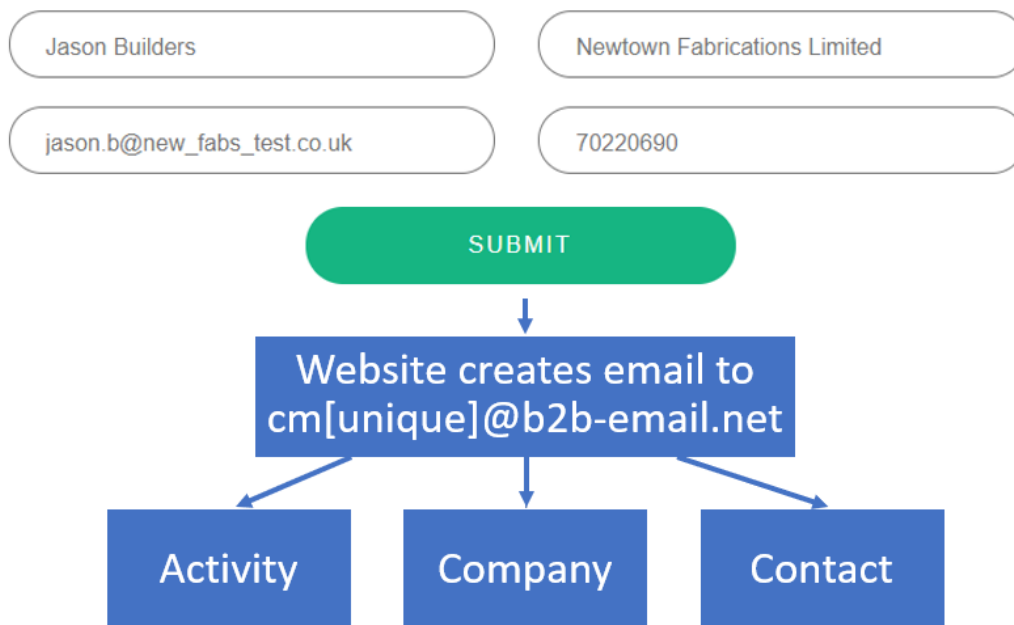# Website Integration (inbound module)

The Website integration module allows information entered onto a form held on your website to be imported into webCRM and a record created or updated.

As you will see from the diagram:

Step 1:
The Prospect fills in the web form.

Step2:
When the Prospect orders or submits the form an Email is created containing the information to webCRM.

Step 3:
webCRM creates, in this example a Company, Contact and Activity record for this Prospect.

The information created from the website form can contain any of the above information so long as there is a corresponding system or Custom field.

Requirements

The features in this guide requires the modules **Inbound email** and **Website Integration module**, which are part of the PLUS license. If you have not subscribed to this module, you will need to do so before following these instructions. You can adjust your subscription in the webCRM system by browsing to Configuration -> License and change the License type to PLUS or ENTERPRISE.

When you have the correct license, the feature can be turned on by browsing to Configuration -> Integration -> Email/Sync (default tab) and set the Inbound email drop-down list to Yes.

Processing Website Integration emails

Enquiries or information from your website which are ready for processing are referred to as website integration Emails and can be accessed from the Home page, where you click the Globe icon.

From this screen you can:

1. Process all the Emails in one go
2. Process an Email one at a time
3. Edit an Email then process
4. Delete an Email
5. Send an Email

You may want to edit an Email to:

- Allocate to a particular Account manager or Territory
- Correct any mistakes or errors prior to processing
- Add any information that was not entered in the Web form.

Once you are ready to process the Emails either click the **Process all data** at the top of the screen or click the **Refresh** button to process each individual email.

Once you process the Email you may send a return Email or remove from the list.

webCRM Modules and Fields

Data can be created or updated in the following webCRM modules:

- Organisations (Not in Person Version)
- Persons
- Activities
- Opportunities/Deliveries
- Products/Quotations

Custom fields can be the following Types:

- Text (50 Characters)
- Date (dd-mm-yyy format)
- Positive Integer
- Checkbox
- List (Selectable List 1 item)
- Multi-Select List (Selectable List , Multiple Items)
- WebLink (ID or full URL up to 50 Characters)

Please note that when specifying data on the website form for a list or Multi-Select field this must be exactly the same description or in the case of a Multi-Select field the Unique identifier number. This is covered in more detail in the next section.
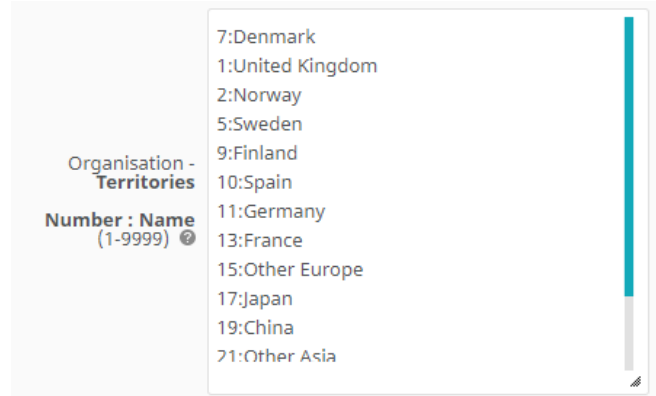
webCRM Data Fields

Data for checkboxes:

For data of type Checkbox the possible data values are: "Yes" (checked) or "No" (not checked)

Data for pick lists:

For data of type Pick list, the text must exactly match (case sensitive) one of the possible existing Pick list values already defined.

Data for Territory can be submitted by Territory Name or Territory Number as defined in Configuration/Drop down lists/Organisations or Contacts.

Data with multiple lines of text:

For address and comments data fields with multiple lines of text, each line of text must be separated by the 4 characters: |CR| (vertical bar, C, R, vertical bar). The <br> tag cannot be used instead.

Multi select lists (Custom fields of type Multi select list):

It is possible to import the actual text value or the number associated with the text value. The text value must exactly match (case sensitive) one of the possible values defined for the multi select list. Import of none-existing values are ignored.

Examples:

+1,8 will add values "01" and "08"

+green,blue will add values green and blue

+green,8 will add values green and "08"

-2,03,11 will remove values "02","03" and "11"

-black,white,yellow will remove values black, white and yellow

-black,3,yellow will remove values black,"03" and yellow

1,8,11 will delete all existing values and add values "1", "8" and "11"

green,blue,yellow will delete all existing values and add values green,blue and yellow.

All the correct descriptions for pick lists and multi select lists can be found in the following sections with webCRM from the Configuration Menu:

Email TO address:

In the webCRM Main Menu click the menu item named Email. You will see an Email address in the upper right hand corner of the screen: Example: cm123abcde@b2b-email.net.

Send the specially formatted data as instructed below to that Email address.

Email subject:

The Email subject line must start with this text: /*/AUTO/*/

Any text following /*/AUTO/*/ in the subject line will be ignored by the auto process.

General text format:

All of the sections are mandatory, and the order of the sections must always be as described. Data for a section can be omitted if no Data is to be created or updated. However, the Start/End lines must always be included. If Data for DateTime is omitted, the current time when the Data is imported to the webCRM system is used instead.

The Email body text can be in HTML format. In this case the tag can be used as new line characters instead of characters 10+13 (CR+LF). However, no other tag types are permitted in that part of the body text which includes the formatted text.

New lines are not always 100% reliable in Emails. So, at the end of each line we recommend that you in addition to the normal new line characters also add these 3 characters: [\]
This will be interpreted as new line.

```
Start:DateTime
… data for DateTime and auto processing
End
Start:Organisation
… data for Organisation
End
Start:Person
… data for Person
End
Start:Activity
… data for Activity
End
Start:OpportunityDelivery
… data for OpportunityDelivery ( = Opportunity
or Delivery )
End
```

Special for the Person version:

The Organisation section must be included anyway. The Organisation and Division names are used only if an Organisation name is assigned in Configuration/Other settings. Other data fields in the Organisation section are used and will be saved as Person-data.

Create or Update:

You determine the create/update method by a value 0, 1 or 2.

A:99:<Value>

<Value> = 0 Update existing data item, create if no match found for existing data. (default)

<Value> = 1 Always create a new data item

<Value> = 2 Update existing (ignore data when no match found for existing data)

Hint: Since the automatic data processing ignores any text preceding the "Start:DateTime" section it is possible to add readable text at the beginning of the email body. This is useful as a user can read this information before accepting the data into webCRM.

Example from Start to Finish

Try webCRM for 14 days

We'll give you 14 days for free to try out webCRM, so that you can discover how easy it is to use. You will be given access to the full version, and don't worry about the installation. The whole thing is web-based.

Jason Builders	Newtown Fabrications Limited
jason.b@new_fabs_test.co.uk	70220690

SUBMIT

Above is a website form. The objective is to send the information to webCRM and create the following:

- Organisation
- Person
- Activity

The information that the website sends to webCRM should be in this format.

Again the description of items in fields within webCRM much be an exact match to the webform.

```
Organisation: Newtown Fabrications Limited, United Kingdom
Contact: Jason Builders, jason.b@new_fabs_test.co.uk
Activity: Free trial - follow up, ST, Follow up from website
||*||
Organisation:Newtown Fabrications Limited
Person: jason.b@new_fabs_test.co.uk
Comment:Evaluating for use with sales Team and Marketing, 6-11-2009 15:06
Start:DateTime
A:01:2009
A:02:11
A:03:6
A:04:15
A:05:6
A:06:37
A:07:-1
A:90:0
End
Start:Organisation
A:01:Newtown Fabrications Limited
E:02:
A:02:
A:03:
A:04:
A:05:United Kingdom
A:09:Customer
A:10:Lead
A:13:ST
A:15:44
A:30:Evaluating for use with sales Team and Marketing|CR||CR
End
Start:Person
A:01:Jason Builders
A:02:jason.b@new_fabs_test.co.uk
A:03:70220690
End
Start:Activity
```

The form in webCRM below shows a new organisation with a person and activity record created.

List of fields

These tables provide the fields available for use in Website Integration and their formats.

Date and Time	
Start:DateTime	Start section
A:01:2008	Year YYYY
A:02:1	Month
A:03:8	Day
A:04:14	Hour (24 hours)
A:05: 52	Minutes
A:06: 19	Seconds
End	End section

Organisation	
Start:Organisation	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:01:Newfab	Organisation name
A:02:8 Highstreet|CR|River House	Address
A:03:IPC 1408	Postcode
A:04:Newtown	City
A:05:United Kingdom	Country
A:06:0216754323	Telephone (Tel. 2 for B2C version)
A:07:0725653426	Fax
A:08: www.newfabcorp.net	www (web page)
A:09:Customer	Type
A:10:Identified Status	Status
A:11:Manufacturing	Industry (Not Person Version)
A:12:Large potential	Alert Text
A:13:JR Owner	Responsible 1 User Initials
A:14:JR Owner2	Responsible 2 User Initials
A:15:44	Territory number
A:16:Kent	State

A:30:Some text here|CR|with 2 lines	Comment
A:31:South Division	Divion name
C:01:1,2	Custom field 1
C:02:a	Custom field 2
C:03:tetst	Custom field 3
C:04:1234	Custom field 4
C:05:1,2	Custom field 5
C:06:addd	Custom field 6
C:07:qweqwewq	Custom field 7
C:08:test8	Custom field 8
C:09:qwer	Custom field 9
C:10:1,2	Custom field 10
C:11:rqqwe	Custom field 11
C:12:qwe	Custom field 12
C:13:12123	Custom field 13
C:14:aaaa	Custom field 14
C:14:121231	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
E:01:aaaaaaaaa	Extra Custom Field 1
E:02:aaa	Extra Custom Field 2
E:03:aa	Extra Custom Field 3
E:04:a	Extra Custom Field 4
E:05:b	Extra Custom Field 5
E:06:b2	Extra Custom Field 6
E:07:b3	Extra Custom Field 7
E:08:b4	Extra Custom Field 8
End	End section

Person	
Start:Person	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:01:Peter Blanchet	Full Name

A:31:Peter	First name
A:32:Blanchet	Last Name
A:33:Harry	Middle Name
A:02:test@test.com	Emai
A:03:0203 456789	Direct Telephone
A:04:07754324523	Mobile Telephone
A:05:Director	Person Title
A:06:Mr	salutation
A:30:Some text here|CR|with 2 line	Comment
A:36:Yes	Block mass email
C:01:1,2	Custom field 1
C:02:a	Custom field 2
C:03:tetst	Custom field 3
C:04:1234	Custom field 4
C:05:1,2	Custom field 5
C:06:addd	Custom field 6
C:07:qweqwewq	Custom field 7
C:08:test8	Custom field 8
C:09:qwer	Custom field 9
C:10:1,2	Custom field 10
C:11:rqqwe	Custom field 11
C:12:qwe	Custom field 12
C:13:12123	Custom field 13
C:14:aaaa	Custom field 14
C:14:121231	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
F:01:Yes	Checkbox 1
F:02:Yes	Checkbox 2
F:03:Yes	Checkbox 3
F:04:No	Checkbox 4
F:05:No	Checkbox 5
F:06:Yes	Checkbox 6

F:07:Yes	Checkbox 7
F:08:Yes	Checkbox 8
F:09:Yes	Checkbox 9
F:10:Yes	Checkbox 10
End	End section

Activity	
Start:Activity	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:01:0	Status 0: Planned (default) 2: Ongoing 3: Completed
A:02:3	Due date (days forward from date from datetime section)
A:03:Send Proposal	Activity Action
A:04:JR	Responsible initials
A:05:From our website	Description
A:06:P45D	Product
A:07:Name	Customer contact name or email (* = same as in Person section)
A:30: Some text here|CR|with 2 lines	Comment
C:01:1,2	Custom field 1
C:02:a	Custom field 2
C:03:tetst	Custom field 3
C:04:1234	Custom field 4
C:05:1,2	Custom field 5
C:06:addd	Custom field 6
C:07:qweqwewq	Custom field 7
C:08:test8	Custom field 8
C:09:qwer	Custom field 9
C:10:1,2	Custom field 10
C:11:rqqwe	Custom field 11
C:12:qwe	Custom field 12
C:13:12123	Custom field 13
C:14:aaaa	Custom field 14

C:14:121231	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
End	End section

Opportunity/Delivery	
Start:OpportunityDelivery	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:98:0	0:Opportunity (default) 1:Delivery
A:01:82311	Opportunity/Delivery Number (at create only)(* = auto numbering (only when enabled in b2bCRM))
A:02:JR	Responsible initials
A:03:JR	Responsible 2 User Initials
A:04:P45D	Product
A:05:5000	Value/Amount (Integer)
A:06:3	Opportunity Level 1-12 N/A for Delivery
A:07:e-commerce order	Description
A:08:05	Currency - unique currency id number
A:09:*	Customer contact name (*=same as in Person data)
A:10:M123	Opportunity search 1 data
A:11:CCB	Opportunity search 1 data
A:12:0	Order date / Expected date. Number of days from date from datetime section (0=default)
A:30: Some text here|CR|with 2 lines	Comment
C:01:1,2	Custom field 1
C:02:a	Custom field 2
C:03:tetst	Custom field 3
C:04:1234	Custom field 4
C:05:1,2	Custom field 5
C:06:addd	Custom field 6
C:07:qweqwewq	Custom field 7
C:08:test8	Custom field 8
C:09:qwer	Custom field 9
C:10:1,2	Custom field 10

C:11:rqqwe	Custom field 11
C:12:qwe	Custom field 12
C:13:12123	Custom field 13
C:14:aaaa	Custom field 14
C:14:121231	Custom field 15
C:16:aaaaaaaa	Custom Memo Field
End	End section

Product	
Start:Product	Start section
A:01:2018	Product year
A:02:blalas rerlewlwelewr we	Comment
C:01:1,2	Custom field 1
C:02:a	Custom field 2
C:03:tetst	Custom field 3
C:04:1234	Custom field 4
C:05:1,2	Custom field 5
C:06:addd	Custom field 6
C:07:qweqwewq	Custom field 7
C:08:test8	Custom field 8
C:09:qwer	Custom field 9
C:10:1,2	Custom field 10
C:11:rqqwe	Custom field 11
C:12:qwe	Custom field 12
C:13:12123	Custom field 13
C:14:aaaa	Custom field 14
C:14:121231	Custom field 15
C:16:aaaaaaaa	Custom Memo Field
End	End section

Quotation lines	
Start:Quotation	Start section

A:01:120	Price
A:02:123	Cost price
A:03:124	List price
A:04:50	Quantity
A:05:35	Discount
A:06:25	Vat percentage
A:07:blalaalsdqwerw	Comment
C:01:1,2	Custom field 1
C:02:a	Custom field 2
C:03:tetst	Custom field 3
C:04:1234	Custom field 4
C:05:1,2	Custom field 5
C:06:addd	Custom field 6
C:07:qweqwewq	Custom field 7
C:08:test8	Custom field 8
C:09:qwer	Custom field 9
C:10:1,2	Custom field 10
C:11:rqqwe	Custom field 11
C:12:qwe	Custom field 12
C:13:12123	Custom field 13
C:14:aaaa	Custom field 14
C:14:121231	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
End	End section