### **Contact Or Enquiry Forms**

Manage Contact or Enquiry Forms that can be embedded into the website to capture Leads



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The system provides the ability to add Contact/Enquiry Forms for lead generation purposes; these forms can be embedded in the website. Anyone who fills the contact forms in the website will be submitted into the system.

**Navigation:-**

Click on **“CRM’** and then click on **“Contact Forms”** and you will be navigated to the Contact Forms page. Staff who has access to this page will be able to see the Contact Forms menu.

In the Contact Forms page there are two sub pages:-

* **“Setup”**
* **“Contacts List”**

**“Setup”** Page:-

Clicking on the **“Add New”** button will open a popup which will give you the ability to add a new contact form. In the popup you have following options:-

1. In the **“Contact Form Name”** field enter the name of the Contact Form.
2. Clicking on the **“Contact Form Type”** will open a dropdown which will give you the ability to assign the type to the contact form i.e General, Students Business.
3. Clicking on the **“Manage”** button will open a popup which will give you the ability to add Contact Form Types. In the the popup you have following options:-
   1. Clicking on the **“Add New”** button will give you the ability to add New type.
   2. All the created types will be displayed in the grid. In the grid:-
      1. **“Contact Type”** column represents the name of

Types.

1. **“Action”** column gives you the ability to edit or Delete the types.
2. Clicking on **“Save Changes”** will create the Contact Form.
3. Clicking on **“Copy Items To Center”** wil open a popup which will give you the ability to copy the Contact Forms to a particular Franchise. In the popup you have following options:-
   1. Clicking on the **“Center”** will open a dropdown containing the list of All the franchises you wish to copy the contact forms to.
   2. All the contact forms will be displayed in the grid and check the contact form you wish to be copied.
   3. Clicking on the **“Copy”** button will copy the contact form.
4. Clicking on the **“Sync Settings”** button will give you the ability to directly sync any new contact form created in all of the franchises.

In order to edit the created form and add new fields in the Contact Form click on the contact form you wish to edit in the grid which will open a popup. In the popup you have following options:-

1. Clicking on the **“Generate Embedded Script”** button will open a popup which contains the embedded script which you can copy and paste in your website. Click on the **“Copy”** button to copy the embedded script.
2. Clicking on the **“Settings”** button will open a popup which will give you the ability to customize the contact form according to your own requirements In the popup you have following options:-

In the **“Settings”** column following configuration options are available:-

1. You have the ability to show/not show the Company Logo in the Contact form by clicking on the **“On/Off”** button in the **“Show** **Company Logo”** field.
2. You have the ability to show/not show the Heading in the Contact form by clicking on the **“On/Off”** button in the **“Show Heading”** Field.
3. You have the ability to show/not show the Watermark in the Contact Form by clicking on the **“On/Off”** button in the **“Show** **Watermark”** field.
4. You have the ability to show/not show the Inline Form in the Contact form by clicking on the **“On/Off”** button in the **“Show** **Inline Form”** field.
5. You have the ability to change the Styling of the Label i.e: Font Size, Bold, Italic etc. in the **“Label Styling”** field.
6. You have the ability to change the Styling of the Heading i.e: Font Size, Bold, Italic etc. in the **“Heading Styling”** field.
7. You have the ability to change the Background Color by clicking on the palette in the **“Background Color”** field.
8. You have the ability to change the Heading text by entering the heading text in the **“Heading Text”** field.
9. You have the ability to change the Font Family of the Contact Form by clicking on the **“Font Family”** dropdown.
10. You have the ability to change the Styling Type of the Contact Form by clicking on the **“Styling Type”** dropdown.
11. You have the ability to change the Submit Button Text by entering text in the **“Submit Button Text”** field.
12. You have the ability to set the Post Navigation URL after clicking the Submit button in the **“Post Navigation URL”** field.
13. Clicking on the **“Save Changes”** button will save the changes.
14. Clicking on the **“Default”** button will set all the values to default.
15. Clicking on the **“Generate Embedded Script”** button will generate the embedded script of the edited form to embed into your website.
16. Clicking on the **“Add New Field”** button will open a dropdown containing all the field choices i.e: Text Boxes, Radio Button etc which you want to insert in the contact form.
17. You have the ability to change the order of the fields by dragging the fields to change their order in the grid. In the grid:-
    1. **“Field Name”** column represents the name of the field.
    2. **“Action”** column gives you the ability to edit or delete the field.

All the Contact Forms are displayed in the grid. In the grid:-

1. **“Contact Form Name”** column represents the name of the column.
2. **“Contact Form Type”** column represents the type of the form.
3. **“Action”** column gives you the ability to copy, edit or delete the contact form.

You have the ability to filter the Contact Forms by clicking on the **“Filter Icon”** on the top right hand side.

**“Contacts List”** Page:-

On this page you have the ability to view the contacts and their information against each contact form. Each Contact Form is listed as a Tab. Clicking the corresponding Contact Form tab will display the list of Contact/Leads in a grid that are submitted for the Contact Form in your website.

In the grid :-

1. **“Contact Form”** represents the Contact Form Name.
2. **“Contact Form Type”** represents the type of the contact form.
3. **“Name”** column represents the name of the Contact.
4. **“Email”** column represents the email of the Contact.
5. **“Phone”** column represents the Phone no of the Contact.
6. **“Contact Type”** column represents the type of the Contact.

You have the ability to filter the contacts by clicking on the **“Filter Icon”** on the top right hand side.

All the contacts/leads that are submitted in the contact forms are also added in the Leads (CRM > Leads) page.