Contact Form 7 – Teamleader CRM Integration

Installation

WordPress Dashboard

- Go to 'Admin' -> 'Plugins' -> 'Add New'.

- Click on 'Upload Plugin'.

- Upload plugin zip.

- Activate plugin.

WordPress Multisite Network Dashboard

- Go to 'Network Admin' -> 'Plugins' -> 'Add New'.

- Click on 'Upload Plugin'.

- Upload plugin zip.

- Only install plugin zip in 'Network Admin' and do not activate it.

- Activate plugin site wise ('Site' -> 'Admin' -> 'Plugins').

Configuration

- Go to 'Admin' -> 'CF7 – Teamleader' -> 'Configuration'.

- Register App in Teamleader CRM to get Client ID and Client Secret. The guide is below.

  - Sign up for a Teamleader CRM Account and register your App.

  - Go to "Profile Icon" -> "Integrations" -> "Build".

  - Click on "Develop your integrations" button.

  - Click on "Create new integration" button. The link is here.

- Name of the integration: Add name. Like "Form Integration".

- Click on "Create integration" button.

- Valid redirect URIs: Add your WordPress Configuration tab URL.

- OAuth scopes: Check "Contacts" checkbox only.

- Short description: Add short description.

- Long description: Add long description.

- Click on "Save changes" button.

- Note: Do not click on "Submit for publication review" button.

- Client ID: Add your Teamleader CRM App Client ID.

- Client Secret: Add your Teamleader CRM App Client Secret.

- Click on 'Authorize' button.

- You can see Teamleader CRM login page if not logged in Teamleader CRM. If not logged in Teamleader CRM, login to Teamleader CRM.

- Click on 'Allow' button.

Integration

- Go to 'Admin' -> 'CF7 – Teamleader' -> 'Integration'.

- You can see list of Contact Form 7 forms.

- Click on edit form icon which you want to integrate form.

- Select a Teamleader CRM object you want to integrate with current form.

- Click on 'Filter' button to filter object fields.

- Check 'Teamleader CRM Integration?' checkbox if you want to integrate Teamleader CRM.

- Select 'Create Object Record' or 'Create/Update Object Record' action event.

  - Create Object Record: On form submitted, it will add record.

  - Create/Update Object Record: If form submitted email address match with existing record, it will update record. If form submitted email address not match with existing record, it will add record.

- Map Contact Form 7 form fields to Teamleader CRM object fields.

Below object wise fields are required in the Teamleader CRM and it must be mapped with Contact Form 7 form fields.

- Contact: Last Name. If map address fields, must be required "Address Street", "Address City", "Address Zip Code" and "Address Country" fields. The "Address Country" field must be accept country code like BE, USA, GBR, AU, etc…

Tags: Create hidden field in the form and add Tags by comma separated. Like Tag1,Tag2,Tag3,etc… Once created, map it with Tags field. Example: `[hidden tags "Tag1,Tag2,Tag3"]`

- Click on 'Save Changes' button.

API Error Logs

- Go to 'Admin' -> 'CF7 – Teamleader' -> 'API Error Logs'.
- You can see Teamleader CRM API error logs.

Settings

- Go to 'Admin' -> 'CF7 – Teamleader' -> 'Settings'.
- API Error Notification: Add 'Subject' and 'Send To'. Will be sent Teamleader CRM API error to the specified email.
- Delete data on uninstall?: Check 'Delete data on uninstall?' checkbox if you want to delete this plugin data on uninstall.

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