



Web Connect Configuration Guide

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c360 Solutions, Inc.
www.c360.com

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Overview

c360 Web Connect for Microsoft CRM is a Microsoft CRM compatible component that allows organizations using Microsoft CRM to easily integrate their web site to Microsoft CRM for lead and web visitor activity capture. Web Connect will allow organizations to:

- Link multiple web site forms to CRM to create Lead and Activity records.
- By form, Web Connect can be configured execute any or all of the following actions:
 - o Email all web form values and actions taken to an SMTP address, record owner, record owner's manager or team in CRM
 - o Match by email address and create new Lead or Activity depending on whether email address was matched to an existing Lead or Contact
 - o Create an additional CRM activity to log form field values and actions taken (same information as sent in email)
 - o Send a configurable HTML or text (administrator may specify) formatted confirmation email to visitor
 - o Specify a URL to which to post one or more of the form field values (e.g. this action may be used for opting visitor into a 3rd party email list)
 - o Run a manual workflow rule in CRM

Web Connect Configuration ---

Implementing Web Connect

Several steps are necessary to implement Web Connect for use in your organization. The steps to implement Web Connect are:

1. **Download Web Connect:** Download Web Connect from www.c360.com
2. **Install the Web Connect configuration tool:** The Web Connect installation guide includes step-by-step instructions to install Web Connect. When you install Web Connect, you are actually installing the Web Connect configuration tool. You will use this to configure Web Connect then you will use its deployment feature to deploy Web Connect components to your web site.
3. **Create web forms:** Create your web forms from the Web Connect templates or build your own web forms.
4. **Copy web forms to your web site:** Once you have created your web forms you will copy them to the area on your site where you would like them to reside.
5. **Configure web form fields and actions:** Using the Web Connect configuration tool configure each form so that its fields correctly map to the CRM Lead fields and the appropriate actions are taken upon form submittal.
6. **Publish Web Connect to Web:** In the Web Connect configuration tool you can select the 'Publish Web Connect to Web' option. This will move the necessary Web Connect components out onto your web site so Web Connect will operate properly when forms are submitted.
7. **Test Web Connect:** Prior to creating links from your production site to your new forms, test each form to ensure that the values entered are properly flowing through to your Microsoft CRM installation.
8. **Go Live:** Link your new forms from your web site so that your visitors will be directed to them and visitor data will begin to show up in CRM.

Creating Web Forms for use with Web Connect

c360 Web Connect allows for existing company web capture pages to integrate into CRM. In order to do this, the forms you would like to integrate into CRM must follow the format shown below. Specifically:

- Web forms must **post** to the WebConnect.aspx page. This page is provided with Web Connect and is published to your web site when you publish Web Connect.
- Web form fields that are to map to picklist field types on the Microsoft CRM Lead records must contain the correct ID values to correspond to the CRM field's integer values (note: in Microsoft CRM picklists field values consist of both a text description as well as an integer ID value)
- Web forms must **require the visitor's email address**. This is what Web Connect uses to determine if the visitor already exists in your CRM database.
- Web forms should validate the data being entered into them. Web Connect will not attempt to validate the data that is being entered. If inappropriate data is entered and CRM is unable to process it, the details of the error will be



emailed to your Web Connect administrator. Adding Java Script into your forms to validate input will reduce potential errors.

Below is the HTML for the SimpleInfo.htm form that is included with Web Connect. This shows the necessary elements for a Web Connect form.

```
<html>
<head>
<meta http-equiv="Content-Type" content="text/html; charset=windows-1252">
<title>Caption</title>
</head>

<body>
  <form method="POST" name="frmCRMLead" action="../webconnect.aspx"
id="Form1">
    <table border="0" width="600" id="table1" cellspacing="0"
cellpadding="0">
      <tr>
        <td width="50%"><b>Contact Us</b></td>
        <td width="50%"></td>
      </tr>
      <tr>
        <td width="50%">First Name:</td>
        <td width="50%"> <input type="text" name="firstname"
size="20"></td>
      </tr>
      <tr>
        <td width="50%">Last Name:</td>
        <td width="50%"> <input type="text" name="lastname"
size="20"></td>
      </tr>
      <tr>
        <td width="50%">E-mail</td>
        <td width="50%"> <input type="text"
name="emailaddress1" size="20"></td>
      </tr>
      <tr><td width = "50%"><input type="submit" name="btnSubmit"
value="submit" >
      </td>
      <td width = "50%"></td>
      </tr>
    </table>
  </form>
</body>
</html>
```

Sample Forms

The Web Connect installation zip file includes several sample forms that may be used as templates or guides in developing your own web site forms. The forms are described in the table below and are all plain forms with no graphical formatting. These forms have been created to use standard CRM Lead fields and values so modification will be necessary if you wish to collect values for custom fields you have added to your CRM Lead records.

Sample Form Name	Form Description
AltCRMLeadFields.htm	This is an example form which includes all standard Microsoft CRM Lead values. This form is useful as a template from which you can remove fields you do not wish to collect and add fields you do wish to collect

ContactUs.htm	<p>This is a simple information collection form to gather a visitor's information and solicit their comments. The fields included are:</p> <ul style="list-style-type: none"> - First Name - Last Name - Company Name - Business Phone Number - Email Address - Comments
SimpleInfo.htm	<p>This form asks the visitor only for first name, last name and email address. This may be appropriate for use when you are simply building a list of email addresses for marketing purposes.</p>

Form Field Input Validation

As mentioned earlier, Web Connect will not validate the data your web visitors enter. To validate the visitors' data entry you may wish to add Java Script to the forms to validate that the visitor is entering data in the format you desire. For example, when asking for an email address you may wish to use Java Script to ensure that the address contains at least an '@' symbol and a '.'. Email addresses without both these characters cannot be valid. Below is an example of a Java Script function to validate the fields in SimpleInfo.htm.

```
<SCRIPT language="javascript">
    function ValidateFields() {
        if (frmCRMLead.firstname.value == "") {;
            alert("Please enter your first name.");
            return false;
        }
        if (frmCRMLead.lastname.value == "") {;
            alert("Please enter your last name.");
            return false;
        }
        if (frmCRMLead.emailaddress1.value == "") {;
            alert("Please enter your email address.");
            return false;
        }
        if ((frmCRMLead.emailaddress1.value.indexOf("@") == -1) &&
(frmCRMLead.emailaddress1.value.indexOf(".") == -1)) {;
            alert("Please enter a valid email address.");
            return false;
        }

        return true;
    }
</SCRIPT>
```

To add the Java Script validation function above to one of the template Web Connect forms insert the code above into the form and change the following line in the form...

```
<input type="submit" name="btnSubmit" value="submit" >
```

...to the line below so the 'ValidateFields' Java Script function will be called when the form is submitted.

```
<input type="submit" name="btnSubmit" value="submit" onClick="return
ValidateFields();" />
```

Web Connect Configuration Tool

Once you have built your forms and placed them on your web site, you must use the Web Connect configuration tool to configure how the form fields map to CRM lead values and to indicate which actions you would like to take place when the form is submitted.

Double-click on the c360.WebConnect.Configuration.exe to launch the Web Connect Setup tool. Before configuring individual Capture Pages, the settings on this tab must be completed.

Global Settings

The Global Settings screen, pictured in figure 2, is where you provide Web Connect the basic information it needs to interact with your Microsoft CRM installation.

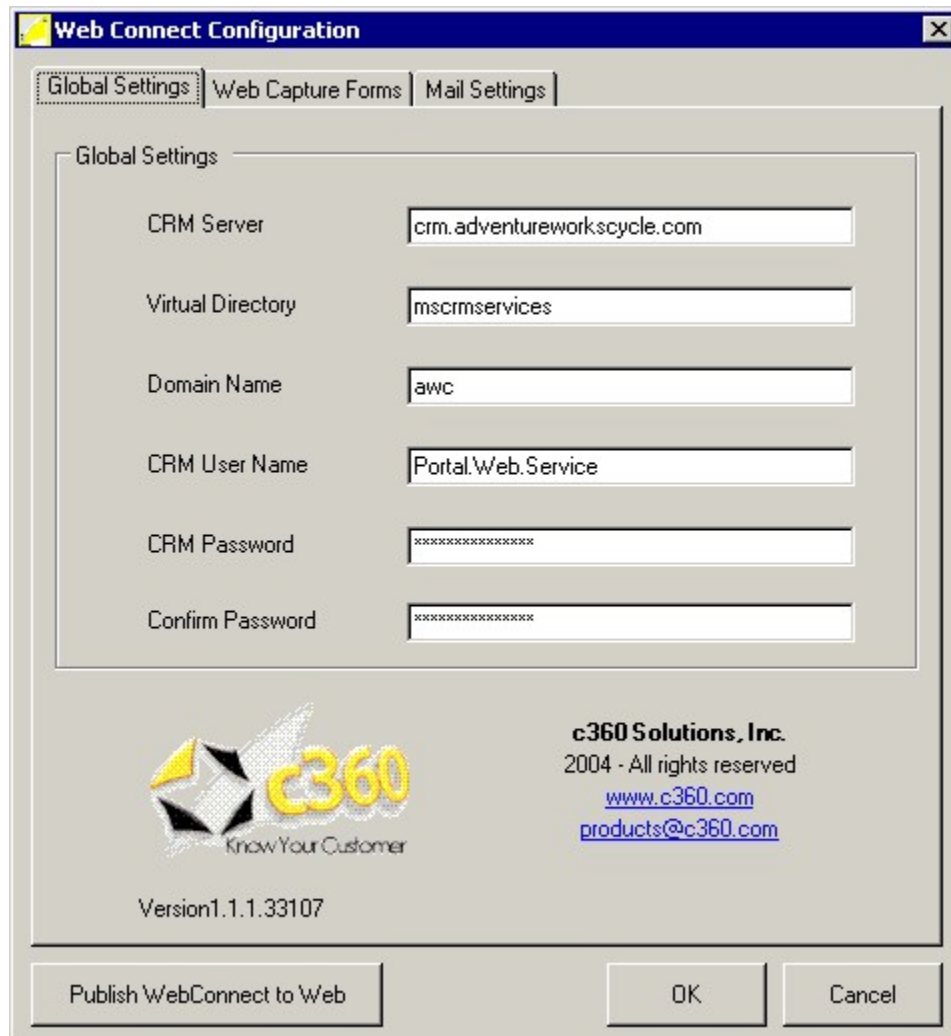
The image shows a Windows-style dialog box titled 'Web Connect Configuration'. It has three tabs: 'Global Settings' (selected), 'Web Capture Forms', and 'Mail Settings'. The 'Global Settings' tab contains several text input fields: 'CRM Server' with the value 'crm.adventureworkscycle.com', 'Virtual Directory' with 'mscrmservices', 'Domain Name' with 'awc', 'CRM User Name' with 'Portal.Web.Service', 'CRM Password' with a masked password 'xxxxxxxxxx', and 'Confirm Password' also with a masked password 'xxxxxxxxxx'. At the bottom of the dialog, there is a 'Publish WebConnect to Web' button on the left, and 'OK' and 'Cancel' buttons on the right. In the bottom right corner, there is a small 'c360' logo with the tagline 'Know Your Customer', the text 'c360 Solutions, Inc. 2004 - All rights reserved', and two email addresses: 'www.c360.com' and 'products@c360.com'. The version number 'Version1.1.1.33107' is displayed in the bottom left corner of the dialog area.

Figure 2: Configuring Web Connect global settings



The table below describes the information that should be entered into each field on the Global Settings screen.

Setting	Description	Example
CRM Server	The machine name of the CRM server	crm.adventureworkscycle.com
Virtual Directory	The virtual directory where the CRM web services reside. By default this will be mscrm services	mscrm services
Domain Name	The domain on which CRM is installed	awc
CRM User Name	The CRM user that Web Connect uses to connect to CRM and create CRM Lead and Activity records	Portal.Web.Service
CRM Password	The password for the CRM user mentioned above	<i>Enter password here</i>
Confirm CRM Password	Repeat the password for the CRM user	<i>Enter password here</i>

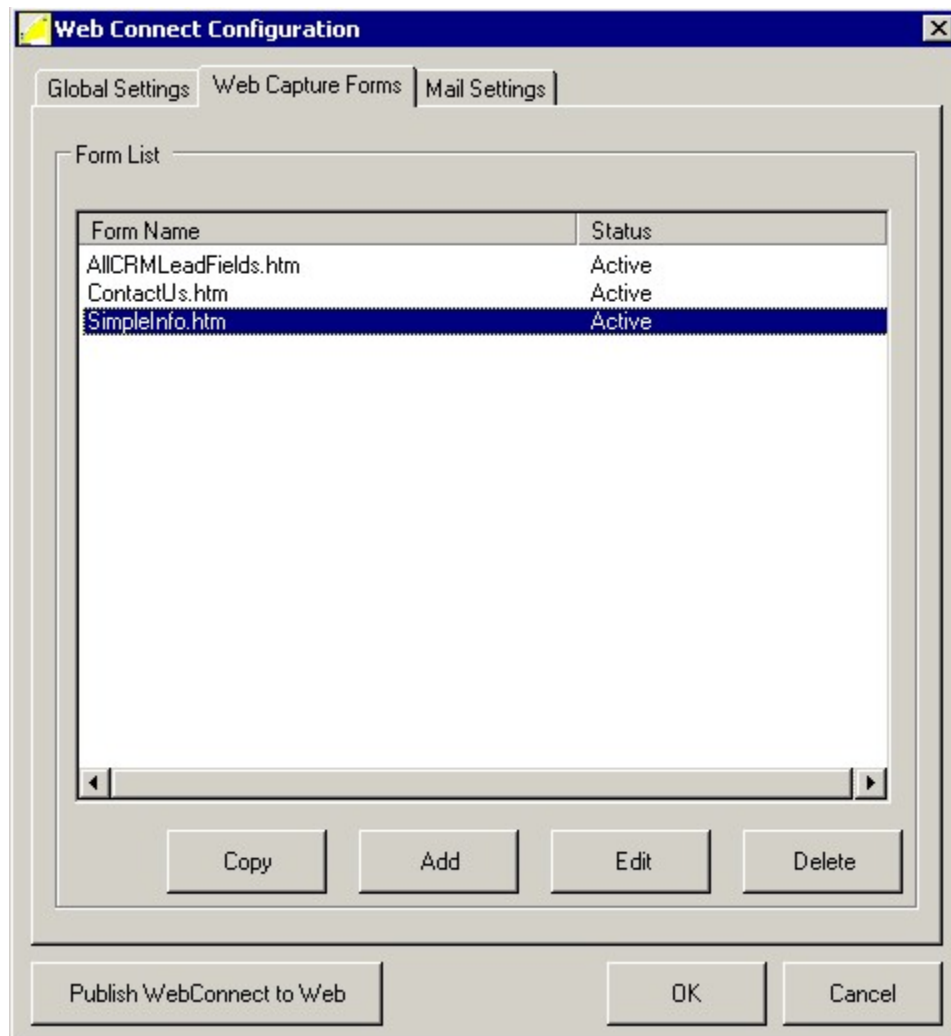
Capture Page Settings

To configure individual capture pages, go to the Capture Page Settings tab, pictured in Figure 3, and click 'Add'. Alternatively, if you plan to use the sample forms they are already configured in the listing.

The 'Edit' button will allow you to modify existing pages you have already configured.

The 'Delete' button will delete any configurations you no longer wish to complete.

The 'Copy' button will allow you to make and rename a copy of form settings that are already configured



Web Connect Configuration

Global Settings | **Web Capture Forms** | Mail Settings

Form List

Form Name	Status
AllCRMLeadFields.htm	Active
ContactUs.htm	Active
SimpleInfo.htm	Active

Copy Add Edit Delete

Publish WebConnect to Web OK Cancel

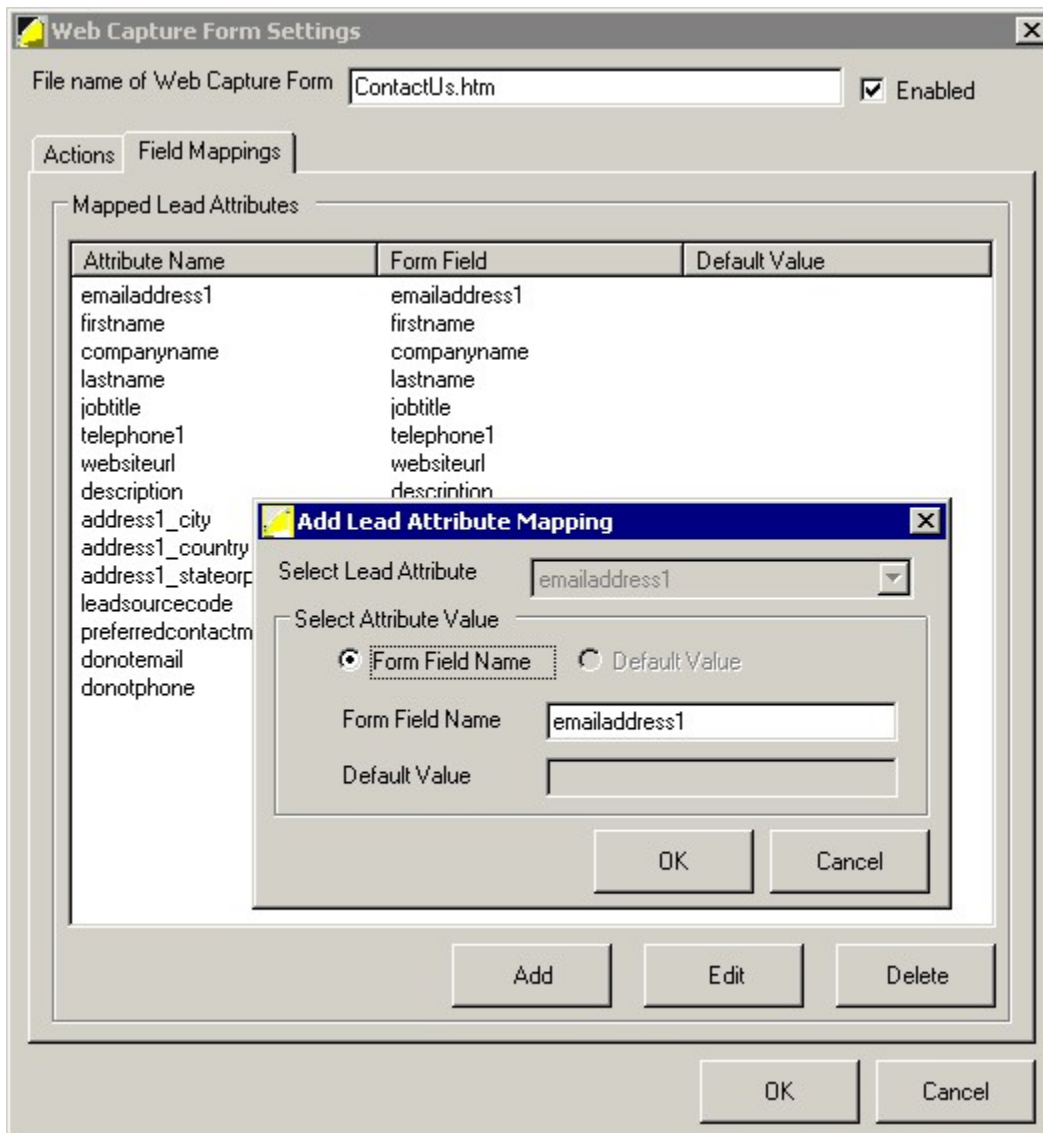
Figure 3: Web capture pages

Capture Page Configurations

To configure a capture page's settings you will need to specify the pages' field mappings and actions to take place when a form is submitted by a web visitor.

Mappings

The Mappings tab is where you tell Web Connect how the fields on your web form should map to the fields on the CRM Lead form. The mappings form is pictured in figure 4.



Web Capture Form Settings

File name of Web Capture Form: ☒ Enabled

Actions | **Field Mappings**

Mapped Lead Attributes

Attribute Name	Form Field	Default Value
emailaddress1	emailaddress1	
firstname	firstname	
companyname	companyname	
lastname	lastname	
jobtitle	jobtitle	
telephone1	telephone1	
websiteurl	websiteurl	
description	description	
address1_city		
address1_country		
address1_stateorprovinc		
leadsourcecode		
preferredcontactmethod		
donotemail		
donotphone		

Add Lead Attribute Mapping

Select Lead Attribute:

Select Attribute Value:

☒ Form Field Name ☐ Default Value

Form Field Name:

Default Value:

OK Cancel

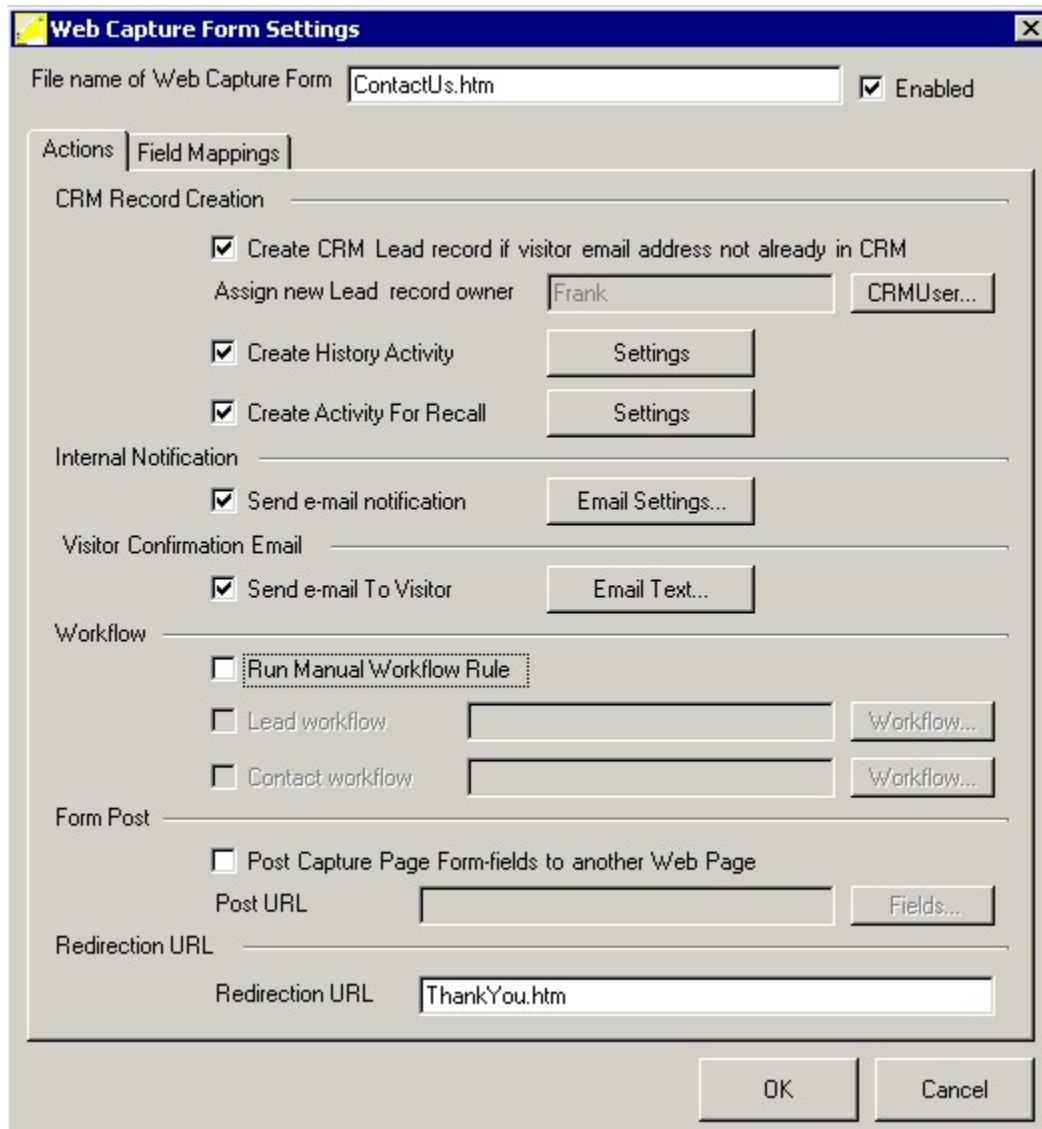
Add Edit Delete

OK Cancel

Figure 4: Map data from your web form to the CRM Lead record

Actions

Click the 'Actions' tab is where you will tell Web Connect what you would like to happen each time a web visitor completes the web form and clicks submit. Figure 5 shows the Actions tab.



Web Capture Form Settings

File name of Web Capture Form: ☒ Enabled

Actions | **Field Mappings**

CRM Record Creation

- ☒ Create CRM Lead record if visitor email address not already in CRM
 - Assign new Lead record owner:
- ☒ Create History Activity
- ☒ Create Activity For Recall

Internal Notification

- ☒ Send e-mail notification

Visitor Confirmation Email

- ☒ Send e-mail To Visitor

Workflow

- ☐ Run Manual Workflow Rule
- ☐ Lead workflow - ☐ Contact workflow

Form Post

- ☐ Post Capture Page Form-fields to another Web Page
 - Post URL:

Redirection URL

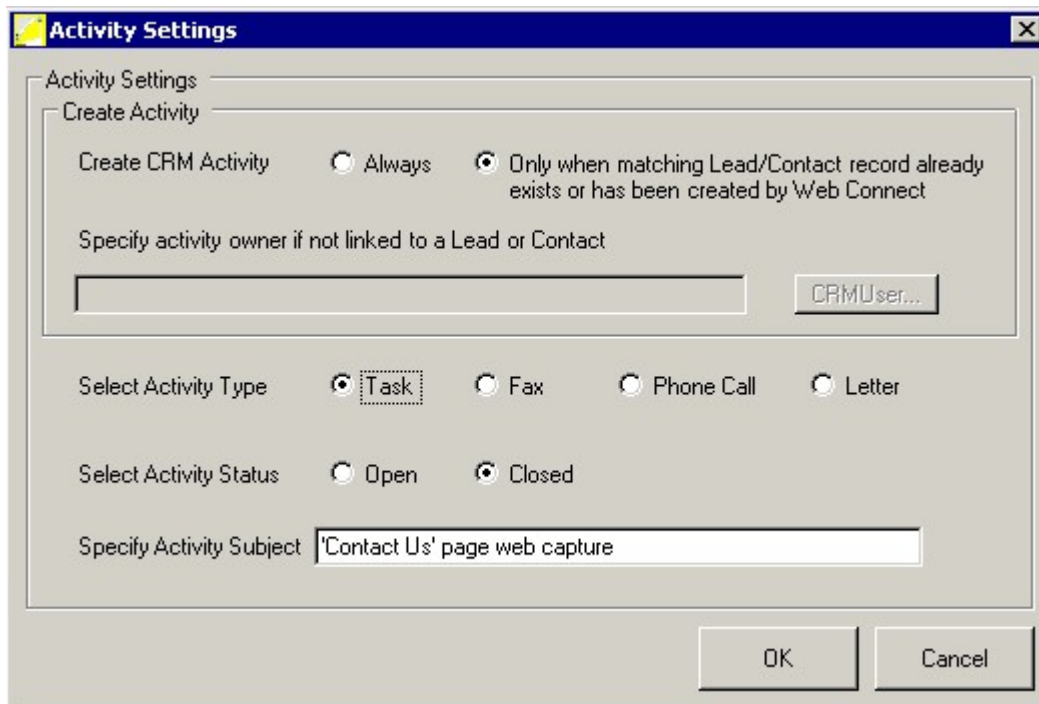
- Redirection URL:

Figure 5: Configure actions

The following table provides a description of each setting on the Actions tab.

Setting	Description
Create CRM lead record if visitor email address not already in CRM	When checked, will create a lead in CRM using the Capture Page mappings set on Mappings tab.
Assign new lead record owner	The CRM user this lead record will be assigned to
Create History Activity	Will create an activity on the lead or contact record with the information captured in the form. See Figure 6
Create Activity for Recall	A reminder activity to follow up on this lead
Internal Notification	Sends internal email notifying employee of the newly added lead. Can be a logical CRM user (Owner, Owner's Manager, Owner's Team) or a non CRM user using SMTP. See figure 7.
Visitor Confirmation Email	Sends email to the visitor of the webpage. Configurable using form fields from the capture page. Can also be written in HTML for special formatting. See Figure 8.
Workflow	Choose Lead and Contact workflow rules to run. You might have internal business rules that require workflow to run when leads or contacts are created.
Form Post	Optional additional internal or 3 rd party post page to process form field values.
Redirection URL	The URL that is displayed to the visitor after submitting the form.

Figure 6 shows the configuration screen for the history activity that Web Connect can create. This Activity is useful for logging the visit and capturing the values that were entered. For example, when a visitor whose email address is already in your CRM database visits your site and completes a form it is good to have this activity created so you will be aware of his visit.



The image shows a Windows-style dialog box titled "Activity Settings". It contains several sections for configuring an activity. The "Create Activity" section has two radio buttons: "Always" and "Only when matching Lead/Contact record already exists or has been created by Web Connect", with the latter being selected. Below this is a text field for "Specify activity owner if not linked to a Lead or Contact" and a "CRMUser..." button. The "Select Activity Type" section has four radio buttons: "Task" (selected), "Fax", "Phone Call", and "Letter". The "Select Activity Status" section has two radio buttons: "Open" and "Closed", with "Closed" being selected. At the bottom, there is a text field for "Specify Activity Subject" containing the text "'Contact Us' page web capture". "OK" and "Cancel" buttons are at the bottom right.

Figure 6: Setting for the history Activity

Figure 7 shows the email settings screen that is displayed when you configure Web Connect to send an internal notification of the visit. The email that is sent includes a hyperlink back to the CRM record.

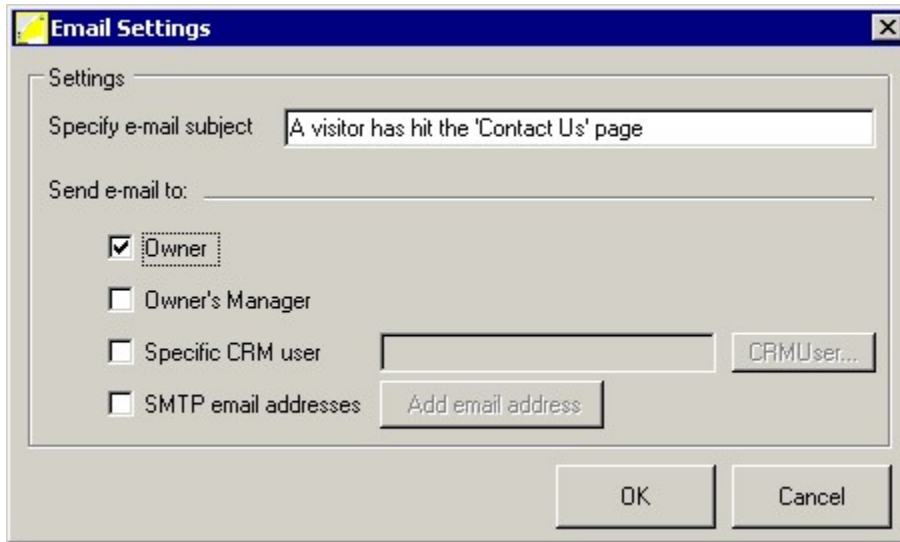
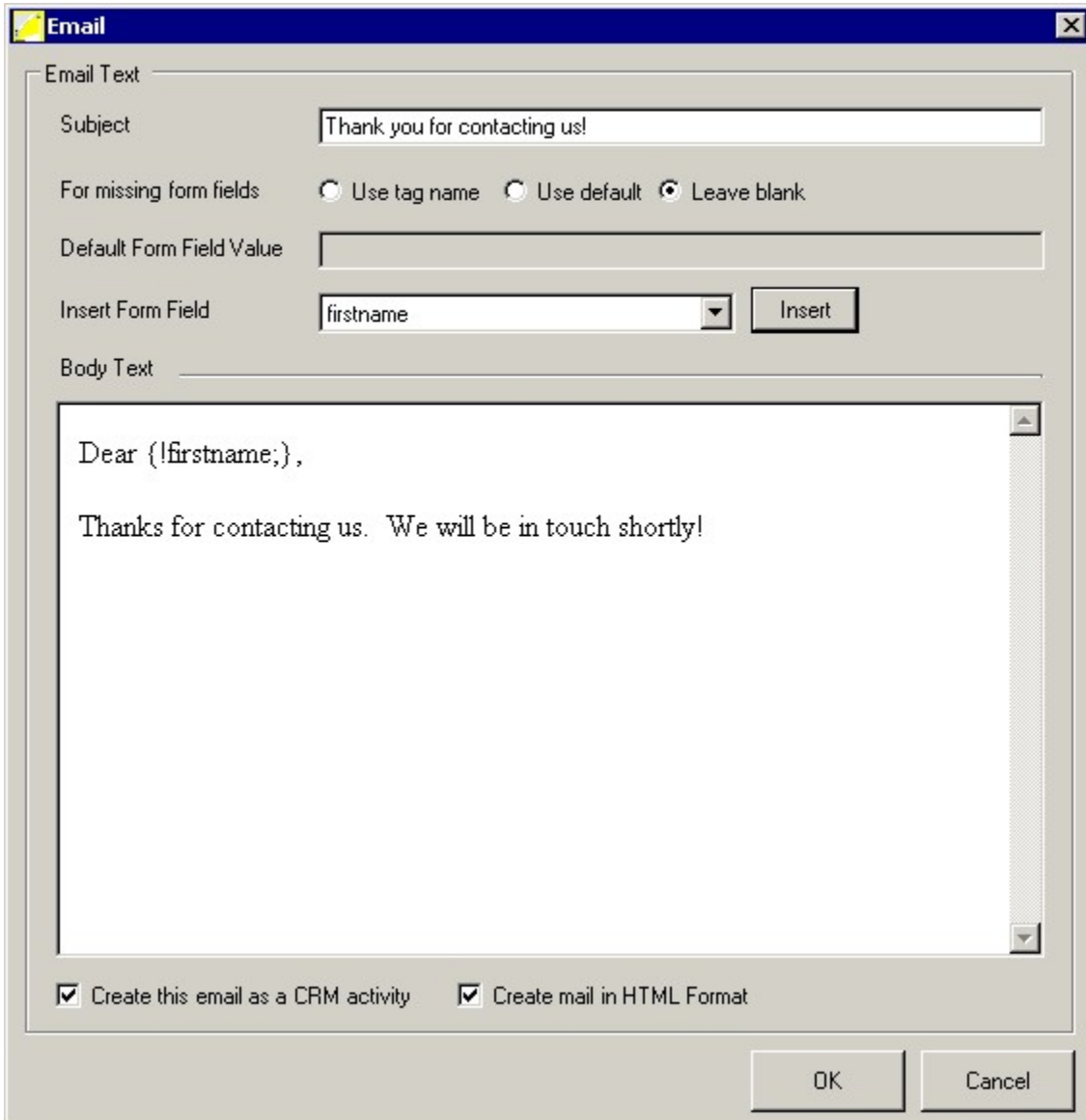
The image shows a Windows-style dialog box titled "Email Settings". It has a "Settings" tab. Inside, there is a text field for "Specify e-mail subject" containing the text "A visitor has hit the 'Contact Us' page". Below this is a "Send e-mail to:" label followed by a list of checkboxes: "Owner" (checked), "Owner's Manager", "Specific CRM user", and "SMTP email addresses". To the right of "Specific CRM user" is a text field and a "CRMUser..." button. To the right of "SMTP email addresses" is an "Add email address" button. At the bottom right are "OK" and "Cancel" buttons.

Figure 7: Settings for the internal email notification

Figure 8 shows the screen for configuring a confirmation email to the web visitor. The email may be created as HTML or plain text and may be created as a CRM activity if desired. The values the visitor supplied in submitting the form may be used to personalize the response back to him.



Email

Email Text

Subject: Thank you for contacting us!

For missing form fields: ☐ Use tag name ☐ Use default ☒ Leave blank

Default Form Field Value:

Insert Form Field: firstname [Insert]

Body Text

Dear {!firstname;},

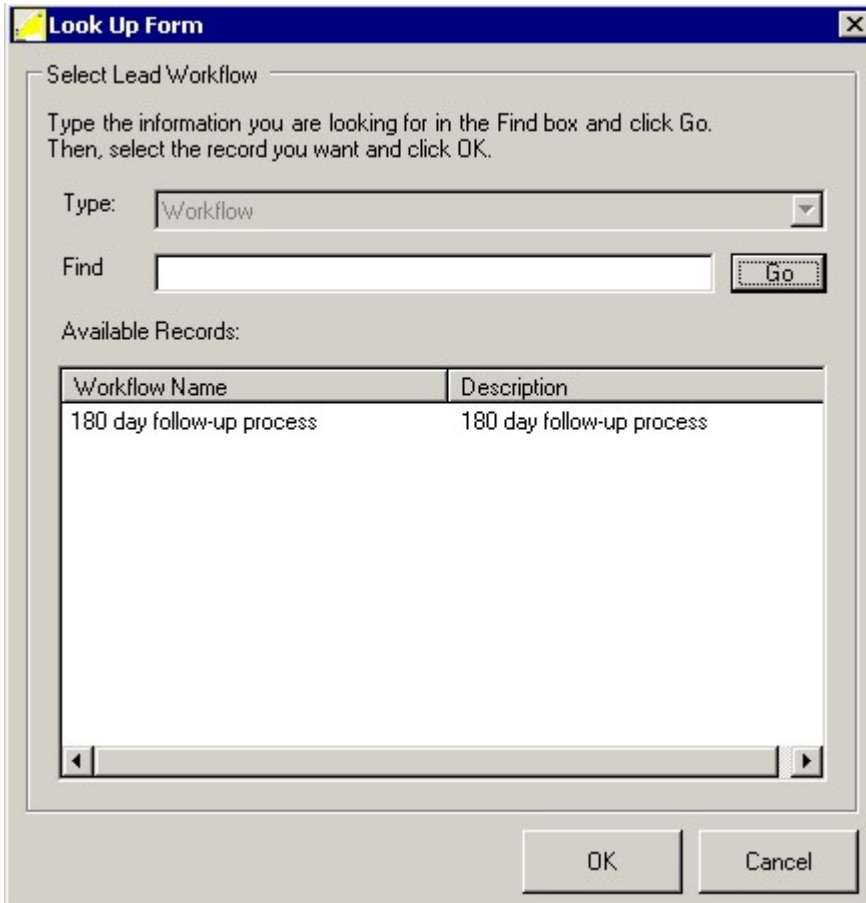
Thanks for contacting us. We will be in touch shortly!

☒ Create this email as a CRM activity ☒ Create mail in HTML Format

OK Cancel

Figure 8: Configuring the confirmation email to be sent to web visitors

If you elect to run a workflow you may select which workflow to run when the CRM record in question is a Lead or a Contact. This is pictured in figure 9. Remember that in some cases (when the visitor's email is not found in CRM) Web Connect will create a new Lead record. In other cases (when the visitor's email is found in CRM) Web Connect will be performing actions against an existing Lead or Contact record. This is important to consider in case you have workflow rules firing on the 'creation' event of Lead records.



Look Up Form

Select Lead Workflow

Type the information you are looking for in the Find box and click Go.
Then, select the record you want and click OK.

Type:

Find

Available Records:

Workflow Name	Description
180 day follow-up process	180 day follow-up process

Figure 9: Selecting a workflow rule to run when the form is submitted

Publishing Web Connect to your web site

Once you have configured all your form settings you are ready to publish the Web Connect components to your web site. Remember, prior to doing this you must copy your web forms to the appropriate location(s) on your web site. Publishing will put other necessary components out onto the web site so your web forms can access these components and these components can, in turn, access Microsoft CRM.

Click the 'Publish Web Connect to Web' button and the publish screen, pictured in figure 10 will appear.

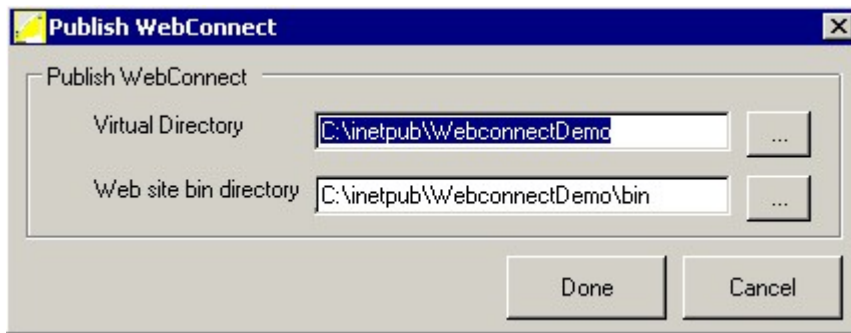
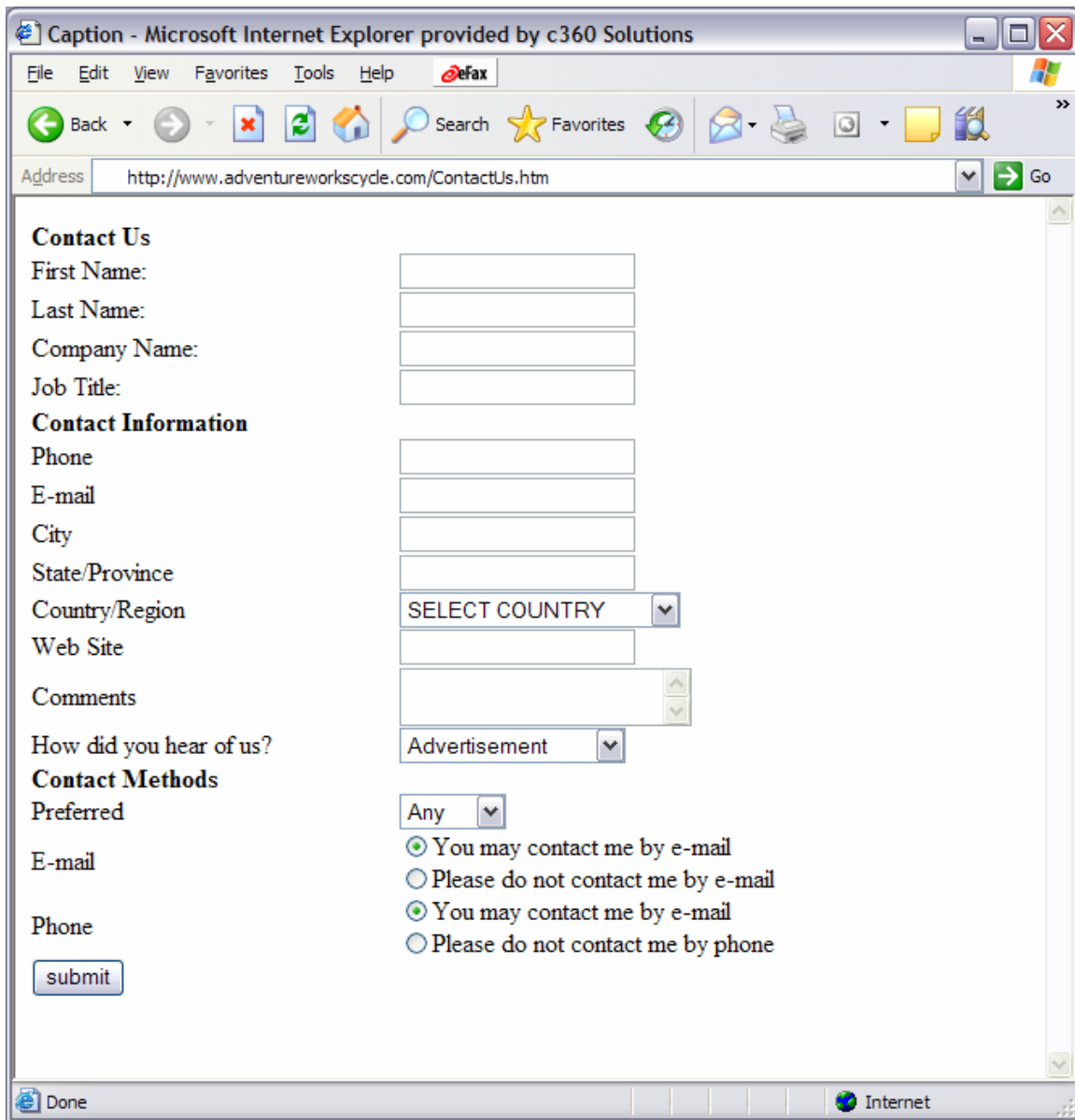


Figure 10: Publishing Web Connect components to your web site

Using the selection buttons on the publish form select your web site's virtual directory where the main web site pages reside as well as the site's bin directory where any executable components of your web site reside. If you do not have a bin directory you can simply create a directory named 'bin' under the root directory of your web site.

Testing Web Connect

Now that you have published the Web Connect components open a browser and type in the URL for one of your Web Forms. Figure 11 below shows the sample 'Contact Us' form supplied with Web Connect. Complete the form and click the submit button and, after a brief processing period, you will be redirected to the specified redirection page.



Contact Us

First Name:

Last Name:

Company Name:

Job Title:

Contact Information

Phone:

E-mail:

City:

State/Province:

Country/Region:

Web Site:

Comments:

How did you hear of us?

Contact Methods

Preferred:

E-mail: ☒ You may contact me by e-mail
☐ Please do not contact me by e-mail

Phone: ☒ You may contact me by e-mail
☐ Please do not contact me by phone

Figure 11: The Web Connect sample 'Contact Us' form

Once you have been redirected to the redirection page, open CRM to verify that the expected actions have taken place.