

# fibrecrm

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PRACTICE

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## Connecting Webforms to Your CRM

**1.** To help with adding your leads you can connect your wordpress website forms to the CRM so when a form is completed it immediately is added as Lead in CRM. To do this you'll need to add use a Form Creator and use a plugin to link. We recommend using; **Ninja Forms, Gravity Forms or Contact Form 7** and using the **SuiteCRM Plugin** to link to the CRM.

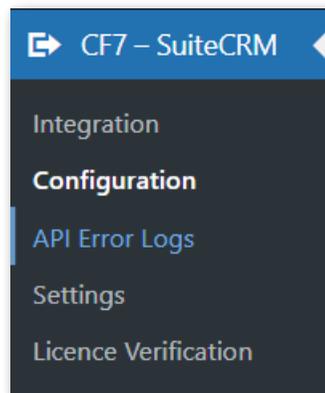


Contact Form 7



GRAVITY FORMS

**2.** Once you've created your forms with the information you'd like to collect and added the SuiteCRM plugin, navigate to the plugin located in the options menu in your wordpress website to connect the form to fields located in your CRM.



**3.** In the options of the Plugin select **Configuration**. Here you will enter the **URL** to your CRM and a **Username** and **Password** related to a user from your CRM. Once done click **Save Changes**.

**4.** The **Integration** option is where you'll link your form to the CRM. You'll see your forms in a list to link a form select the **Pencil** icon in the **Actions** column.

Form Name	Integration Status	Action
Contact form 1	✗	
Book a Discovery Call	✓	
Download Whitepaper	✓	
Book a Discovery Call_copy	✓	
Lead Referral Form	✓	
Chaser for IRIS	✓	
iChaser LinkedIn	✓	

**5.** On the **Integration Form** select the **Module** you'd like to link the form to in the drop down menu and then select **Filter**, so the fields available for that module will appear. **Tick** the SuiteCRM integration box, you can then select the **Action**

Contact Form 7 Form Field	SuiteCRM Module Field
your-name	Select a field
your-email	Select a field
your-subject	Select a field
your-message	Select a field

**Event**. Below that you can link your form fields to your crm field using the dropdown menu. If you're not sure what field you require navigate to the CRM field you want the information to go into and then right click and select **Inspect**. It will there give you the field name. Once done click **Save Changes**.