Using the Web Capture function to import data from web forms

Overview

Most businesses have a form on their web site that visitors can fill in to request more information. Typically, such form will send an email containing the information that the visitor has entered to one or multiple people. Someone then has to manually process that information request: record the name in a database, call the person back to confirm their details, and assign a task to one of the sales reps to follow up.

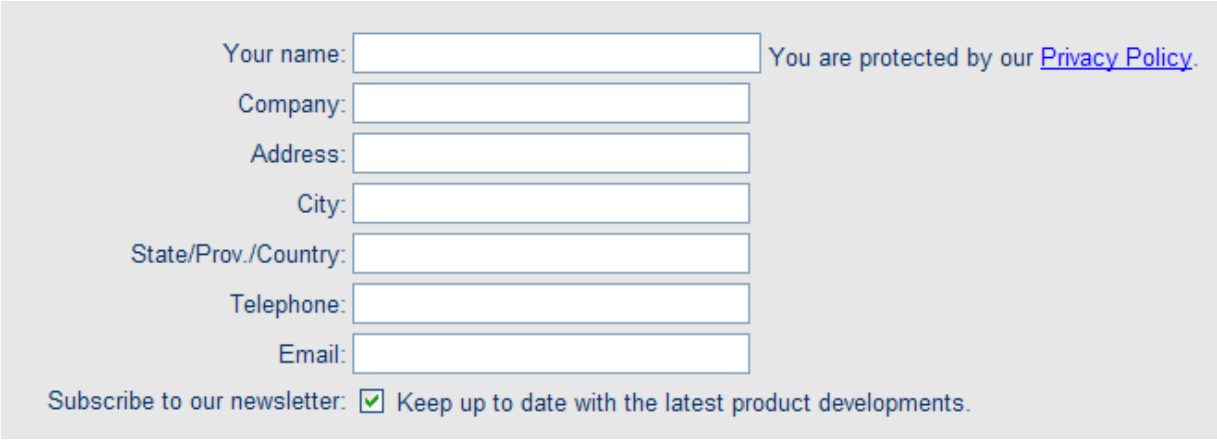
It is a manual process that is fraught with problems. The biggest issue is when web leads are not followed up in timely matter. The person who left their details on your web site is upset with the lack of response and goes somewhere else.

The **Web Capture** module in Legrand CRM enables you to automate this process, thereby ensuring that no web lead is ever lost or not responded to.

This Application Note describes how to configure the Web Capture module in Legrand CRM and how to format the emails generated by your web forms so that they can be processed.

Web Forms

Surf the web and you will often encounter forms. Some, like the example below, simply ask you for basic contact information in order to send you product information.



Others, like the one shown on the next page, may be more complex and ask for a whole range of information in order to direct your question to the right department or the right person.

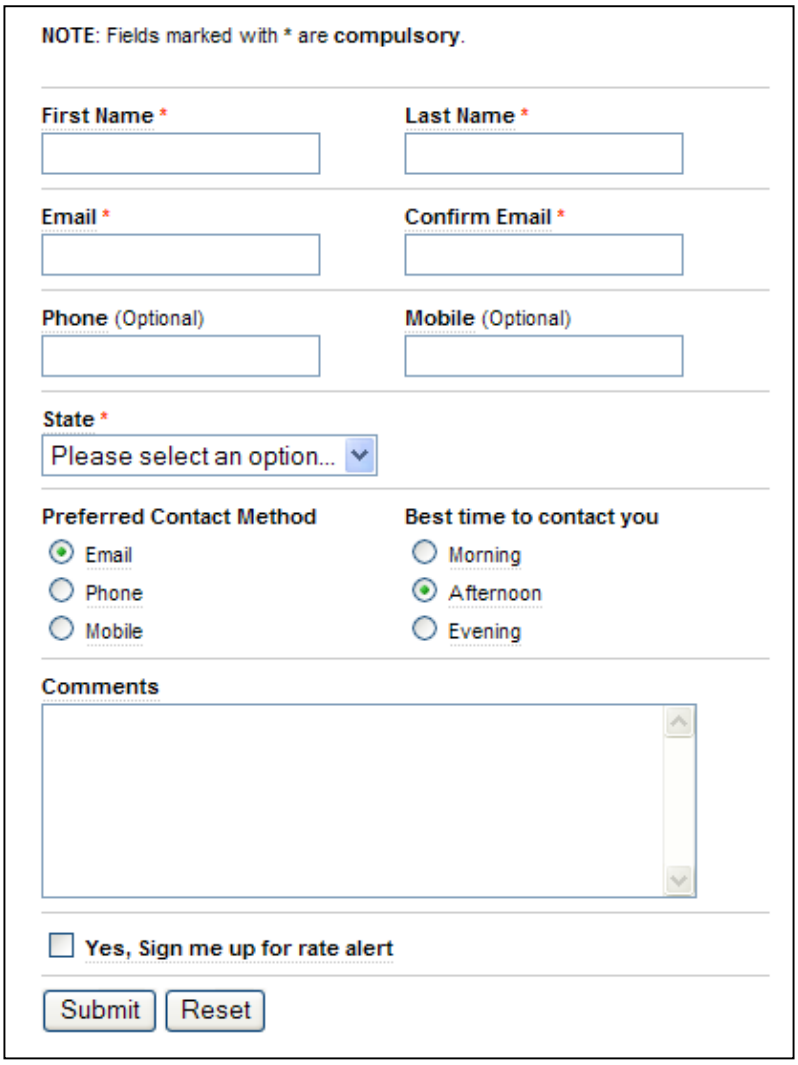
In most cases the **Submit** or **Send** button on the web form causes an email to be sent to a specific email account; for instance, *inforequest@yourcompany.com*

The **Web Capture** module in Legrand CRM enables you to automate the processing of forms submitted at your web site.

This is made possible by defining a specific format for the email that is generated from the form at your web site.

By conforming to the format that Legrand CRM has specified, the email that is generated at your web site can contain instructions that specify what to do with the information that was collected in the form:-

- Whether to simply create a Contact record or to also create a Sales Opportunity record
- Where to put the data in the Legrand CRM database



A 5-step process

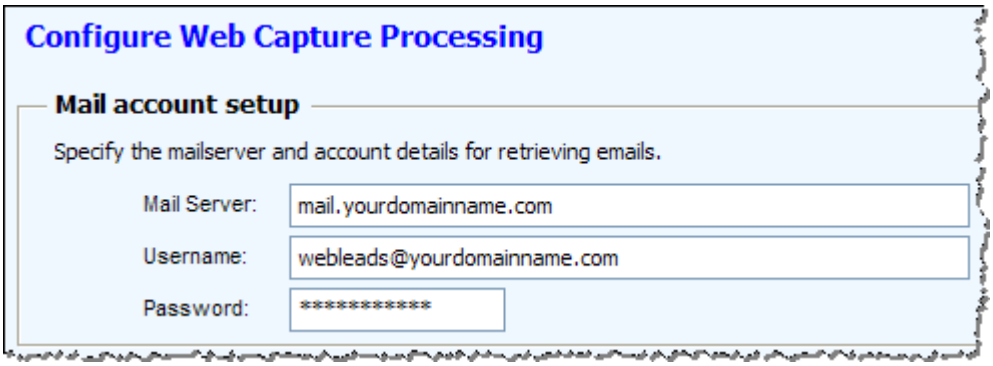
In essence there are five steps

1. Create a dedicated email account that will be used by the Web Capture module
2. Decide which data you will collect in the web form(s) and decide where you will place that data in the Legrand CRM database
3. Have a Web Designer create the web form, which includes the creation of the email template formatted according to Legrand CRM specifications
4. Configure the email reader in the Web Capture module and specify the actions it should perform.
5. Determine which user accounts in Legrand CRM will have access to the Web Capture function and assign to them the required User Permissions

Step 1: Create a dedicated email account

The Web Capture module includes an email reader to retrieve emails from your mail server.

You need to have a dedicate email account to which the web form submissions are sent. This email account can be anything you want; examples are *weblead@yourcompany.com* or *webrequest@yourcompany.com*, but it could also be *12345@yourcompany.com*



In the configuration screen of the Web Capture module you will need to specify the mail server, mail account and password.

Step 2: Mapping your web form to data in Legrand CRM

This is probably one of the most difficult parts of your Web strategy: how much data to request from web visitors? Ask for too much and some visitors will not bother to complete the form, ask too little and you will not have enough information to determine whether this is the right prospect for you.

Whatever information you decide to collect on the web form needs to be mapped to fields in your Legrand CRM database, otherwise what is the point of collecting this data if it is not going to be used.

The key element in this step is to identify which Company, Contact fields in the Legrand CRM database you will use to store the data that is collected at your web site.

Creating Opportunity and Customer Service records

In addition to creating Company and Contact records you can also create Opportunity and Customer Service records. You could, for instance, have a dedicated web form that is used to capture web leads for specific sales offers and have the lead processing function create an Opportunity record.

Or, you could have a support form on your web site that collects information from existing customers, sends an email with the provided information to the Web Capture email and have the lead processing function create a Customer Service record.

Why not automatically create the records?

Sometimes we are asked why doesn't Legrand CRM automatically create the company, contact, opportunity and/or customer service records automatically? In two words the answer is 'spam' and 'quality'.

Spam – there is no doubt that the moment you put a web form on your web site you'll start receiving some spam from time to time, despite the measures your web designer has taken. You don't want your CRM database to populated with this.

Quality – people will make typing mistakes, or submit the same information twice, or are already in your CRM database but have used a different email address to submit the inquiry or support question.

This is why the Web Capture function provides **assisted processing** – no need to re-key the data, but you can review the data, search for an existing contact and decide how to process the information that was submitted in the web form.

Step 3: Creating the web form and email template

Now comes the technical part: creating the web form and programming that form to generate an email in the appropriate format so that it can be processed by the Web Capture module in Legrand CRM.

This should be an easy task for an experienced Web Designer.

Please note that data verification should be done at the web form. For instance, a Contact record as a minimum requires a Last Name; therefore your web form should not accept submissions without a name. There probably are a number of validation rules you may want to implement; e.g. email address is required, etc…

The email 'Subject' determines how information is processed

The content in the 'Subject' of the email determines how the information is processed. The Web Capture module allows you to process three different types of web forms:

- **Web lead**: creates Contact and Company records, if applicable, then creates an Activity record and, optionally, a Task record.
- **Sales lead**: performs the same as Web lead and in addition also creates a new Opportunity record
- **Service request**: performs the same as Web lead and creates a new Customer Service record

If the Subject line contains any of the words '*Web Lead*', '*Web Capture*' or '*Weblead*' the system performs the Web Lead function.

If the Subject line contains either '*Sales Lead*', '*Sales Opportunity*' or '*SalesOpportunity*' the email is processed as a sales opportunity.

If the Subject line contains either '*Support Request*', '*Support Issue*' or '*Service Issue*' the email is processed as a customer service issue.

Contact record creation rule

When a visitor fills in a web form she/he always has to supply a name and, optionally, a company name.

The Web Capture function will search the existing database for an exact match of FirstName + LastName. If it cannot find an exact match a new Contact record will be created. If it can find an exact match no new Contact record will be created; the Activity record and other optional records will be created for the existing Contact.

Account/Company record creation rule

If a Company name was supplied in the email the Web Capture function will scan the database for any existing record where there is an exact match in the Company name. If there is an exact match no new record is created.

The body of the email

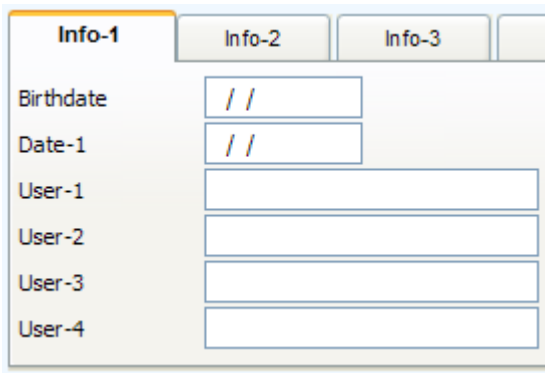
The body of the email contains the data that the web visitor supplied, together with a Legrand merge code which instructs the system where to store the data. You can access all the fields in the Company and Contact records and, if a Sales lead or Service request, the fields in the opportunity and customer service records.

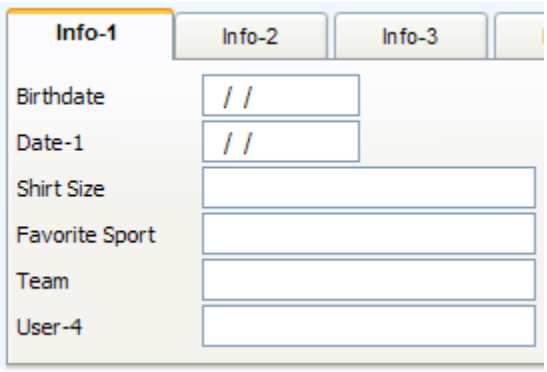
The format is: **[#mergecode#]*<screen label>* data**

[#mergecode#]	This has to be a valid Legrand CRM merge code; i.e. one of the merge codes that are used in Word and email templates like [#Contact_User03#]
<screen label>	This optional information represents the screen label that you have assigned to the data element. This information will not be processed. (see below)
Data	This is the actual piece of data that will be recorded in the database

The reason for the existence of *<screen label>* is simply to aid in the visual interpretation of the data in the email. From the day you started using Legrand CRM you would have configured all the screen captions to reflect terminology that applies in your business and to properly identify what each data field represents.

For instance, in the example below you will notice on the left hand side the raw un-configured view of a Contact record. On the right hand side you can see how the *User01, User02 and User03* fields have been renamed to 'Shirt Size', 'Favorite Sport' and 'Team'





The merge codes for those three fields are [#Contact_User01#], [#Contact_User02#] and [#Contact_User03#]. So, if your web form were to ask the web visitor what their favorite sport and team is, and what their shirt size is, the way you would transmit that data in the email is:-

```
[#CONTACT_USER01#]  XL
[#CONTACT_USER02#]  NFL
[#CONTACT_USER03#]  The Raiders
```

While the above is what the application requires to process the data it is not easy to read for a person. How are we to remember what is stored in the User01, User02 and User03 fields?

One way to make it easier for an individual to read the email is to include the screen label. The above email then transforms to:-

```
[#CONTACT_USER01#]<shirt size>  XL
[#CONTACT_USER02#]<favorite sport>  NFL
[#CONTACT_USER03#]<team>  The Raiders
```

So, to recoup, everything that is found between brackets (<>) immediately after the merge codes is ignored, it is only used for increased readability of the email.

Address data uses different merge codes

Address data is a different situation that requires the use of special merge codes. Why? Because the location where the address information will be stored may vary with each web visitor.

If a web visitor belongs to a Company you would want their address information to be recorded in the company record, but if the web visitor does not belong to a company or if the visitor decided to specify their home address then the address information would need to go in the Contact record.

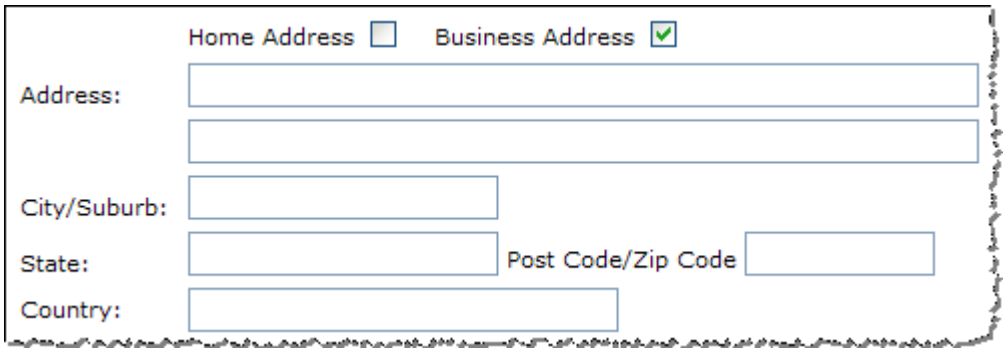
To spare you the effort of writing code in your web form which either puts Company address merge codes or Contact address merge codes in the email you can instead use a generic address code and use a code called [#ISHOMEADDRESS#] to instruct the application where to store the data.

It is for this reason that the address merge codes used in the email are:-

```
[#ISHOMEADDRESS#]  False
[#ADDRESS1#] 554 Market Street, Suite 904
[#ADDRESS2#]
[#CITY#]   San Francisco
[#STATE#]  CA
[#CODE#]   94104
[#COUNTRY#]   USA
```

As you can see the address merge code do not indicate whether the address data is going into the Contact record or the Company record. The [#ISHOMEADDRESS#] code is used to instruct the system where to store the address data.

Below is an example of how your web form could ask the visitor whether the supplied address is a home or a business address.



The final remark to make before we show some examples is to point out that the email generated by your web form **must be in plain text format**, not in rich text or HTML format! Your web designer will know how to do this.

The first example is of an email used to capture Contact and Account information, i.e. a Web Lead.

```
Subject:  Web Lead
BODY of email:
[#COMPANY_NAME#]   Mega Corporation
[#CONTACT_TITLE#]  Ms.
[#CONTACT_FIRSTNAME#] Nikki
[#CONTACT_LASTNAME#]  Burrows
[#CONTACT_EMAIL1#] n.burrows@megacorp.biz
[#ISHOMEADDRESS#]  False
[#ADDRESS1#] 554 Market Street, Ste 904
[#ADDRESS2#]
[#CITY#]   San Francisco
[#STATE#]  CA
[#CODE#]   94104
[#COUNTRY#]   USA
[#COMPANY_PHONE#]   415-123-4567
[#COMPANY_KEYWORD#]  Web Lead
[#CONTACT_KEYWORD#]  Newsletter1
[#CONTACT_KEYWORD#]  Newsletter2
[#CONTACT_PHONE1#]   415-999-9999
[#CONTACT_USER01#]<shirt size>  XL
[#CONTACT_USER02#]<favorite sport>  NFL
[#CONTACT_USER03#]<team>  The Raiders
[#CONTACT_BIRTHDATE#] 08/04/1984
[#CONTACT_NOTES#] need a great CRM that is easy to use
```

When processing this email the Web Capture function will first check if there already is a contact 'Nikki Burrows' in the database.

If there is an exact match the system will not create a new contact record <u>and will not update the existing Contact record with the data provided in the web form, except for Keyword assignments.</u> Why? Because we don't want the web visitor to directly update their CRM record, that would require a lot more business logic to control what can or cannot be changed by the web visitor.

An Activity record is created which contains all the information that the visitor provided at the web site.

In addition, if the email contains keyword assignments – e.g. the form contains an "Add me to the mailing list" checkbox or an "I'm interested in product A" checkbox – then these will be added to the existing record.

If the contact Nikki Burrows does not yet exist in the database then a new Contact record is created. The system checks if there is an existing Company record, based on an exact match of the company name, and if none is found a new company record is created.

Below is an example of an email to capture a Sales Lead . It performs the same Contact and Company processing as for the Web Lead but in addition it also creates an opportunity record.

```
Subject:  Sales Lead
BODY of email:
[#COMPANY_NAME#]   Mega Corporation
[#CONTACT_TITLE#]  Ms
[#CONTACT_FIRSTNAME#] Nikki
[#CONTACT_LASTNAME#]  Burrows
[#CONTACT_EMAIL1#] n.burrows@megacorp.biz
[#ISHOMEADDRESS#]  False
[#ADDRESS1#] 554 Market Street, Ste 904
[#ADDRESS2#]
[#CITY#]   San Francisco
[#STATE#]  CA
[#CODE#]   94104
[#COUNTRY#]   USA
[#COMPANY_PHONE#]   415-123-4567
[#COMPANY_KEYWORD#]  Web Lead
[#CONTACT_KEYWORD#]  Newsletter1
[#CONTACT_KEYWORD#]  Newsletter2
[#CONTACT_PHONE1#]   415-999-9999
[#CONTACT_USER01#]<shirt size>  XL
[#CONTACT_USER02#]<favorite sport>  NFL
[#CONTACT_USER03#]<team>  The Raiders
[#CONTACT_BIRTHDATE#] 08/04/1984
[#OPPORTUNITY_SUMMARY#] This is where you collect a 1-line description of what they want
[#OPPORTUNITY_FORECAST#] Not Forecasted
[#OPPORTUNITY_Category#] Opp Category1
[#OPPORTUNITY_USER01#] 5
[#OPPORTUNITY_USER02#] Data for user-2 field
[#OPPORTUNITY_YesNo1#] YES
[#OPPORTUNITY_YesNo2#] NO
[#OPPORTUNITY_DESCRIPTION#]
This is where you collect the multi-line description of what the web lead wants
Line 2 description
Line 3 description
```

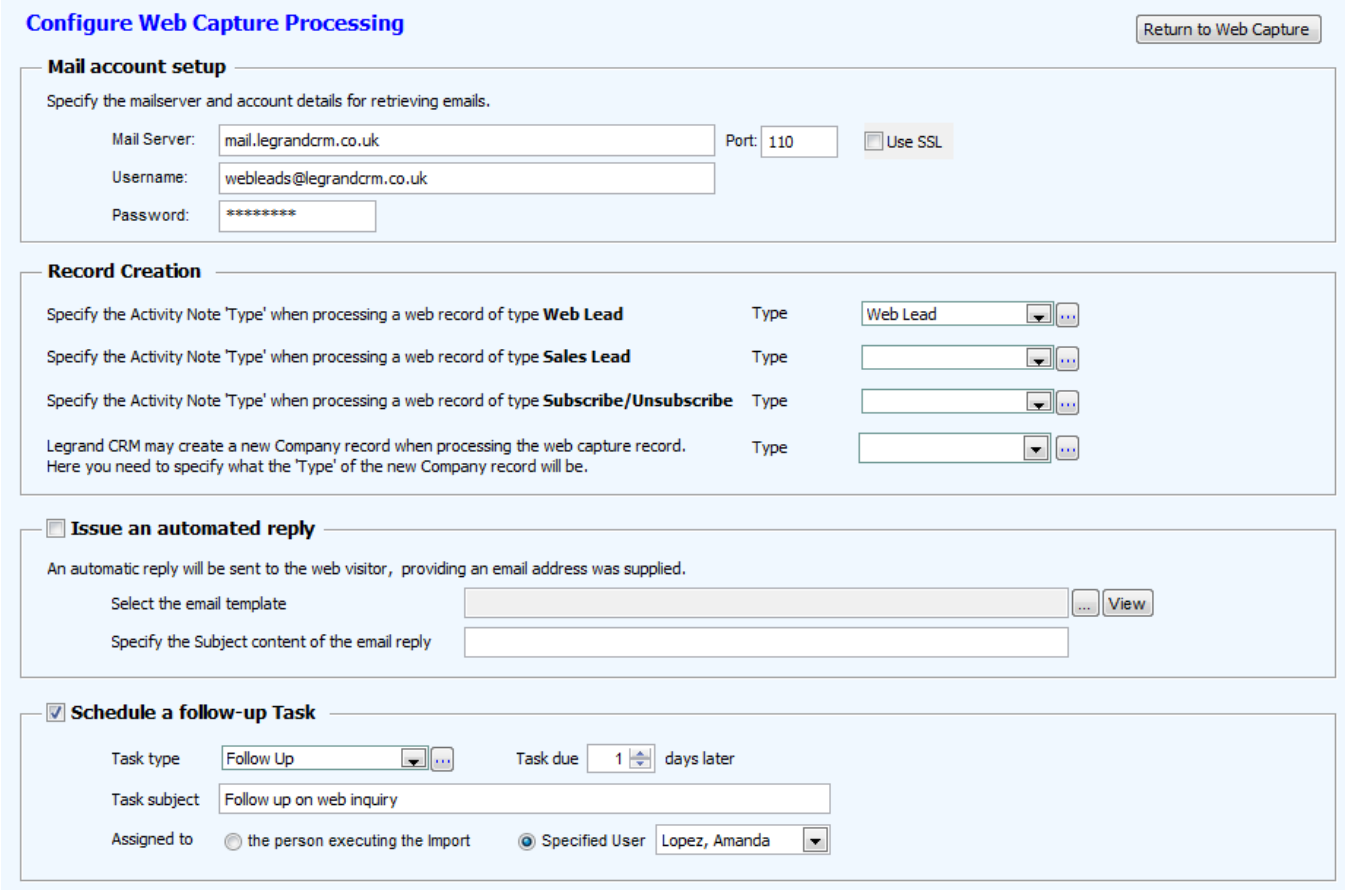
So, you can create web forms that are as simple or as complex as you want. How much data you collect is a business decision, in fact you may decide to have several different forms on the web site to capture different types of situation: e.g. someone who asks to be added to a newsletter; someone who asks for detailed sales info, etc…

Step 4: Configuring the Web Capture module

Once you have finalized the content and format of the email that your web form will generate the next step is to configure the Web Capture module in Legrand CRM and run some tests.

Configuring the Web Capture module is straight forward.

First you need to specify the mail server and mail account details for retrieving emails.



When an email is processed the system will always create an Activity record which contains the raw data that was submitted by the visitor. You can decide what the 'Activity Type' of the Activity record should be.

We strongly recommend that you dedicate a specific Activity Type to record the data that was collected on your web site, e.g. in the example above we used an Activity Type called 'Web Lead'.

The reason for dedicating a specific Activity Type is that it makes it easy to track how many web leads you are receiving: simply run an Activity report for type='Web Lead' for a given period.

Similarly, you can define a specific Account Type (Company Type) to quickly identify company records that were created by the Web Capture module. As these new leads are followed up and qualified you would then subsequently change their Company Type to something more appropriate like 'Prospect' or 'Lead'.

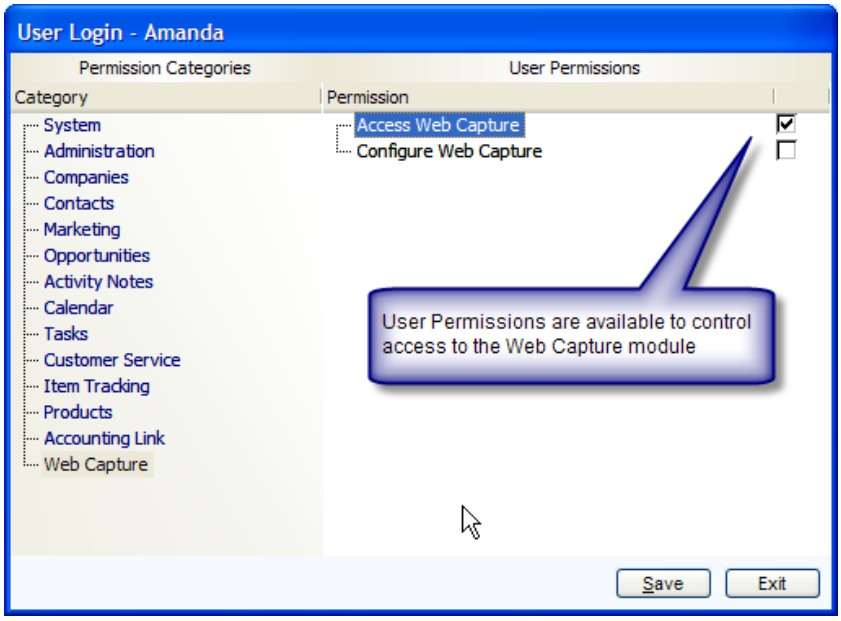
In addition to specifying the required information for mail account and record Types there are also two optional instructions: sending an automated email response and scheduling a follow-up task.

It is good practice to send an automated email response when a visitor fills in a form at your web site. This email response can be sent directly from your web site or you could instruct Legrand CRM to send an email when the Web Capture module processes the data that was submitted at your web form.

The 'Schedule a Follow-Up Task' section is optional but can be considered essential if you want to ensure that no web lead is ignored. Prospective customers quickly become irritated if their information request is ignored. By automatically creating a follow-up task you create a process that ensures every web lead will be followed up.

Restricting Access

Access to the Web Capture module is controlled via two User Permissions.

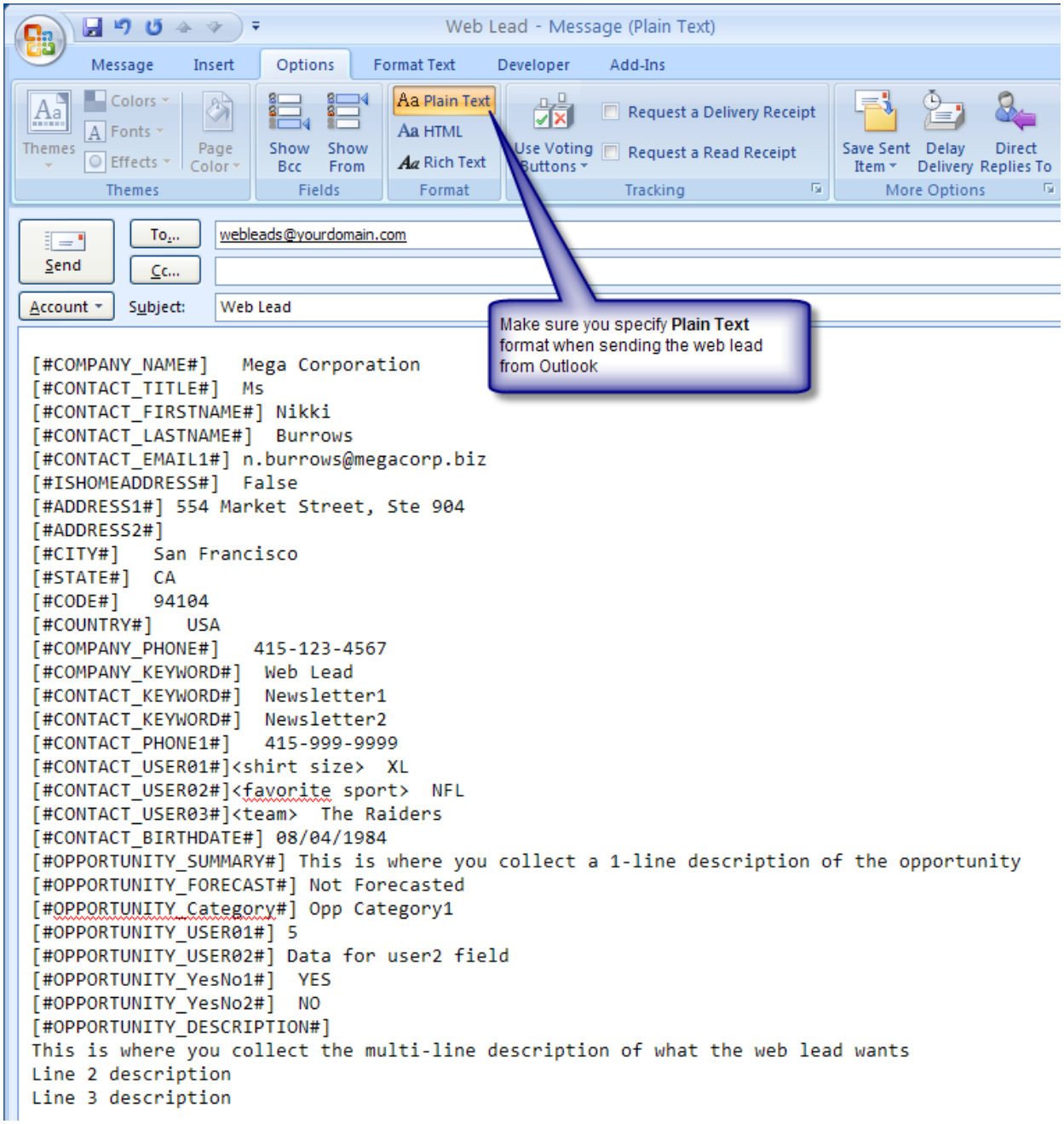


If a User is given access to the Web Capture module it means they can not only view the data waiting to be processed in the Web Capture module but can also perform the *Get Mail*, *Process Mail* and *Print List* commands.

Testing

You don't need to have your web form fully designed in order to send test emails to the Web Capture module for processing.

To test that the emails are correctly formatted and will be processed as you expect all you need to do is to create the email account for the Web Capture function and then use your email application (e.g. Microsoft Outlook) to send test emails. The important thing to remember is that the emails you send must be in text format, not in HTML or Rich text format.



Appendix: data merge codes

Below is the list of data merge codes used for Company, Contact, Opportunity and Support (aka Customer Service) modules.

Company merge codes	Contact merge codes	Opportunity merge codes	Support merge codes
[#Company_City#]	[#Contact_BirthDate#]	[#Opportunity_Amount1#]	[#CustService_Date1#]
[#Company_Code#]	[#Contact_Date1#]	[#Opportunity_Amount2#]	[#CustService_Date2#]
[#Company_Country#]	[#Contact_Date2#]	[#Opportunity_Amount3#]	[#CustService_Description#]
[#Company_Date1#]	[#Contact_Date3#]	[#Opportunity_Amount4#]	[#CustService_IsClosed#]
[#Company_Date2#]	[#Contact_Date4#]	[#Opportunity_Category#]	[#CustService_Module#]
[#Company_Date3#]	[#Contact_Email1#]	[#Opportunity_Date1#]	[#CustService_Number1#]
[#Company_Date4#]	[#Contact_Email2#]	[#Opportunity_Date2#]	[#CustService_Number2#]
[#Company_Date5#]	[#Contact_Fax#]	[#Opportunity_Date3#]	[#CustService_Priority#]
[#Company_Date6#]	[#Contact_FirstName#]	[#Opportunity_Date4#]	[#CustService_Response#]
[#Company_Date7#]	[#Contact_IsPrimary#]	[#Opportunity_Description#]	[#CustService_Status#]
[#Company_Date8#]	[#Contact_Lastname#]	[#Opportunity_EstCloseDate#]	[#CustService_Summary#]
[#Company_Date9#]	[#Contact_AccountManager#]	[#Opportunity_EstValue#]	[#CustService_Type#]
[#Company_Fax#]	[#Contact_Mobile#]	[#Opportunity_Forecast#]	[#CustService_User1#]
[#Company_Industry#]	[#Contact_Note#]	[#Opportunity_Manager#]	[#CustService_User2#]
[#Company_MailCity#]	[#Contact_Number1#]	[#Opportunity_Probability#]	[#CustService_User3#]
[#Company_MailCode#]	[#Contact_Number2#]	[#Opportunity_Summary#]	[#CustService_User4#]
[#Company_MailState#]	[#Contact_Number3#]	[#Opportunity_Territory#]	[#CustService_User5#]
[#Company_MailStreet#]	[#Contact_Number4#]	[#Opportunity_User01#]	[#CustService_YesNo1#]
[#Company_AccountManager#]	[#Contact_Number5#]	[#Opportunity_User02#]	[#CustService_YesNo2#]
[#Company_Name#]	[#Contact_Phone1#]	[#Opportunity_User03#]	[#CustService_YesNo3#]
[#Company_Notes#]	[#Contact_Phone2#]	[#Opportunity_User04#]	
[#Company_Number1#]	[#Contact_Position#]	[#Opportunity_User05#]	
[#Company_Number2#]	[#Contact_Home_City#]	[#Opportunity_User06#]	
[#Company_Number3#]	[#Contact_Home_Code#]	[#Opportunity_User07#]	
[#Company_Number4#]	[#Contact_Home_Country#]	[#Opportunity_User08#]	
[#Company_Number5#]	[#Contact_Home_State#]	[#Opportunity_User09#]	
[#Company_Number6#]	[#Contact_Home_Street#]	[#Opportunity_User10#]	
[#Company_Number7#]	[#Contact_Title#]	[#Opportunity_User11#]	
[#Company_Number8#]	[#Contact_User01#]	[#Opportunity_User12#]	
[#Company_Number9#]	[#Contact_User02#]	[#Opportunity_User13#]	
[#Company_Phone#]	[#Contact_User03#]	[#Opportunity_User14#]	
[#Company_State#]	[#Contact_User04#]	[#Opportunity_User15#]	
[#Company_Street#]	[#Contact_User05#]	[#Opportunity_User16#]	
[#Company_Type#]	[#Contact_User06#]	[#Opportunity_YesNo1#]	
[#Company_User01#]	[#Contact_User07#]	[#Opportunity_YesNo2#]	
[#Company_User02#]	[#Contact_User08#]	[#Opportunity_YesNo3#]	
[#Company_User03#]	[#Contact_User09#]		
[#Company_User04#]	[#Contact_User10#]		
[#Company_User05#]	[#Contact_User11#]		
[#Company_User06#]	[#Contact_User12#]		
[#Company_User07#]	[#Contact_User13#]		
[#Company_User08#]	[#Contact_User14#]		
[#Company_User09#]	[#Contact_User15#]		

[#Company_User10#]	[#Contact_User16#]		
[#Company_User11#]	[#Contact_User17#]		
[#Company_User12#]	[#Contact_User18#]		
[#Company_User13#]	[#Contact_User19#]		
[#Company_User14#]	[#Contact_User20#]		
[#Company_User15#]	[#Contact_User21#]		
[#Company_User16#]	[#Contact_User22#]		
[#Company_User17#]	[#Contact_User23#]		
[#Company_User18#]	[#Contact_User24#]		
[#Company_User19#]	[#Contact_YesNo1#]		
[#Company_User20#]	[#Contact_YesNo2#]		
[#Company_User21#]	[#Contact_YesNo3#]		
[#Company_User22#]			
[#Company_User23#]			
[#Company_User24#]			
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[#Company_User26#]			
[#Company_User27#]			
[#Company_User28#]			
[#Company_User29#]			
[#Company_User30#]			
[#Company_User31#]			
[#Company_User32#]			
[#Company_User33#]			
[#Company_Web#]			
[#Company_yesNo1#]			
[#Company_yesNo2#]			
[#Company_yesNo3#]			

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