HOW TO DO A WEBFORM

BASICS & SPECIFICS

DIGITAL TEAM
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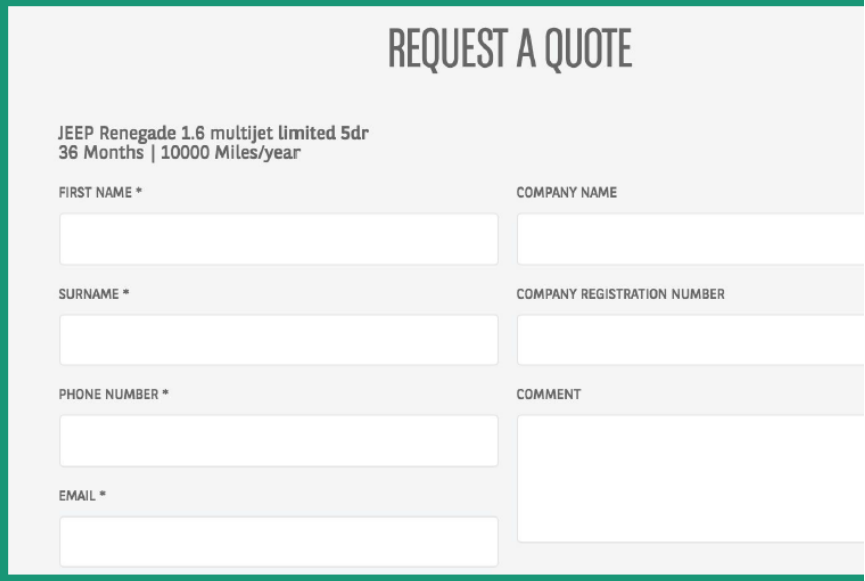
1 THE BASICS OF WEBFORMS

WEBFORMS & SALESFORCE



How to manage a form and salesforce

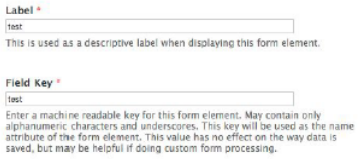
WEBFORMS & SALESFORCE

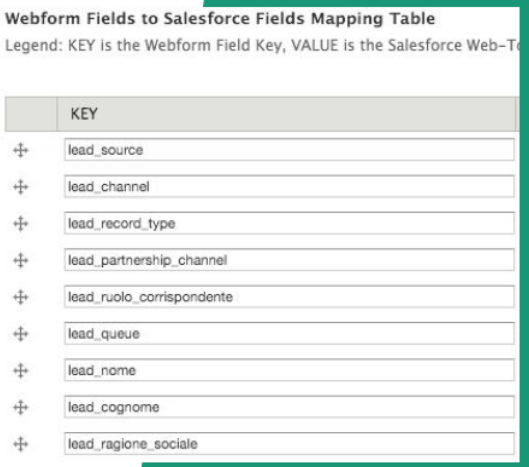
To create a webform, click on “Manage Content > Content > Add content > Webform”.
To edit a webform, click on “Manage Content > Webforms”.

TITLE	CREATED	STATUS	VIEW	OPERATIONS
Quotazione usato	07/27/2015 - 16:07	Open	Submissions Analysis Table Download	Edit Components Clear
Richiedi un preventivo per questa marca	09/21/2015 - 15:31	Open	Submissions Analysis Table Download	Edit Components Clear
Richiedi un preventivo	09/25/2015 - 16:32	Open	Submissions Analysis Table Download	Edit Components Clear

Then click on the “Components” button of the webform you want to edit, then you can add form field by enter a name and selecting a type of field.

Then click on “Add”. And complete the form.



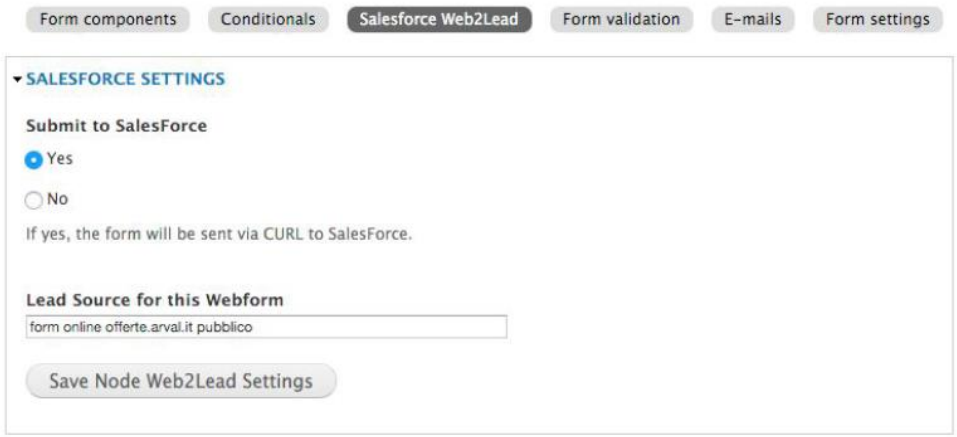


For salesforce, you have to refer to the list of key on “Configuration > Web services > Salesforce webform
The “fied key” (webform components) have to be the same as the key (Saleforce webform fields).

Pay attention : Don’t modificate the Salesforce Key, it is the same for all countries

WEBFORMS & SALESFORCE

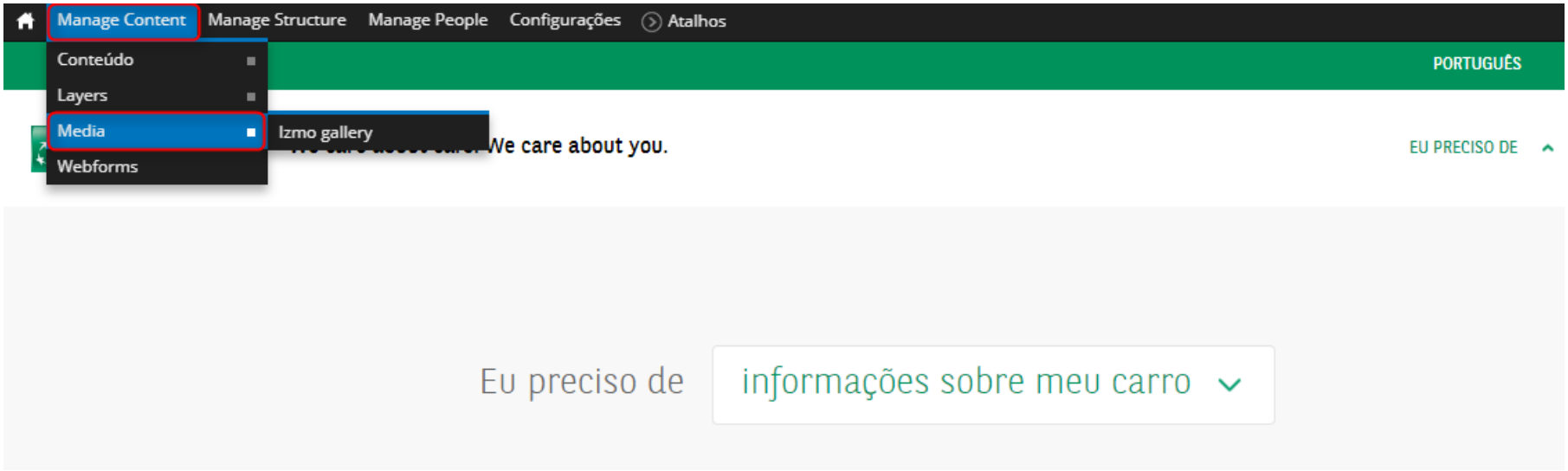
For salesforce you have to enter the lead source (click on “Salesfoce Web2Lead” tab):



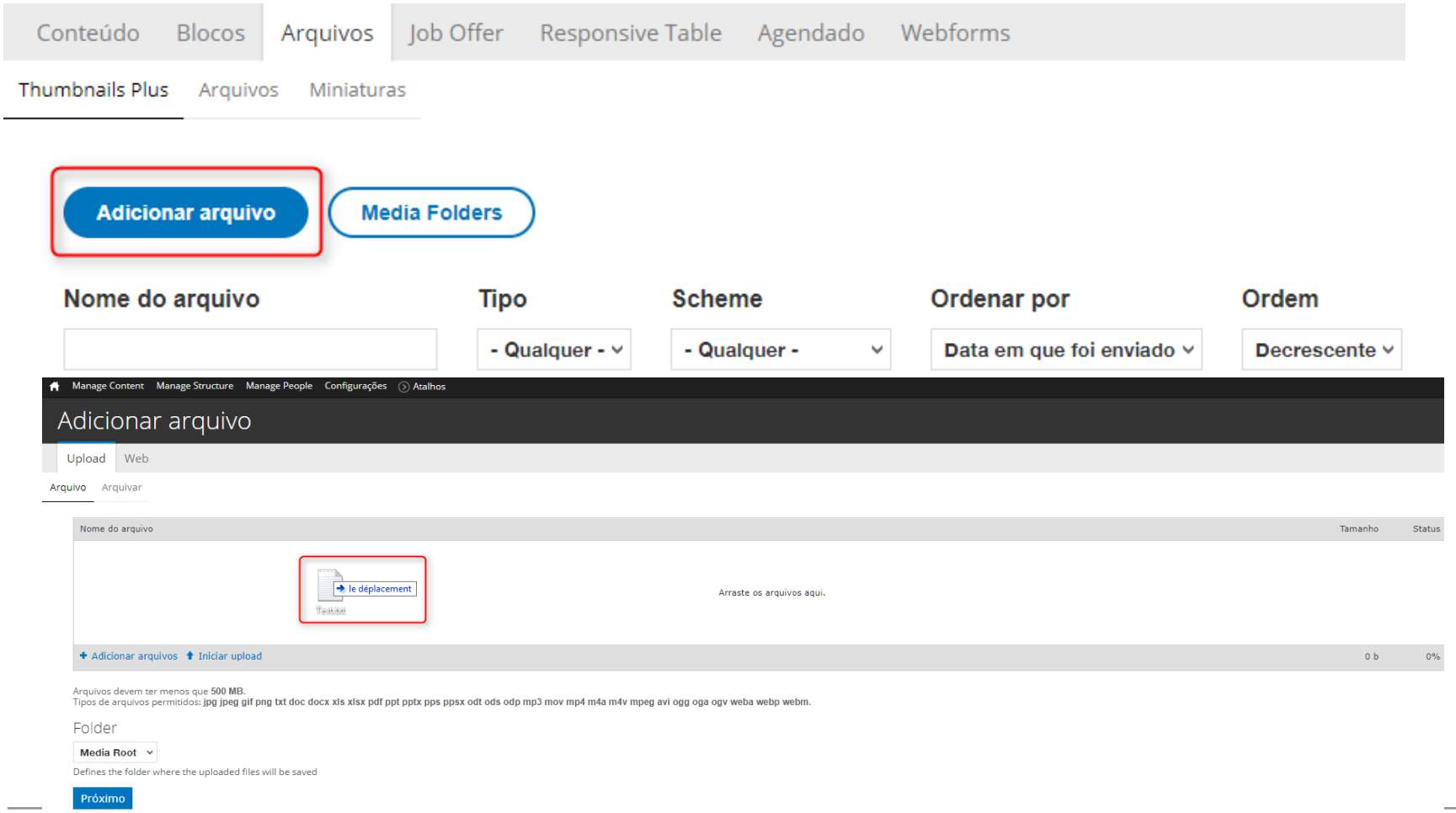
Finally, you have to enter the recipient (click on “E-mails” tab):

2 HOW TO IMPLEMENT A FILE IN A WEBFORM ?

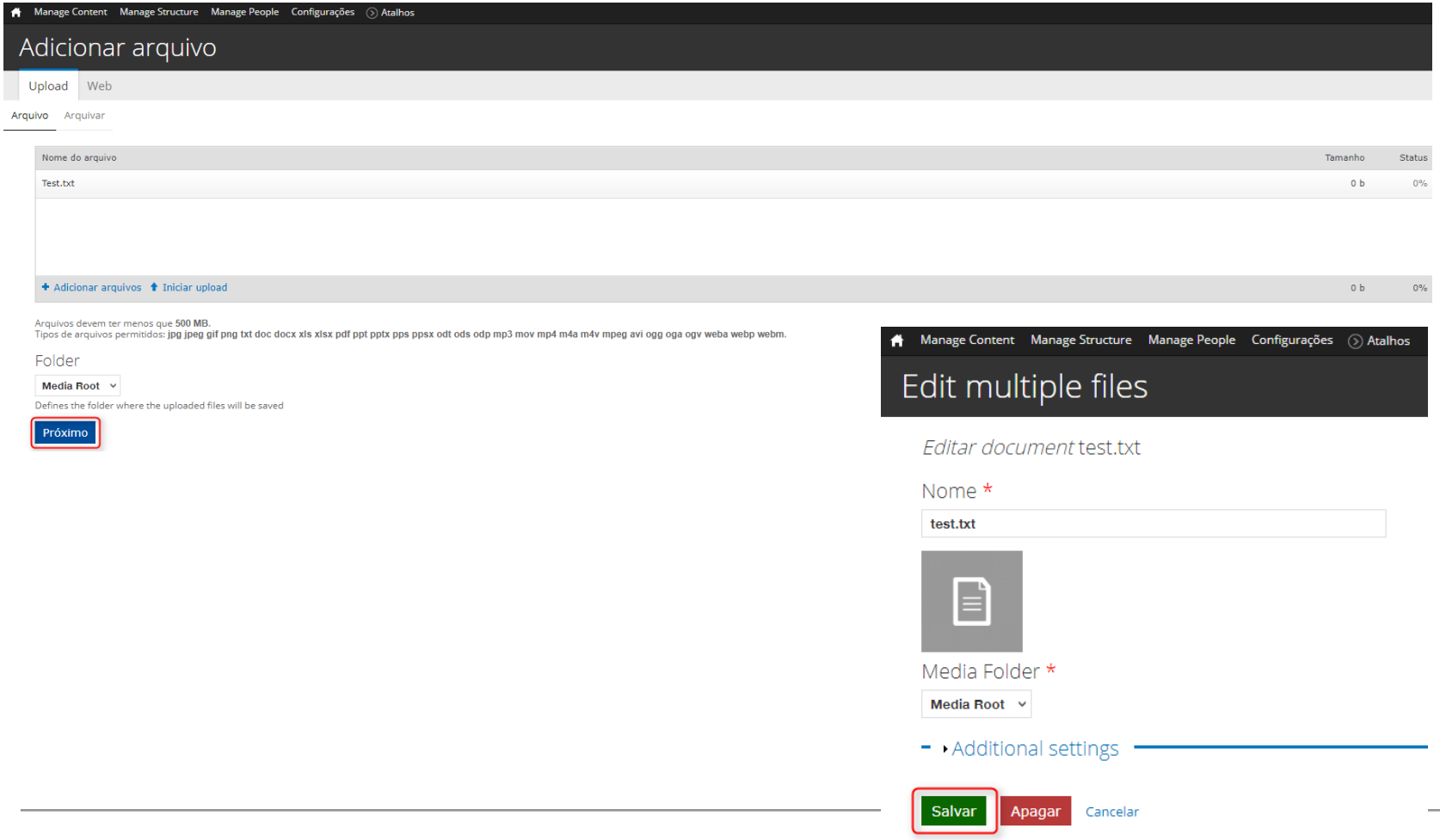
- First, you have to add your file you want your customers download.
To do that, you have to click on : **"Manage Content"** => **"Media"**.



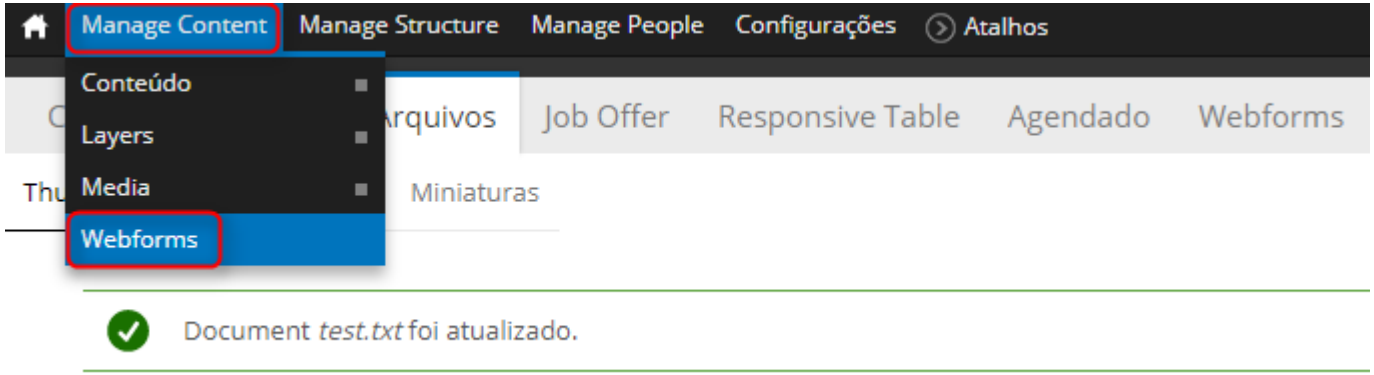
- Click on **« Add files »** and drag and drop your file in the window.



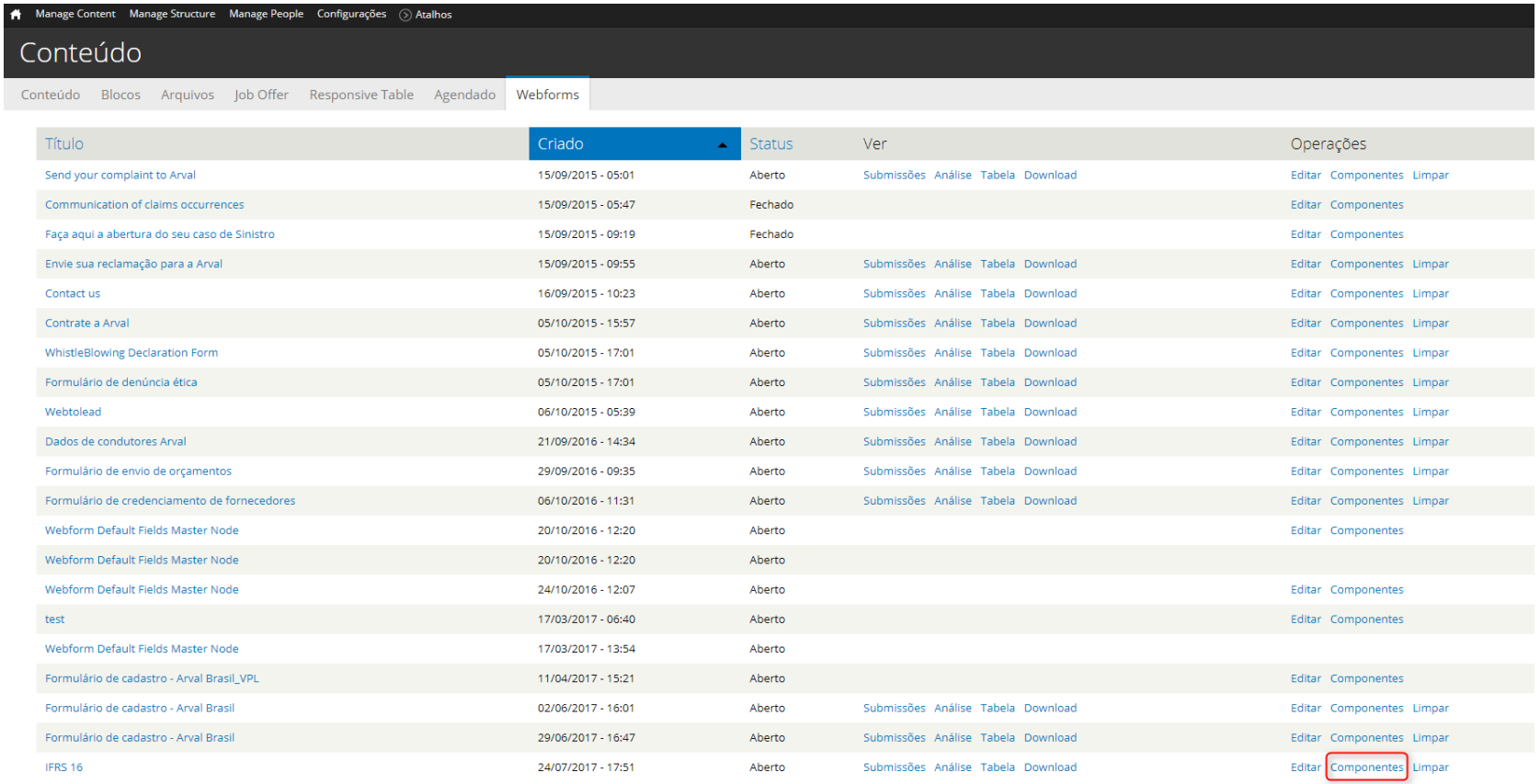
- Click on « **Next** » and on « **Save** ».



- After, to add your file into your webform, click on **"Manage Content"** => **"Webforms"**.

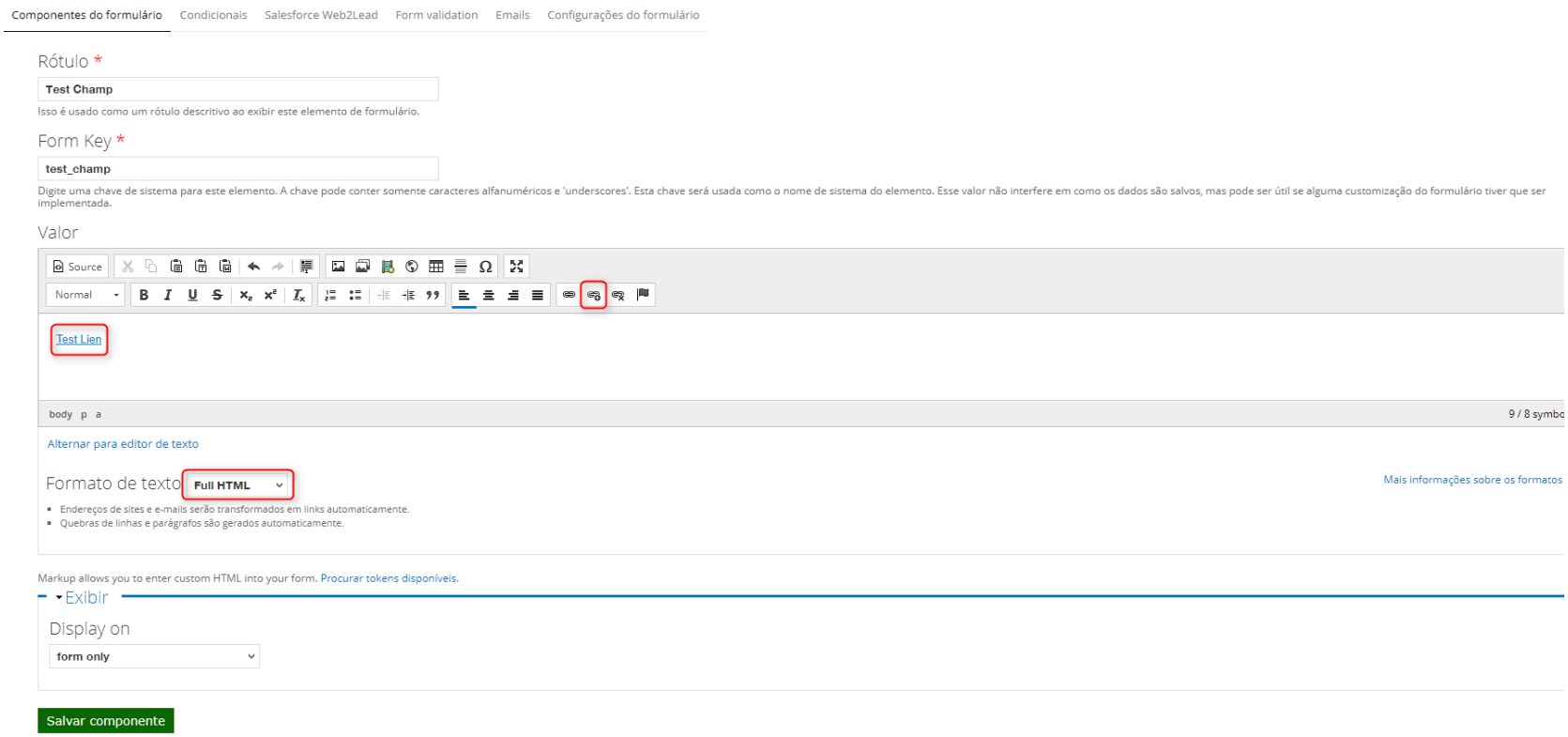


- Click on **"Componants"** on the webform you want to add your field.

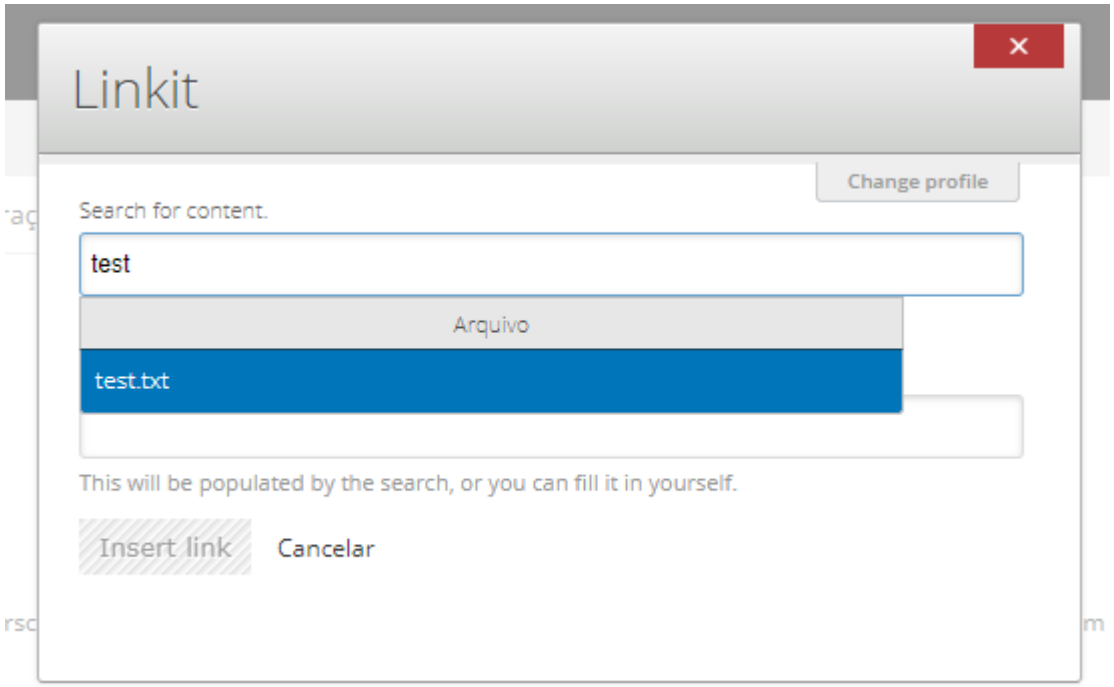


- Add your field (*Nome do novo componente*), click on **« Markup »** and **« Add »**.

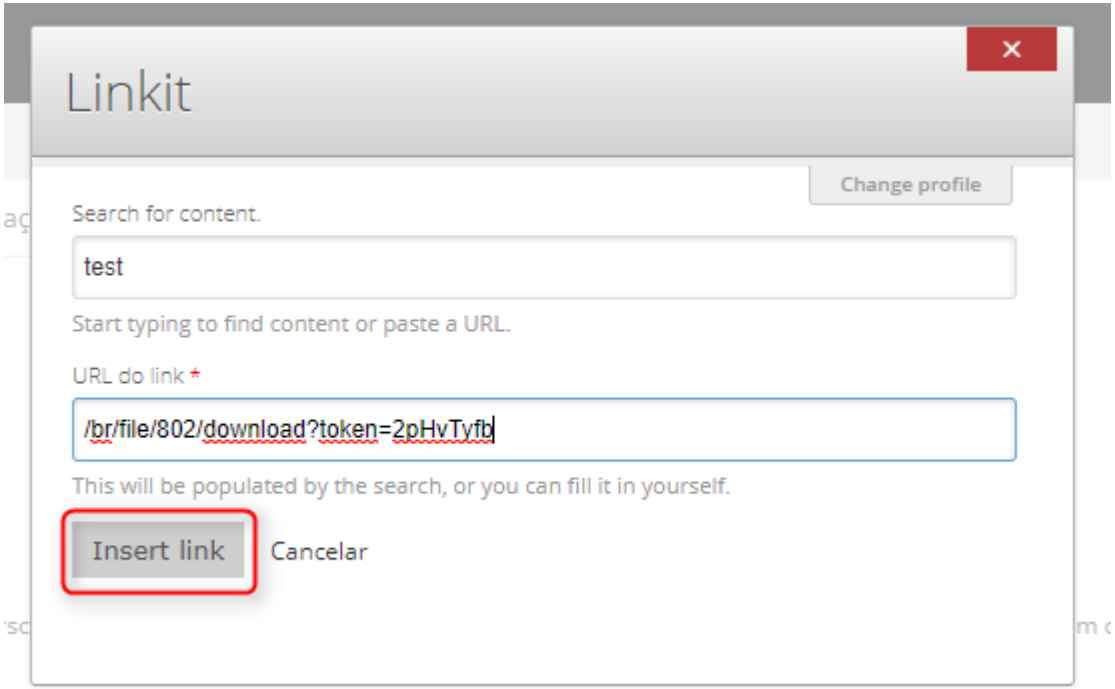
- Fill the different fields.
Click on **"Full HTML"**, write your link name and click on **"Link to content"**.



- Fill your file name and click on the file you want.



- Click on **"Insert Link"** and on **"Salvar Componente"**.



It's OK, your customers will download the file when they click on your link through the webform.

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