox"/>	City	<input type="checkbox"/>	7	<input type="checkbox"/>	City
<input type="checkbox"/>	State/Province	<input type="checkbox"/>	8	<input type="checkbox"/>	State/Province
<input type="checkbox"/>	Zip/Postal Code	<input type="checkbox"/>	9	<input type="checkbox"/>	Zip/Postal Code
<input type="checkbox"/>	Country	<input type="checkbox"/>	10	<input type="checkbox"/>	Country
<input type="checkbox"/>	Phone	<input type="checkbox"/>	11	<input type="checkbox"/>	Phone
<input type="checkbox"/>	Email	<input type="checkbox"/>	12	<input type="checkbox"/>	Email
<input type="checkbox"/>	Website	<input type="checkbox"/>	13	<input type="checkbox"/>	Website
<input type="checkbox"/>	Description	<input type="checkbox"/>	14	<input type="checkbox"/>	Description
<input type="checkbox"/>	Lead Source	<input type="checkbox"/>	15	<input type="checkbox"/>	Lead Source
<input checked="" type="checkbox"/>	Status *	<input checked="" type="checkbox"/>	16	<input checked="" type="checkbox"/>	Status
<input type="checkbox"/>	Industry	<input type="checkbox"/>	17	<input type="checkbox"/>	Industry
<input type="checkbox"/>	Rating	<input type="checkbox"/>	18	<input type="checkbox"/>	Rating
<input type="checkbox"/>	Annual Revenue	<input type="checkbox"/>	19	<input type="checkbox"/>	Annual Revenue
<input type="checkbox"/>	Employees	<input type="checkbox"/>	20	<input type="checkbox"/>	Employees
<input type="checkbox"/>	Unread By Owner	<input type="checkbox"/>	21	<input type="checkbox"/>	Unread By Owner

---

**Form Settings**

Form Type :     Form Mode :  Update     None    Form builder is in Edit mode

Duplicate handling :  Skip     Update     None

Assign Contacts to User :

Error Message Submission :  ?

Success Message Submission :  ?

Enable URL Redirection :

Enable Google Captcha :

Page id or Post id :  ?

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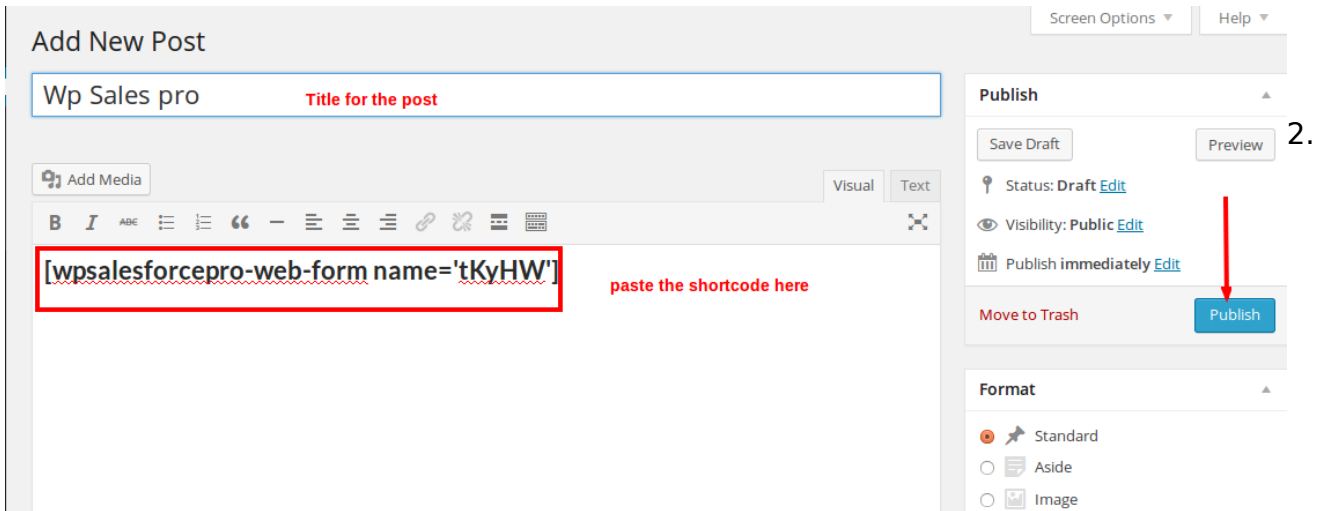
**Save Field Settings**

[Save Field Settings](#)

Thankyou for creating with WordPress. Version 4.0

**Shortcodes:**

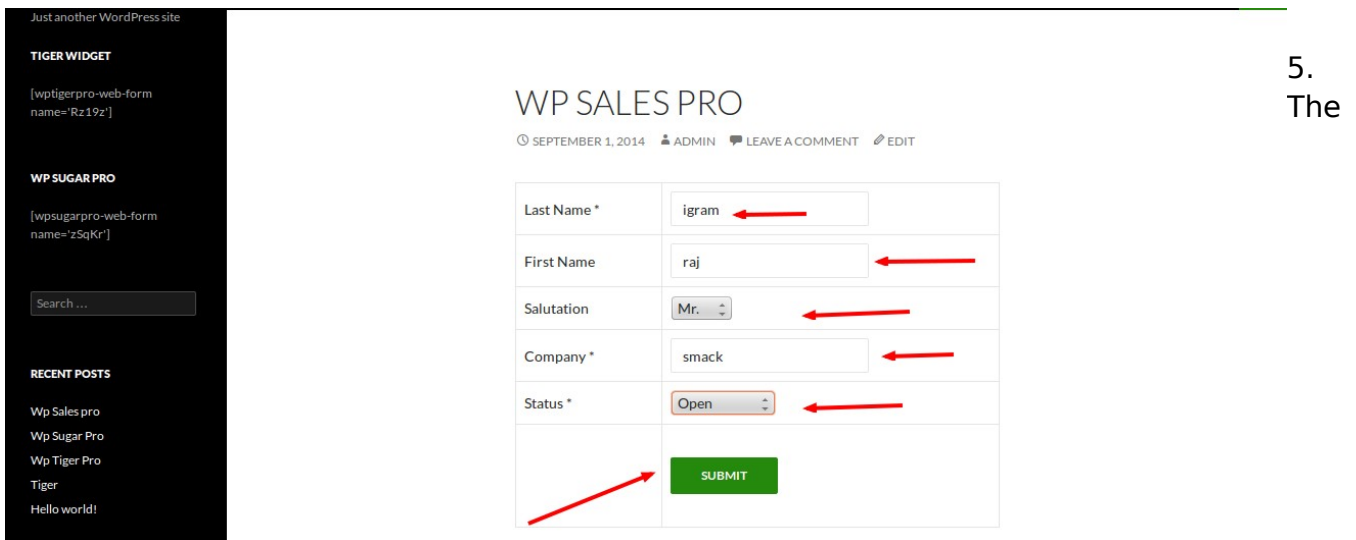
1. To generate the form in a page or post use the short code as [wpsalesforcepro-web-form name='tKyHW'] and click publish as shown in below figure.



Click View post.

3. The form is displayed in the sample page with selected fields and mandatory fields.

4. Data are entered in the fields and click submit button. The data are stored in leads of salesforce CRM.



same procedure is done for 'Contact fields'. Here the datas are stored in contacts of salesforce CRM.

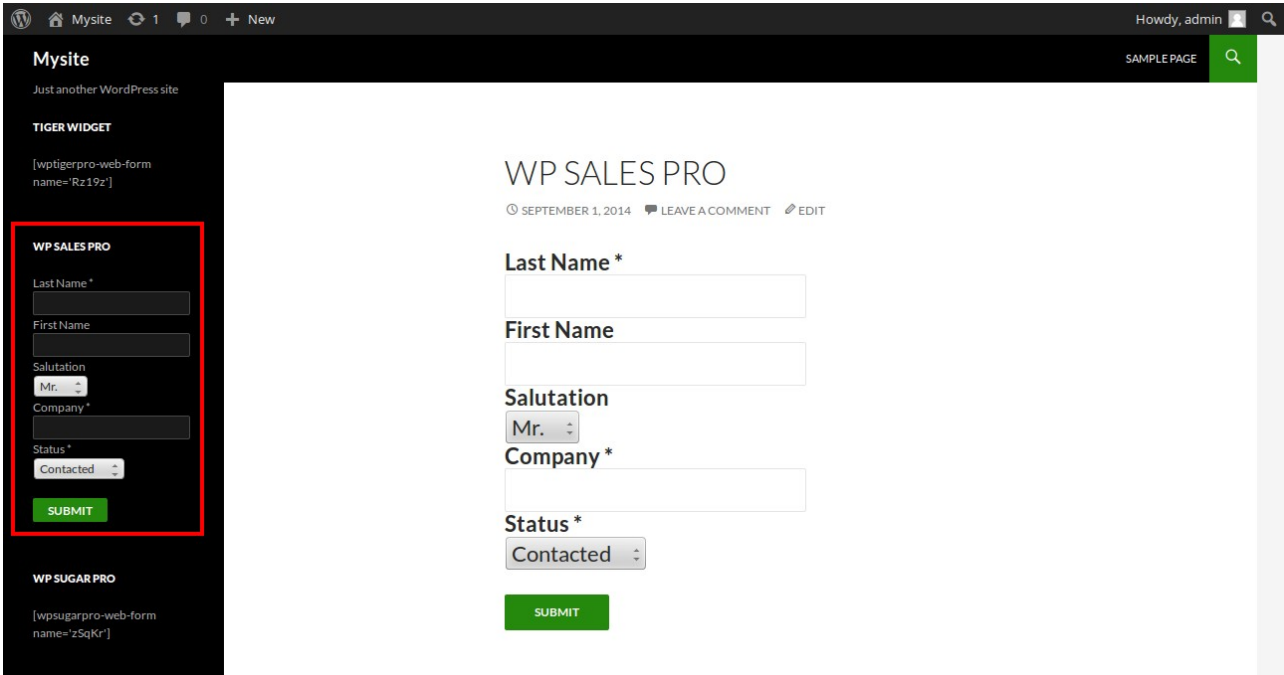
6. For widgets also same process but you have to enable Form Type as “**Widget**” in dropdown box.

7. Go to 'WP-Admin panel >> Appearance >> Widgets'.

8. Text tab is activated and choose the area to display the widget form.

9. Now paste the generated short code in the Text area and save it.

10. View the post. The widget form is shown in the selected area of the WP-Admin panel.



The screenshot displays a WordPress admin interface. On the left sidebar, the 'Mysite' dashboard is visible, featuring a 'TIGER WIDGET' and a 'WP SALES PRO' widget. The 'WP SALES PRO' widget is highlighted with a red border and contains the following form fields: 'Last Name \*', 'First Name', 'Salutation' (with a dropdown menu showing 'Mr.'), 'Company \*', and 'Status \*' (with a dropdown menu showing 'Contacted'). A green 'SUBMIT' button is located at the bottom of this widget. The main content area shows a post titled 'WP SALES PRO' dated 'SEPTEMBER 1, 2014'. The post content includes the same form fields as the widget: 'Last Name \*', 'First Name', 'Salutation' (dropdown 'Mr.'), 'Company \*', and 'Status \*' (dropdown 'Contacted'), followed by a green 'SUBMIT' button. The top navigation bar shows 'Mysite', '1', '0', 'New', and 'Howdy, admin'.

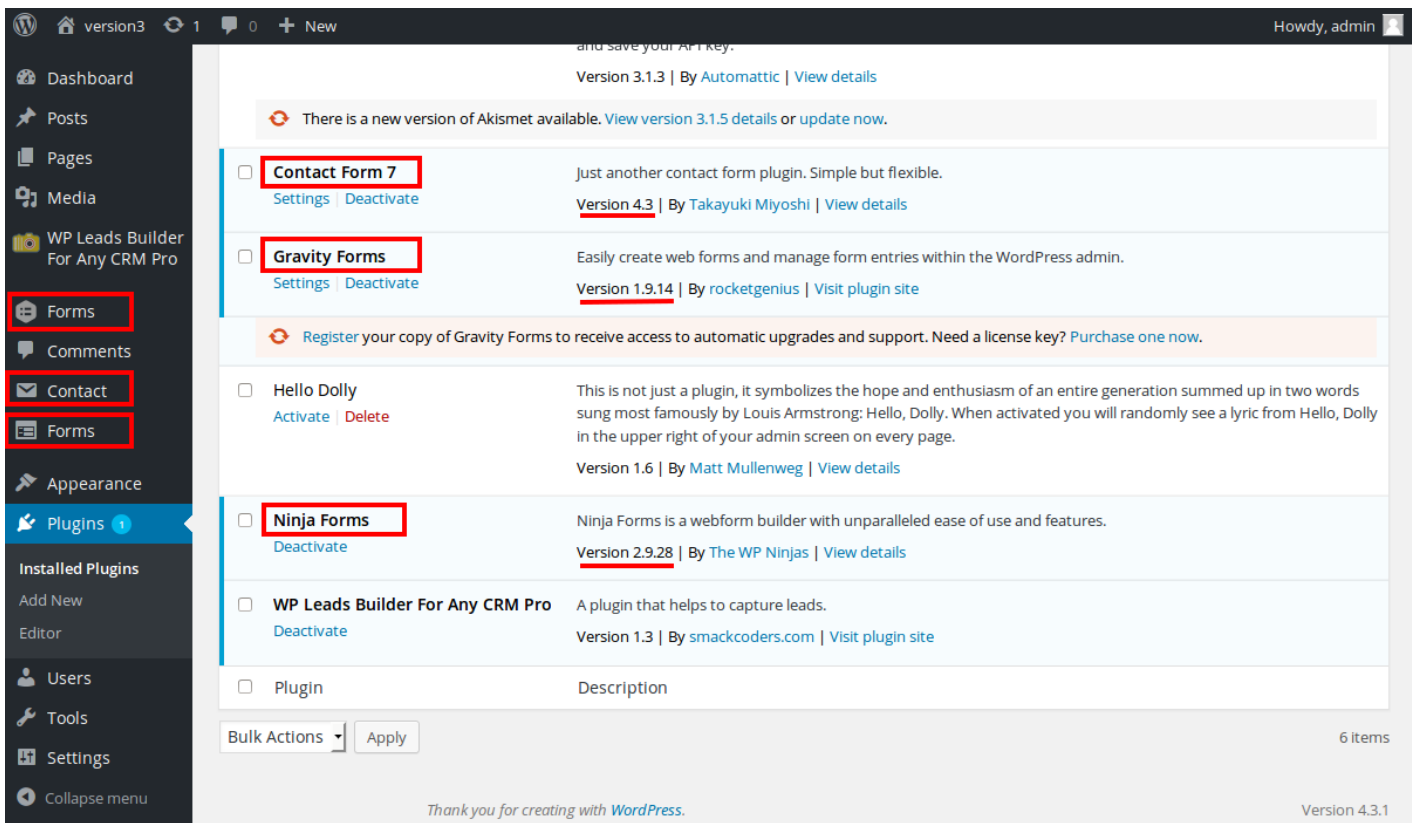
## ThirdParty Plugins:

Third Party Plugins supports such as **Ninja forms** and **Contact Form 7** are the new features added in the WP LEADS BUILDER FOR ANY CRM PRO.

## Install ThirdParty Plugins:

To access the Ninja Forms and Contact Form 7 in your WP LEADS BUILDER plugin first you need to install the thirdparty plugins(Ninja Forms and Contact form 7) in your wordpress instance.

1. Install third party plugins via “**wordpress/wp-content/plugins/**” .
2. Put the Ninja forms and contact form 7 plugins inside the “**plugins**” folder and unzip the packages.
3. Then go to “**Plugins**” and Activate “**Contact Form 7**” and “**Ninja Forms**”. Then the plugins are activated and shown in the left side menu as shown below.
4. You should install the latest version of the ninja form, contact form 7 and gravity form plugin.



The screenshot shows the WordPress admin interface. The left sidebar contains a menu with 'Forms' highlighted in red. The main content area displays a list of plugins. The following table summarizes the visible plugins:

Plugin Name	Description	Version	Author
Contact Form 7	Just another contact form plugin. Simple but flexible.	Version 4.3	By Takayuki Miyoshi
Gravity Forms	Easily create web forms and manage form entries within the WordPress admin.	Version 1.9.14	By rocketgenius
Hello Dolly	This is not just a plugin, it symbolizes the hope and enthusiasm of an entire generation summed up in two words sung most famously by Louis Armstrong: Hello, Dolly. When activated you will randomly see a lyric from Hello, Dolly in the upper right of your admin screen on every page.	Version 1.6	By Matt Mullenweg
Ninja Forms	Ninja Forms is a webform builder with unparalleled ease of use and features.	Version 2.9.28	By The WP Ninjas
WP Leads Builder For Any CRM Pro	A plugin that helps to capture leads.	Version 1.3	By smackcoders.com

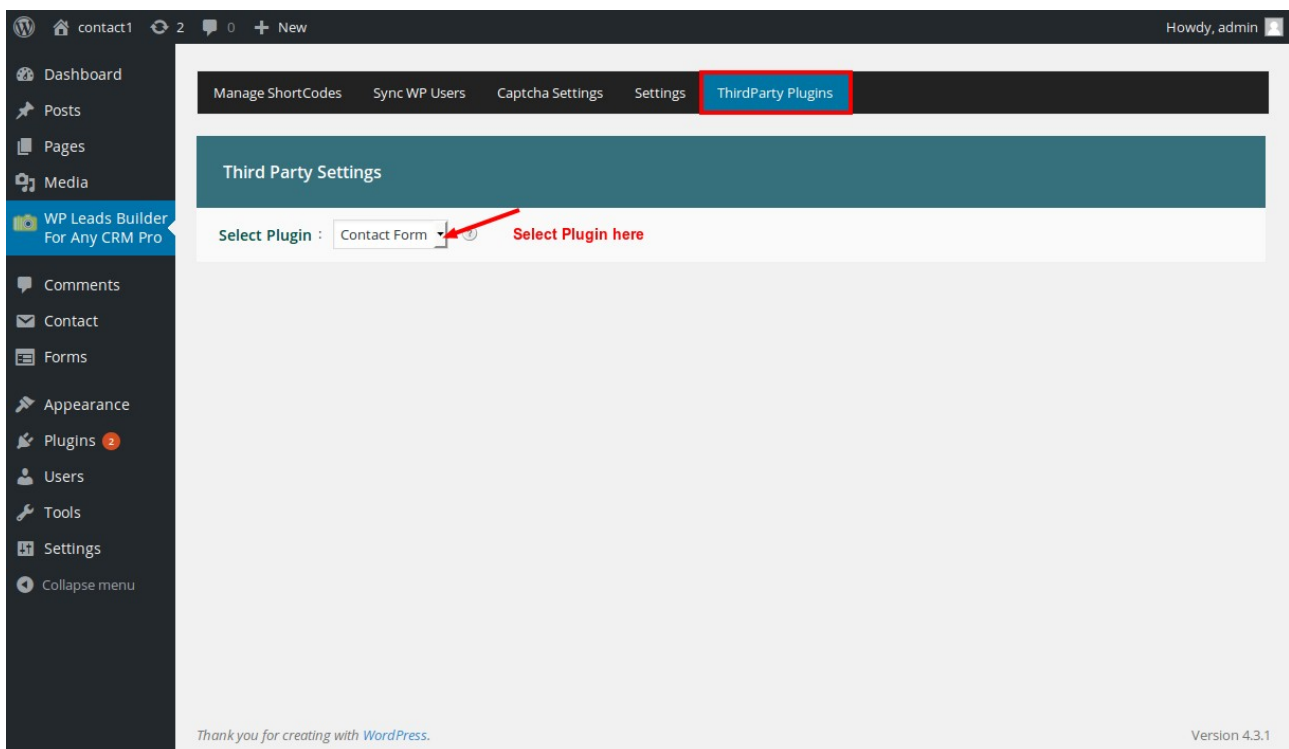
At the bottom of the page, there is a 'Bulk Actions' dropdown menu and an 'Apply' button. The footer of the page reads 'Thank you for creating with WordPress.' and 'Version 4.3.1'.

## 1 . CONTACT FORM 7:

### Step 1: Select Contact Form 7 plugin

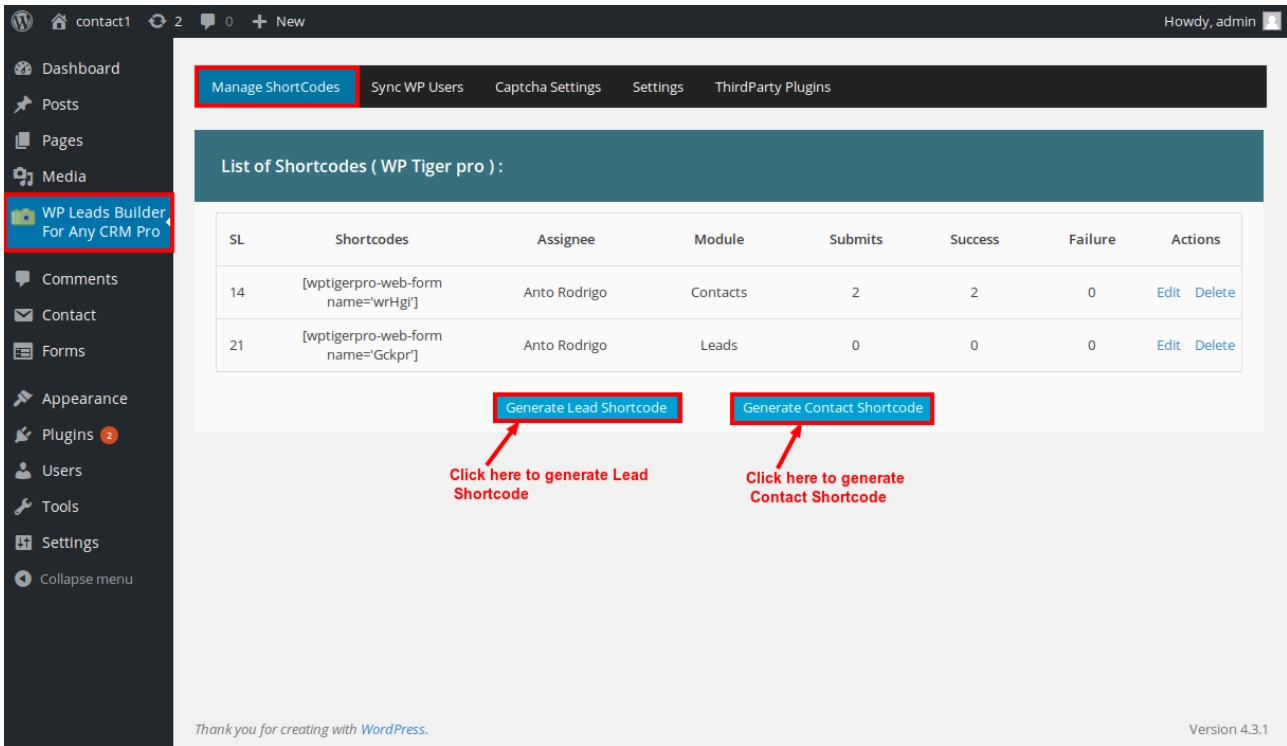
To select Contact Form 7 from third party plugins:

1. Click and go to “**WP Leads Builder For Any CRM Pro**” plugin.
2. Click “**ThirdParty Plugins**” which redirects you to Third Party Settings page.
3. Then select “**Contact Form**” from the Select plugin drop down menu as shown below.



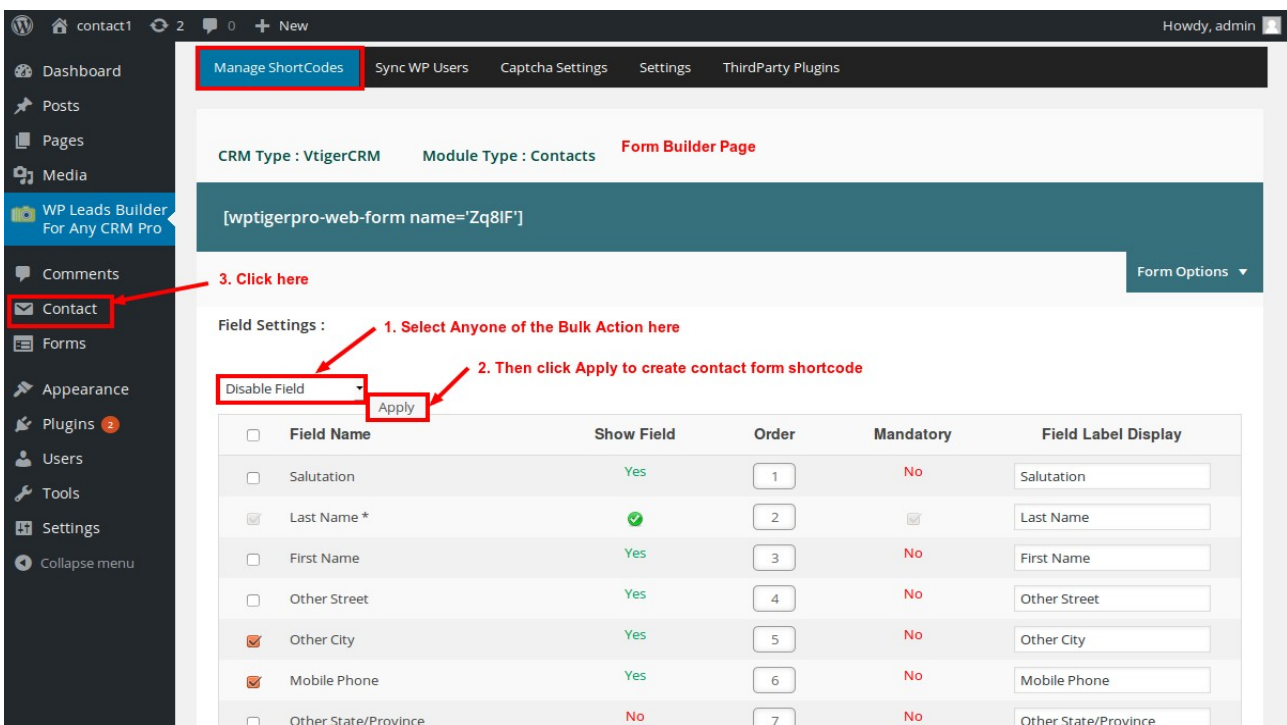
### Step 2: Generate Shortcode

1. Go to “**Manage Shortcode**” Page. Click “**Generate Lead Shortcode**” or “**Generate Contact Shortcode**” button to create Form Shortcode. It will redirect you to edit shortcode page
2. There you can Edit form and form field settings or you can click “**Edit**” to redirect to Form Builder Page and change the field settings.



## FORM BUILDER:

1. In the Form Builder page you should select anyone of the Action from the “**Bulk Actions**” drop down menu.
2. then click “**Apply**” button.
3. It will create a new “**shortcode**” with enabled fields in the “**Contact Form**” plugin.

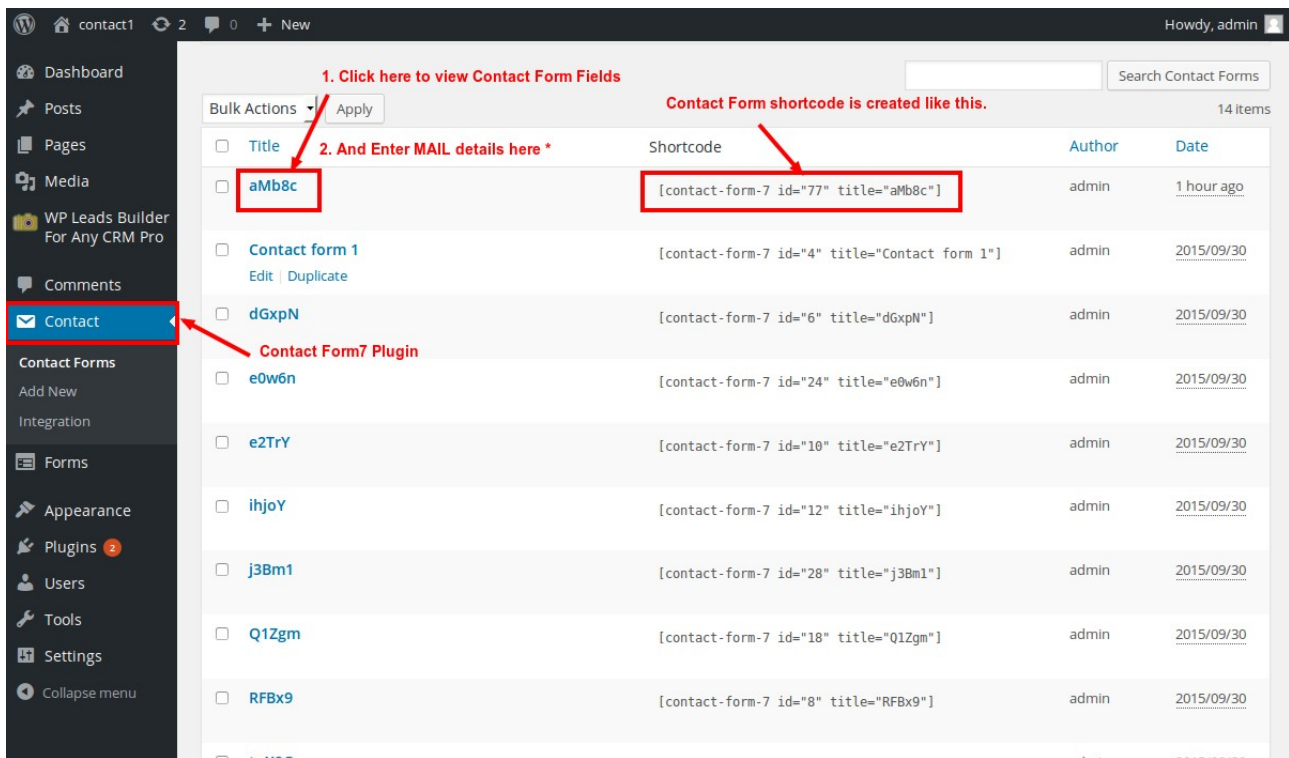




4. Then click **“Contact”** which is the contact form 7 plugin .
5. There you can see the contact form **“shortcode”** and form fields.

### STEP 3: Contact Form Shortcode

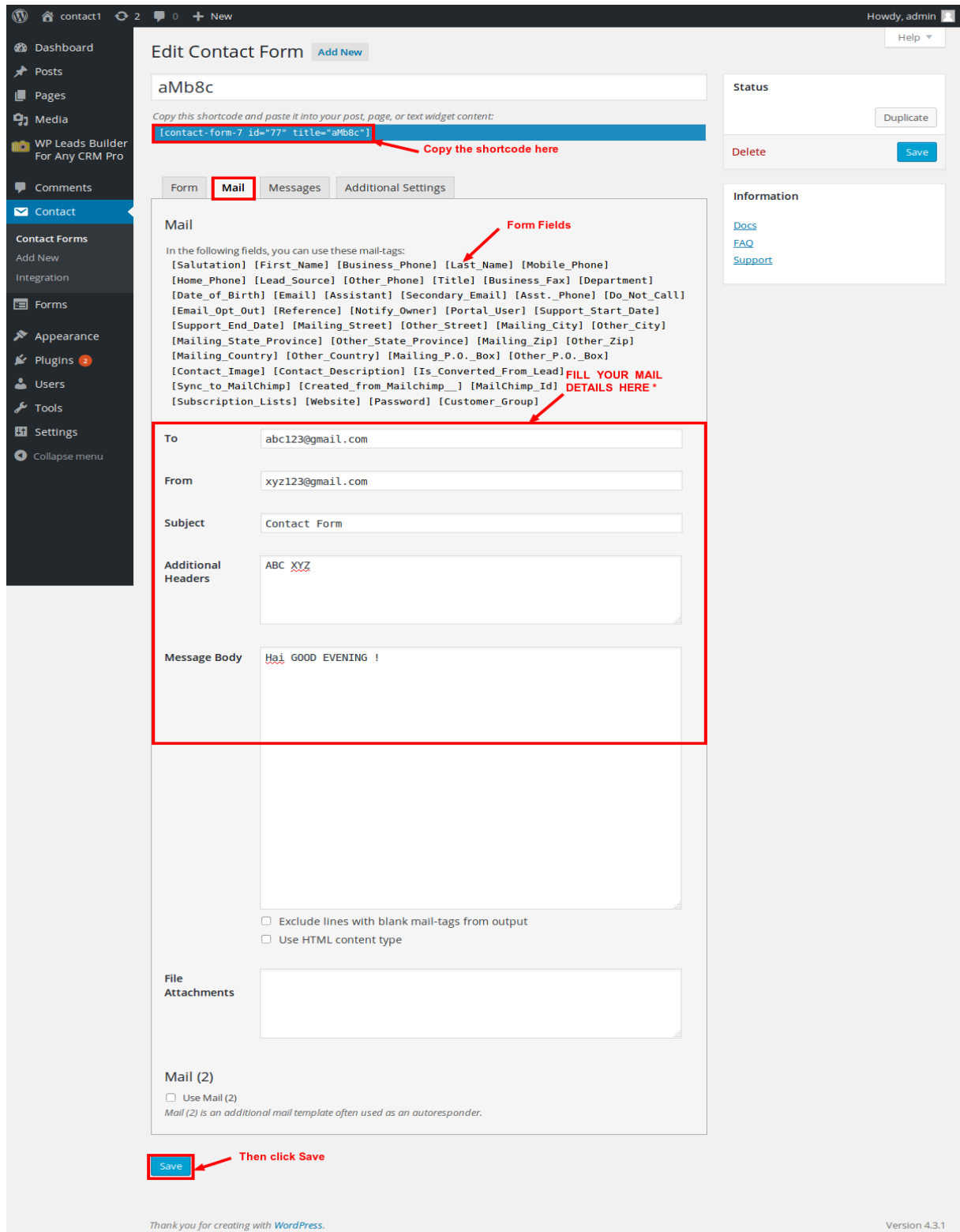
1. Click **“Contact”** which redirects you to the contact form 7 plugin.
2. There you can see the **“contact form shortcode”** which appears under **shortcode**.
3. Click the **“title”** corresponding to the shortcode to view the contact form fields.
4. And you should enter the **MAIL** details there. It is mandatory one in the contact form plugin.



### STEP 4: Enter MAIL Details \*

1. Inside **“Edit Contact Form”** page you can view the FORM settings, MAIL settings and response **Messages** and the contact form **“Shortcode”**.
2. Click **“Mail”** option to enter your E-mail details.
3. You should enter the mail details as shown below. Because when you click **Submit** button in the form it captures all of the user's entered details and send it to the E-mail which was entered by the user.

4. After entering the Mail details click “**Save**” button.
5. You can also see the response Messages by clicking “**Messages**” option as shown below.
6. Finally **copy** the contact form **shortcode** and paste it into your posts or pages.



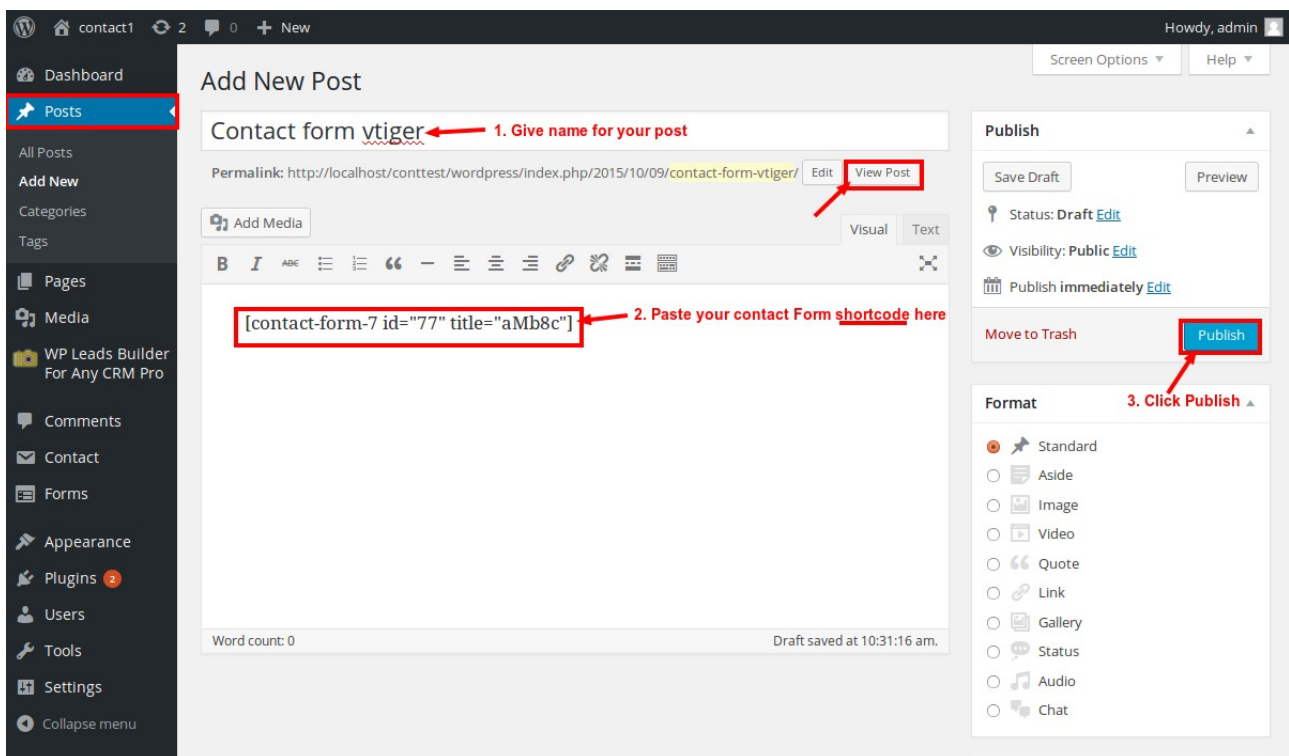
The screenshot displays the 'Edit Contact Form' interface in WordPress. The contact form ID is 'aMb8c'. A blue box highlights the shortcode `[contact-form-7 id="77" title="aMb8c"]` with a red arrow pointing to it and the text 'Copy the shortcode here'. The 'Mail' tab is selected, showing a list of mail tags and a form for configuring the email. The form fields are: To (abc123@gmail.com), From (xyz123@gmail.com), Subject (Contact Form), Additional Headers (ABC XYZ), and Message Body (Hi GOOD EVENING !). A red box highlights the 'To', 'From', 'Subject', 'Additional Headers', and 'Message Body' fields. A red arrow points to the 'Message Body' field with the text 'FILL YOUR MAIL DETAILS HERE\*'. At the bottom, a red box highlights the 'Save' button with a red arrow and the text 'Then click Save'. The interface also includes a sidebar with navigation options, a status section with 'Duplicate', 'Delete', and 'Save' buttons, and an information section with links for 'Docs', 'FAQ', and 'Support'. The footer shows 'Thank you for creating with WordPress.' and 'Version 4.3.1'.

7. When you have use the shortcode *second time* and if any changes made using **Bulk Action** then you should come here and click **Save** button once again to update the mail details.

### STEP 5: Create Post and paste the shortcode

After successfully finished the above steps **paste** the contact form shortcode in the post.

1. Go to “**Posts**” and Click “**Add New**” button. Add New Posts page will appear.
2. Enter the “**title**” for your post.
3. “**Paste**” the contact form **shortcode** as shown below.
4. Click “**publish**” to create your post.
5. Finally click “**View Post**” to see the form generated.



### STEP 6: FILL THE FORM AND SUBMIT

1. **Enter** all the “**details**” in the contact form as shown below.
2. Click “**Submit**” to send your form details to the corresponding crm.
3. When you click “**Submit**” all the form details are captured and send to your mail-id.

## Contact Form Vtiger

Salutation

Mr.

First\_Name

abc

Last\_Name\*

xyz

Mobile\_Phone

776676

Business\_Fax

abcxyz

Other\_Street

victor

Other\_City

Chennai

Other\_Country

japan

Password\*

1234

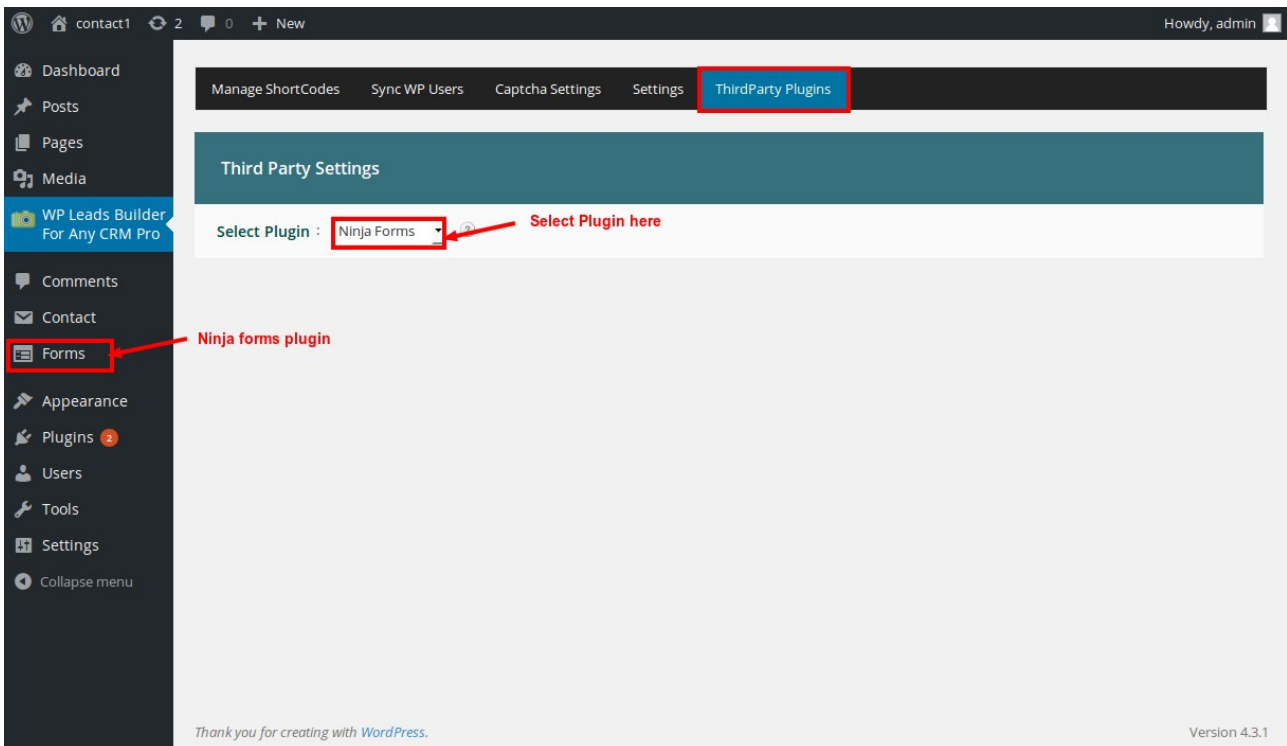
**SUBMIT**

## 2. NINJA FORMS:

### Step 1: Select Ninja Forms plugin

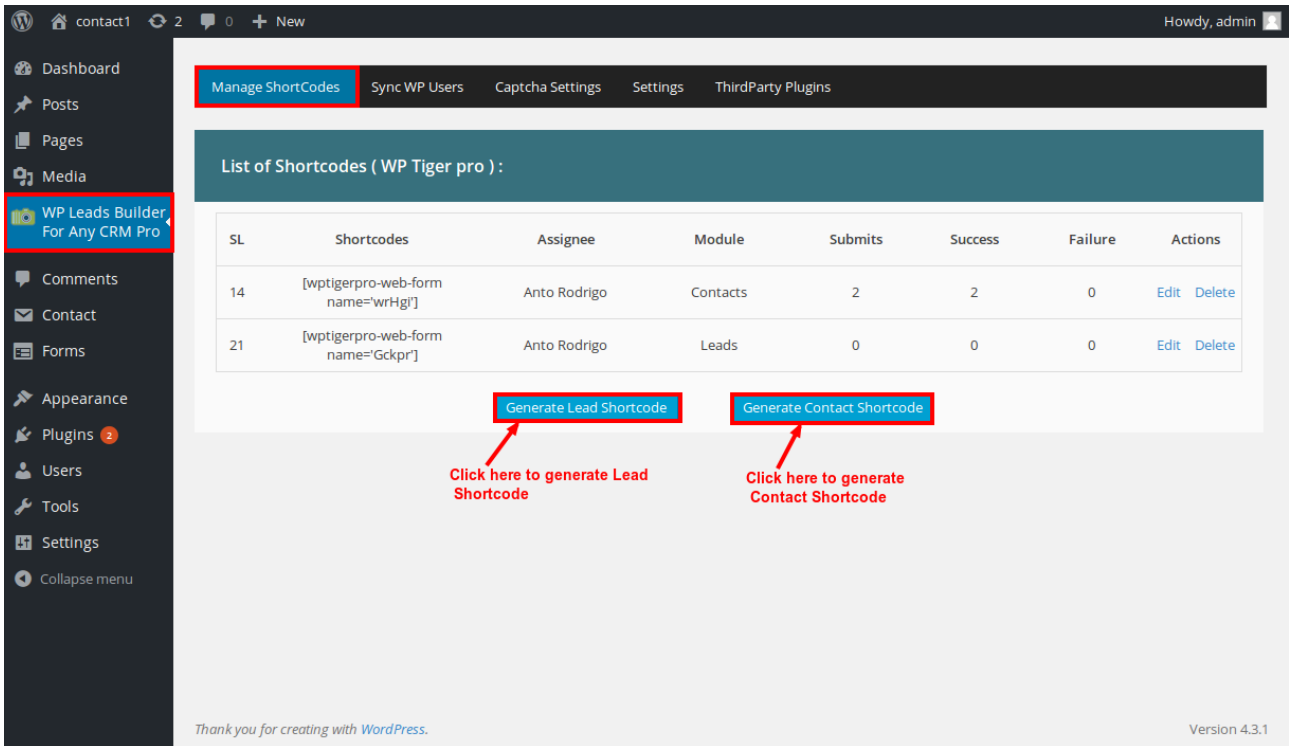
To select Ninja Forms from third party plugins:

1. Click and go to **“WP Leads Builder For Any CRM Pro”** plugin.
2. Click **“ThirdParty Plugins”** which redirects you to Third Party Settings page.
3. Then select **“Ninja Forms”** from the Select plugin drop down menu as shown below.



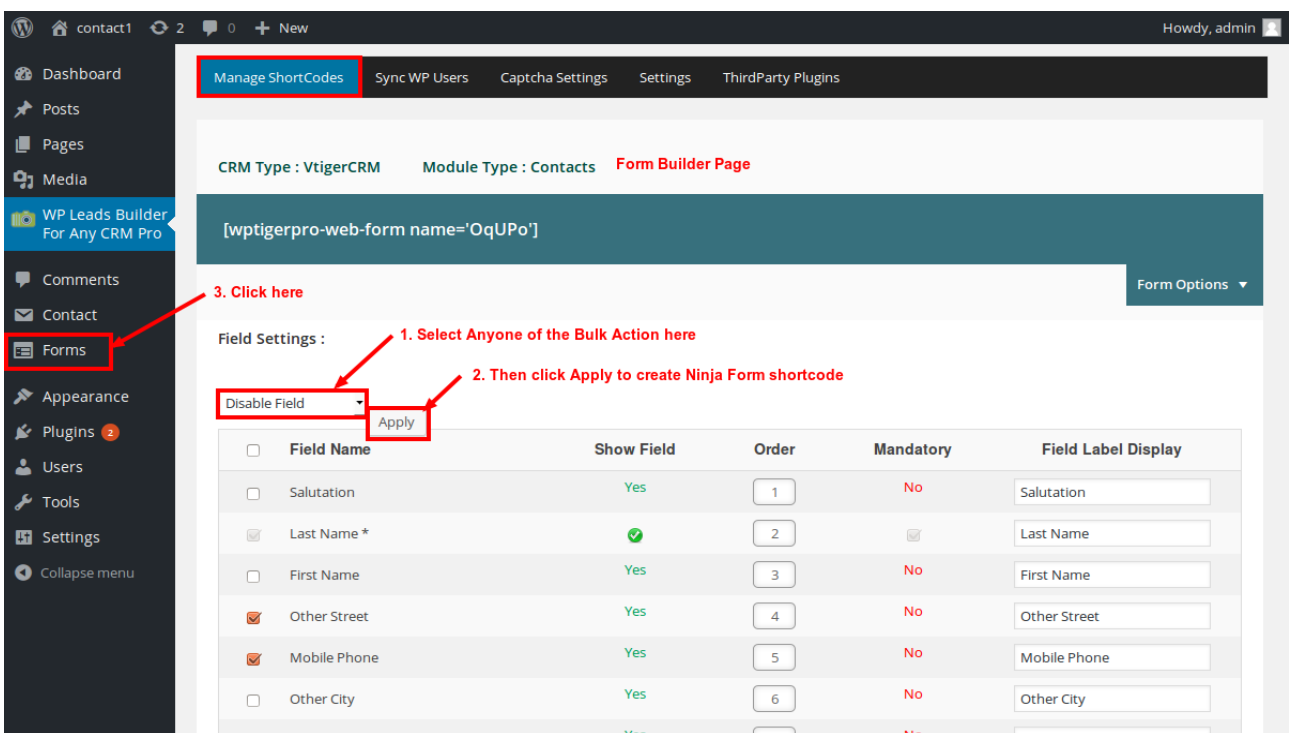
### Step 2: Generate Shortcode

1. Go to **“Manage Shortcode”** Page. Click **“Generate Lead Shortcode”** or **“Generate Contact Shortcode”** button to create Form Shortcode. It will redirect you to edit shortcode page.
2. There you can Edit Form and form field settings or you can click **“Edit”** to redirect to Form Builder Page and change the field settings.



## FORM BUILDER:

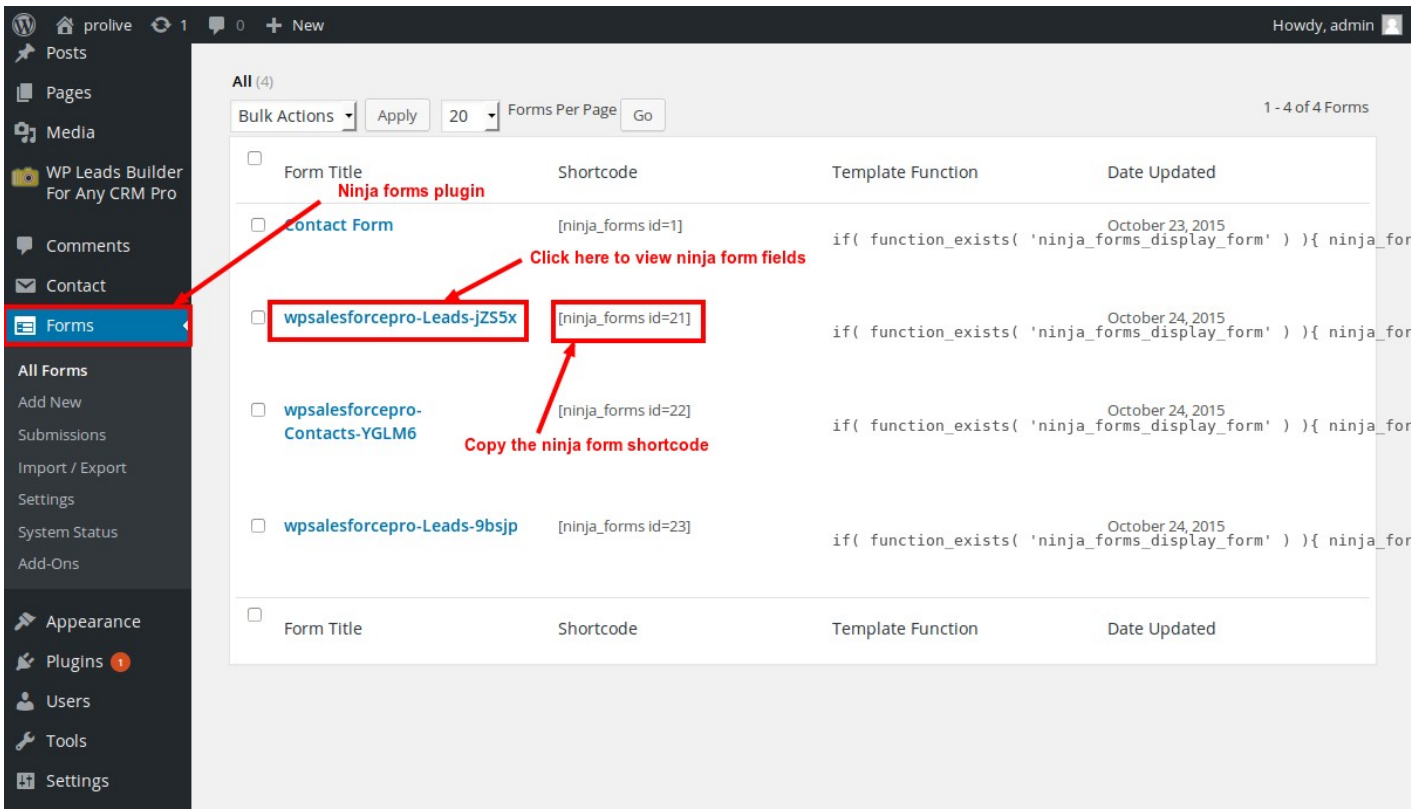
1. In the Form Builder page you should select anyone of the Action from the “**Bulk Actions**” drop down menu.
2. then click “**Apply**” button.
3. It will create a new “**shortcode**” with enabled fields in the “**Ninja Forms**” plugin.



4. Then click **“Forms”** which is the Ninja Forms plugin .
5. There you can see the contact form **“shortcode”** and form fields.

### STEP 3: Ninja Form Shortcode

1. Click **“Forms”** which redirects you to the Ninja Forms plugin page.
2. There you can see the **“Ninja form shortcode”** which appears under **shortcode**.
3. Click the **“Form Title”** corresponding to the shortcode to view the Ninja form fields.



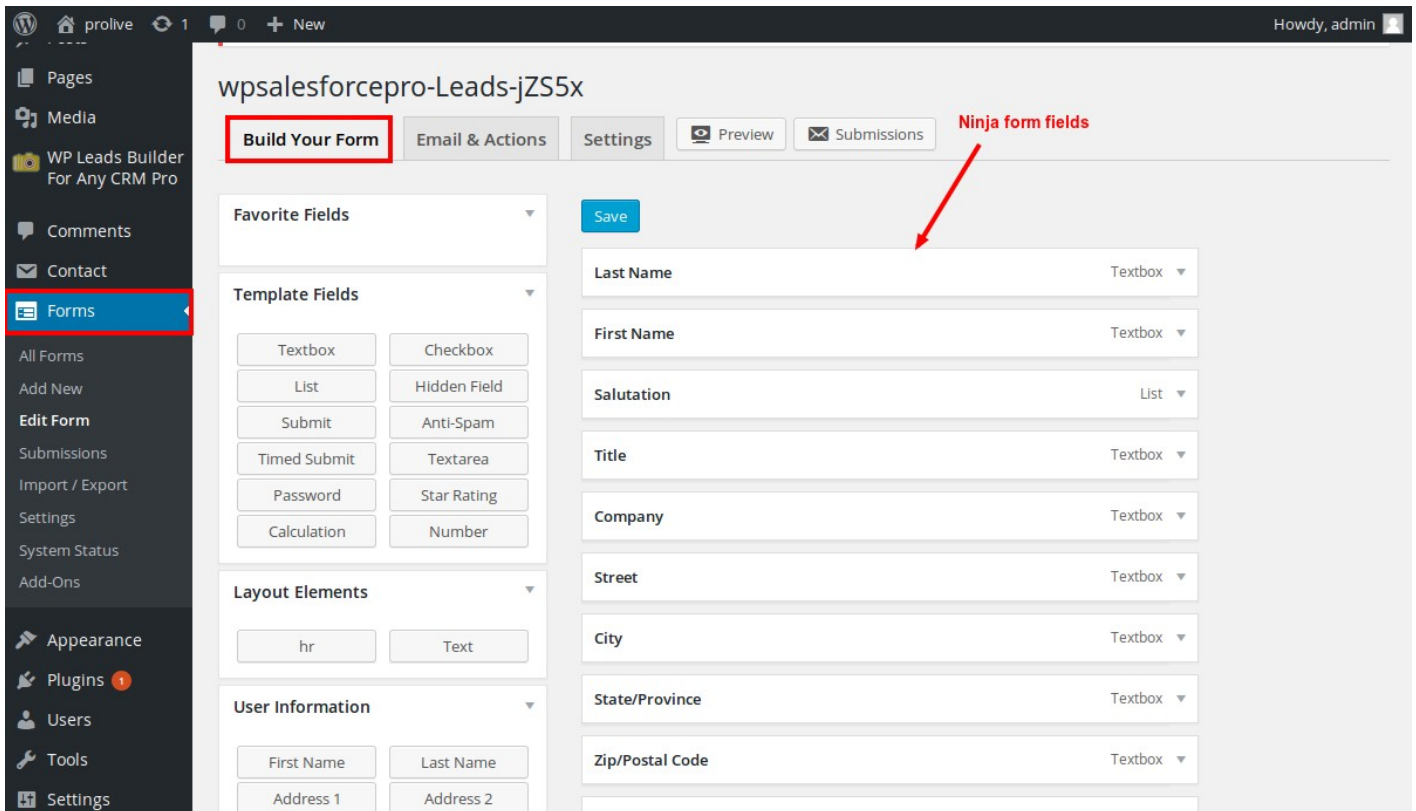
The screenshot shows the WordPress dashboard with the Ninja Forms plugin interface. The left sidebar has the 'Forms' menu item highlighted. The main content area displays a table of forms with columns for Form Title, Shortcode, Template Function, and Date Updated. Annotations include a red box around the 'Forms' menu item, a red arrow pointing to the 'Ninja forms plugin' header, a red box around the 'wpsalesforcepro-Leads-jZ55x' form title with the annotation 'Click here to view ninja form fields', and a red box around the '[ninja\_forms id=21]' shortcode with the annotation 'Copy the ninja form shortcode'.

Form Title	Shortcode	Template Function	Date Updated
<b>Ninja forms plugin</b>			
Contact Form	[ninja_forms id=1]	if( function_exists( 'ninja_forms_display_form' ) ){ ninja_for	October 23, 2015
wpsalesforcepro-Leads-jZ55x	[ninja_forms id=21]	if( function_exists( 'ninja_forms_display_form' ) ){ ninja_for	October 24, 2015
wpsalesforcepro-Contacts-YGLM6	[ninja_forms id=22]	if( function_exists( 'ninja_forms_display_form' ) ){ ninja_for	October 24, 2015
wpsalesforcepro-Leads-9bsjp	[ninja_forms id=23]	if( function_exists( 'ninja_forms_display_form' ) ){ ninja_for	October 24, 2015
Form Title	Shortcode	Template Function	Date Updated

4. **“Copy”** the Ninja Form Shortcode and paste it in your **posts** or **pages**.

### NINJA FORM FIELDS:

1. Click on the **“Build Your Form”** option to view the fields.
2. There you can see the list of enabled Ninja Form Fields.
3. You can edit the Ninja Form fields here.
4. Finally click **“Save”** button to save the changes.

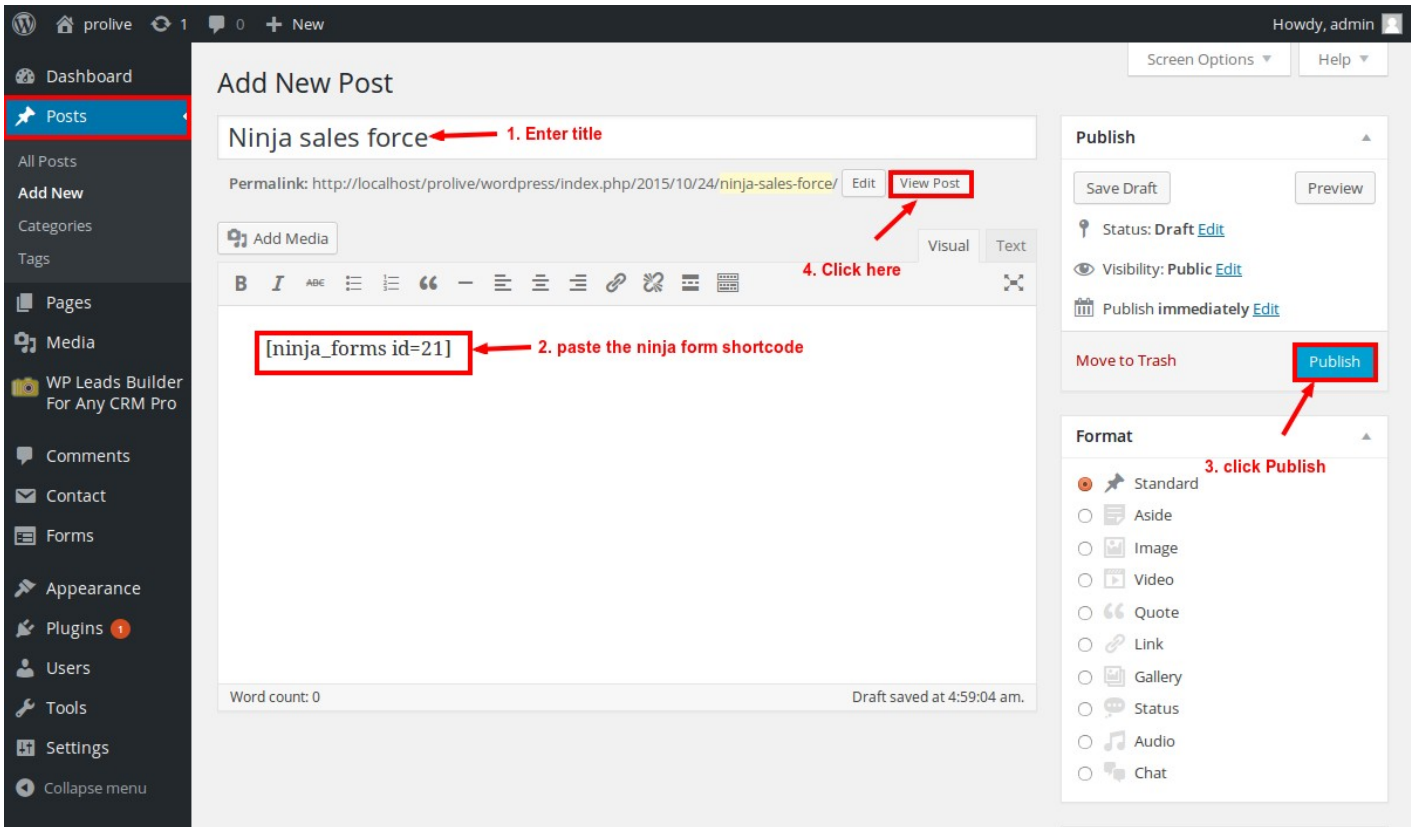


## STEP 4: Create Post and paste the shortcode

After successfully finished the above steps **paste** the Ninja form shortcode in the post.

1. Go to **“Posts”** and Click **“Add New”** button. Add New Posts page will appear.
2. Enter the **“title”** for your post.
3. **“Paste”** the Ninja form **shortcode** as shown below.
4. Click **“publish”** to create your post.
5. Finally click **“View Post”** to see the form generated.





The screenshot shows the WordPress 'Add New Post' interface. The left sidebar contains navigation options: Dashboard, Posts (highlighted), All Posts, Add New, Categories, Tags, Pages, Media, WP Leads Builder For Any CRM Pro, Comments, Contact, Forms, Appearance, Plugins (with a notification icon), Users, Tools, Settings, and Collapse menu. The main content area is titled 'Add New Post' and features a text input field containing 'Ninja sales force', with a red arrow pointing to it and the text '1. Enter title'. Below the title is a permalink: 'http://localhost/prolive/wordpress/index.php/2015/10/24/ninja-sales-force/'. To the right of the permalink are 'Edit' and 'View Post' buttons, with a red arrow pointing to 'View Post' and the text '4. Click here'. Below the permalink is a rich text editor with a toolbar containing bold, italic, text color, background color, bulleted list, numbered list, quote, link, unlink, table, and table of contents icons. The editor content contains the shortcode '[ninja\_forms id=21]', which is enclosed in a red box with a red arrow pointing to it and the text '2. paste the ninja form shortcode'. At the bottom of the editor, it shows 'Word count: 0' and 'Draft saved at 4:59:04 am.'. On the right side, there are three panels: 'Publish', 'Format', and 'Screen Options'. The 'Publish' panel includes 'Save Draft' and 'Preview' buttons, 'Status: Draft Edit', 'Visibility: Public Edit', 'Publish immediately Edit', and a 'Publish' button highlighted with a red box and a red arrow pointing to it with the text '3. click Publish'. The 'Format' panel shows a list of post formats: Standard (selected), Aside, Image, Video, Quote, Link, Gallery, Status, Audio, and Chat.

## STEP 5: FILL THE FORM AND SUBMIT

1. **Enter** all the “**details**” in the Ninja form as shown below.
2. Click “**Submit**” to send your form details to the corresponding crm.
3. If you are enabled the “**Email Notification**” in the Lead Builder Setting page then the fields are send to your mail-id during form submission.

### Ninja Form vtiger

Fields marked with an \* are required

**Salutation**

**First Name**

**Last Name \***

**Date of Birth**

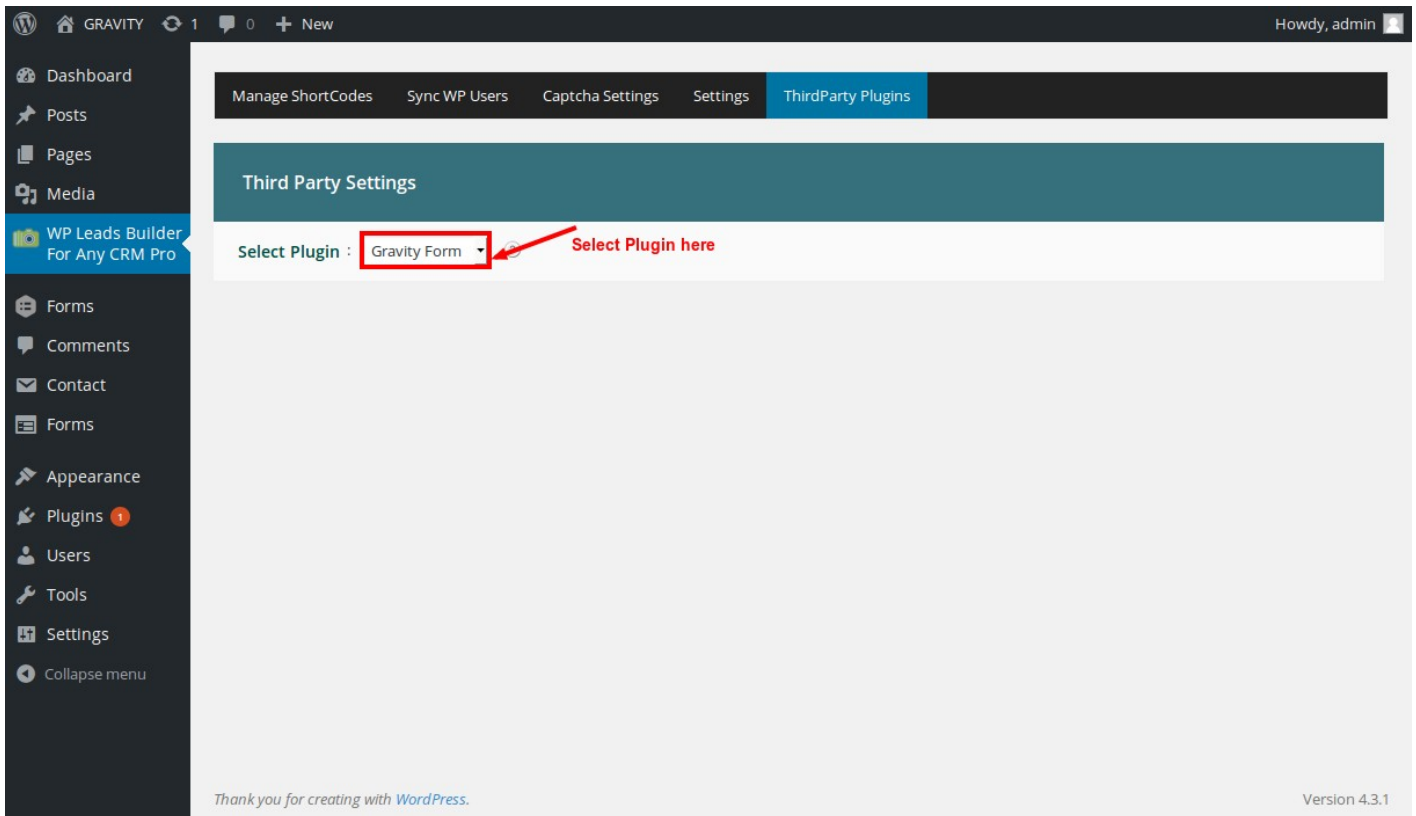
**Password \***

### 3. Gravity Forms:

#### Step 1: Select Gravity Form plugin

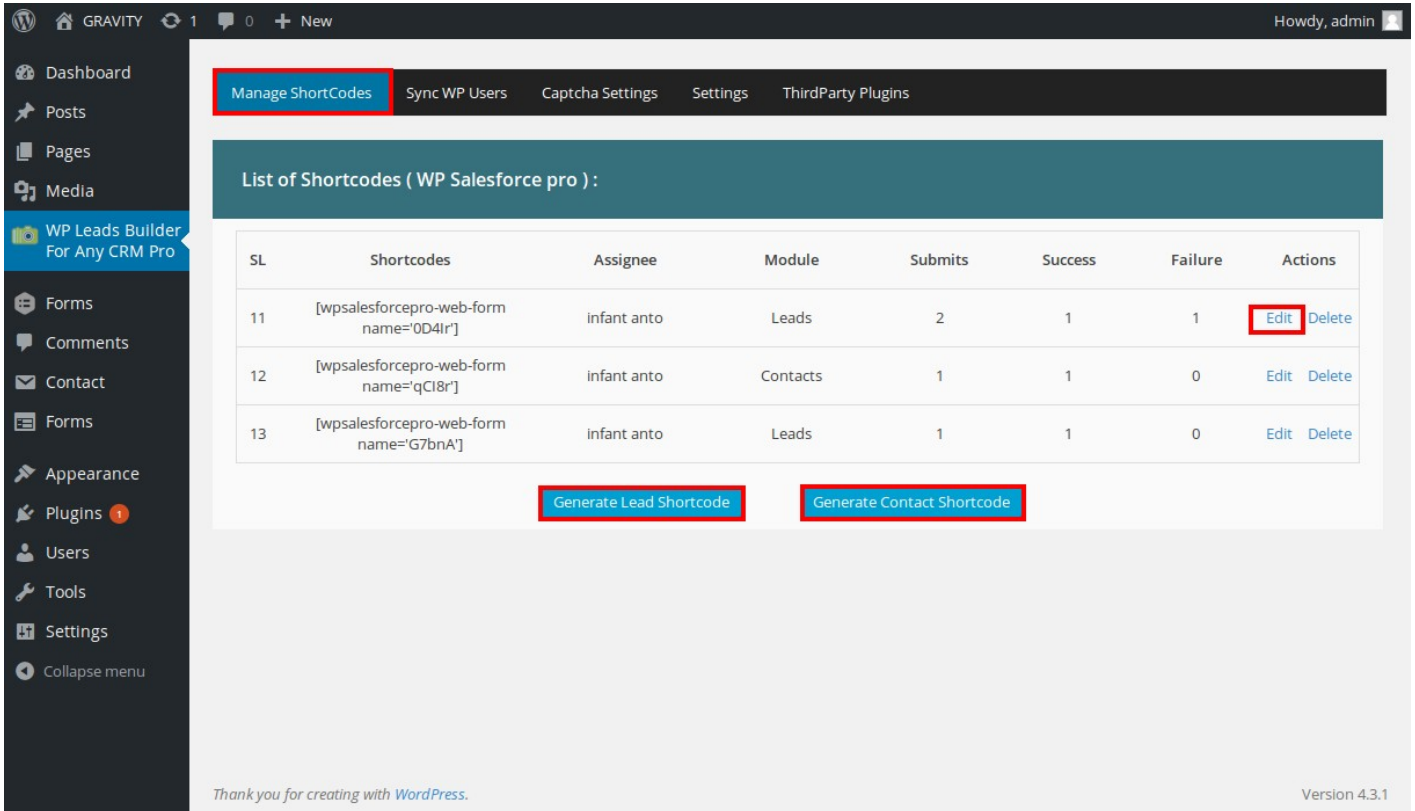
To select gravity form from third party plugins:

1. Click and go to “**WP Leads Builder For Any CRM Pro**” plugin.
2. Click “**ThirdParty Plugins**” which redirects you to Third Party Settings page.
3. Then select “**Gravity Form**” from the Select plugin drop down menu as shown below



#### Step 2: Generate Shortcode

1. Go to “**Manage Shortcode**” Page. Click “**Generate Lead Shortcode**” or “**Generate Contact Shortcode**” button to create Form Shortcode. It will redirect you to edit shortcode page
2. There you can Edit form and form field settings or you can click “**Edit**” to redirect to Form Builder Page and change the field settings.



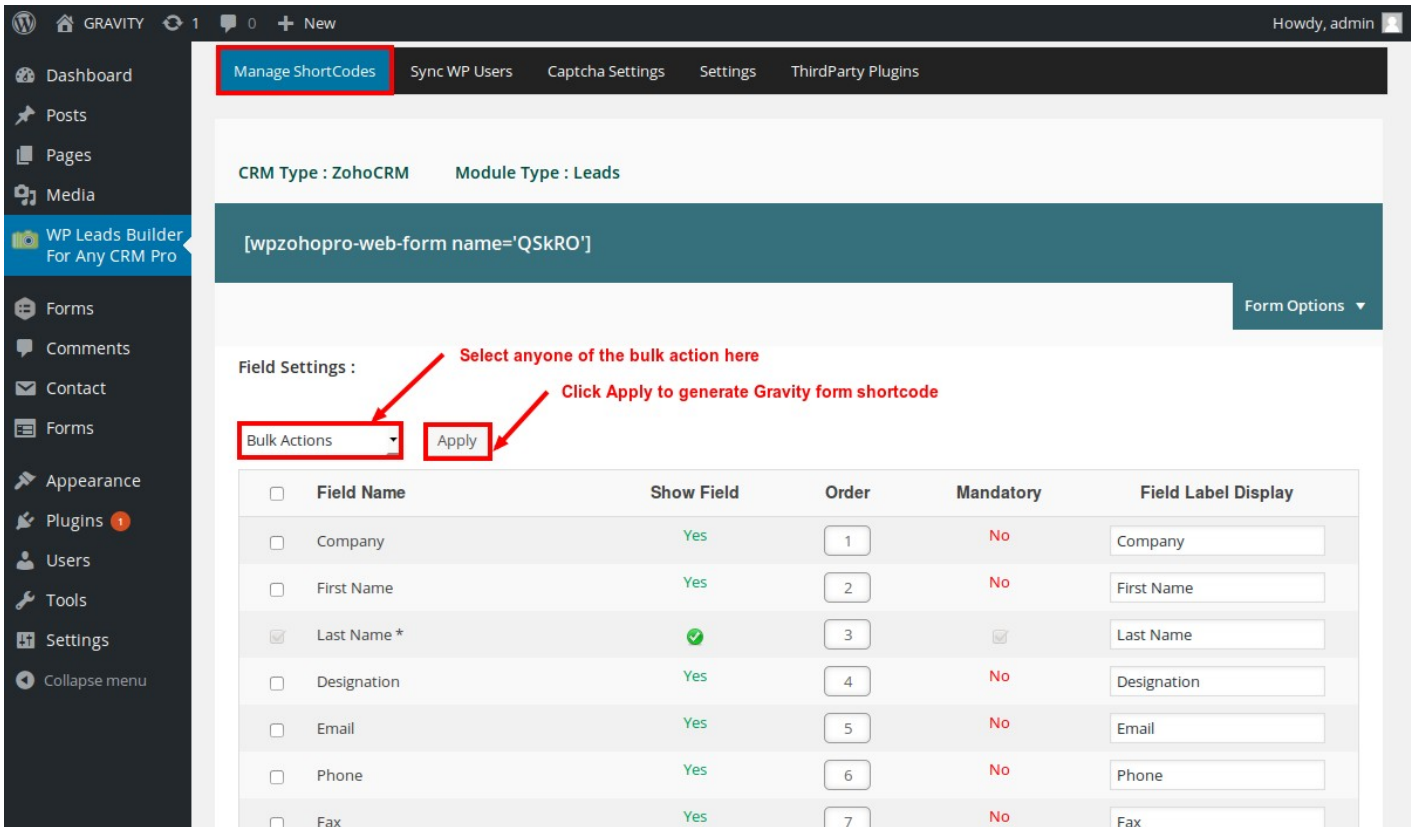
The screenshot shows the WP Leads Builder dashboard. The top navigation bar includes 'Manage ShortCodes' (highlighted), 'Sync WP Users', 'Captcha Settings', 'Settings', and 'ThirdParty Plugins'. The main content area is titled 'List of Shortcodes ( WP Salesforce pro ) :'. Below this is a table with the following data:

SL	Shortcodes	Assignee	Module	Submits	Success	Failure	Actions
11	[wpsalesforcepro-web-form name='0D4lr']	infant anto	Leads	2	1	1	<a href="#">Edit</a> <a href="#">Delete</a>
12	[wpsalesforcepro-web-form name='qC18r']	infant anto	Contacts	1	1	0	<a href="#">Edit</a> <a href="#">Delete</a>
13	[wpsalesforcepro-web-form name='G7bnA']	infant anto	Leads	1	1	0	<a href="#">Edit</a> <a href="#">Delete</a>

Below the table are two buttons: 'Generate Lead Shortcode' and 'Generate Contact Shortcode'. The footer includes 'Thank you for creating with WordPress.' and 'Version 4.3.1'.

## FORM BUILDER:

1. In the Form Builder page you should select anyone of the Action from the “**Bulk Actions**” drop down menu.
2. then click “**Apply**” button.
3. It will create a gravity form “**id**” and “**title**” with enabled fields in the “**Gravity Form**” plugin.



CRM Type : ZohoCRM    Module Type : Leads

[wpzohopro-web-form name='QSkRO']

Field Settings :

Select anyone of the bulk action here

Click Apply to generate Gravity form shortcode

<input type="checkbox"/>	Field Name	Show Field	Order	Mandatory	Field Label Display
<input type="checkbox"/>	Company	Yes	1	No	Company
<input type="checkbox"/>	First Name	Yes	2	No	First Name
<input checked="" type="checkbox"/>	Last Name *	Yes	3	<input checked="" type="checkbox"/>	Last Name
<input type="checkbox"/>	Designation	Yes	4	No	Designation
<input type="checkbox"/>	Email	Yes	5	No	Email
<input type="checkbox"/>	Phone	Yes	6	No	Phone
<input type="checkbox"/>	Fax	Yes	7	No	Fax

4. Then click **“Forms”** which is the Gravity form plugin.

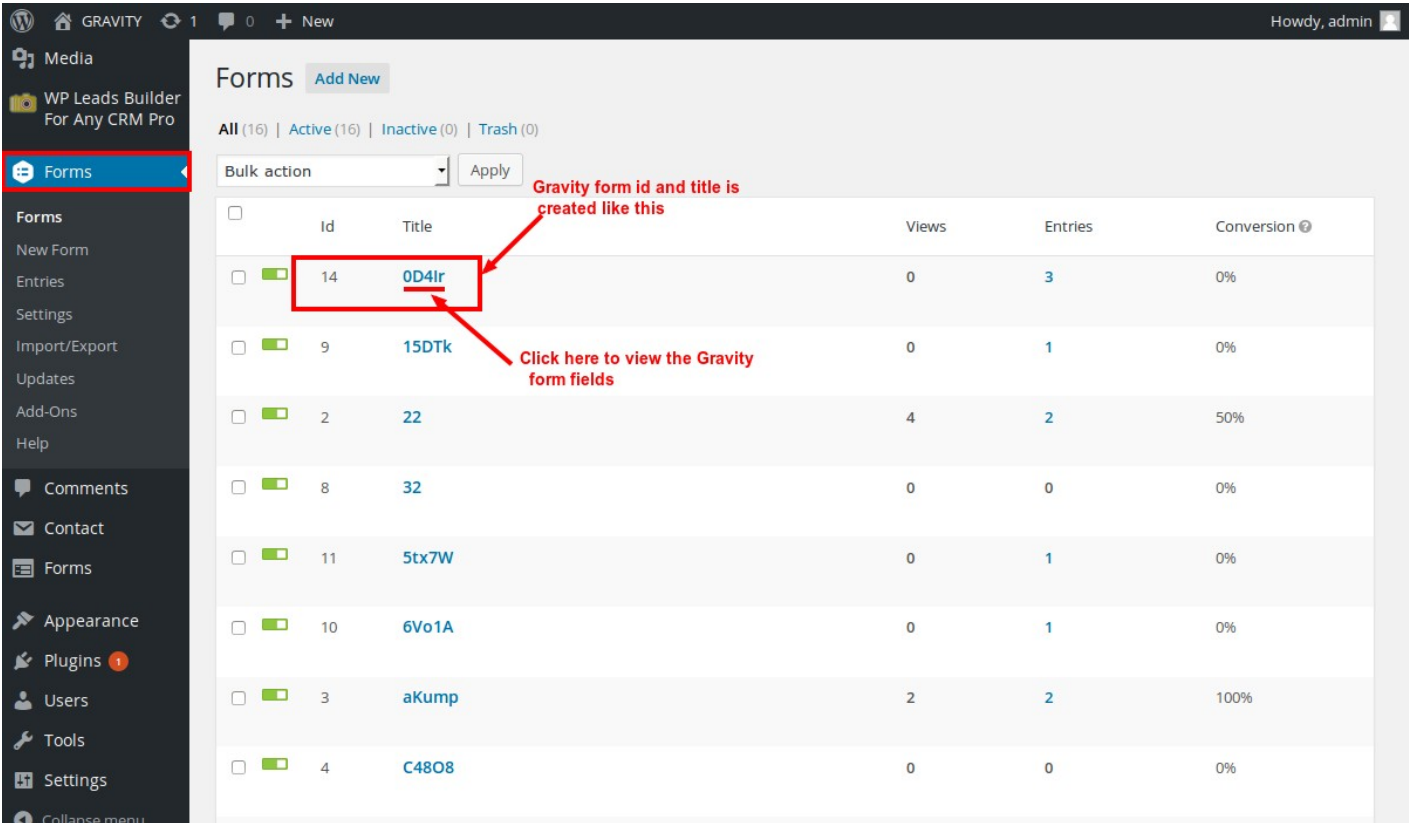
5. There you can see the Gravity form **“id”** and **“title”** with form fields.

### STEP 3: Gravity Form Shortcode

1. Click **“Forms”** which redirects you to the gravity form plugin.

2. There you can see the gravity form **“id”** and **“title”**.

3. Click the **“title”** to view the gravity form fields.



Forms [Add New](#)

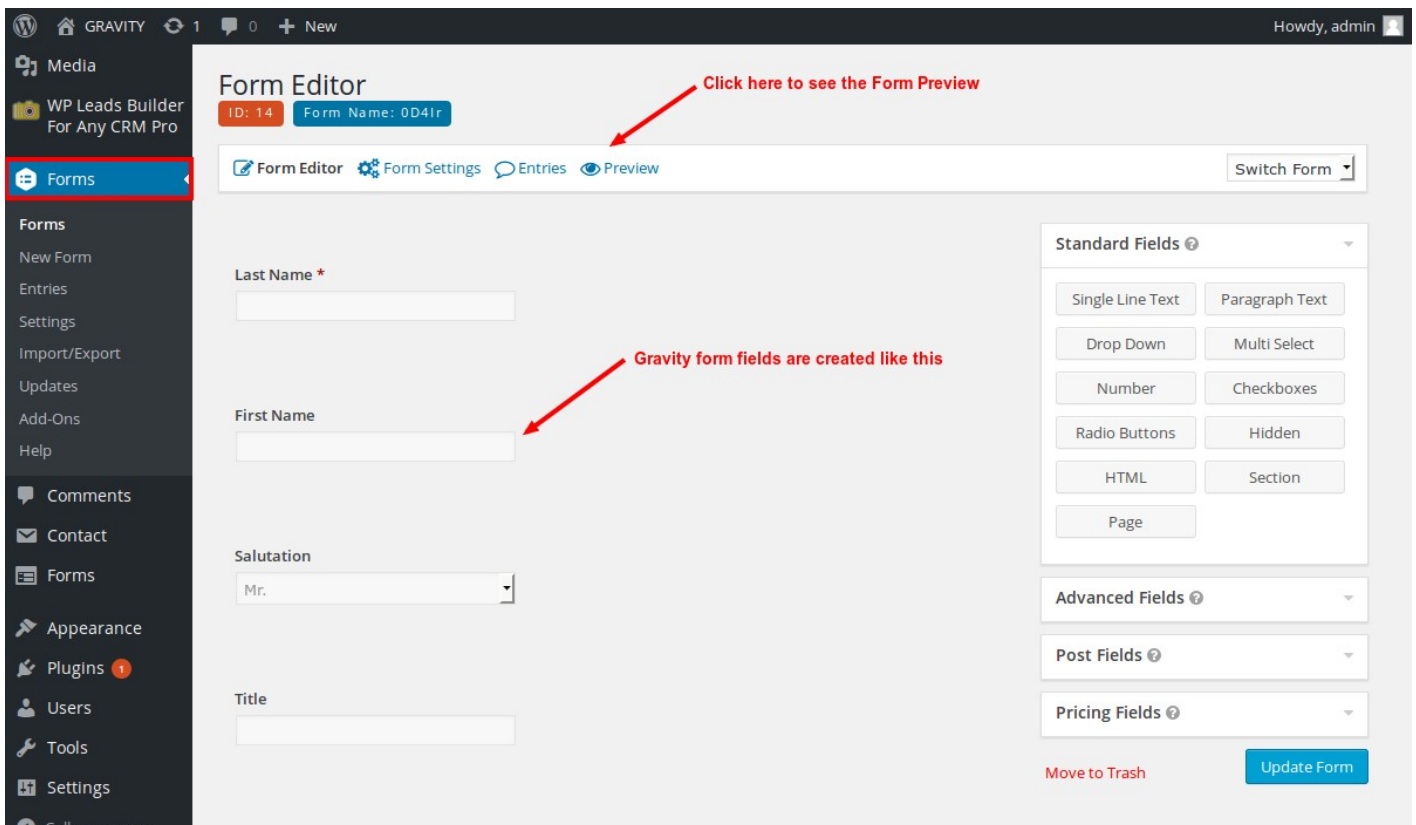
All (16) | Active (16) | Inactive (0) | Trash (0)

Bulk action

<input type="checkbox"/>	Id	Title	Views	Entries	Conversion <sup>?</sup>
<input type="checkbox"/>	14	0D4lr	0	3	0%
<input type="checkbox"/>	9	15DTk	0	1	0%
<input type="checkbox"/>	2	22	4	2	50%
<input type="checkbox"/>	8	32	0	0	0%
<input type="checkbox"/>	11	5tx7W	0	1	0%
<input type="checkbox"/>	10	6Vo1A	0	1	0%
<input type="checkbox"/>	3	aKump	2	2	100%
<input type="checkbox"/>	4	C48O8	0	0	0%

## Gravity Form Fields:

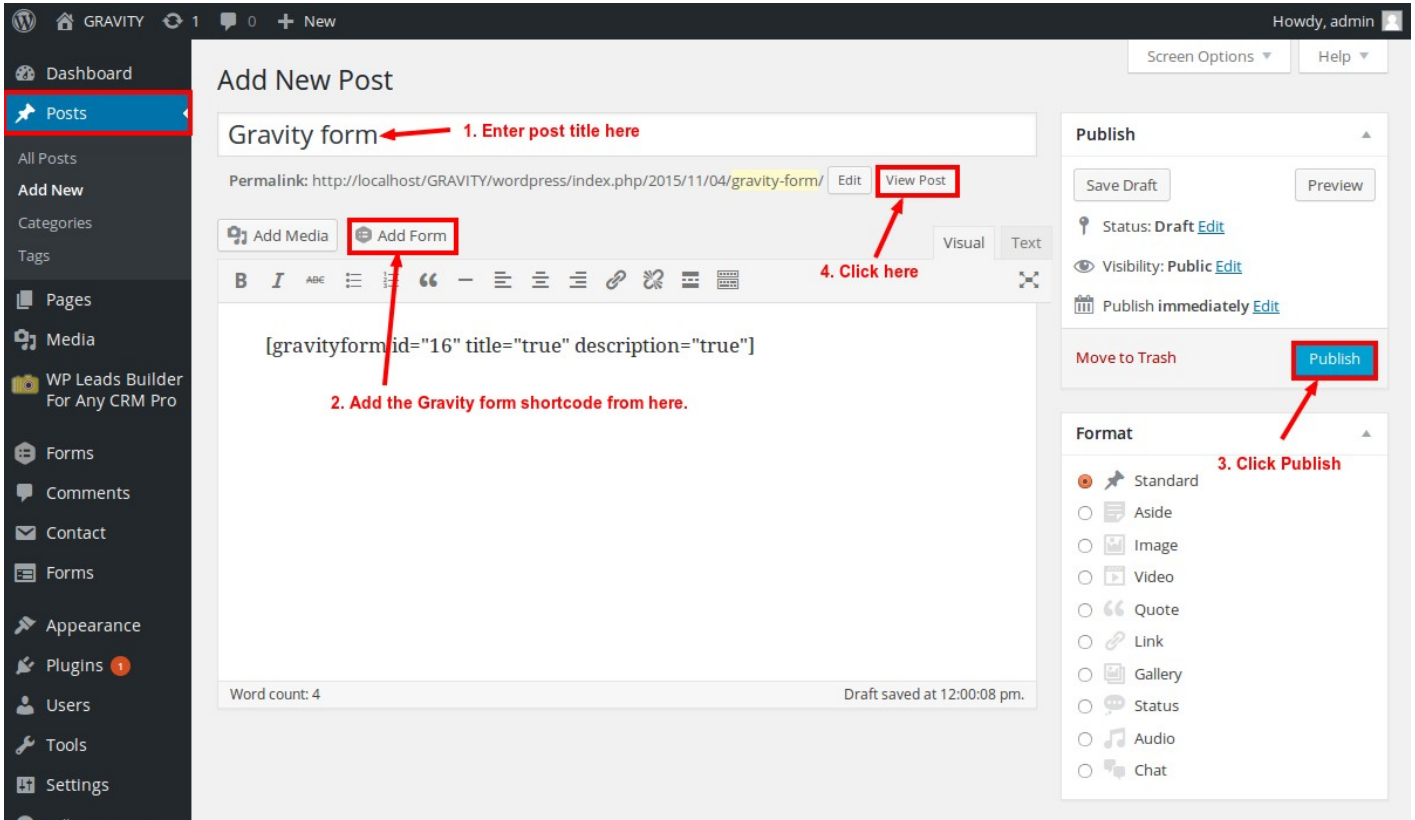
1. Click **“title”** in the gravity form plugin.
2. There you can see the Gravity form **“fields”** created and click **“Preview”** to display the form preview.



## STEP 4: Create Post and Add the shortcode

After successfully finished the above steps Select the Gravity form.  
in the post.

1. Go to **“Posts”** and Click **“Add New”** button. Add New Posts page will appear.
2. Enter the **“title”** for your post.
3. Click **“Add Form”** to add the gravity form shortcode in the post content.

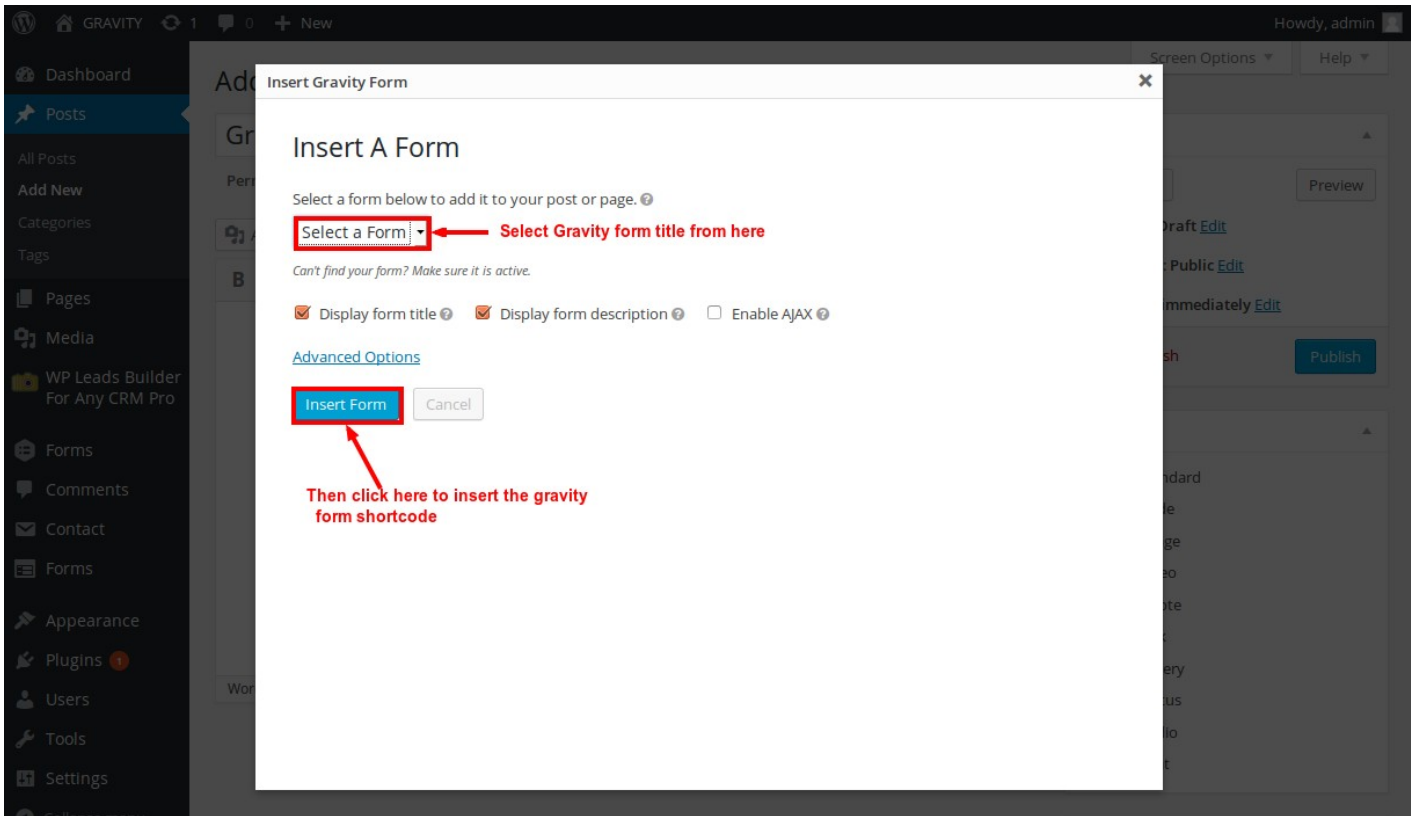


The screenshot shows the WordPress 'Add New Post' editor interface. The title field contains 'Gravity form' with a red arrow pointing to it and the text '1. Enter post title here'. Below the title, the 'Add Form' button is highlighted with a red box and a red arrow pointing to it, with the text '2. Add the Gravity form shortcode from here.' below it. The main content area contains the shortcode '[gravityformid="16" title="true" description="true"]'. The 'Publish' button in the right-hand sidebar is highlighted with a red box and a red arrow pointing to it, with the text '3. Click Publish' above it. The 'View Post' button is also highlighted with a red box and a red arrow pointing to it, with the text '4. Click here' below it. The left sidebar shows the 'Posts' menu item highlighted with a red box. The bottom of the editor shows 'Word count: 4' and 'Draft saved at 12:00:08 pm.'

4. Select a gravity form title from the drop down menu.

5. Then click “**Insert Form**” to add the gravity form shortcode in the post content.





6. Click “**publish**” to create your post.

7. Finally click “**View Post**” to see the form generated.

### **STEP 5: FILL THE FORM AND SUBMIT**

1. **Enter** all the “**details**” in the gravity form as shown below.

2. Click “**Submit**” to send your form details to the corresponding crm.

3. When you click “**Submit**” all the form details are captured and send to your mail-id.

## Gravity form

**G7bnA**

G7bnA

**Last Name \***

**First Name**

**Salutation**

**Title**

**Company \***

**Street**

**Mobile Phone**

**Email**

**Website**

**Status \***

**SUBMIT**

4. After all the form fields are submitted to crm the “**Successfully Submitted**” confirmation message will be displayed.