

How to Capture Leads?

leadBase Software

CAPTURE LEADS

- For Lead Capturing feature, You will go to **Settings > Tools > Capture Leads**

The screenshot displays the leadBase dashboard interface. The top navigation bar includes links for Dashboard, Leads, Lead Groups, Lead Types, Sites, Forms, Partners, Settings, and Reports. The left sidebar lists various categories: Leads, Lead Groups, Lead Types, Sites, Forms, Partners, and Settings. The main dashboard area features a 'DASHBOARD' section with several colored tiles representing lead statistics: Total Leads (136), New Leads (129), Uncont Leads (1), Invalid Leads (0), Valid Leads (1), Closed Leads (0), Partners (3), Introducers (3), Referrals (3), and Lead Groups (15). Below these tiles are two line charts: 'All Incoming leads' and 'Leads'. The 'Settings' menu is open, showing a list of options including Tools, CMS Pages, Packages, Blogs, Site Settings, Roles, Templates, Users, User Groups, Testimonials, Demos Scheduled, Subscribers, and Contact Us Log. The 'Tools' submenu is also open, displaying options like Import Leads, Update Leads, Import Activity, and Capture Leads, which is highlighted with a red box. The 'Capture Leads' option is also highlighted in the left sidebar under the 'Settings' category.

leadBase

Dashboard Leads Lead Groups Lead Types Sites Forms Partners Settings Reports

Tools

CMS Pages

Packages

Blogs

Site Settings

Roles

Templates

Users

User Groups

Testimonials

Demos Scheduled

Subscribers

Contact Us Log

Import Leads

Update Leads

Import Activity

Capture Leads

DASHBOARD

136 Total Leads

129 New Leads

1 Uncont Leads

0 Invalid Leads

1 Valid Leads

0 Closed Leads

3 Partners

3 Introducers

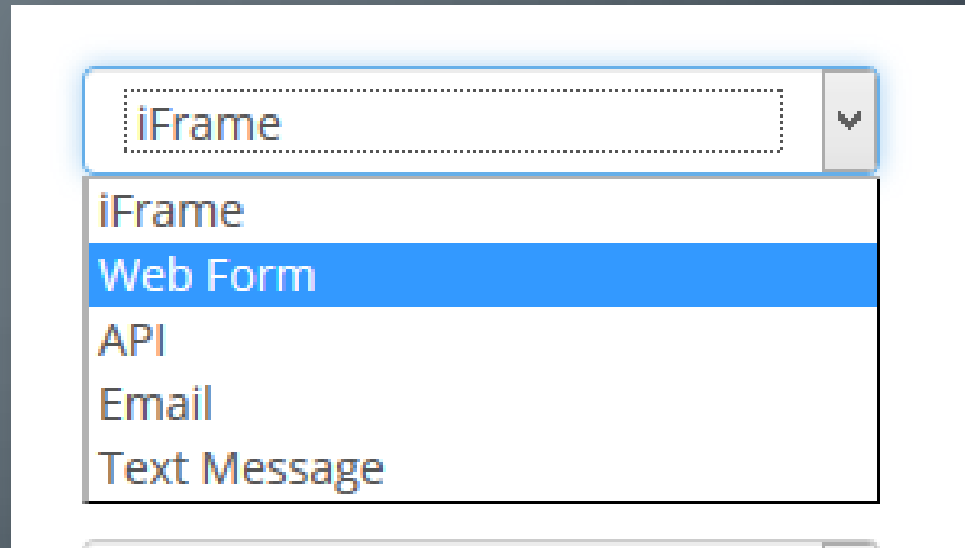
3 Referrals

15 Lead Groups

All Incoming leads

Leads

It becomes easy for users of leadBase software to capture their leads using Website, iFrame, API, Email and Text Message



Step 1: Capture Leads through IFrame

- User have to select a lead group with which he has saved the forms.
- At Step 1, user will select capture method **IFrame**.
- User will select lead group.
- User will select Introducer/ Source and site associated with it.

CAPTURE LEADS

Step 1: Select Lead Group & Options

You have chosen to capture leads directly through a website or through the API.

Capture Method

iFrame

Lead Group

Introducer/Source

Associated Site

iFrame
Web Form
API
Email
Text Message

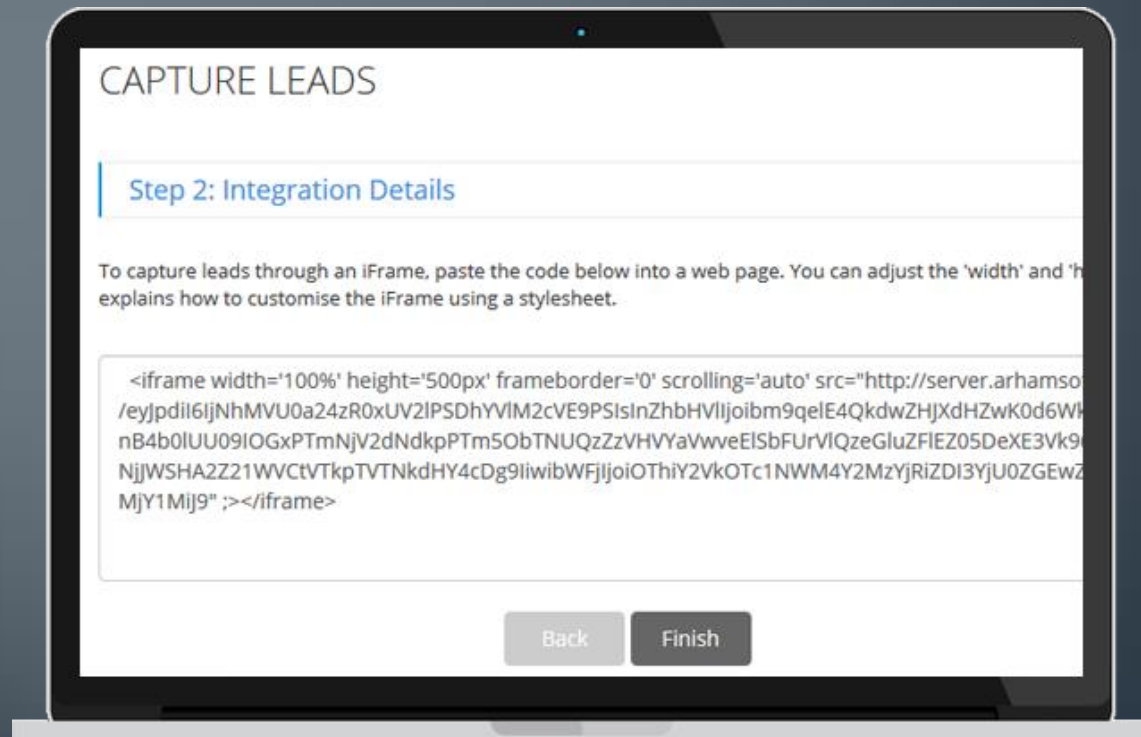
Default

Back

Next

Step 2: Integration Details

- To capture leads through an iFrame, paste the code below into a web page. You can adjust the 'width' and 'height' values to fit your page.



Capture Leads through Web Form

- User have to select a lead group with which he has saved the forms.
- At Step 1, user will select capture method **Web Form**.
- User will select lead group.
- User will select Introducer/ Source and site associated with it.
- User will add a **Return URL**

Capturing Web Form:

CAPTURE LEADS

Step 1: Select Lead Group & Options

You have chosen to capture leads directly through a website or through the API.

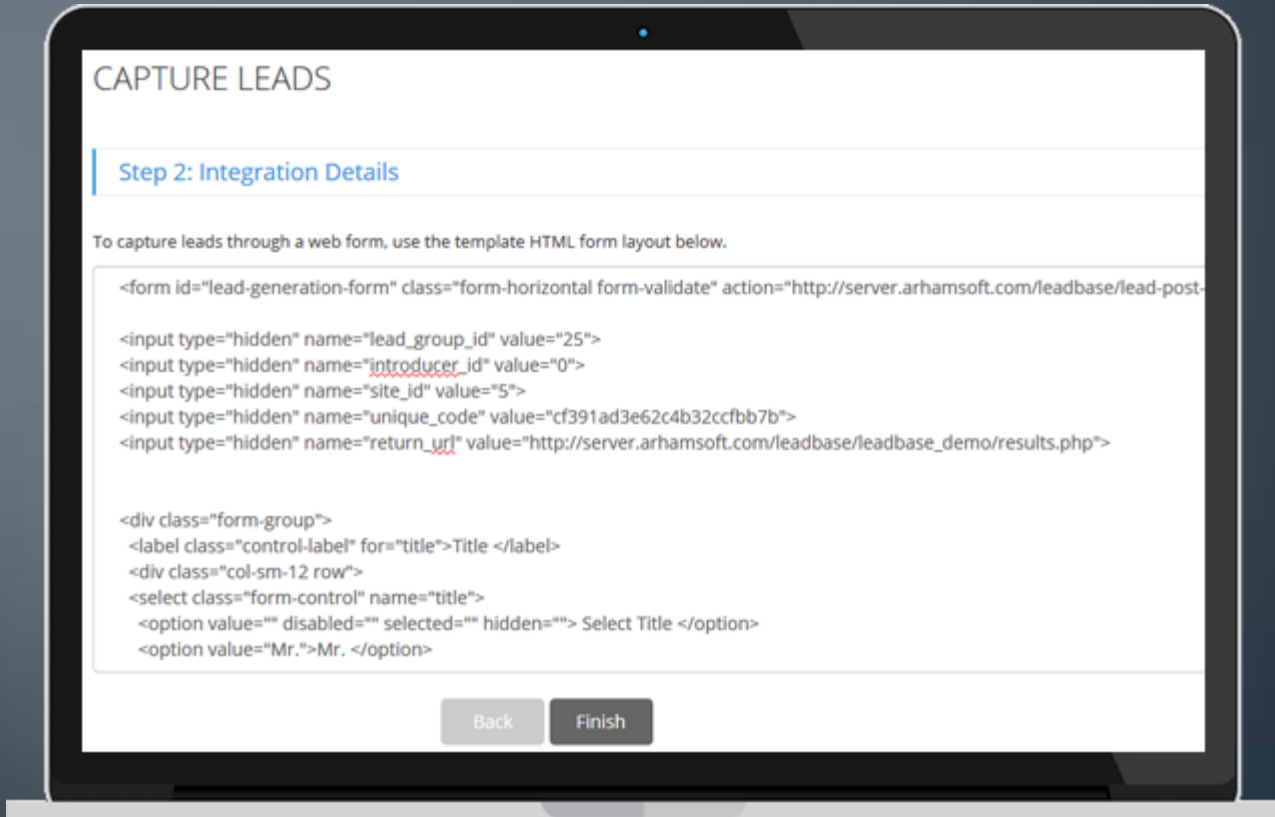
Capture Method	Web Form ▼
Lead Group	test Lead 95 ▼
Introducer/Source	None ▼
Associated Site	Default ▼
Return URL	<input type="text"/>

Back

Next

Step 2: Integration Details

- To capture leads through a web form, use the template HTML form layout below.



The image shows a laptop screen with a web application interface. The main heading is 'CAPTURE LEADS'. Below it, a sub-section is titled 'Step 2: Integration Details'. The text below this section reads: 'To capture leads through a web form, use the template HTML form layout below.' Below this text is a code block containing HTML code for a form. The code includes hidden input fields for 'lead_group_id', 'introducer_id', 'site_id', 'unique_code', and 'return_url'. It also includes a 'form-group' containing a 'control-label' for 'Title' and a 'form-control' which is a 'select' element with two options: 'Select Title' and 'Mr.'. At the bottom of the screen, there are two buttons: 'Back' and 'Finish'.

CAPTURE LEADS

Step 2: Integration Details

To capture leads through a web form, use the template HTML form layout below.

```
<form id="lead-generation-form" class="form-horizontal form-validate" action="http://server.arhamsoft.com/leadbase/lead-post-  
  
<input type="hidden" name="lead_group_id" value="25">  
<input type="hidden" name="introducer_id" value="0">  
<input type="hidden" name="site_id" value="5">  
<input type="hidden" name="unique_code" value="cf391ad3e62c4b32ccfbb7b">  
<input type="hidden" name="return_url" value="http://server.arhamsoft.com/leadbase/leadbase_demo/results.php">  
  
<div class="form-group">  
<label class="control-label" for="title">Title </label>  
<div class="col-sm-12 row">  
<select class="form-control" name="title">  
<option value="" disabled="" selected="" hidden=""> Select Title </option>  
<option value="Mr.">Mr. </option>
```

Back Finish

Capture Leads through API

- User have to select a lead group with which he has saved the forms.
- At Step 1, user will select capture method **API**.
- User will select lead group.
- User will select Introducer/ Source and site associated with it.

Capturing Leads Through API

CAPTURE LEADS

Step 1: Select Lead Group & Options

You have chosen to capture leads directly through a website or through the API.

Capture Method

API

Lead Group

test Lead 95

Introducer/Source

None

Associated Site

Default

Back

Next

Step 2: Integration Details

- To use the API, POST a JSON CURL request to the URL below with the template provided.
- You can post a json file with curl like so:

```
curl -X POST -H "Content-Type: application/json" -d @FILENAME  
DESTINATION
```

so for example:

- ```
curl -X POST -H "Content-Type: application/json" -d
@../data/cats.json http://localhost:8080/mSfvMwNAfj
```

# CAPTURE LEADS

## Step 2: Integration Details

To use the API, post a curl JSON request to the URL below with the template provided.

**Submission Type:** POST

### CURLOPT\_URL:

`http://server.arhamsoft.com/leadbase/api/lead-post`

### Fields:

```
{
 "lead_group_id":"14",
 "introducer_id":"0",
 "site_id":"0",
 "unique_code":"8e3558366e71ccc7f9f9ff17",
 "first_name":" ",
 "last name":" "
```

Back

Finish

# Capture Leads Through Email

- User have to select a lead group with which he has saved the forms.
- At Step 1, user will select capture method **EMAIL.**
- User will select lead group.
- User will select Introducer/ Source and site associated with it.

# Capturing Leads Through Email

## CAPTURE LEADS

### Step 1: Select Lead Group & Options

You have chosen to capture leads directly through a website or through the API.

**Capture Method**

Email



**Lead Group**

Marketing



**Introducer/Source**

None



**Associated Site**

Default



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Next

# Step 2: Integration Details

- To create a lead by email, send a plain Text Email to the email address below using the template provided.

## CAPTURE LEADS

Step 2: Integration Details

To create a lead by email, send a plain text email to the email address below using the template provided.

Email: user@arhamsoft.com

**Template:**

```
lead_group_id: 41
introducer_id: 0
site_id: 0
unique_code: 8e3558366e71ccc7f9f9ff17
first_name:
last_name:
phone:
```

Back

Finish



# Capture Leads Through Text Message

- User have to select a lead group with which he has saved the forms.
- At Step 1, user will select capture method **Text Message**.
- User will select lead group.
- User will select Introducer/ Source and site associated with it.

# Capturing Leads Through Text Message

## CAPTURE LEADS

### Step 1: Select Lead Group & Options

You have chosen to capture leads directly through a website or through the API.

**Capture Method**

Text Message

**Lead Group**

Marketing

**Introducer/Source**

None

**Associated Site**

Default

Back

Next

# Step 2: Integration Details

- To create a lead by SMS, send a message to the contact number below using the template provided.

## CAPTURE LEADS

Step 2: Integration Details

To create a lead by sms, send a message to the contact number below using the template provided.

**Contact No:** 144-544-6666

**Template:**

lead\_group\_id: 41  
introducer\_id: 0  
site\_id: 0  
unique\_code: 8e3558366e71ccc7f9f9ff17  
first\_name:  
last\_name:  
phone:

Back

Finish

From our **blog** to our **support** team, we're here for you if and when you need us! **it's time to Capture your Own Leads!**