



vtiger Web Forms 5.0.2 User Manual

Document History

Version 5.0.2

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1. Introduction

The **vtiger Web Forms** is an add-on package for vtiger CRM, an *Open Source Customer Relationship Management* project. You can use the vtiger Web Forms for the following purposes:

- Capture leads from Website
- Capture contacts from Website
- Enable Unsubscribe option in compliance with CAN-SPAM act

Working Principle

1. Your organization implemented vtiger CRM for capturing Website visitors' information through Online Lead or contact form.
2. Website visitors submit their contact details in Online Lead form.
3. The Website visitor's details are transferred to vtiger CRM server and create a lead or contact under **Leads** or **Contacts** module.
4. In vtiger CRM, administrator assigns leads or contacts to one of the sales representatives.
5. Afterwards your organization can use the lead/contact details for various business activities.



2. Installing vtiger Web Forms

- System Requirements
- Installation Prerequisites
- Installation Procedure

2.1. System Requirements

- **Hardware:** x486 with 256 MB RAM or higher with a minimum of 100 MB disk space
- **Operating System:** Windows 2000/NT/XP/2003
- **Web Server:** Apache version 2.0.40 and higher or Microsoft version IIS 5 and higher
- **PHP:** 4.2.x through 5.1.x.

2.2. Installation Prerequisites

- The **vtiger CRM 5.x** is installed in the back-end server
- Your Website is based on PHP 4.2.x through 5.1.x

2.3. Installing Lead or Contact Form

1. Download the [vtigercrm-webforms-5.0.2.zip](#) from the Sourceforge.net.
2. Extract the **vtigercrm-webforms-5.0.2.zip** file in your Website. After extracting, the file structure will be *<Website Home>/<webforms>/*. You can also modify the directory structure as per your *Website* file conventions.
3. Modify the **config.php** file present under *<Website Home>/<webforms>/Lead or <Website Home>/<webforms>/Contact* as given below:

Server_Path: Specify the absolute path (URL) of the vtiger CRM server. For example, if your vtiger CRM server is running at `http://vtigercrm.com/demo` means you need to specify the `Server_Path` as given below:

```
$Server_Path = "http://en.vtiger.com/";
```

Now save the **config.php** file.

4. Modify the Look & Feel of the Online Lead form as per your Website requirements.

5. You may also change the complete layout of the Online Lead form according to your Website layout.

Now your Web-to-Lead form is ready for deployment.

Note: Follow the same procedure to create Web-to-Contact form.

2.3. Installing Unsubscribe Form

You can use Unsubscribe form for disabling mass mail

1. Download the [vtigercrm-webforms-5.0.2.zip](#) from the Sourceforge.net.
2. Extract the **vtigercrm-webforms-5.0.2.zip** file in your Website. After extracting, the file structure will be *<Website Home>/<webforms>/unsubscribe*. You can also modify the directory structure as per your *Website* file conventions.
3. Modify the **config.php** file present under *<Website Home>/<webforms>/unsubscribe* as given below:

Server_Path: Specify the absolute path (URL) of the vtiger CRM server. For example, if your vtiger CRM server is running at <http://vtigercrm.com/demo> means you need to specify the **Server_Path** as given below:

```
$Server_Path = "http://en.vtiger.com/";
```

Now save the **config.php** file.

4. Modify the Look & Feel of the Unsubscribe form as per your Website requirements.
5. You may also change the complete layout of the Unsubscribe form according to your Website layout.

Now your Unsubscribe form is ready for deployment.

Note: Follow the same procedure to create Web-to-Contact form.

3. Customer Support

Please post your valuable comments, feature requests, and issues in **vtiger CRM Discussions** (<http://www.vtiger.com/discussions/>) so that we can provide technical support for you.

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