

Web2CRM File Upload Manager User Manual

V 1.0



CRM Innovation LLC 8527 Bluejacket Street Lenexa, KS 66214

crminnovation.com

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Overview

The File Upload (Upload) add-on to the Web2CRM forms builder will allow your CRM Contacts to attach a single file to their form submission. Upload can be used with any form for any CRM entity that has the Notes feature. Upload doesn't require any code to be installed on the CRM server or customizations to be made to the CRM system. Integration with the company website is straightforward and the application provides standard Form HTML to insert on a company webpage for the form and the upload. Just like the base Web2CRM product, Upload does not require any 'special' code on the web server and works with IIS, Apache or Linux Servers.

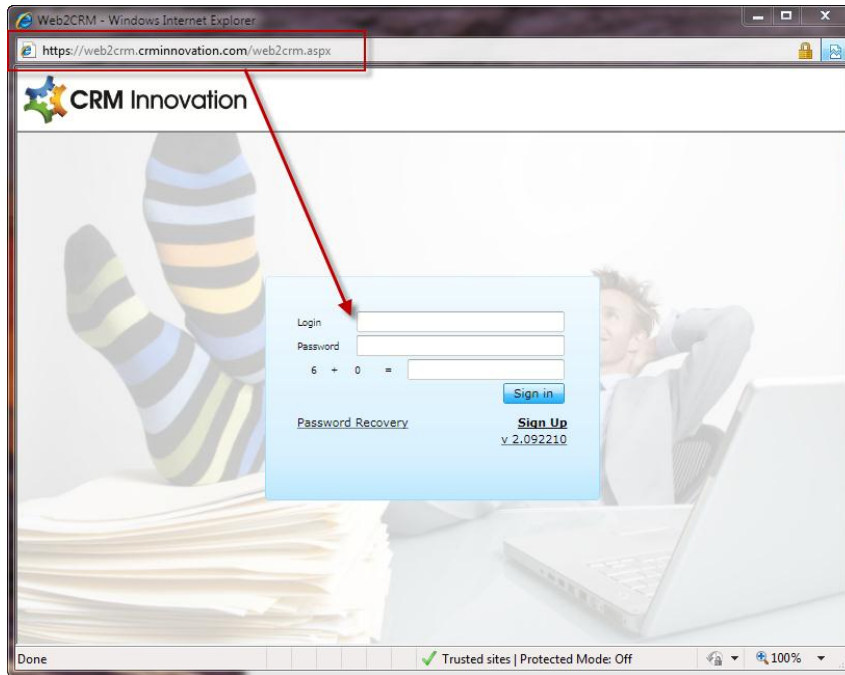
Application Steps Overview

A high level review of the sequence of the steps is as follows:

1. Login to the Web2CRM application.
2. Select the Entity for forms design.
3. Design the form to include the fields that you want the user to fill in.
4. Check the Document Management Button.
5. Save and publish the form.
6. Select the Carry Code Button
7. A new screen will be presented with the Form code, select all the code and copy (alt A, then Alt C). This code includes the Upload code.
8. Insert this code onto a web page where you want the Form to reside.
9. You are done!

Launch Web2CRM

Start Web2CRM as you normally would and login with your master account credentials.



Select the entity that you want to create the Upload form.



Usage Mode: Full License
Master Login: master
CRM Login: Teammember3
CRM Organization: Demo1
URL: http://demo1.ibizinitatives.com:5555
Logout

Instructions:
Select the entity that you will create the form.
Select either a previous form to update or create a new form.

Select Entity
Contact

Change Login Create Form

Previous Forms

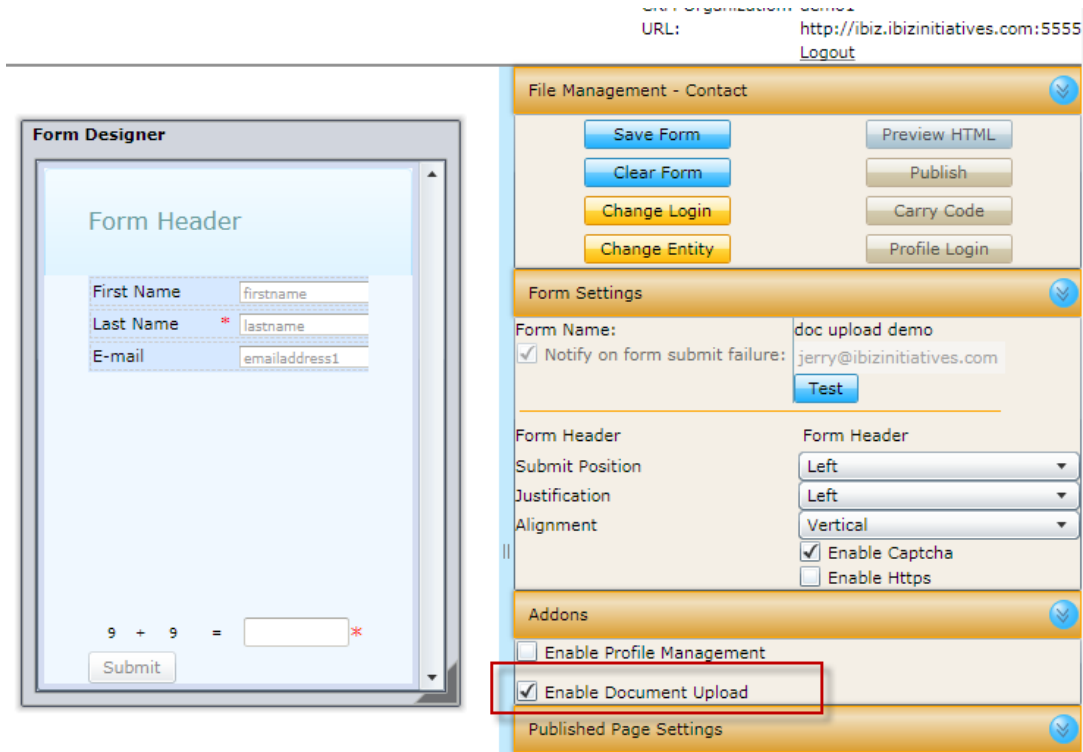
- contact : Published
- Date : Published
- newProfile : Published
- testingProfile : Published

Delete Form UnPublish Form Open Form

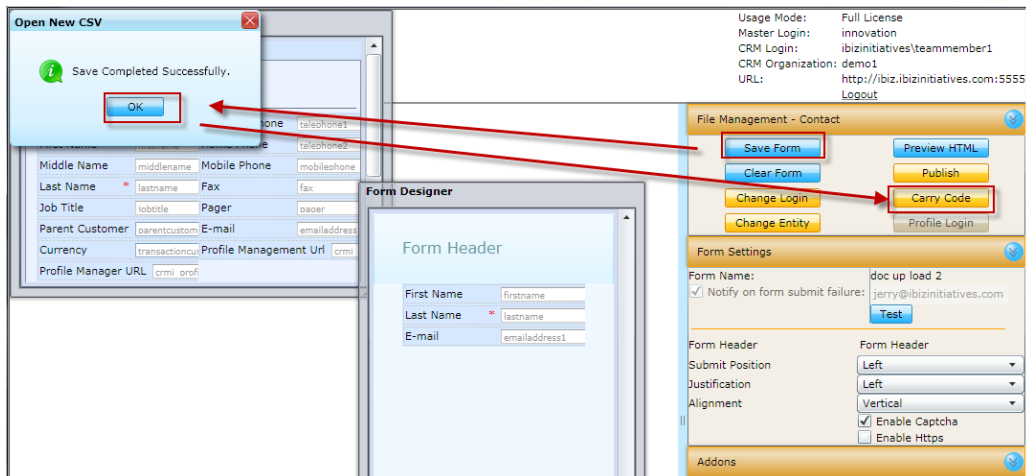
Enable the Document Upload Option

Design the form as you would normally. After you have created the form and it appears that way you want it we need to get it ready for the Upload. **Check the Enable Document Upload check box in the Addons section.**

Note: All Web2CRM users receive a free 7 day trial as part of their overall trial or subscription. When you are ready to purchase this option send an email to CRMinfo@crminnovation.com and we will get you invoiced and then enable your addon feature(s).



When you are done, click on Save Form. Then click on the Carry Code button and copy the code to your website designer as you would for a Web2CRM form that doesn't use the Upload feature.



Upload Page Sample

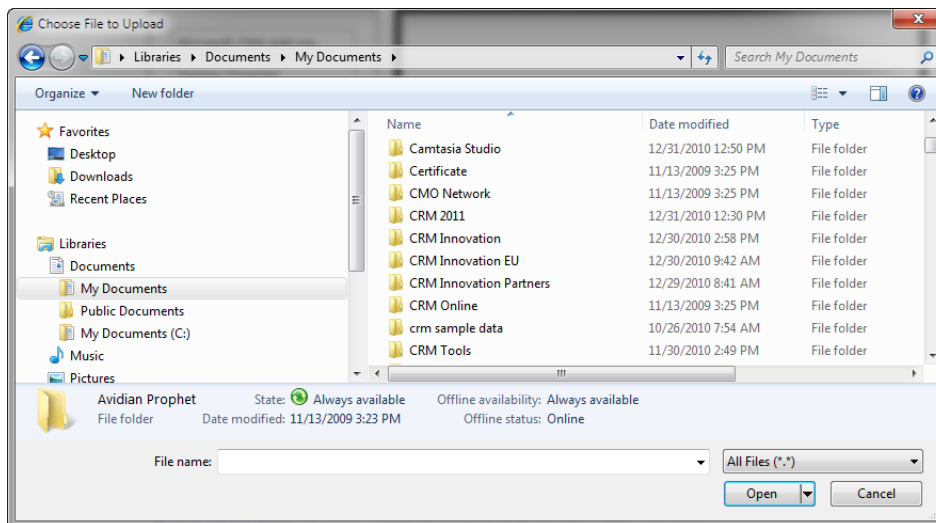
Here is an example of a form with the Upload Feature.

The screenshot shows a web browser window with a form titled "Create form and Upload Attachment". The form is titled "Contact Record Submit with Attachment" and contains the following fields and buttons:

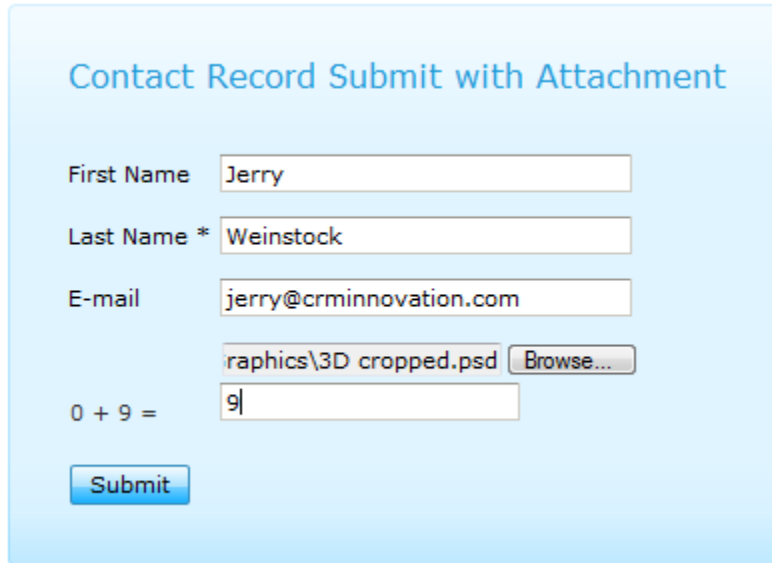
- First Name:
- Last Name *:
- E-mail:
- A "Browse..." button next to a small, empty input field.
- A "Submit" button.

Below the form, a note states: "Note: File size is limited to 5mb. Larger or multiple files should be zipped first. Executable files are not allowed are rejected."

When the website visitor clicks on Browse a 'typical' Windows Explorer Window will open. Select the File and click Open.



The completed form will look like this to the user.



Contact Record Submit with Attachment

First Name

Last Name *

E-mail

0 + 9 =

After the user clicks on Submit they are taken to the “Thank You” page that was specified in the Designer. A Default “Thank You” shown below.

Thank You!
Your information has been successfully submitted.

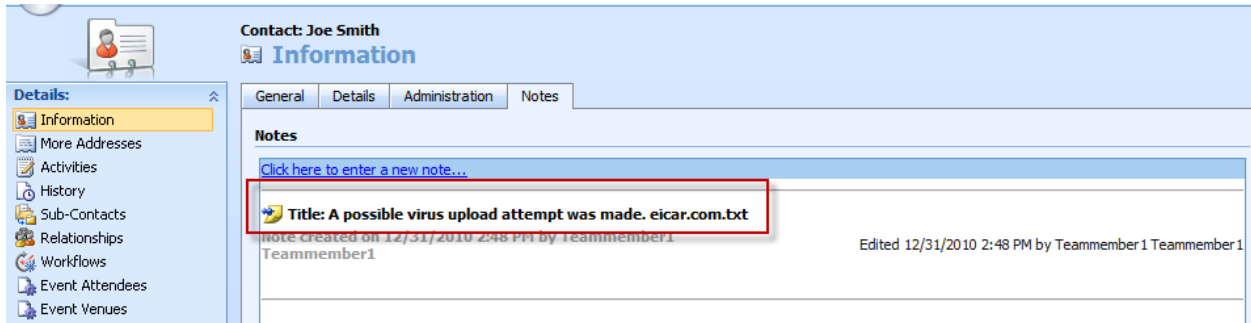
Note: We do not provide any indication to the submitter as to the status of their attachment submission. We do this to avoid providing any hint to an unscrupulous individual regarding their success or failure of inflicting pain into your CRM system. It is always best to keep the captcha (math question) enabled to keep the robots off your system. You may want to add to the form submit page advisories to the maximum files size and/or acceptable files types.

Upload Results

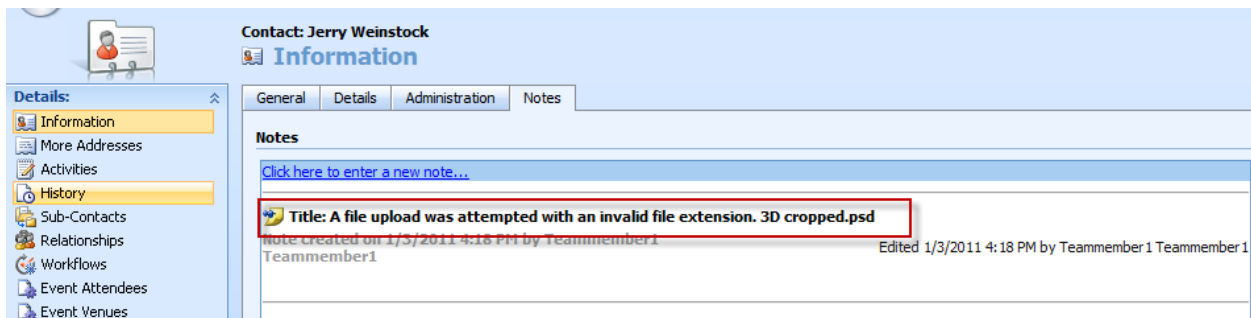
When the new record is submitted to the CRM system the uploaded document is attached to the new record as a Note attachment.

Several samples are show below:

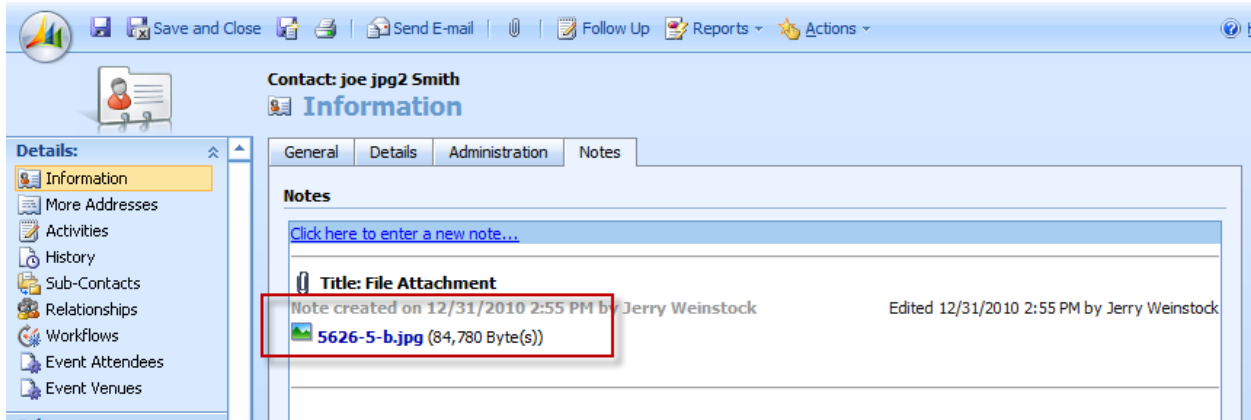
Virus Scan – the file is scanned and no document is attached if it returns positive. A Note record with the warning is created with the file name attempted but no file is attached.



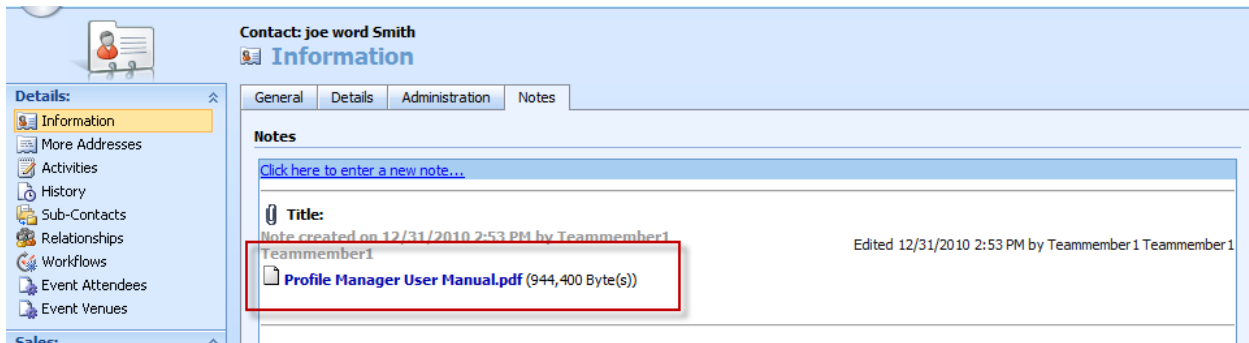
Example of an invalid file type upload.



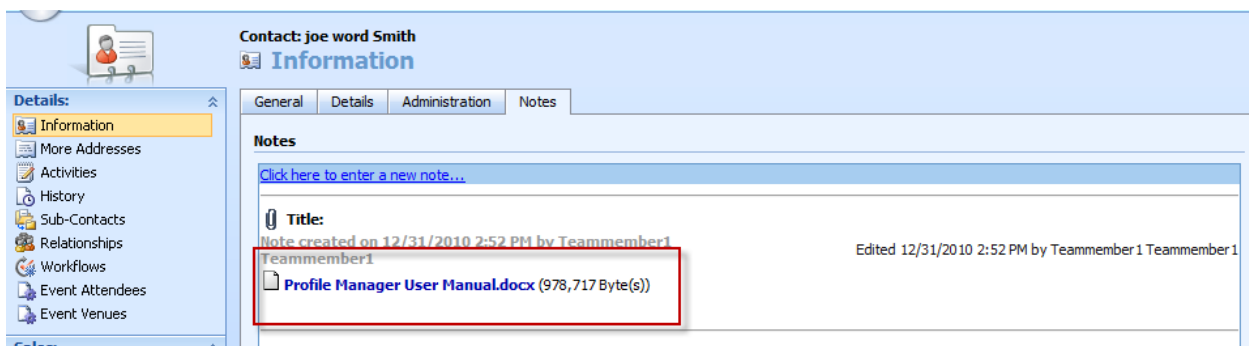
Example of a valid file upload for a graphics file



Example of a valid file upload for a pdf file

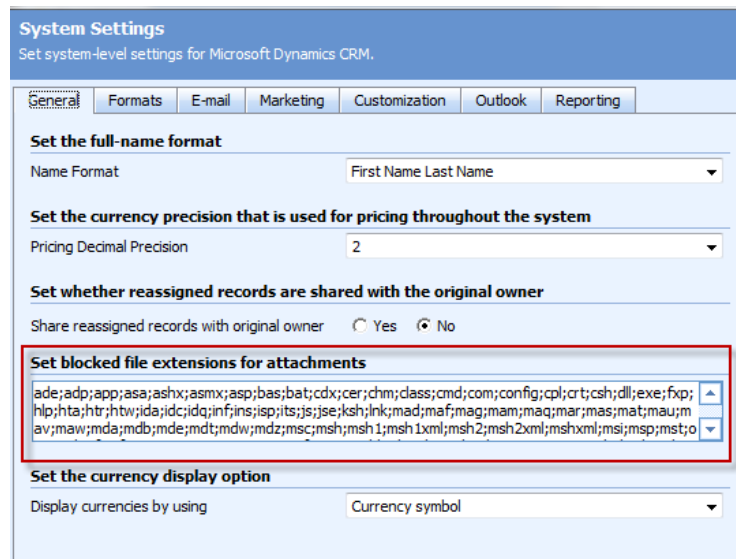


Example of a valid file upload for a Word document file



Attachment Types and File Size Rules

1. Allowed file types are based on the settings in your CRM system which can be viewed at Settings, Administration, System Settings, General.



2. File size limits for attachments are based on a 5mb limit currently.