

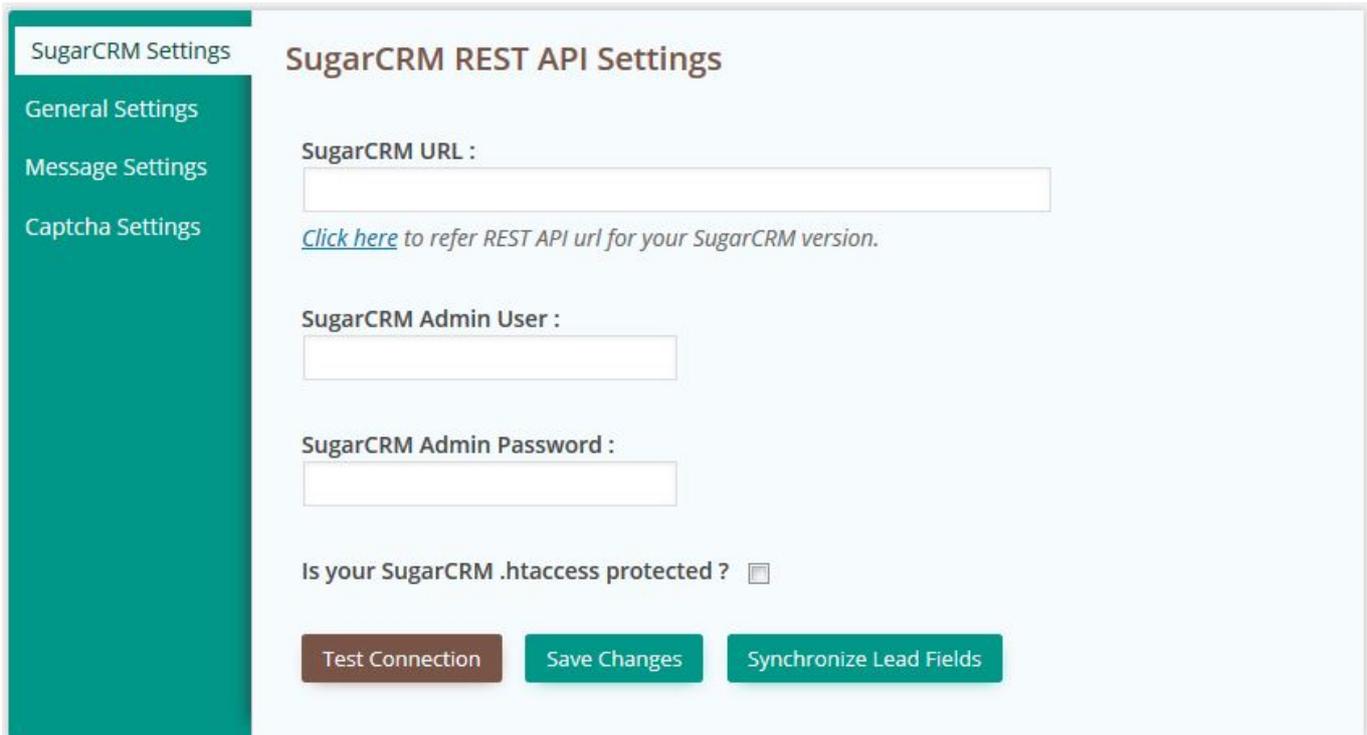
Thanks for choosing '**Wordpress to SugarCRM Form Builder**'.

'**WordPress to SugarCRM lead form-builder**' is ultimate, feature packed & powerfull plugin to generate easy leads from your WordPress site. It is upgrade to our free plugin '**WordPress to SugarCRM lead**'.

This plugin will let you generate **unlimited web-forms** in few simple steps via user friendly drag & drop designed based form-builder. And of course you can use any of generated form anywhere on your WordPress site.

Installation Procedure :

- Download & Enable the plugin.



- Go to 'Your SugarCRM' page. You will see below form.
- **Test connection** with your SugarCRM & **Save** your SugarCRM credentials.
- Synchronize Lead Fields by clicking '**Synchronize Lead Fields**'.
- Now all your Lead fields will be mapped in '**SugarCRM Lead module field list**' table in '**Lead Module**' menu.
- Choose which fields you want to enable on Form-builder. You can decide which fields will be mandatory, chnage their labels & make them to hidden from there.
- Go to **Form Builder** menu under Your SugarCRM menu. You will se below table. All Lead-Forms will be listed here.

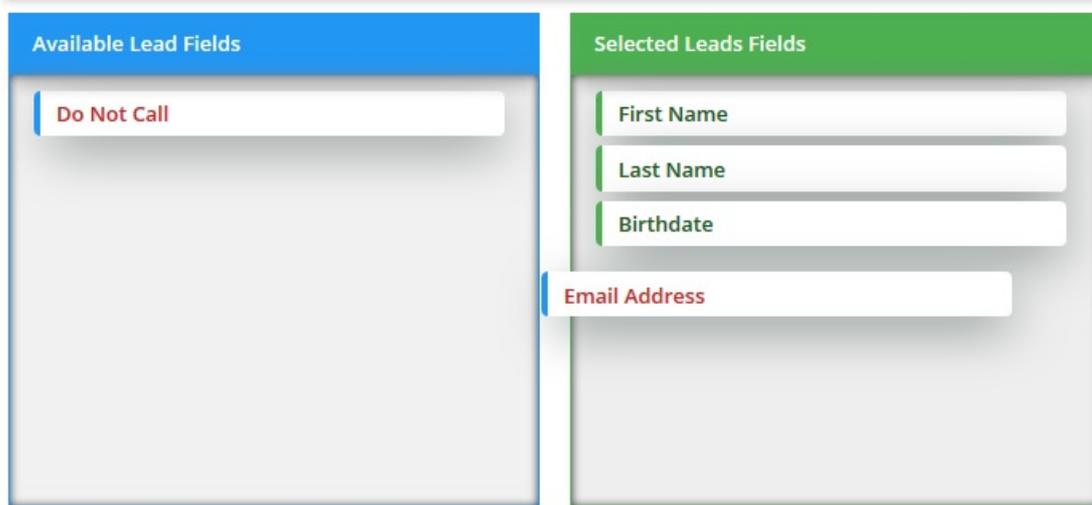
SugarCRM Lead Forms [Add New](#)

[Active Forms](#) | [Inactive Forms](#) | [Reset](#) 1 item

Form Name	Form Slug	Shortcode	Status
Lead Form	lead_form	[WPSugar_Lead_Form id="27" title="Lead Form"]	Active

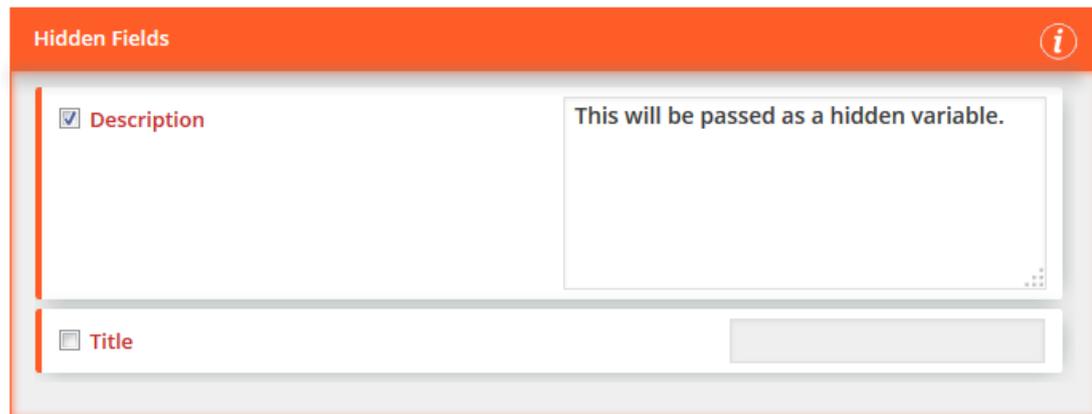
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- Click on 'Add new' button. You will see **SugarCRM Lead-Form**.
- Enter Form details. Drag fields you wish to display on Lead-Form from "**Available Lead Fields**" & Drop them on "**Selected Leads Fields**". See below image.



The image shows two side-by-side panels. The left panel, titled 'Available Lead Fields', contains a single field labeled 'Do Not Call'. The right panel, titled 'Selected Leads Fields', contains three fields: 'First Name', 'Last Name', and 'Birthdate'. Below these, there is a field labeled 'Email Address' with a red border, indicating it is currently selected or being added.

- Make sure to check the Check-box on the left of each field in '**Hidden Fields**' section before saving the form. Only checked fields will be saved with value specified in the input box to its right.



The image shows the 'Hidden Fields' section with an orange header. It contains two fields: 'Description' and 'Title'. The 'Description' field has a checked checkbox and a text input box containing the text 'This will be passed as a hidden variable.'. The 'Title' field has an unchecked checkbox and an empty text input box.

- You can add your '**custom CSS**' to each form. Add your custom styles in Custom CSS section. Be sure to wrap your styles in "**<style> </style>**".
- Click **Save** button. After saving form you will be redirected to form-listing page. Your newly added form will appear there. Copy the **shortcode** of the form you wish to display and place it anywhere you want to display this form (i.e Post, Page, Widget etc.).

- After saving the form you can customize mail option for that particular form. Goto '**Mail Options**' on form-builder page. You will be redirected to Mail options page. Check checkbox Send mail to user on success. You will see mail subject and mail body **WYSIWYG editor**. Compose your subject and mail template. You can choose **Lead-fields** to display in Email-Template. {\$field-name} will be replaced by the value user has provided on Lead-Form.
- For captcha settings. You can either use our custom CAPTCHA or you can use google reCAPTCHA. To use google reCAPTCHA you will need to register your domain. [Click here](#) to register your domain for reCAPTCHA.
- Once you register your domain for reCAPTCHA API. You will receive two API keys, **Site key (Public key) & Secret key (Private key)**. Save both the keys in '**Captcha Settings**' section of Your SugarCRM page. Now lead forms will be protected with google reCAPTCHA (Tough on bots Easy on humans). You must set both the keys for reCAPTCHA to work.
- You can change general settings of plugin like **Capture Remote IP, Get Email Notification & Default Redirect to** in '**General Settings**' section of your Your SugarCRM page.
- You can change general messages like **Success Message, Failure Message, Required Fields Message & Invalid Captcha Message** in '**Message Settings**' section of Your SugarCRM page.

Important Notes :

- You must save your **SugarCRM credentials** in Your SugarCRM page. Otherwise plugin will not work at all.
- Changing the status of an Enabled field to disable will remove that particular field from all the Lead-Forms.
- Setting field hidden will push that field in "Hidden Fields" with NULL (i.e. Empty) value if its available in "Selected fields" on Form-Builder.
- Unsetting hidden (i.e. Making field visible) will push that field in "Selected Fields" if its selected in "Hidden fields" on Form-Builder.
- Making any field **Required** will make that particular field Required in all the forms.
- To use **Capture Remote IP feature** – you must create a custom field in your SugarCRM Lead module with field-name 'lead_remote_ip'.
- You must save your **reCAPTCHA Site key (Public key) & Secret key (Private key)** in order to use google reCAPTCHA on your Lead-Forms.