Creatio Academy

Web-to-object integration

Version 8.0

Table of Contents

Create a landing page on your website

PRODUCTS: MARKETING

The first step of landing integration is to create a landing page.

Create unique landing pages for each of your offers targeted at certain audiences. For example, use the following configurations:

- For first-time visitors, create a web-form for entering the email address to subscribe to your newsletter.
- For visitors interested in downloading valuable content, prepare a separate contact form.
- For customers who are ready to place an order, buy a service, or negotiate in person, create a detailed landing web-form.

The more the landing page is fitted to the customer's maturity, the more potential customers will be willing to start communicating with your brand regardless of the decision-making stage they are at.

To reach the maximum website conversion, follow the general recommendations for the landing page style, fields, and other UI elements.

Page layout

- Create individual unique landing pages for each of your offers.
- Try to convey the message in the header of your landing page as precisely as possible.
- The landing page design must be user-friendly for the target audience.
- Use concise wording and avoid walls of unstructured text.

Landing page fields

- Design your data collection form to make sure you will get the most relevant information from your customers without asking them to input too much information.
- At least one form field must collect the customer contact information, such as the email or phone number. We recommend that you make these fields required.
- Make sure that the customers who fill out your landing page webform have a clear understanding of the fact that they are sharing their contact information and are ready to communicate with your brand. Include a field in your landing page form that the customers will use to confirm that they agree to receive marketing materials (“opt-in”).
- Use data entry validity check for the most important fields of the form to get the valid contact information from the customers.

Note. You can set up automatic completion of the web forms on your landing pages with Creatio contact data (name, email, phone, etc.) of the contact who opened the landing page by clicking a link in a Creatio bulk email.

Call to action and redirects

- A call-to-action button (such as “Buy,” “Sign up,” “Watch the demo,” etc) must be available.
- Create a page that your customer will be redirected to upon clicking a call-to-action button.

After setting up the landing page, proceed to set up the connection of the landing page to Creatio

Connect your website landing page to Creatio

PRODUCTS: MARKETING

After you publish landing pages on your website, take the following steps:

1. Add a new record in the [*Landing pages and web forms*] section.
2. Set up a page to redirect customers.
3. Modify the generated unique HTML code.
4. Set up lookup and custom field mapping.
5. Add the modified HTML code to the code of the website landing page.
6. Set up the automatic population of lead (or other Creatio object) fields that the customers do not fill out.

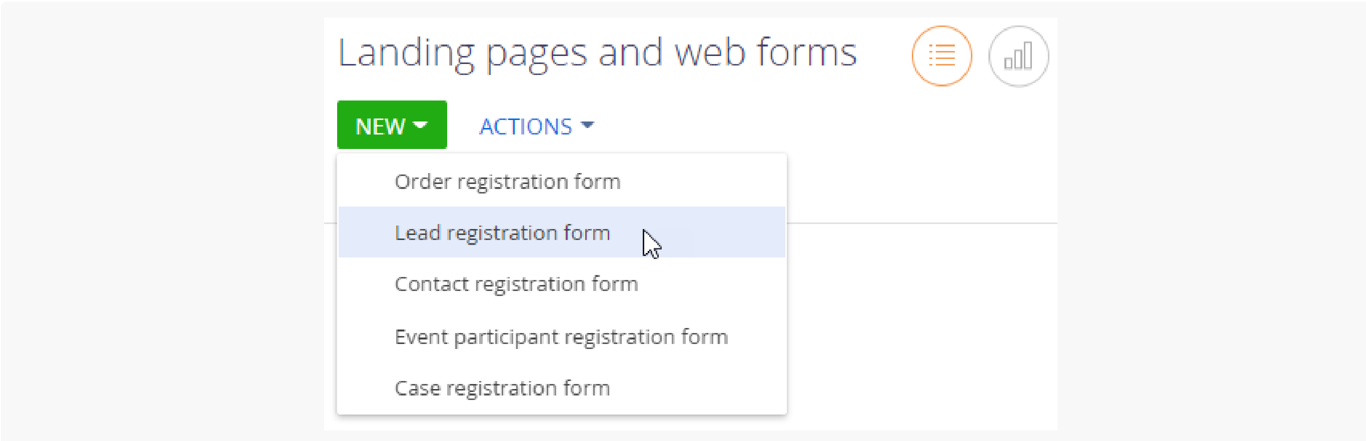
Note. We recommend the website developer to set up landing pages.

Attention. Creatio supports integration with CMS that let you add custom HTML and JavaScript code. You need an additional connector to integrate with other CMS, such as WordPress. Learn more in the Creatio Community and Creatio Marketplace websites.

Add a new record in the [Landing pages and web forms] section

1. Open the [*Landing pages and web forms*] section. Click [*New*] and select the type of landing page integration (Fig. 1). For example, lead registration form. This opens a new page.

Fig. 1 Create a new landing page

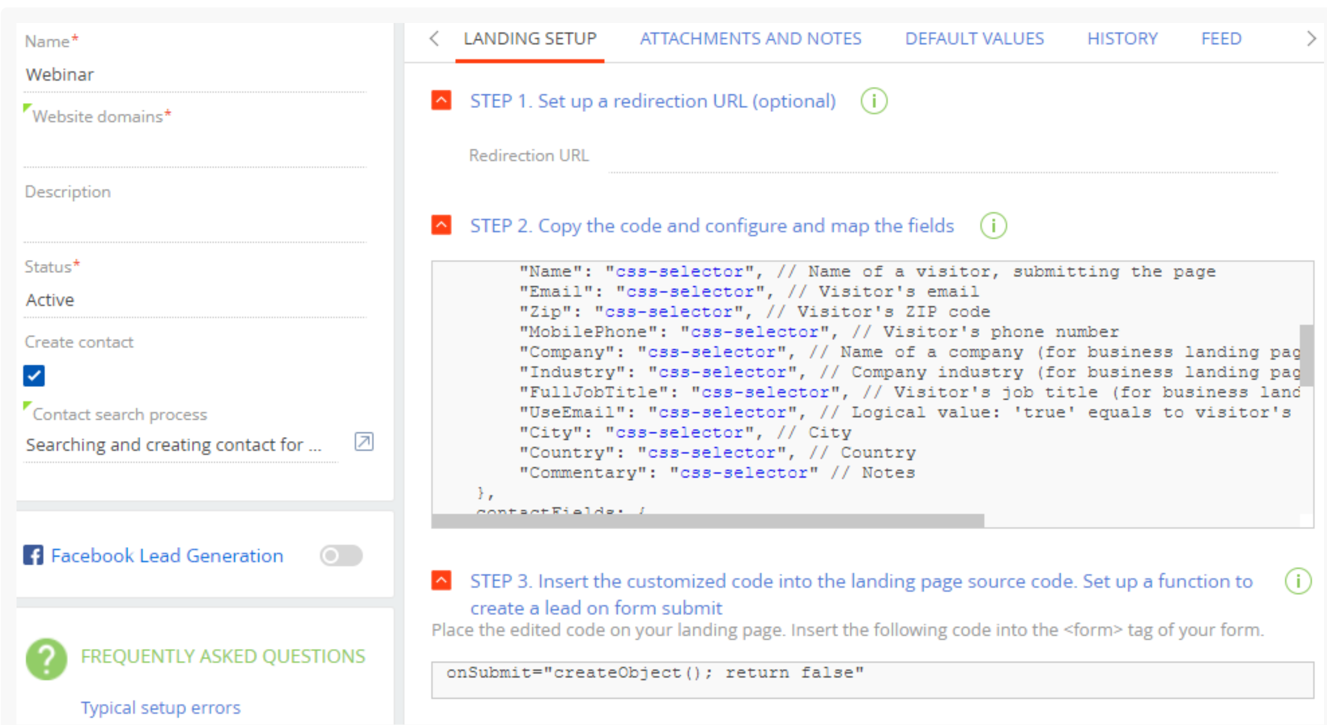


2. Fill out the fields on the page that opens:

   a. Specify your landing page name in Creatio in the [*Name*] field.

   b. Specify your landing page URL in the [*Website domains*] field. You can specify one or more URLs separated by commas. If you add "*" to the end of the URL, Creatio records every contact and lead registered on the domain, not only on a specific page.

Fig. 2 Landing page fields



   c. Specify additional information about the landing page in the [*Description*] field.

   d. Select the [*Create contact*] checkbox to enable the automatic creation of both a lead and a contact when a user submits the form.

   e. Select the business process that identifies Creatio contacts that submit forms in the [*Contact search process*] field. You can use the existing "Searching and creating contact for web form" business process or specify a custom process. Learn more about the contact identification mechanism in a separate article: [Identify contacts that submit web forms](#).

   f. Specify the URL to open for the user after the form submission in the [*Redirection URL*] field.

3. Click [*Save*].

Set up a page to redirect customers

You can configure Creatio settings so that your site visitor is automatically redirected to a certain page right after submitting the web form. For example, to the Thank You page. To do that, open the [*Landing setup*] tab and enter the redirection page URL in the [*Redirection URL*] field. For example, http://mysite.com/submit/thank-you-page. As a result, the HTML code embedded into your landing page will use the specified URL for redirection. For example:

redirectUrl: "http://mysite.com/submit/thank-you-page"

Attention. Configure the redirection page settings prior to copying the HTML code from Creatio to your website landing page. If the landing page redirection is already set up on your website, you can leave the [*Redirection URL*] field blank.

Edit the unique HTML code

Attention. This article covers the process of editing HTML code for a lead registration form.

To ensure the the fields of a lead record added automatically after a registration on the landing page are populated correctly, edit the unique HTML code and add the edited code to the landing page code.

The list of lead page fields that are populated upon a registration on a landing page is located in the "fields" block of the HTML code. Match these fields to the web form fields. View an example of the "fields" block in the HTML code below.

```
fields: {

"Name": "css-selector", // Name of a visitor, submitting the page

"Email": "css-selector", // Visitor's email

"Zip": "css-selector", // Visitor's ZIP code

"MobilePhone": "css-selector", // Visitor's phone number

"Company": "css-selector", // Name of a company (for business landing pages)

"Industry": "css-selector", // Company industry (for business landing pages)

"FullJobTitle": "css-selector", // Visitor's job title (for business landing pages)

"UseEmail": "css-selector" // Logical value: 'true' equals to visitor's opt-in to receive emails
}
```

To ensure the lead is registered correctly, add at least one field from the “contactFields” block to the HTML code. View an example of the block below.

```
contactFields: {
        "FullName": "css-selector", // Name of a contact
        "Phone": "css-selector", // Contact's mobile phone
        "Email": "css-selector" // Contact's email
}
```

Select fields to map to a lead record

You can set up mapping for both standard lead fields and custom fields. Learn more about setting up field mapping for lookups and custom fields in a different section: [Set up lookup and custom field mapping](#).

See the values of standard fields from the HTML code and corresponding lead page fields below:

- “Name” → [*Contact full name*].
- “Email” → [*Email*].
- “Zip” → [*ZIP code*].
- “MobilePhone” → [*Mobile phone*].
- “Company” → [*Account name*].
- “Industry” → [*Industry*].
- “FullJobTitle” → [*Job title*].
- “EventId” → [*Event*]. If you specify the unique event ID in the page code, the ID takes priority over the default values in the landing page records.
- “UseEmail” → whether the customer agreed to receive promotional materials.

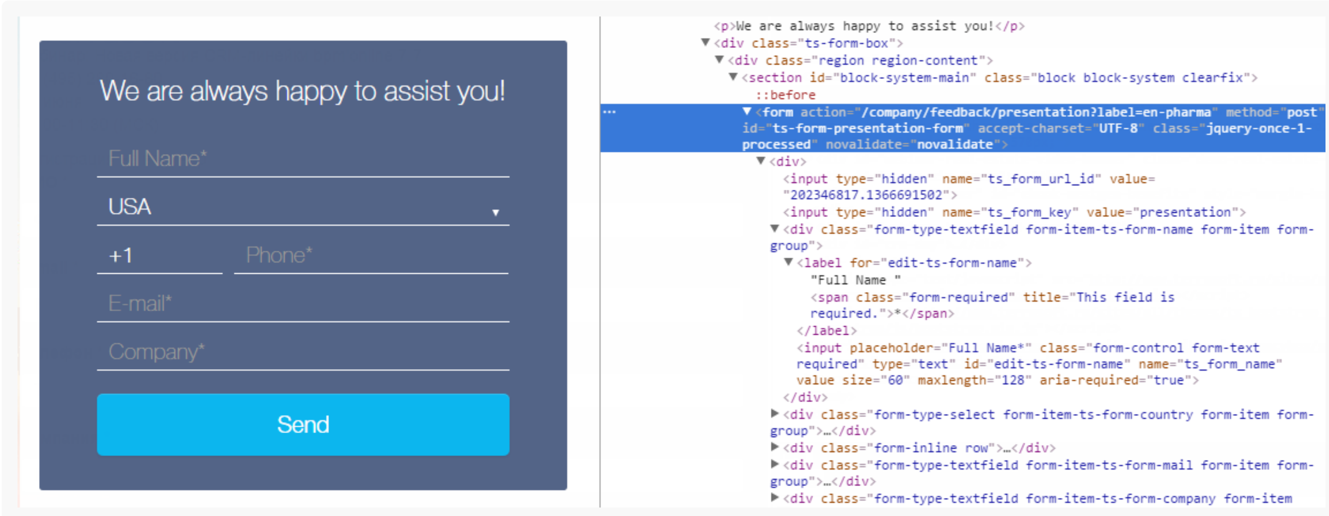
You can delete the fields the web form does not use from the HTML code.

Match the web form fields to the lead record fields

To fill out the lead page, replace the “css-selector” expression with the ID or class of the corresponding field of the landing page form.

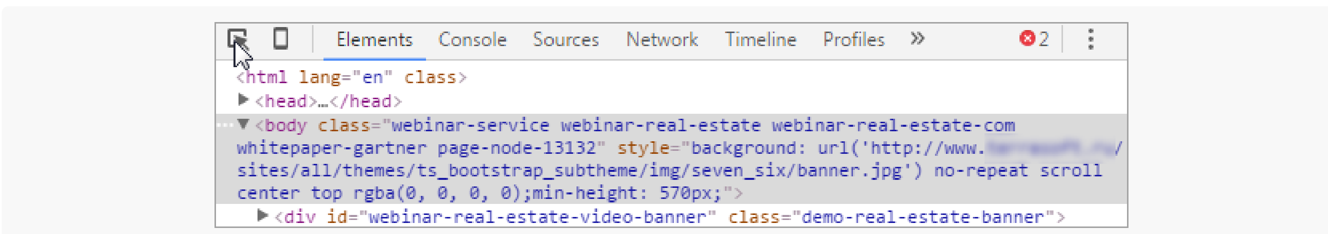
1. Copy the unique HTML code to any text editor.
2. Replace the “css-selector” text in the code with the corresponding selector name from the code of the landing page on your website. The procedure for viewing source code might be different in different browsers. See an example that sets up the population of the [*Full name*] field in Google Chrome below.
    a. Go to the landing page and open the source code (Fig. 3).

Fig. 3 Landing page source code



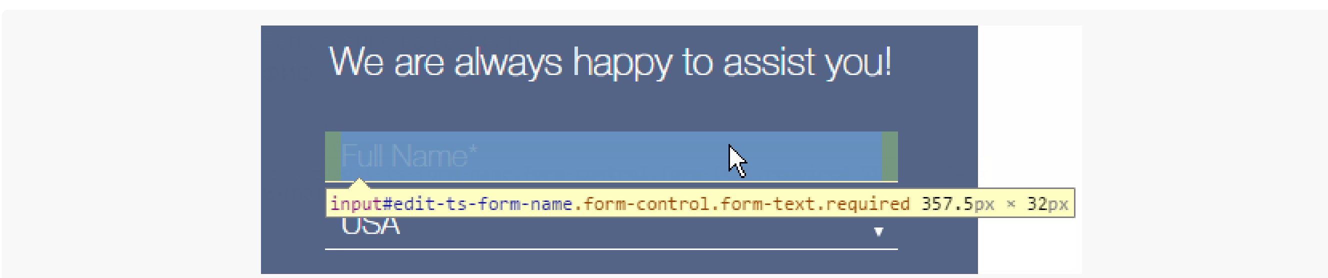
b. Click the icon in the source code area (Fig. 4).

Fig. 4 Select a code item on the page



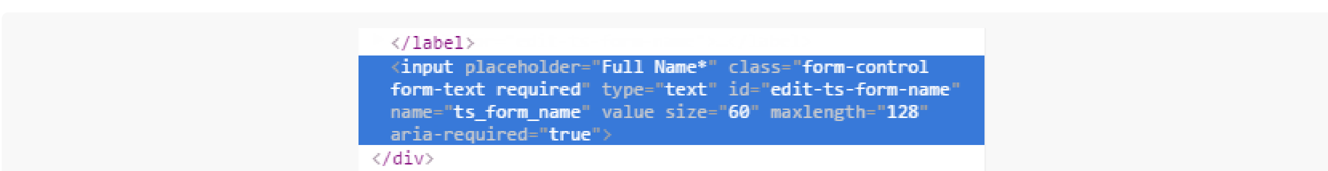
c. Click the [*Full name*] field on the landing page (Fig. 5).

Fig. 5 Select an item to view code



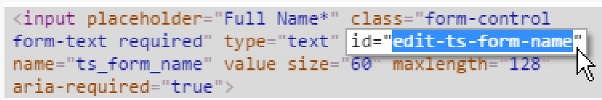
The code of the selected field is highlighted in the source code area of the page (Fig. 6).

Fig. 6 Highlighted code fragment that corresponds to the [*Full name*] field



d. Copy the value that is contained in the "id" parameter of the source code (Fig. 7).

Fig. 7 Copy the "id" value from the source code



e. Replace the “css-selector” in the [*Name*] value of the source code:

```
fields: {

"Name": "#edit-ts-form-name", // Name of a visitor, submitting the page

"Email": "css-selector", // Visitor's email

"Zip": "css-selector", // Visitor's ZIP code
}
```

Attention. You can use the “id” or “class” values to replace the “css-selector” parameters of the landing page fields. If you use the “id” value, put the “#” character before it when editing the HTML code. For example, #edit-ts-form-name.

3. Replace “css-selector” for the remaining fields in the same manner.

Note. Delete any fields you do not use on the landing page from the generated HTML code.

Recommendations on field mapping setup

- You can map one web form field to several fields in Creatio. For example, Creatio can use the value the customer specifies in the “Name” field of your form to populate the [*Name*] (of the contact) and [*Name*] (of the account) fields of the lead page.
- You can map one field of a lead page in Creatio to only one field of your web form. We do not recommend mapping two fields of your form to one lead page field. In that case, one of the values overwrites the other.
- We recommend mapping the fields of the same type and format. However, if a lookup field contains the value the customer entered in the field of a different format, Creatio populates the lookup field. For example, if your form contains a “Country” text field and the customer enters “USA,” which matches a lookup value in the countries lookup, Creatio populates the [*Country*] lookup field on the lead page with that value. Also, Creatio includes additional input logic for [*Country*], [*State/province*] and [*City*] fields. If Creatio cannot find the values the customer enters in these fields, the values are saved to additional text fields of the lead object.
- We recommend passing the unique code to the lead page when managing lookup fields, since a name cannot identify a record and is not a unique key in the Creatio database. If a user has a different UI language (culture) configured, passing the name leads to creating another record, likely to be a duplicate.
- Use radio buttons and drop-down lists that have unique ID values as interactive UI elements for localizable lookups. Learn more in a different section: [Set up lookup and custom field mapping](#).
- We recommend passing data in a format that specifies the time zone when mapping date/time fields (“DATETIME” data type). For example, use the 4/12/2008 9:30:00 AM -01:00 format to pass data for the UTC-

1 time zone, and use the 4/12/2008 9:30:00 AM +00:00 format to pass data for the UTC time zone.

Once you set up the mapping, add the modified HTML code to the landing page code.

Set up lookup and custom field mapping

Landing page web forms can use non-standard fields, such as radio buttons or drop-down lists that contain lookup records.

Attention. The settings below are performed by the website administrator and cover the lead registration form.

Pass the radio button values

1. Add a hidden field to the HTML markup of the landing page. The field can have a custom ID:

```
<input type="hidden" id=" idOfRadiobutton" />
```

2. Map the lead field to the new hidden field in the “fields” block of the landing page code:

```
"UsrField": "#idOfRadiobutton"
```

3. Pass the value selected using a radio button to the hidden field created earlier. Add an expression that contains this value to the landing page code before the fragment that calls the create lead function (createLead):

```
var idOfRadiobutton = $('input[ name=name_of_your_radiobutton ]:checked').val();
```

4. Save the changes.

Pass the drop-down list values

1. Add a hidden field to the HTML markup of the landing page. The field can have a custom ID:

```
<input type="hidden" id="fieldId" />
```

2. Map the lead field to the hidden field in the “fields” block of the landing page code:

```
"UsrField": "#fieldId"
```

3. Calculate and pass the value selected in the field to the hidden field before calling the lead creation function.

Add an expression that contains this value to the landing page code before the fragment that calls the create lead function (createLead):

```
var fieldId = $("#name_of_dropdown option:selected").text();
```

```
$("#fieldId").val(fieldId);
```

4. Save the changes.

As a result, the data entered on the web form via the radio button and drop-down lists will be passed to the Creatio lead page.

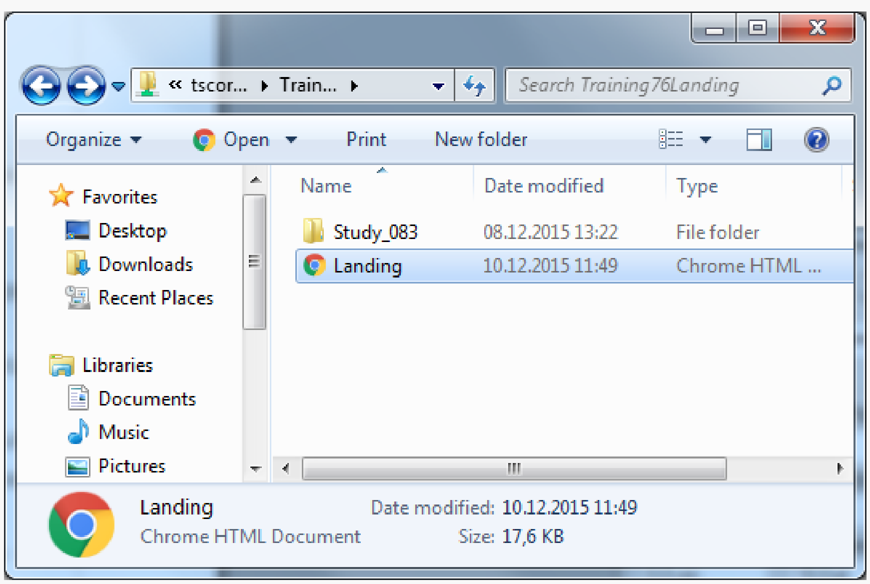
Add the modified HTML code to the landing page source code

Attention. This article covers the process of editing HTML code for a lead registration form.

After you edit the generated HTML code, add it to the code of the landing page on your website. To do this:

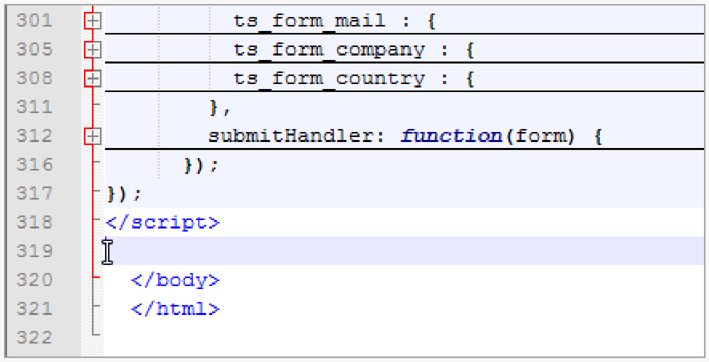
1. Copy the entire code that you modified earlier to the clipboard.
2. Place the source code on the landing page:
   a. Go to the location of the landing page file on the server (Fig 8).

Fig. 8 Location of the landing page on the server



   b. Open the landing page in a text editor.
   c. Paste the generated HTML code to the source code of the landing page, for example, before the closing </body> tag (Fig. 9).

Fig. 9 Embed the generated HTML code into the source code of the landing page



d. Save the changes.

3. Add the event that launches the CreateLead() function to the landing page code. To do this, use the following code: onSubmit="createLead(); return false". To place an event in the source code of the landing page:

a. Go to the “form action” tag in the source code:

```
<span class="registration">Webinar registration</span>



        <form action="/webinar-creatio-7-6" method="post" id="ts-form-universal-form" accep
```

b. Add onSubmit="createLead(); return false" code to the opening <form> tag. For example:

```
<span class="registration">Webinar registration</span>

<form action="/webinar-creatio-7-6" method="post" id="ts-form-universal-form" accept-charse
```

c. Save the changes.

After you connect the landing page to Creatio, proceed to set up automatic page field population for leads created via landing pages.

Set up autofill for lead page fields

PRODUCTS: MARKETING

After connecting Creatio to landing, some fields on Creatio lead pages may be omitted in the customer web form. You can set up autofill for such fields depending on your landing page specifics and purpose.

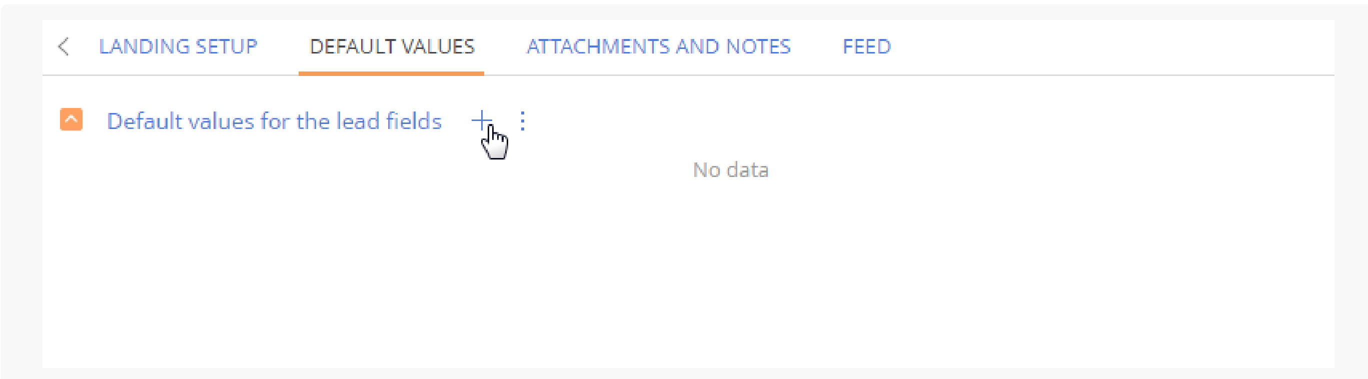
We recommend that you start with setting up the autofill defaults for the [*Need type*] and [*Need maturity*] fields. For example, the subscription form for your hardware special offer can automatically be connected to the “Hardware” need type. Your web form for the customers who are ready to communicate in person or to place an order can be connected to the need maturity values: “Discovered” or “Sales-ready.”

On the [*Default values*] tab, you can set up the autofill defaults for the lead page fields. You can set up the autofill feature for any field type including the mapped ones. In this case, the default value will be filled in the lead page field only if the customer left it blank.

To set up autofill of the lead fields:

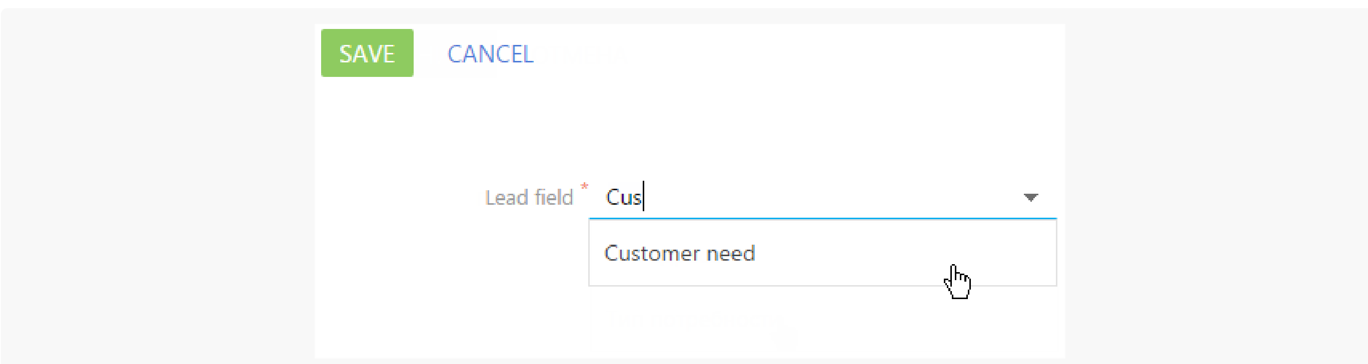
1. Go to the [*Default values*] tab of the landing page. Click the + button on the [*Default values for the lead fields*] detail (Fig. 1).

Fig. 1 – Filling out the [*Default values for the lead fields*] detail



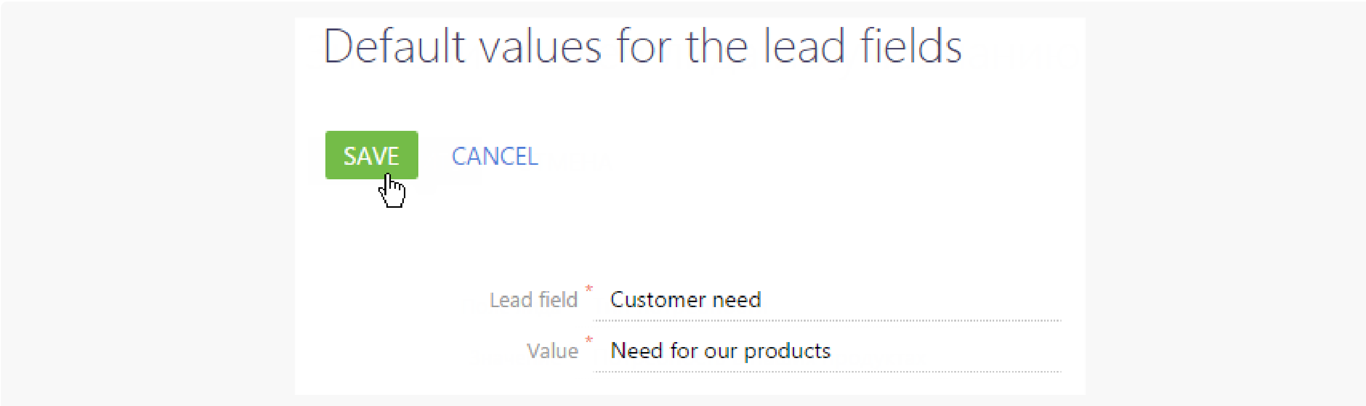
2. Select the [*Need type*] field (Fig. 2).

Fig. 2 – Selecting a field that must be filled in automatically



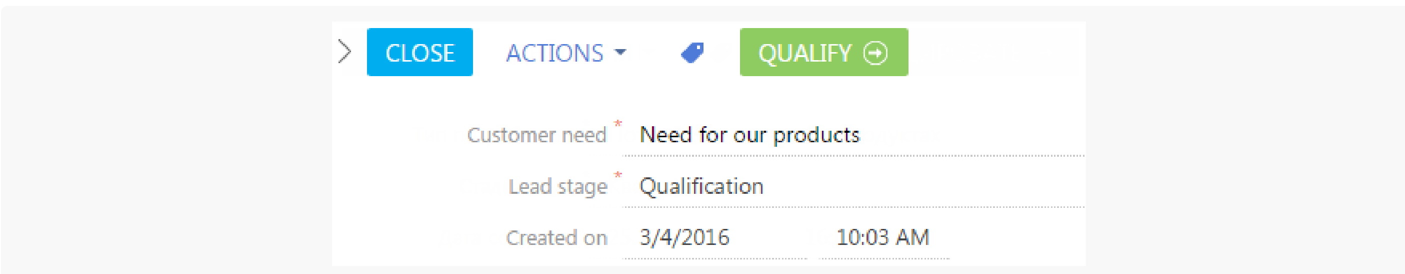
3. In the [*Value*] field, select the value which will be used to fill in the need type, for example, "Need for our products."
4. Click [*Save*] (Fig. 3).

Fig. 3 – Saving the autofill settings of the fields



After the landing page form is submitted, the [*Customer need*] field of the lead page will be filled in automatically with the "Need for our products" value (Fig. 4).

Fig. 4 – Lead page fragment



After setting up an automatic population of page fields, proceed to set up populating the landing web form with customer data.

Set up autofill of landing page fields

PRODUCTS: ALL CREATIO PRODUCTS

The feedback forms on your landing page normally contain fields that can be filled with the information available in the [*Contacts*] section (for example, name, email, phone, etc.). The data received in this way are recorded in Creatio and used to form the client base.

If the landing page is aimed at existing customers, you can set up auto-filling of the landing page fields with information from the corresponding contact profiles. If an existing customer opens the landing page form via a link from a personalized email, the form fields will already be populated with the corresponding information. This will simplify the web form submission for the customers and ensure that the data contains no errors, as well as that no duplicate contact records are created in the system.

Attention. Set up the landing page first before setting up auto-filling of its web form fields. These settings are covered in the "Connect a landing page to Creatio" article.

How autofill works for landing page fields

The autofill feature will work only if the corresponding information is available in the contact’s profile. To set up the autofill for landing page fields, edit the email template and add a macro for each field to the landing page link. The macros will be replaced with the contact’s information, which will be passed to the webform when the contact clicks the link.

The web form fields can be filled in with information from the Contact object, as well as from the connected objects. For example, this can be the contact’s name, as well as the connected account’s phone.

Set up autofill of landing page fields

You can map the recipient’s personalized data (such as name, email address, etc.) to landing page fields by adding macros to the landing page link in the email template.

Example. Pass the Creatio contact name and email address to the landing form.

1. Go to the [*Email*] section and add a new email. Fill out the email page and select a template (or create a new one). The procedure for creating bulk emails is covered in the “Create a bulk email” and “Create a trigger email” articles.
2. Open the template for editing.
3. In the edit mode, select the element where you wish to add a link to your landing page and click the button on the toolbar.
4. In the opened window, specify the landing page URL. At the end of the URL, add parameters for autofill of the landing page fields:

   ?Name=[*#Recipient.Name#*]&Email=[*#Contact.Email#*]

   In this example, “Name” and “Email” are web form field names that contain the contact’s name and email address. The [*#Recipient.Name#*] and [*#Contact.Email#*] values are macros that will add the contact’s name and email address to the personalized email. Basic instructions on working with macros are available in the “Personalize email content with macros” article.

   Note. The names of the web form fields are located in the “fields” block of the landing page HTML code. The macros that correspond to the web form fields can be obtained by opening a template for editing in the Content Designer and clicking the button.

5. Click [*OK*]. A link to the landing page form will be generated by the template element.
6. Save changes and save the email record.

As a result, when a contact clicks the link to the landing page in the email, the “Name” and “Email” fields of that page will contain the contact’s name and email from Creatio.

Identify contacts that submit web forms

PRODUCTS: MARKETING

Since version 7.18.3, you can use the “Searching and creating contact” business process to identify contacts that submit forms on newly-created landing pages that involve contact creation.

Default contact identification mechanism

The process searches for matching contact details in the form submission by applying a set of the following rules, from higher to lower priority:

1. Search by [*Full name*] and [*Email*] and [*Phone number*] fields.
2. Search by [*Email*] and [*Phone number*] fields.
3. Search by [*Full name*] and [*Phone number*] fields.
4. Search by [*Email*] field.

If the lowest-priority rule yields no results, a new contact is created.

If the process identifies the contact yet the submission includes a new email or phone number, Creatio will add the new communication option to the [*Communication options*] contact detail and mark the option as valid. Creatio will update the communication options of the earliest-created contact if it finds duplicate contacts.

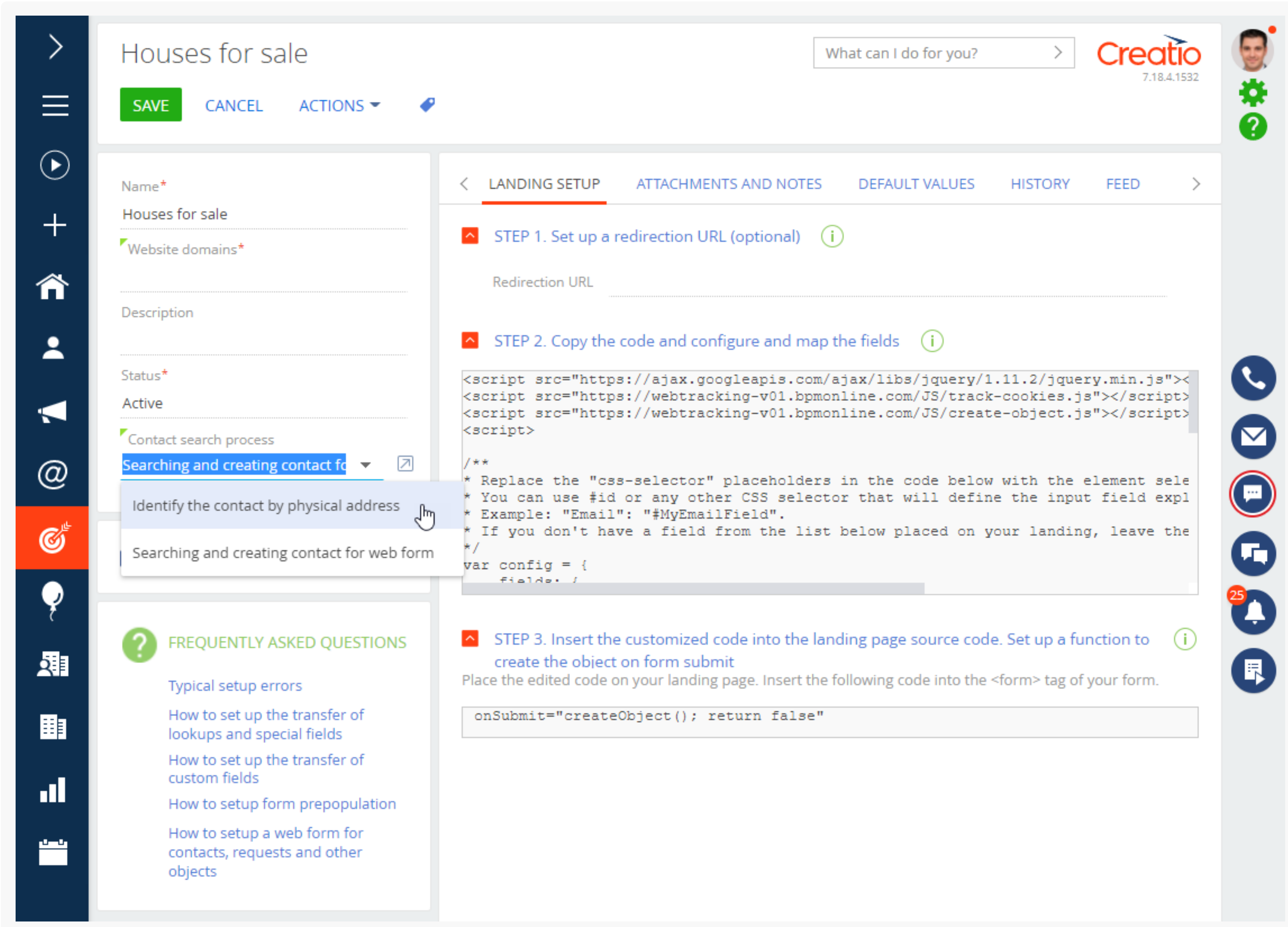
The process matches phone numbers as sets of digits without any additional characters. Full names are matched completely, both as combinations of first, middle, and last names and verbatim. Emails are matched verbatim.

Customize the contact identification mechanism

By default, Creatio uses the "Searching and creating contact" business process on all landing pages that involve contact creation. To customize the contact identification mechanism, edit the "Searching and creating contact" business process. Alternatively, use a different process for all or specific landing pages. To do this:

1. Create a business process that has custom contact identification mechanism.
2. Add the process to the [*Web form contact identification process*] lookup.
3. Go to the [*Landing pages and web forms*] section → the relevant landing page record.
4. Select the process in the [*Contact search process*] field.
5. Click [*Save*].
6. Repeat steps 3-5 for other relevant landing pages.

Fig. 1 Select a custom contact identification process



Update the contact identification mechanism

The default and custom contact identification mechanisms of landing pages set up in the earlier Creatio versions remain unchanged. To update them:

1. Customize the existing contact identification mechanism, if needed.
2. Go to the [*Landing pages and web forms*] section → the relevant landing page record.
3. Select the relevant contact identification process in the [*Contact search process*] field.
4. Replace the code snippet embedded into the landing page with the snippet in the [*STEP 2. Copy the code and configure and map the fields*] block on the [*Landing page setup*] tab.

   If the form contains fields not specified in the new snippet, perform additional setup:

   a. Expand the snippet with additional field mappings. Learn more in a separate article: Connect your website landing page to Creatio.
   b. Add the corresponding columns to the [*Web form data*] table.
5. Click [*Save*] on the section record page.