Form Builder in Agile CRM

Agile CRM pulls in visitor information entered, through the web forms on your website & creates a contact with all the given attributes, in the CRM. It integrates with various third party web forms such as WuFoo & Unbounce, also provides for a custom web form builder within the CRM.
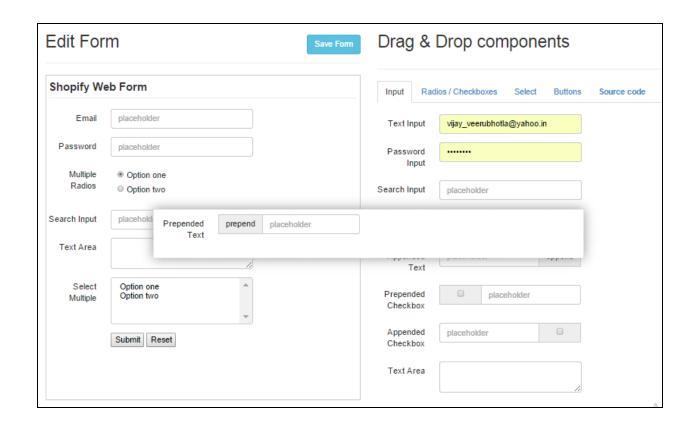
Usage

Agile's Form Builder helps you create your custom web forms at ease and place it on your website. Whenever a web visitor fills up the web form, a new contact gets created in Agile and all the data submitted through the form gets added to the contact page as various attributes - Name, Company, Email, Phone no, Address, Notes etc… Also, you can keep tracking this contact whenever he visits your website & get his detailed browsing history on the contact page.
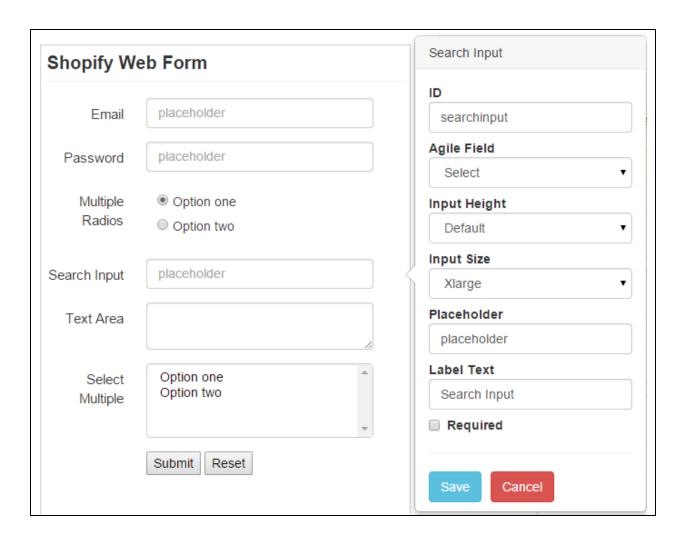
Create your Web Form

Here's how you can use our Form Builder to build smart & appealing web forms on to your website:

1. Firstly, go to the Admin Settings panel on the Agile dashboard ---> Integrations---> 'Form Builder' under the Web to Lead section.

2. Click on the 'Show Forms' button on the widget & it directs you to the Forms page. You can see the forms that you created & saved earlier, if any. Now, click on the 'Add Form' button on the right top of the window.

3. You will see the Form Builder window. Go to the Drag & Drop Components section and browse through the available tabs for your required fields. Drag & drop all the fields that you need, into the 'Your Form' panel.

4. Once you are done selecting your fields, click on each of the field, and in the new window that pops up, fill in all the details. Also, you have to map it to the correct Agile field for some of the fields.
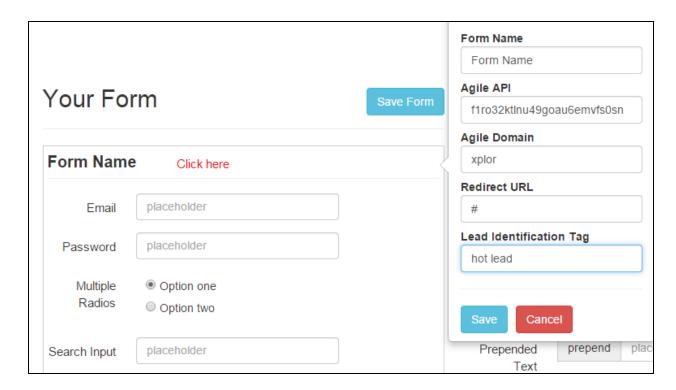
Here's the list:
ID - field name or anything
Agile Field - the relevant contact's attribute (First name, Company, Email, Phone etc…)
Input Height - the required height of the field (Small/ Default/ Large)
Input Size - the required size of the field (Small/ Medium/ Large/ Xlarge)
Label Text - your chosen name for the field
… and so forth.

5. Once you are done creating your customized web form, save the form by clicking on the 'Save Form' button.
6. Now, move to the 'Source Code' tab under the Drag & Drop Components. Copy all the source code and paste it on to your website at your required location, but always above the footer.
7. Also, note that you need to include Analytics code in the web page, for your web form to work on that page. (For Analytics code, go to Agile dashboard ---> Admin Settings ---> API & Analytics ---> Analytics code.)

Tag Contacts from a particular Web Form

Click on the space on the top of 'Your Form' panel, some where near the 'Form Name' text. In the new window that pops up, enter the tag that you want to add for the contacts from this web form under the 'Lead Identification Tag' field. Enter other details such as form Name, Redirect URL (if required) and save the details.
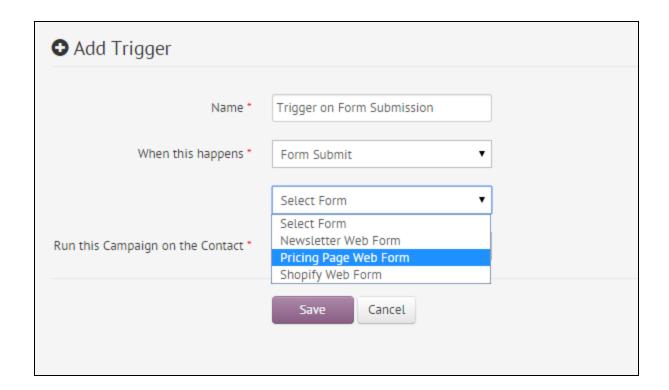

Now, all the contacts that are created through this web form will have the tag that you mentioned above, in the 'Lead Identification Tag' field.

Trigger a Campaign upon Form submit

You can choose to trigger a campaign on the new contact created up on the form submit. Here's how you do that:

Once you are done placing the form source code on to your website, go to the Agile dashboard ---> Campaigns ---> Manage Triggers and click on the 'Add Trigger' button. In the 'Add Trigger window', select the 'Form Submit' option under the 'When this happens' field and select the web form that you would like to trigger a campaign upon its submission. Now, select the campaign that you have to run upon form submission in the 'Run this Campaign on the contact' field. Label the trigger and save the details. That's it!

You now have set up the trigger upon form submission. Whenever a contact is created through this web form, the campaign that you chose will be run on the newly created contact.

Thanks for checking out!