

Web2CRM – Profile Manager User Manual

V1.0

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Overview

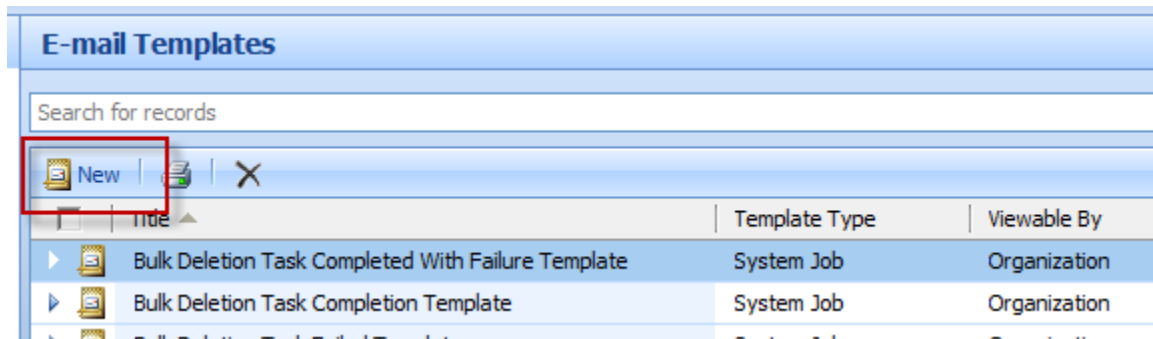
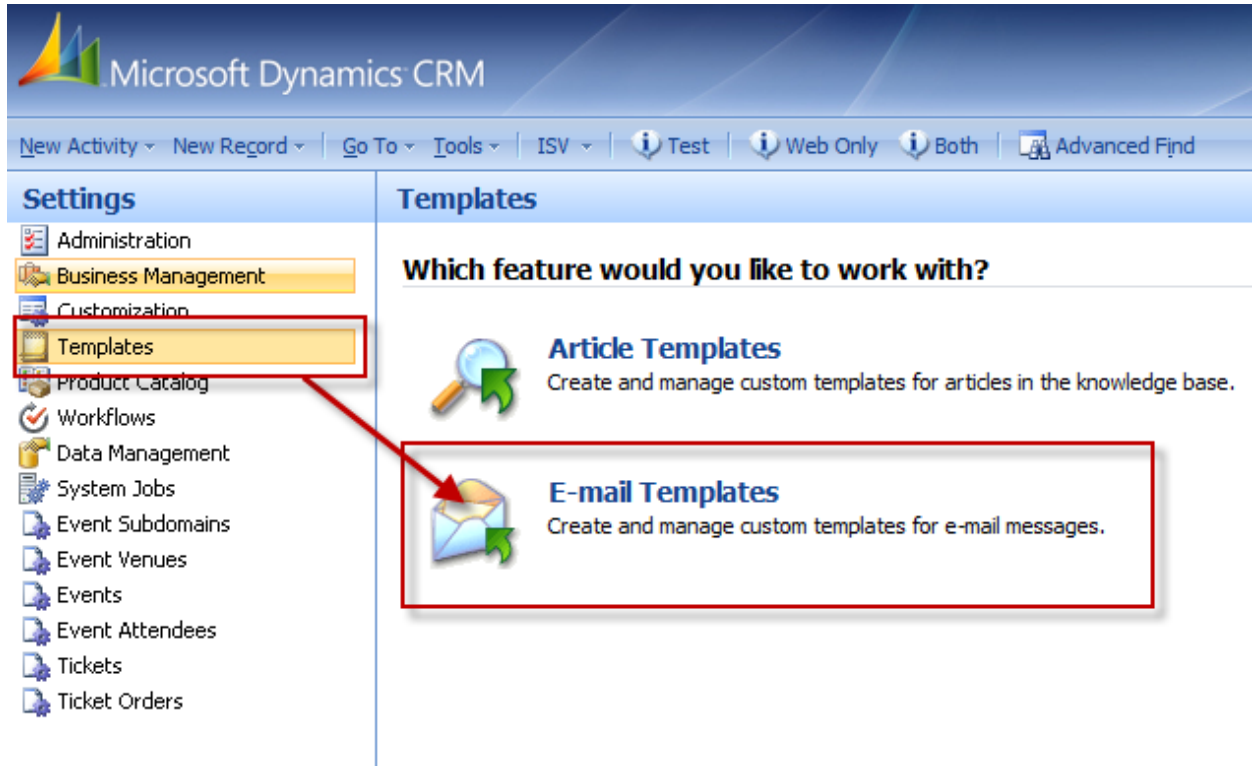
The Profile Manager add-on to the Web2CRM forms builder will allow your CRM contacts to self-manage their profiles in CRM. PM can be used with the following CRM entities that support E-mail Templates: Leads, Contacts, or Accounts. PM doesn't require any code to be installed on the CRM server or customizations to be installed. Integration with the company website is straightforward and the application provides standard form HTML to insert on a company webpage for the purposes of user validation.

Application Steps Overview

A high-level review of the sequence of the steps are as follows:


1. Create a template in the CRM system that will be referenced by the PM application. This template will be used to send the validation email to the person.
2. Login to the Web2CRM application.
3. Select the Contact, Lead or Account entity for forms design.
4. Design the form to include the fields that you want the user to see so that they can update their profile.
5. Enter the name of the Template you created earlier and enter the schema name for the field that will be used to validate the user.
6. Save and publish the form and select the Profile Manager Button.
7. A new screen will be presented with the validation form code.
8. Insert this code onto a web page where you want the form to reside.
9. Direct your audience to this page where they will enter the value (typically email address) that will go into the field validator you selected in the form designer.
10. When the visitor enters their information (typically email address) it will be validated against the CRM system. If there is a match the user will be sent the completed template that includes the link to a page (hosted on the CRM Innovation Web2CRM server) that will display their information in the form that was designed in step 4. When they submit the edited form their information in the CRM System will be automatically updated in real time.
11. If the validation data can't be verified they will be notified and redirected back to the form validation page where they will have an opportunity to try again.

Create a template in the CRM system that will be referenced by the PM application. This template will be used to send the validation email to the person.



E-mail Template Type

Select a template type to use for this new e-mail template.

Template Type: 

- Global
- Lead
- Opportunity
- Account
- Contact
- Quote
- Order
- Invoice
- Case
- Contract
- Service Activity
- System Job

Internet | Protected Mode:

ort Data Task Completion Template	System Job	Organ
ort Data Task Failure Template	System Job	Organ

Save and Close | Insert/Update | Delete | Help

E-mail Template New

Details

Type * **Contact Template** Language English

Title * **#ProfileManagerContact#**

Description: this template is used with the Web2CRM Profile Manager to allow Contacts to update their data in their CRM Record

Subject * Profile Management Update Request

Rich Text Editor:

Hello **{!Contact : First Name;};**

In response to your request we are sending you this email so that you may update your profile in our database. If you didn't request this event, just ignore this email.

To update your profile, **#click on this link#** and a new browser Window will open up. You will be presented with a prefilled in form that will display the information that we have for you currently in our database. If any information is out of date or incomplete, just type in the new or correct information. When you are finished editing the form, just click on the submit button to complete the process. Then close the Window.

Thank you for taking the time to update the information we have on file. It will allow us to deliver relevant communications to you in the future.

If you have any questions about this process just call our customer service team at: 913.555.1212.

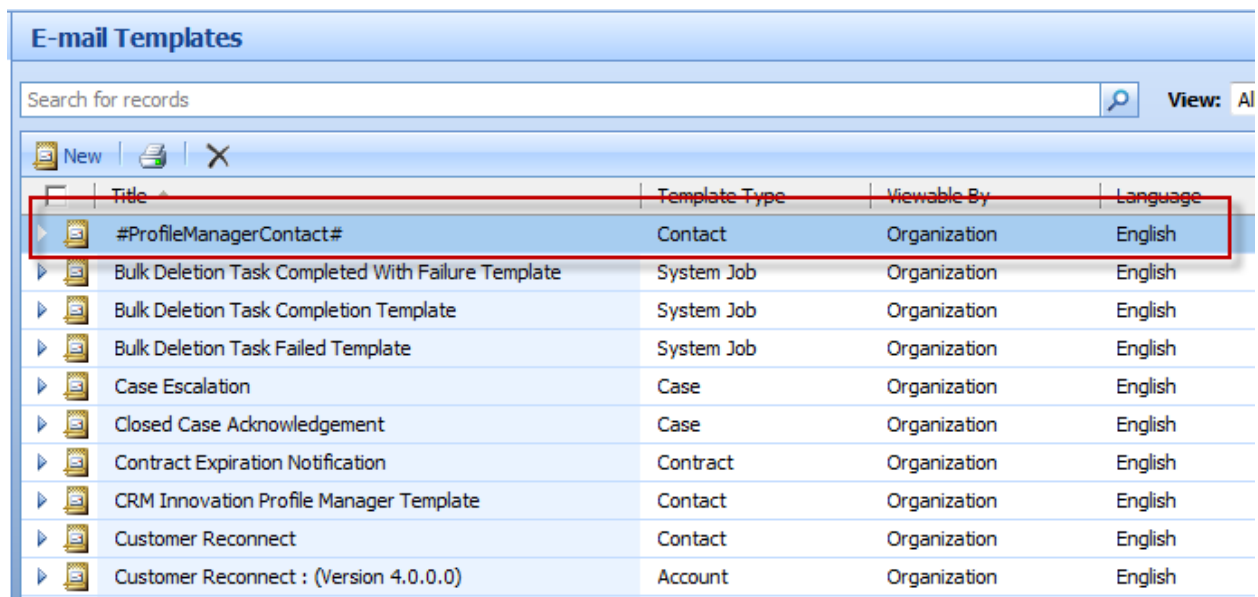
Best Regards,

{!User : First Name;}
{!User : Title;}

So that the Profile Manager will know what template to use put # immediately before and after the Title of the Template and then in the body of the email where you want the link to appear put # before and after the text that should be highlighted as the hyperlink.

To update your profile, #click on this link# and a new form with a pre-filled form that will display the information.

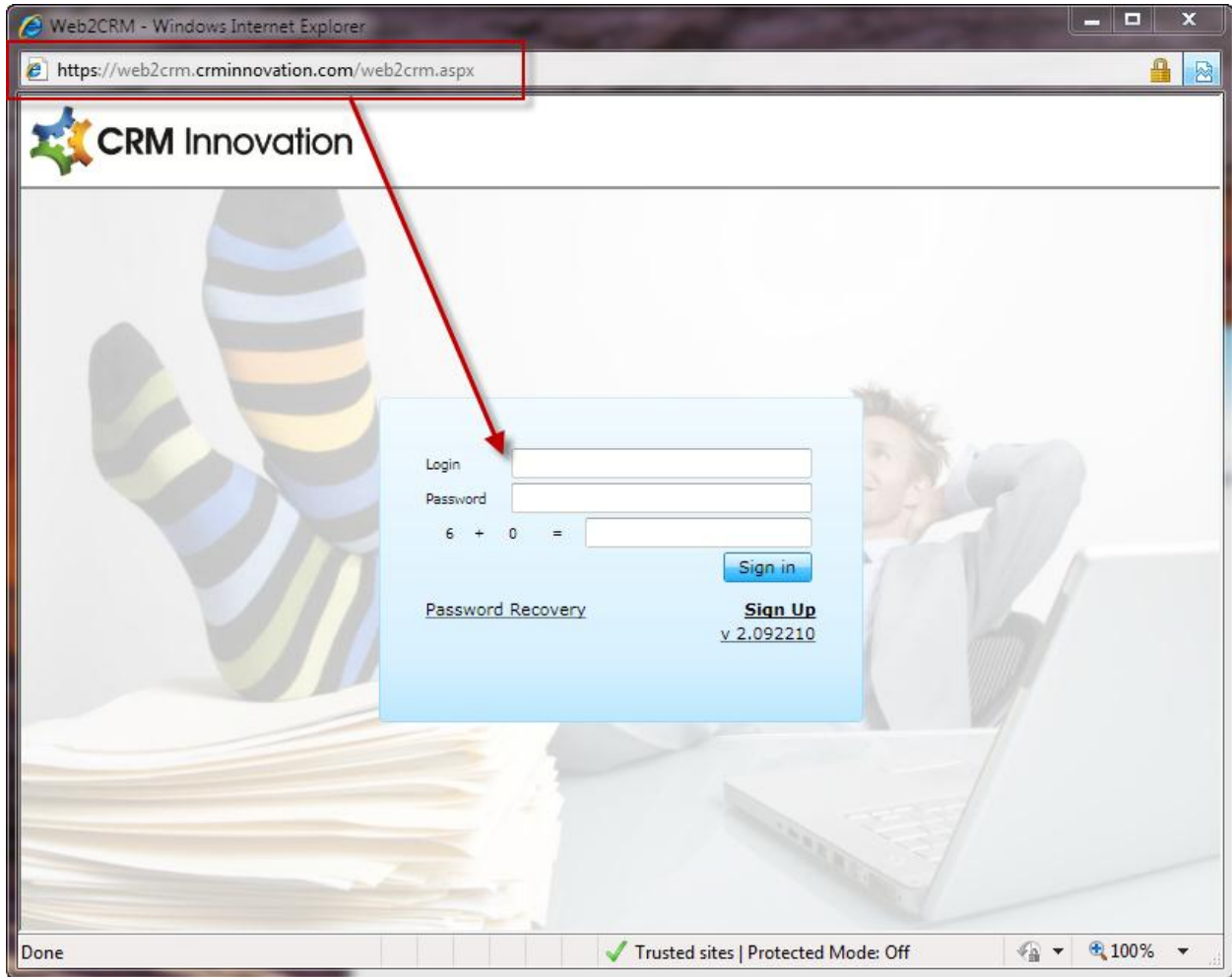
This is what the finished template listing will look like.



The screenshot shows the 'E-mail Templates' interface. At the top, there is a search bar labeled 'Search for records' and a 'View: All' dropdown. Below the search bar is a toolbar with 'New', 'Print', and 'Close' icons. The main area is a table with the following columns: Title, Template Type, Viewable By, and Language. The first row, '#ProfileManagerContact#', is highlighted with a red border. Other rows include 'Bulk Deletion Task Completed With Failure Template', 'Bulk Deletion Task Completion Template', 'Bulk Deletion Task Failed Template', 'Case Escalation', 'Closed Case Acknowledgement', 'Contract Expiration Notification', 'CRM Innovation Profile Manager Template', 'Customer Reconnect', and 'Customer Reconnect : (Version 4.0.0.0)'.

Title	Template Type	Viewable By	Language
#ProfileManagerContact#	Contact	Organization	English
Bulk Deletion Task Completed With Failure Template	System Job	Organization	English
Bulk Deletion Task Completion Template	System Job	Organization	English
Bulk Deletion Task Failed Template	System Job	Organization	English
Case Escalation	Case	Organization	English
Closed Case Acknowledgement	Case	Organization	English
Contract Expiration Notification	Contract	Organization	English
CRM Innovation Profile Manager Template	Contact	Organization	English
Customer Reconnect	Contact	Organization	English
Customer Reconnect : (Version 4.0.0.0)	Account	Organization	English

Login to the Web2CRM application.



Select the Contact, Lead or Account entity for forms design.

Usage Mode: Full License
Master Login: master
CRM Login: Teammember3
CRM Organization: Demo1
URL: http://demo1.ibizinitiatives.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

Design the form to include the fields that you want the user to see so that they can update their profile.

URL: http://ibiz.ibizinitiatives.com:5555
[Logout](#)

File Management - Contact

Save Form Preview HTML
Clear Form Publish
Change Login Carry Code
Change Entity Profile Login

Form Settings

Form Name:
 Notify on form submit failure: nichols_christopher@live.com
[Test](#)

Form Header Profile Management

Submit Position Left
Justification Left
Alignment Vertical
 Enable Captcha
 Enable Https

Addons

Enable Profile Management
Profile Key emailaddress1
Template Title #ProfileManagerContact#

Published Page Settings

Thank You Page Thank You
CSS Style Style 1

Form Designer

Profile Management

First Name firstname
Last Name lastname
Job Title jobtitle
Business Phone telephone1
Home Phone telephone2
Cell Phone mobilephone
Fax fax
E-mail emailaddress1
Street 1 address1_line1
Street 2 address1_line2
City address1_city
State/Province address1_stateorpro
ZIP/Postal Code address1_postalcode
Country/Region address1_country
Preferred Any
Personal Email Do No Allow
Newsletters Do No Allow

Save Form

Previous Forms

Select a previous saved form that you would like to save over then click the save button.

test

New Form:

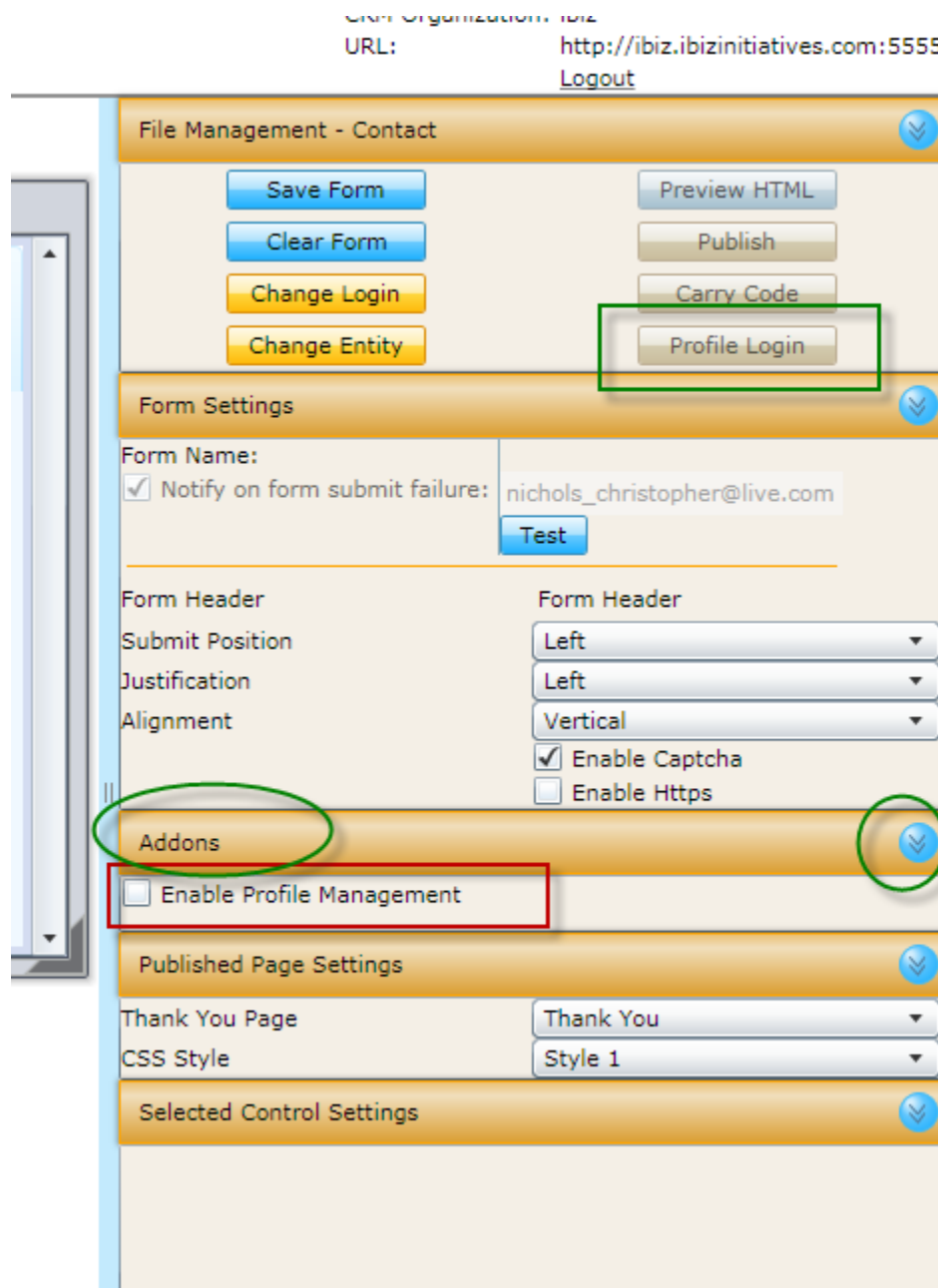
Type in the name of the new form and then click the Save button.

profile manager

Save Cancel

Enter the name of the Template you created earlier and enter the schema name for the field that will be used to validate the user.

However to make this fields visible in the admin panel you will need to select the check box in the Addons section for Enable Profile Management as shown in the screen shot after the one immediately below.



Enable Https

Addons

Enable Profile Management

Profile Key

Template Title

Published Page Settings

An example of a finished form.

Form Designer

Profile Management

First Name: firstname

Last Name: * lastname

Job Title: iobtitle

Business Phone: telephone1

Home Phone: telephone2

Cell Phone: mobilephone

Fax: fax

E-mail: emailaddress1

E-mail:

Street 1: address1 line1

Street 2: address1 line2

City: address1 city

State/Province: address1 stateorpro

ZIP/Postal Code: address1 postalcode

Country/Region: address1 countrv

Preferred: Anv

Personal Email: Do No Allow

Newsletters: Do No Allow

2 + 2 = *

Submit

File M

Form

Form N

Not

Form H

Submit

Justific

Alignm

Addo

Ena

Profil

Temp

Publis

Thank

CSS St

Selec

Schem

Display

Cell Wi

Font Si

Save and publish the form and select the Profile Manager Button.

URL: <http://ibiz.ibizinitiatives.com:555/>
Logout

File Management - Contact

Save Form Preview HTML
Clear Form Publish
Change Login Carry Code
Change Entity Profile Login

Form Settings

Form Name:
 Notify on form submit failure: nichols_christopher@live.com
Test

Form Header: Profile Management
Submit Position: Left
Justification: Left
Alignment: Vertical
 Enable Captcha
 Enable Https

Addons

Enable Profile Management
Profile Key:
Template Title:

Published Page Settings

Thank You Page: Thank You
CSS Style: Style 1

Form Designer

Profile Management

First Name:
Last Name:
Job Title:
Business Phone:
Home Phone:
Cell Phone:
Fax:
E-mail:
Street 1:
Street 2:
City:
State/Province:
ZIP/Postal Code:
Country/Region:
Preferred:
Personal Email: Do Not Allow Allow
Newsletters: Do Not Allow Allow

Save Form

Previous Forms

Select a previous saved form that you would like to save over then click the save button.

test

New Form:

Type in the name of the new form and then click the Save button.

profile manager

Save Cancel

Save Completed Successfully.

OK

File Management - Contact

Save Form Preview HTML
Clear Form Publish
Change Login Carry Code
Change Entity Profile Login

Form Settings

Form Name: profile manager

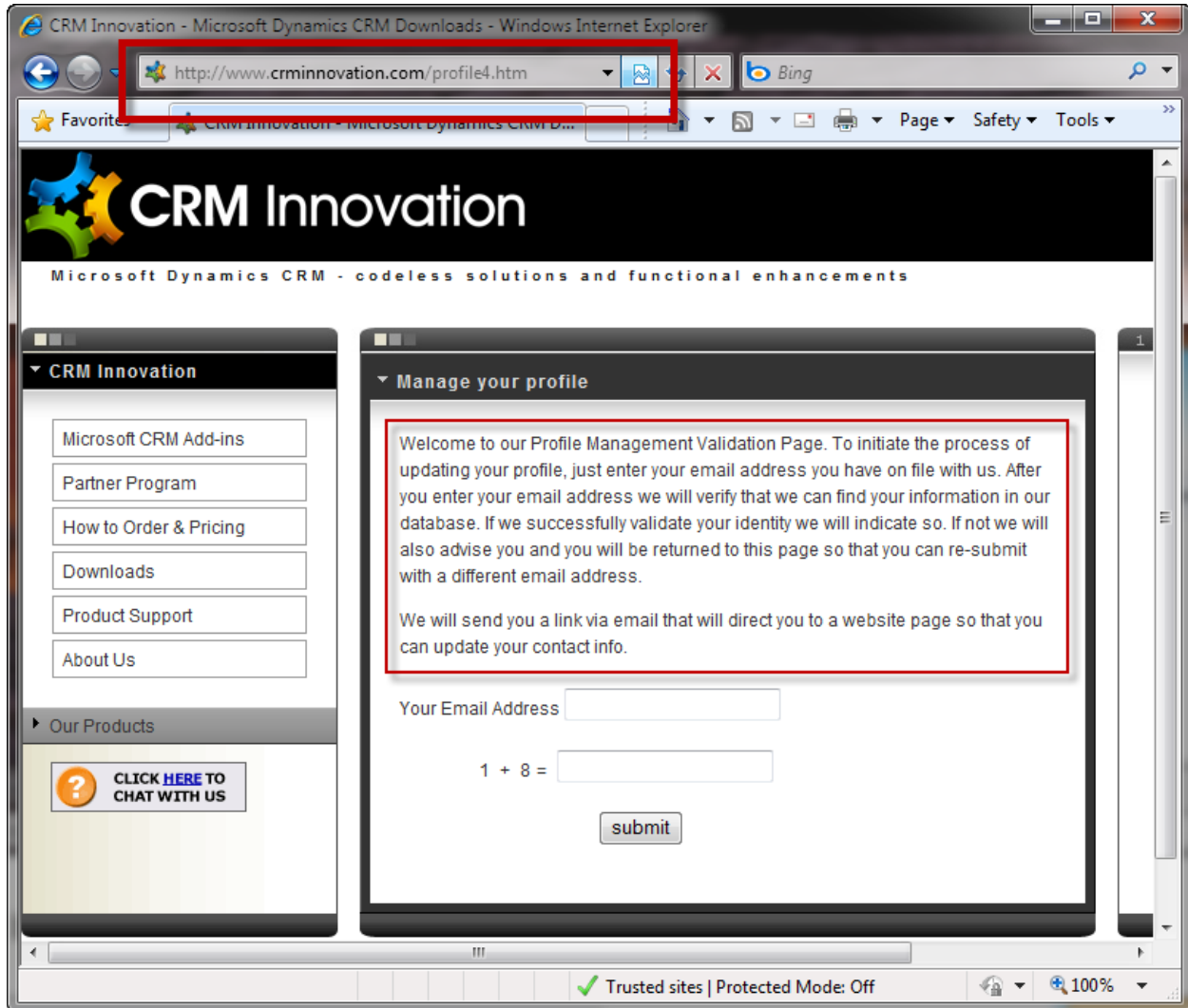
A new screen will be presented with the validation form code. Insert this code onto a web page where you want the form to reside.



The following Html is used to validate the users unique profile key:

```
<body onload="generateCaptcha  
();"><script>  
    function checkCaptcha(){  
        try{  
            var spOne  
= parseInt(document.getElementById  
('spnOne').innerHTML, 10);  
            var spTwo  
= parseInt(document.getElementById  
('spnTwo').innerHTML, 10);  
            var spAns  
= parseInt(document.getElementById  
('spnAnswer').value, 10);  
            if(spOne +  
spTwo == spAns){
```

Direct your audience to this page where they will enter the value (typically email address) that will go into the field validator you selected in the form designer.



When the visitor enters their information (typically email address), it will be validated against the CRM system. If there is a match, the user will be sent the completed template that includes the link to a page (hosted on the CRM Innovation Web2CRM server) that will display their information in the form that was designed in step 4. When they submit the edited form their information in the CRM System will be automatically updated in real time.

Congratulations!
You logged in successfully and an email has been sent to you.
If you are not redirected within 5 seconds [click here](#).

If the validation data can't be verified they will be notified and redirected back to the form validation page where they will have an opportunity to try again.

Sorry.
The credentials you used are not valid.
If you are not redirected within 5 seconds [click here](#).

