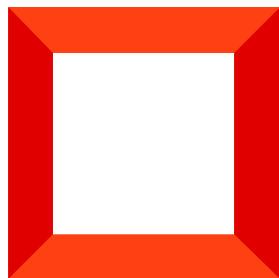
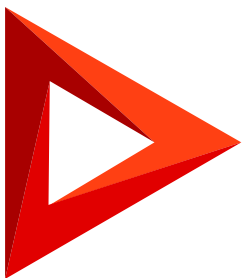


Landing pages and web forms

Version 8.0



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Integrate with landing pages and web forms

PRODUCTS: **MARKETING**

Landing page is a standalone website page that is designed for a call to action, a specific goal usually related to a marketing campaign. Creatio can connect to your landing pages and use the captured visitor data to add new records. For example, this lets you generate a prospect database and nurture leads before handing them off to sales.

You can use landing pages to set up the registration of any Creatio object related to sales funnel or customer service. For example, you can use a page that contains special subscription offers, shopping cart page, user registration page, or multimedia download page as landing page. Creatio can add cases, leads, contacts, accounts, orders, and other records based on data retrieved from the submitted web form.

Since version 8.0.5 you can pass data from a landing page to Creatio in multiple ways:

- Integrate Creatio with external webhook service. For example, Landingi, Instapage, Elementor.
- Customize HTML code of the landing page and integrate the page with a record in the [*Landing pages and web-forms*] section.

Note. The instructions below are based on a common way to use landing pages and web forms to gather leads. Register other Creatio objects similarly.

Integrate with landing pages via external webhook service

This integration is available for Creatio 8.0.5 and later. You can integrate landing pages created in any builder that supports webhooks. We recommend using Landingi service. Learn more in a separate article: [Landingi service integration](#).

You can connect Matomo to landing page that integrates to Creatio via external webhook service to add tracked data to Creatio. For example, since Creatio 8.0.7, you can add data with events tracked on a landing pages to contact.

The general procedure to integrate Creatio with a landing page includes the following steps:

1. **Get API key.**
2. **Create a landing page.**
3. Set up OAuth authentication if you use Creatio **on-site**. This is a one-time procedure. Learn more in a separate article: [Set up OAuth 2.0 authorization for integrated applications](#).
4. **Connect your landing page to Creatio** and set up field mapping between the page and Creatio lead.
5. **Set up tracking** to enrich the customer profile with website events (optional). Learn more about tracking setup on the [Creatio Marketplace](#).

This procedure differs based on your webhook service. To integrate an external webhook service with Creatio,

follow the instructions in separate articles: [Set up external webhook service integration](#), [Landing service integration](#).

Integrate with landing pages via web-to-object mechanism

The general procedure to integrate Creatio with a landing page includes the following steps:

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, for example, WordPress. Learn more on [Creatio Community](#) and [Marketplace](#).

1. **Create landing pages** based on [general rules and recommendations](#).
2. **Connect your landing page to Creatio and set up field mapping between the lead page and landing page form.** To [connect](#) the landing page to Creatio, copy the unique code snippet generated in Creatio for your landing page and paste it into page code. The fields are mapped between the landing page and lead page through the embedded code snippet. As a result, each lead generated via the landing page will automatically be saved to the [*Leads*] section for further nurturing in Creatio.
3. **Set up the landing forms processing.** The form your customers fill out only provides part of the information required for lead nurturing. Depending on the purpose of the landing page, you can set up [autofill](#) for some of the lead page fields. For example, the subscription form for a special offer on hardware can automatically be connected to the “Hardware” need type. You can also streamline the process of filling out the registration form on the landing page for bulk email recipients by [autofilling](#) the required fields that have Creatio data available, for example, name, email, phone number, etc.
4. **Set up tracking** to enrich the customer profile with the website events and track lead channels and sources. Learn more about setting up tracking in a separate article: [Track contact data](#).

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

Landingi service integration

PRODUCTS: [ALL CREATIO PRODUCTS](#)

This functionality is available for Creatio 8.0.5 and later.

[Landingi](#) is a no-code landing page and pop-up builder. It lets you create landing pages that have high conversion rates and pass lead data to Creatio automatically. You can browse an extensive library of fully customizable templates or create your own design from scratch. [Creatio Marketplace](#) includes a Landingi connector that streamlines field mapping for landing pages. The connector enables no-code developers to easily map landing

page fields directly to a Creatio object.

Integration with Landingi is based on the [webhook functionality](#). After a webhook is received, Creatio starts processing it. The processing mechanism works similarly for all webhook-based services. Learn more in a separate article: [Process webhooks in Creatio](#).

General setup procedure

Before you start setting up the Landingi service integration, [sign up](#) for Landingi and set up a landing page that contains a form. Learn more about creating a page in [Landingi documentation](#).

The general procedure to integrate Creatio with Landingi includes the following steps:

1. **Get your API key.** This step differs based on your Creatio version.

[For Creatio version 8.0.7 and later](#)

[For Creatio version 8.0.5-8.0.6](#)

2. **Connect the landing page to Creatio** and set up the field mapping between the page and Creatio object. Learn more in the add-on documentation: [Landingi connector for Creatio](#).
3. **Test** the integration by submitting the form on the landing page.

If you use Creatio **on-site**, set up OAuth authentication to enable secure connection for Landingi. This is a one-time procedure. Learn more in a separate article: [Set up OAuth 2.0 authorization for integrated applications](#).

You can set up tracking to enrich the customer profile with website events. To do this, integrate Creatio with Matomo tracking service. Learn more about tracking setup on the [Creatio Marketplace](#).

Mapping features

To ensure the webhook service works as intended, configure the field mapping in Landingi. View the example that configures field mapping for the [*Contact*] object in Landingi below (Fig. 2).

Fig. 2 Field mapping for the [*Contact*] object in Landingi

Object

Connect your form fields with fields in your chosen integration, so that the data is saved correctly.

<input type="text" value="Name"/>	→	<input type="text" value="Full name"/>
<input type="text" value="Email"/>	→	<input type="text" value="Email"/>
<input type="text" value="Phone"/>	→	<input type="text" value="Mobile phone"/>
<input type="text" value="Company"/>	→	<input type="text" value="Account"/>

You map the form to [*Contact*], [*Lead*], [*Order*], and [*Submitted form*] Creatio objects out of the box. These objects are listed in the [*Webhook entities*] lookup. To map another Creatio object, add it to the lookup.

Follow the **recommendations** in the table below when mapping the Landingi form fields to the Creatio object fields.

Recommendations for mapping the Landingi form fields to the Creatio object fields

Landingi form field type	Creatio object field type
[Name]	[Text]
[Email]	[Email address] or [Text]
[Phone]	[Phone number] or [Text]
[Checkbox]	[Boolean]
[Radio button]	[Text]
[Website]	[Web link] or [Text]
[Title]	[Text]
[Company]	[Text]
[PESEL]	[Text]
[Address]	[Text]
[Single line text]	[Text]
[Multi line text]	[Multiline text]
[Numbers]	[Integer]
[Drop-down list]	<p>[Dropdown]</p> <p>If you want to map the Landingi form field to a Creatio lookup, use the lookup item ID as the field value of the Creatio object. For example, if you want to map the Landingi form field to the [City] lookup, use the city ID from the lookup as the field value of the Creatio object.</p>
[Country select]	[Text]

Landing form field [<i>Date</i>]	Creatio object field type [<i>Date</i>]
type [<i>File</i>]	[<i>Text</i>]. Creatio imports only the file link.
[<i>Hidden field</i>]	[<i>Text</i>]

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.

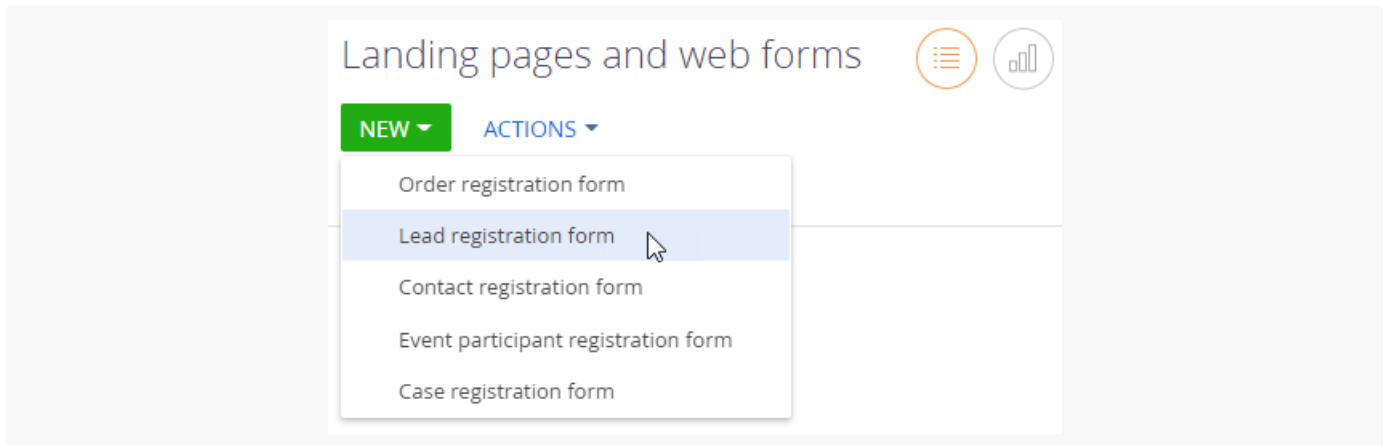
Note. We recommend the website developer to set up landing pages.

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.

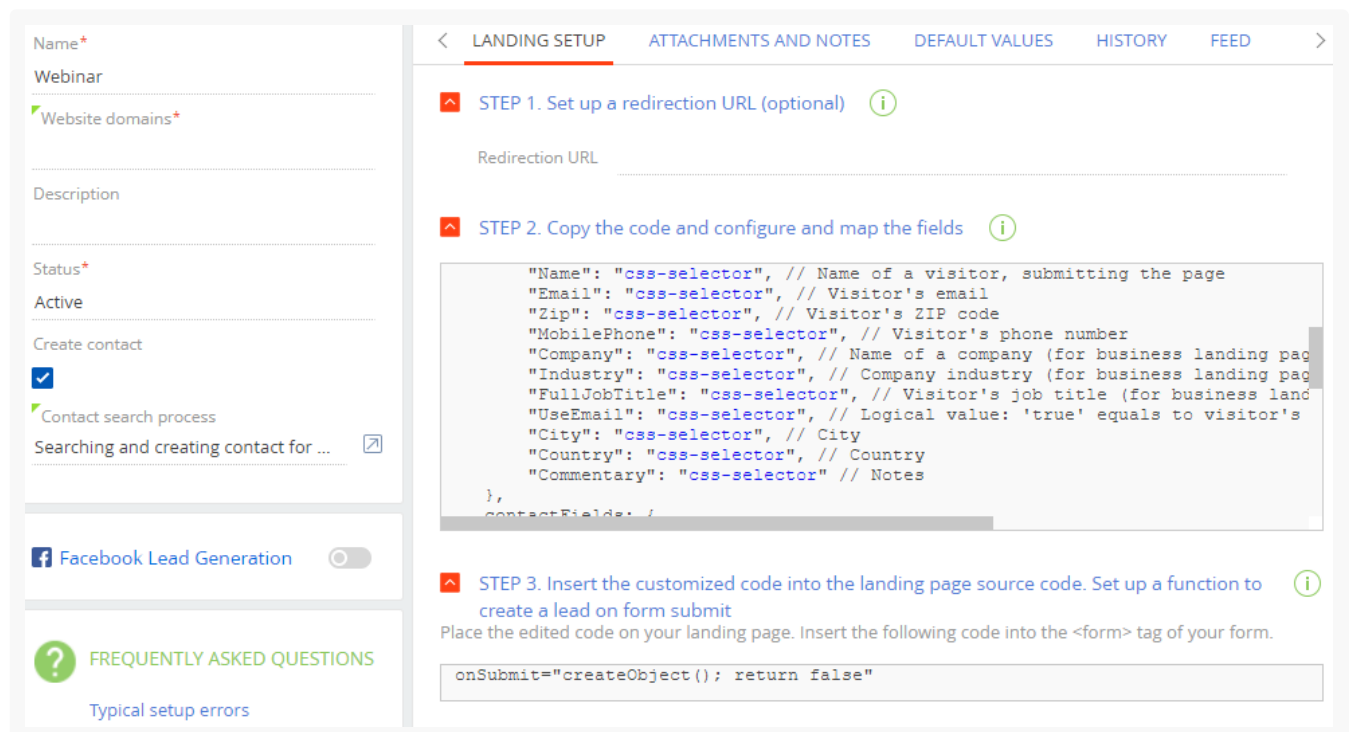
Fig. 1 Create a new landing page



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.

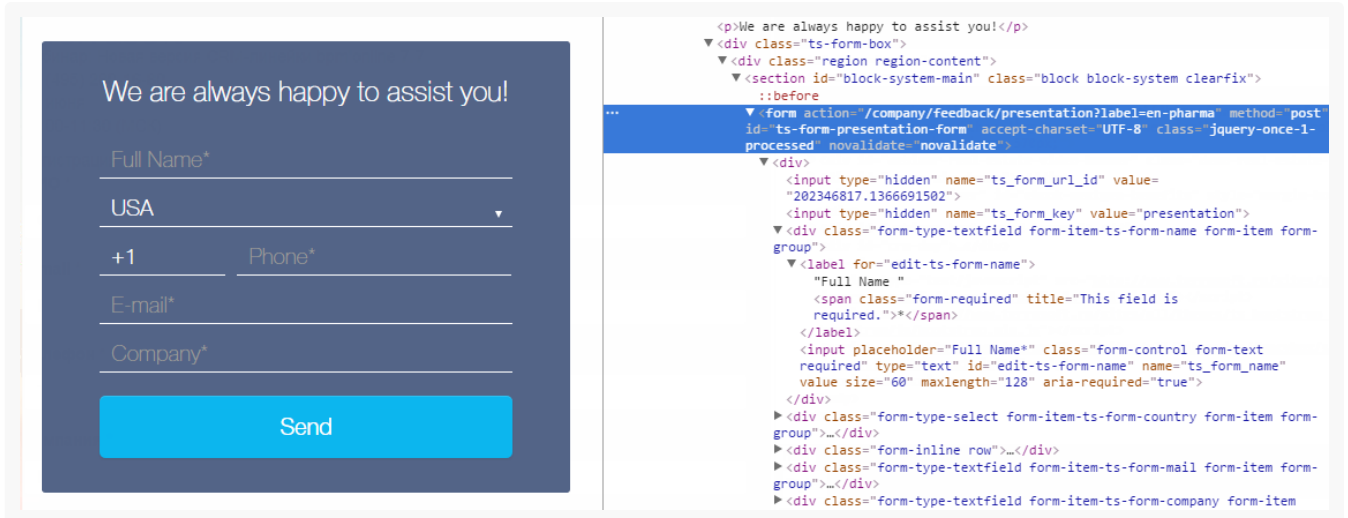
You can delete the fields the web form does not use from the HTML code.

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




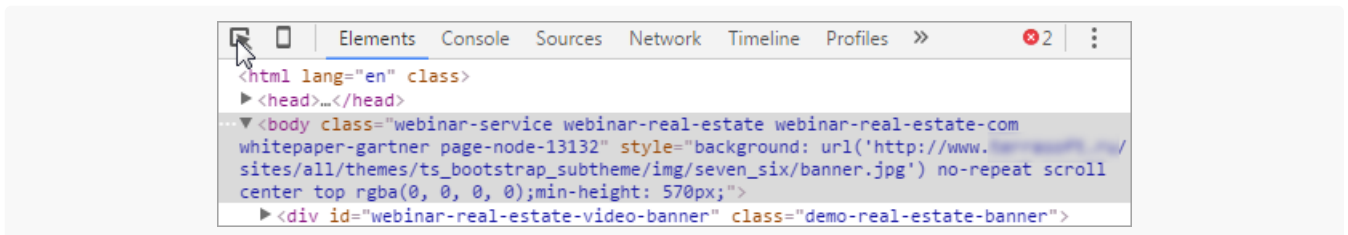
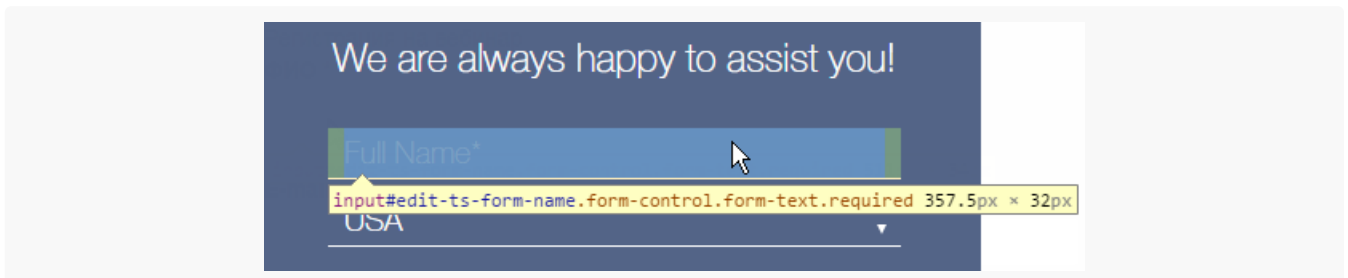
- b. Click the  icon in the source code area (Fig. 4).

Fig. 4 Select a code item on the page



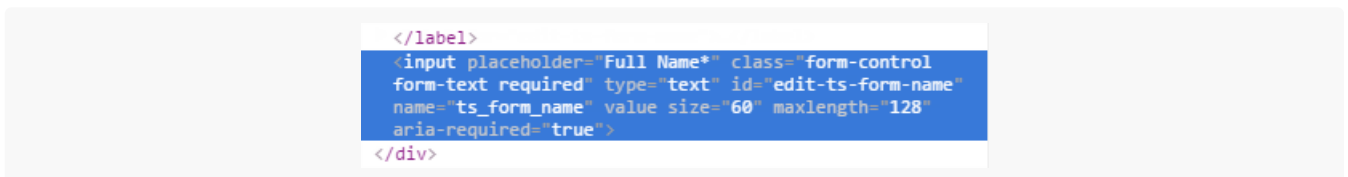
- c. Click the [Full name] field on the landing page (Fig. 5).

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

```
<input placeholder="Full Name*" class="form-control
form-text required" type="text" id="edit-ts-form-name"
name="ts_form_name" value size="60" maxlength="128"
aria-required="true">
```

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.

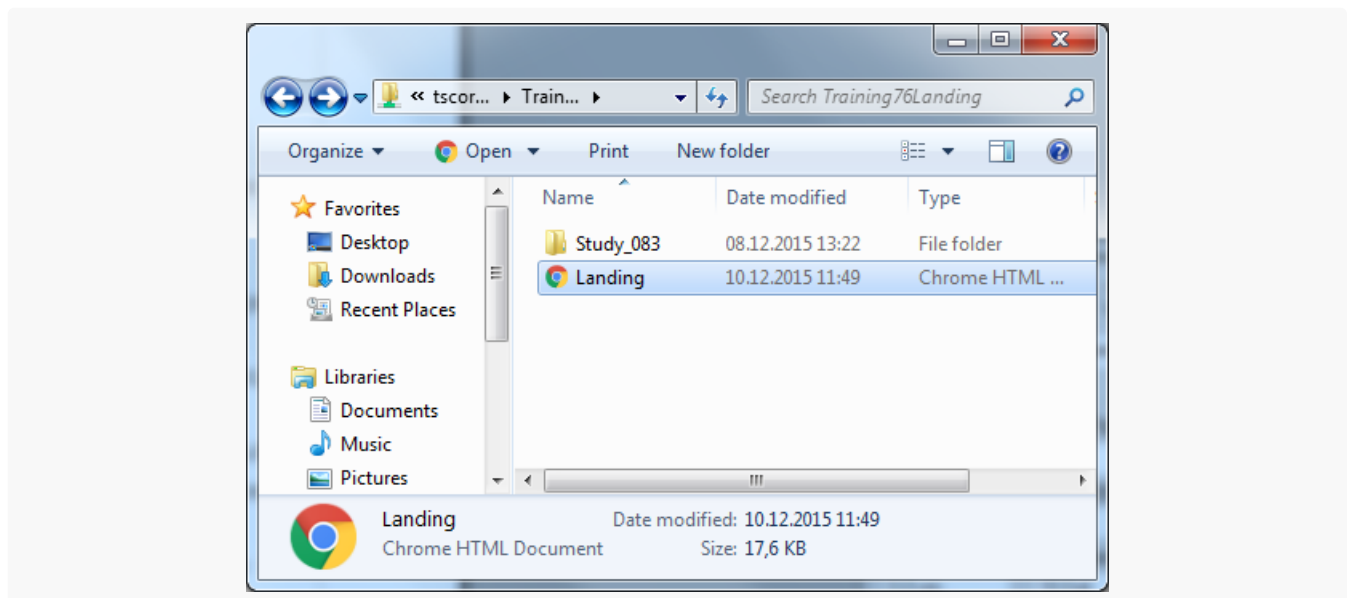
Add the modified HTML code to the landing page source code

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

```

301 |      ts form mail : {
305 |      ts form company : {
308 |      ts form country : {
311 |      },
312 |      submitHandler: function(form) {
316 |      });
317 | });
318 | </script>
319 |
320 | </body>
321 | </html>
322 |

```

- 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-chars
```

- 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.

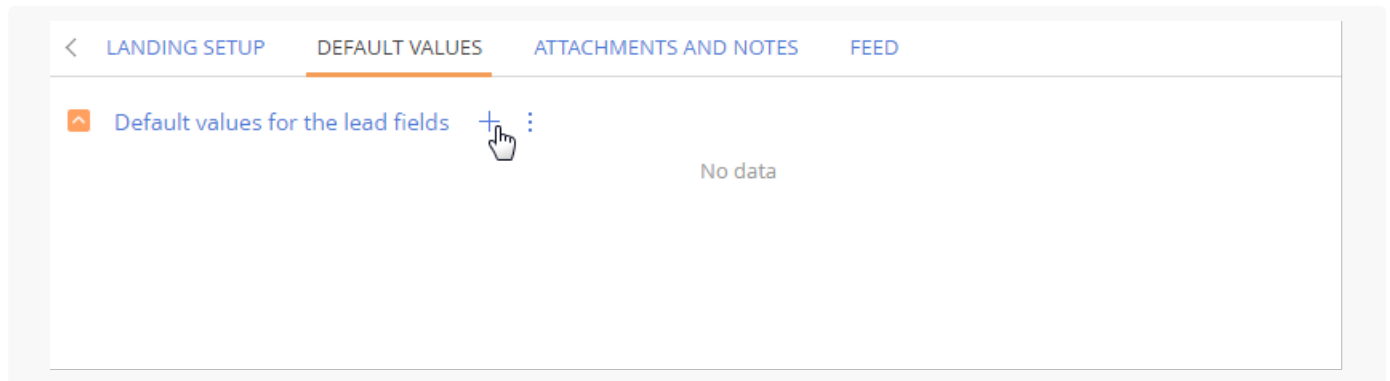
We recommend that you start with setting up the autofill defaults for the [*Need type*] and [*Need maturity*] fields. For example, the subscription form for your hardware special offer can automatically be connected to the "Hardware" need type. Your web form for the customers who are ready to communicate 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:

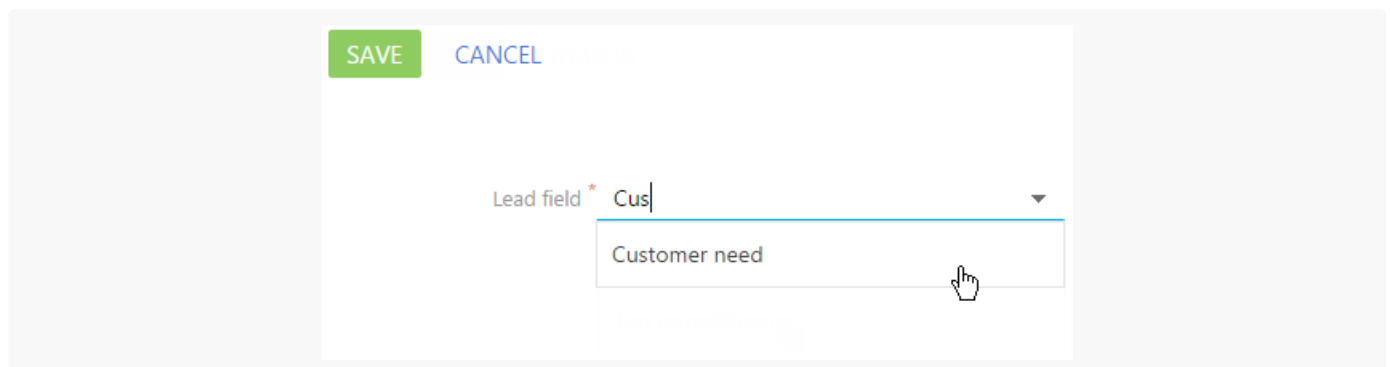
1. Go to the [*Default values*] tab of the landing page. Click the + button on the [*Default values for the lead fields*] detail (Fig. 1).

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



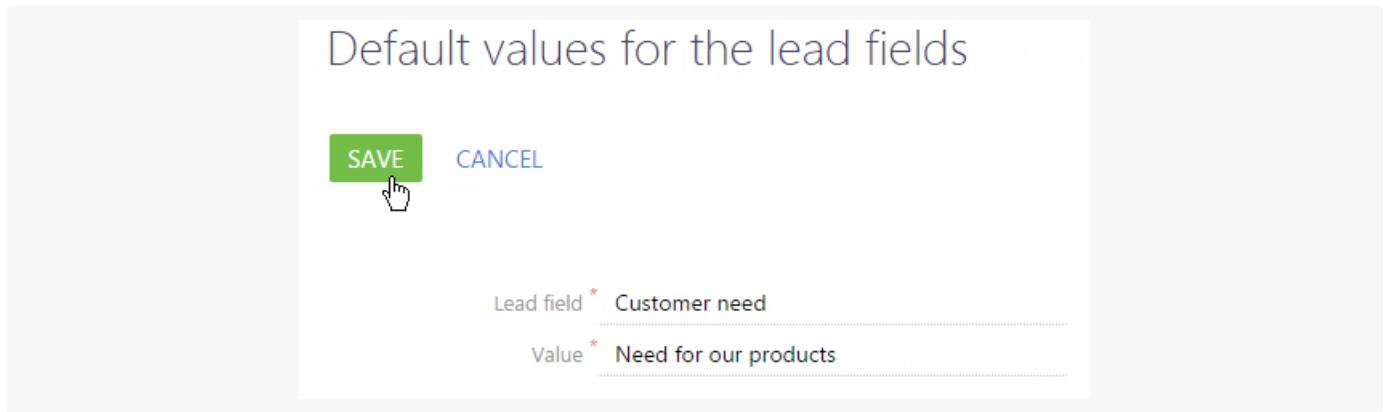
2. Select the [*Need type*] field (Fig. 2).

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



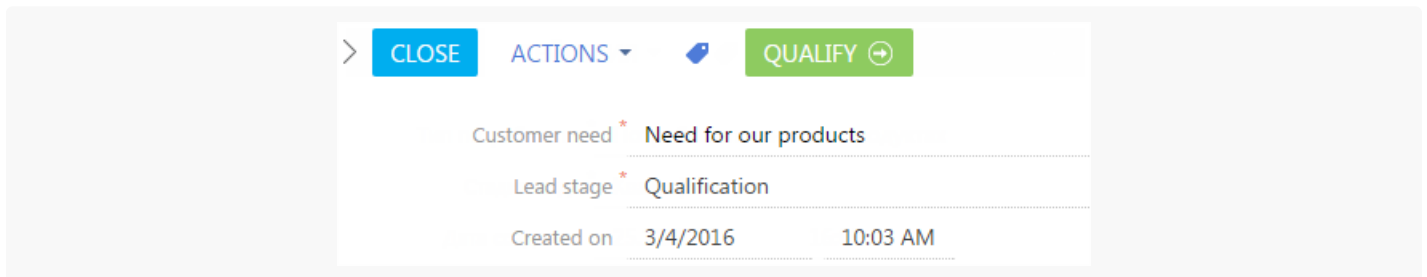
3. In the [*Value*] field, select the value which will be used to fill in the need type, for example, "Need for our products."
4. Click [*Save*] (Fig. 3).

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.

Set up automatic lead registration from social networks

PRODUCTS: **MARKETING**

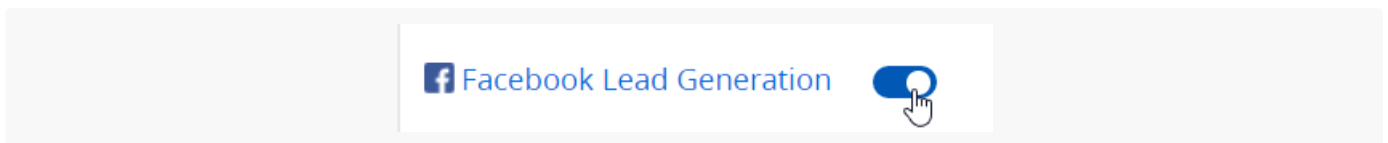
You can set up automatic lead registration in Creatio when a customer fills in a form on Facebook or Instagram. The setting is available for users with a preconfigured Facebook Ads Manager account.

Attention. Before you start setting up lead generation from social networks, make sure the “Identity server Url (IdentityServerUrl), “Identity server client id” (IdentityServerClientId) and “Identity server client secret” (IdentityServerClientSecret) system settings are populated. If the system setting values are not populated, contact support assistance.

To set up lead registration from social networks:

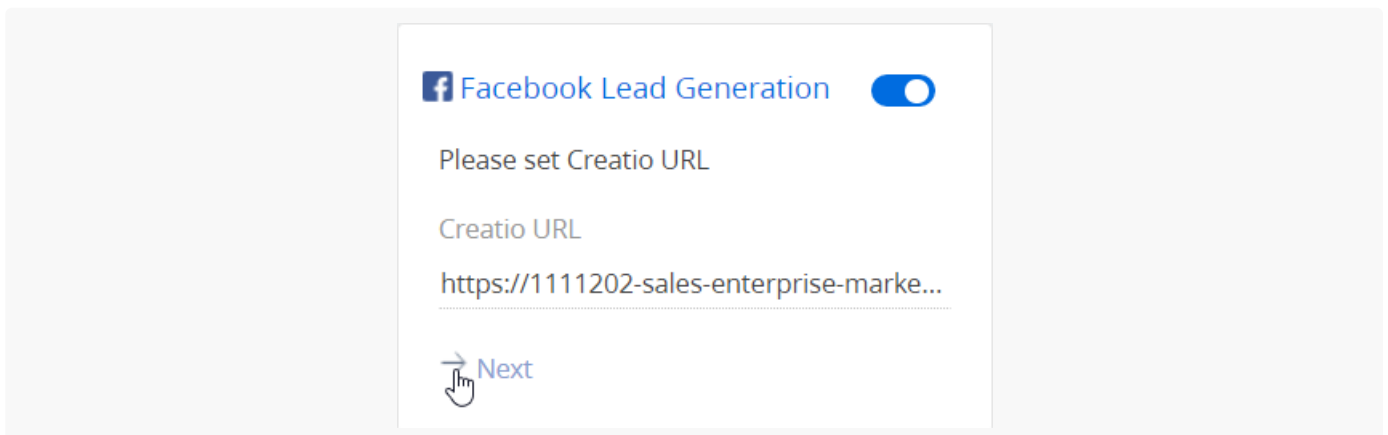
1. **Open** the [*Landing pages and web forms*] section.
2. **Click** [*New*] → [*Lead registration form*].
3. **Populate** the fields on the opened page:
 - a. [*Name*] - the record title that will display in the section list and the connected records;
 - b. [*Website domains*] - facebook.com.
4. **Save** the record.
5. Open the created record and **activate** the [*Facebook Lead Generation*] switcher.

Enabling Facebook lead generation



6. **Click** the [*Creatio URL setting*] link.
7. **Specify** your application URL in the [*Creatio URL*] field and click [*Next*].

Specifying Creatio URL



8. Click [*Select a source*].
9. If synchronization with social networks is **already configured** in Creatio, proceed with step 10 of the current guide.

If you are setting up lead registration from social networks **for the first time** and Creatio is not synchronized with any Facebook account yet, click [*Manage pages*].

- a. **Log in** to Facebook. To ensure the correct setup, log in to your user account with administrator permissions to your Facebook public page and the “Ads manager” role.

Attention. After you set up the integration, do not degrade the administrator user permissions. This may cause issues with the functionality operation.

- b. **Select** one or several pages for setting up synchronization with Creatio. Click [*Next*].

Selecting a Facebook page to synchronize with Creatio

What Pages do you want to use with Creatio Social?

In the next step, you will determine what Creatio Social can do with the Pages you selected.

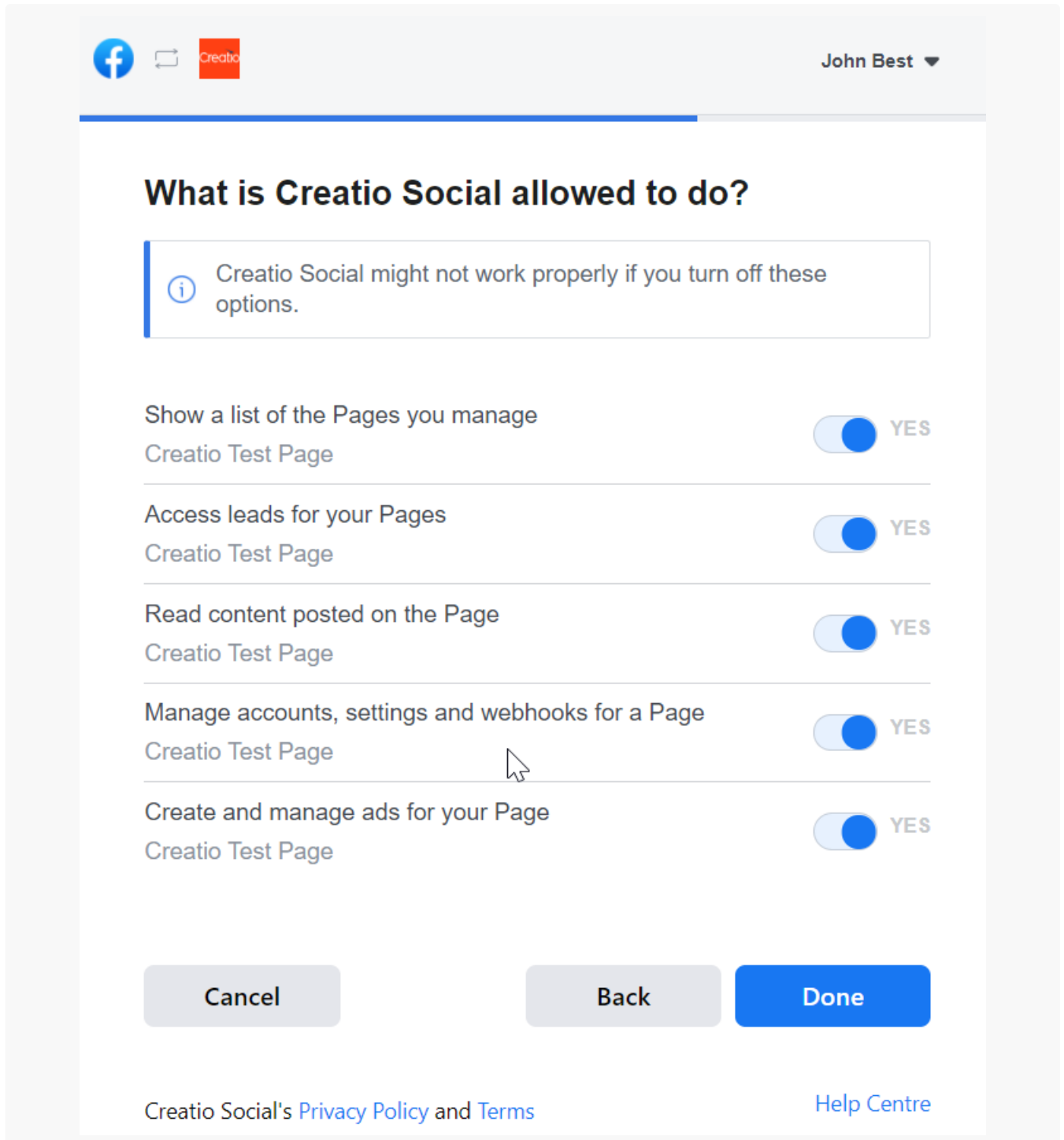
All Pages (1) Select All

A Our company

[Creatio Social's Privacy Policy and Terms](#) [Help Center](#)

- c. Permit Creatio to **manage your public page**. This will enable passing the data from social networks to Creatio. If you restrict Creatio from managing the page, lead registration may not work properly.

Setting up access to managing the page

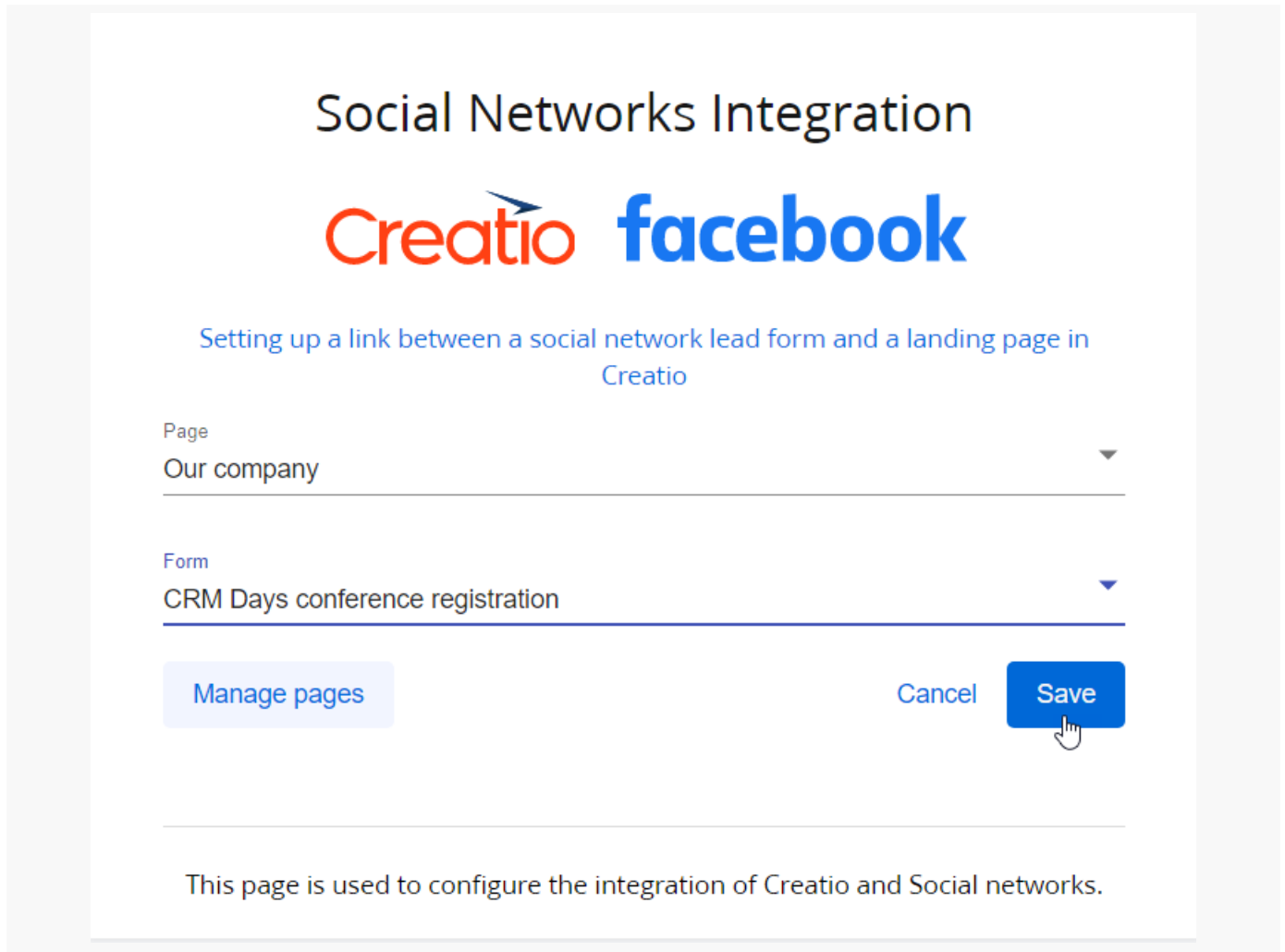


10. On the page of selecting a form, specify:

- The **Facebook page** with a configured campaign;
- Lead registration form** that has been created for this page in Ads Manager.

11. Click [Save].

Selecting a Facebook page and form to synchronize with Creatio



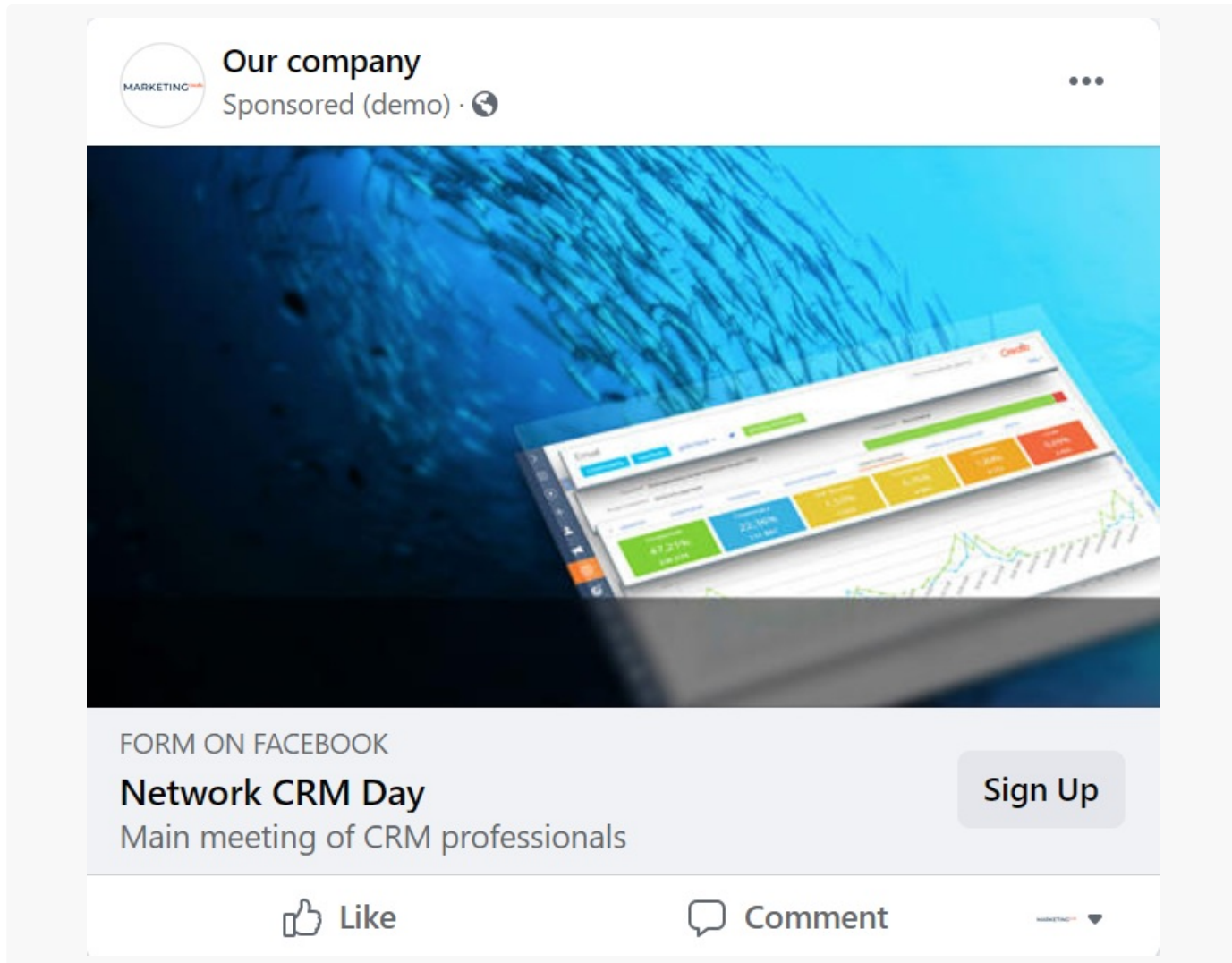
12. Close the setup window and return to the **landing page in Creatio**.

13. Refresh the page. As a result, the [*Facebook Lead Generation*] block will be populated with data from the synchronized Facebook page.

14. **Save** the landing record.

As a result, after the campaign is triggered in Facebook and Instagram, the ad record available for users will be connected to the form. Each time a form is submitted, a new lead will be added in Creatio.

Displaying an ad record with a lead registration form in the Facebook feed



The following values can be passed to the leads added via social networks: email, phone number, address, city, region, country, postal code, full name, position, work phone, work email, account name. If you add other fields to the Facebook form, their values will be stored in the [*Notes*] detail. You can only pass text field values to Creatio due to restrictions on the Facebook side.

Note. If you change the default captions of the Facebook Ads Manager fields in the form, the field values may not be passed to Creatio properly.

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

The screenshot shows the Creatio landing page setup interface for a record named "Houses for sale". The interface is divided into several sections:

- Header:** Includes the record name "Houses for sale", a search bar "What can I do for you?", and the Creatio logo with version "7.18.4.1532".
- Actions:** Buttons for "SAVE", "CANCEL", and "ACTIONS".
- Form Fields:** Fields for "Name*", "Website domains*", "Description", "Status*" (set to "Active"), and "Contact search process". A dropdown menu is open over the "Contact search process" field, showing options like "Identify the contact by physical address" and "Searching and creating contact for web form".
- LANDING SETUP Tab:** Contains three steps:
 - STEP 1. Set up a redirection URL (optional):** Includes a "Redirection URL" field.
 - STEP 2. Copy the code and configure and map the fields:** Contains a code snippet for tracking and form configuration. The code includes jQuery and JavaScript for tracking cookies and creating objects. A comment indicates that CSS selectors should be replaced with actual field IDs.
 - STEP 3. Insert the customized code into the landing page source code. Set up a function to create the object on form submit:** Includes a text box with the code `onSubmit="createObject(); return false"`.
- FREQUENTLY ASKED QUESTIONS:** Lists common setup errors and provides links to help articles, such as "How to set up the transfer of lookups and special fields" and "How to setup a web form for contacts, requests and other objects".
- Right Sidebar:** Contains various utility icons like a phone, email, chat, and a notification bell with a "25" badge.

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.

Landing page setup FAQ

PRODUCTS: **MARKETING**

What is the purpose of the [*Landing pages and web forms*] section in Creatio?

The [*Landing pages and web forms*] section is used to set up integration between Creatio and web forms on your websites. As a result, each time an integrated web form is submitted, a new record is automatically created in Creatio using data from the submitted form. Landing page integration can be used for generating leads, adding customers to event participants, automatic order registration, and more.

The [*Landing pages and web forms*] section is used for setting up connections between landing pages on your website and Creatio. In the [*Landing pages and web forms*] section a landing page record must be created that contains basic information about the landing page and a unique HTML code that must be integrated into the HTML code of the landing page.

After performing these settings, the data entered in the web form of the landing page, such as full name, email, phone, will be passed to Creatio and used to add a new record (for example a new lead) in Creatio.

What are the difference between a landing page on the website and a Creatio landing page record?

When setting up a landing page two main entities must be differentiated:

- A landing page on the website.
- A landing page record in the [*Landing pages and web forms*] section of Creatio. A landing page record contains information on the actual landing page, for example, its name, link, etc. These records are used to set up connections between a landing page on a website and Creatio.

An actual landing page and the corresponding landing page record in the [*Landing pages and web forms*] section have their own HTML code used to connect the two entities. The unique code of a landing page record is integrated into the HTML code of an actual landing page on a website.

What does the landing page code do?

The HTML code of a landing page is required to automatically create a new record in the system if a web form on the landing page is filled in. This code is used for setting up the data transfer between a landing page on a website to Creatio. Initially, the code fragment is set up for a specific landing page and then integrated into the HTML code of the landing page. Learn more about managing the landing page HTML code in a separate article: [Connect your website landing page to Creatio](#).

How do I use the [*Website domains*] field?

Enter the actual landing page URL in the [*Website domains*] field.

For example, the website name is `www.example.com`. This website has a landing page available at the following address: `www.example.com/landing`. This address must be entered in the [*Website domains*] field on the Creatio landing record page.

Attention. The address entered in this field must match the address of the landing page where the HTML code was integrated.

Note. In the [*Website domains*] field, specify all domains used to host the landing page. The domains must be separated with commas.

How do I use the [*Redirection URL*] field?

The [*Redirection URL*] field in the landing code determines the page where the user is redirected after filling out the landing page webform. You can specify the address of any page on your website. If your website settings specify a different action after filling out the landing page, leave this field empty.

If you fill in the [*Redirection URL*] field for a new [*Landing pages and web forms*] section record, then the unique HTML code of this record will contain the link to the page specified in the [*Redirection URL*] field in the `redirectUrl` block.

Thus, for the proper functioning of the landing page, fill out the landing page record fields, including [*Redirection URL*] and save the record, then connect the landing page record with the landing page. Learn more about managing the landing page HTML code in a separate article: [Connect your website landing page to Creatio](#).

How do you set up one landing page record for a page with several web forms?

If your landing page has several web forms, you can use a single Creatio landing page record to connect to all of them.

Attention. The settings below are performed by the website administrator.

In the standard HTML code of the landing page record in Creatio, there is a “config,” block where field mapping between web forms and lead fields are set up. To set up a mapping between a lead record field and **several web forms**, create several “config” blocks in the code, one for each actual web form. A separate `createLead` function must be set up for each “config” block.

For example, your landing page has two web forms. The first form contains “Full name” and “Email” fields, and the other one contains “Full name” and “Mobile phone” fields. To use one landing for the landing page with two web forms, make the following changes to the code:

1. Copy the whole “config” block as many times as the number of web forms that you need to connect to the landing page record in Creatio.
2. Add unique names to the “config” blocks whose parameters are passed to the `createLead` function. For example “config1” and “config2.”
3. In the “config1” block, set up the mapping of the fields from the first web form:

```
Name: "#..." Email: "#..."
```

4. In the “config2” block, set up the mapping of the fields from the second webform:

```
Name: "#..." Phone: "#..."
```

5. Set up two createLead functions:

```
function createLead1() { landing.createLeadFromLanding(config1) } function createLead2() { la
```

6. For each web form, set up calling of a separate createLead function:

```
onsubmit="createLead1(); return false" onsubmit="createLead2(); return false"
```

After this, a lead will be created in Creatio each time a user fills out any of the two web forms.

How do I set up a single landing for several pages?

If several web forms with a similar structure are implemented in several pages within one domain, you can use a single landing page record for all of them. To do this, enter all needed URLs in the [*Website domains*] field, separating them with commas: <https://www.creatio.com/trial?product=sales>, <https://www.creatio.com/trial?product=marketing>

As a result, when a web form is filled out on any of the website pages, where this landing page code is integrated, a new record (for example, lead) will be automatically created in Creatio.

Why will Creatio not register leads despite the properly customized landing page?

After you have created and [set up](#) a landing page, new records will be registered in Creatio when the landing page webform is filled in. If it doesn't happen, perhaps one of the landing page fields (such as lead) is required but either not included in the web form, or not filled.

In this case, you can:

- Clear the [*Required*] checkbox from the lead page fields (or the page fields of another Creatio object). Learn more about changing fields on edit pages in a separate article: [Set up page fields](#).
- [Set up](#) the population of these fields with default values.

How to set up the population of fields with default values for leads registered via a landing page?

The landing page webform can contain all the fields used by Creatio on the lead page. You can set up automatic population of individual fields with default values. Learn more about populating the lead fields with default values in a separate article: [Set up autofill for lead page fields](#).

How does Creatio search for contact duplicates while creating leads from landing pages?

As soon as your customer submits a web form on your landing page, Creatio automatically creates a new lead record based on the entered data. After this, the “Searching and creating contact” process starts automatically to check whether the new lead can be linked to an existing contact or if a new contact needs to be created. This helps Creatio to avoid creating contact duplicates when new leads are registered from landing pages. You can view or edit the “Searching and creating contact” process in the process library.

Note. The “Searching and creating contact” process starts only if the [*Create contact*] checkbox is selected for the landing page.

Learn more about the contact identification mechanism in a separate article: [Identify contacts that submit web forms](#).

How do I set up the correct population of lead creation time?

A situation may occur an incorrect date was set in the [*Creation date*] when registering a lead via a landing page. To avoid this, we recommend you to check the time zone set on the server where Creatio is hosted. For the lead creation time to be set correctly, make sure that the time zone on the application server corresponds to your actual time zone.

Can I configure the website event tracking for manually registered leads?

You cannot configure the website event tracking for manually registered leads.

The website event tracking is executed based on the history of the transitions through the website of a specific Internet user. During the tracking process, a certain session is recorded in the browser by using cookies. If a lead is created manually, no web-page visitor is connected to a web-browser session. Thus, the history of the website navigation of such a user cannot be tracked.

If an internet user, having made several transitions through the pages, fills in the landing page web form of your website, the history of his transitions will be transferred to Creatio.

Note. If a user clears the browser cookies before filling out the landing page web form, the history of his transitions will be removed and will not appear in Creatio.

How do I configure data transfer from one landing page web form to separate lead page fields?

There is the “config” block in the HTML code of the landing page. This block configures the mapping of landing page web form fields and lead fields. To set up the correspondence of one landing page webform field to multiple lead fields, you will need to add a hidden field to the HTML code of the landing page, set up the mapping, and then configure the createLead function.

For example, a single “Name” field is implemented in the web form of your landing page. And Creatio lead page has two separate fields: [*First name*] and [*Last name*].

Attention. The settings below are performed by the website administrator.

To populate the [*First name*] and [*Last name*] lead page fields correctly, make the following changes to the code:

1. Add two hidden fields to the HTML markup:

```
<input type="hidden" id="selectedNameCaption" /> <input type="hidden" id="selectedSecondNameC
```

2. Set up the mapping of the hidden fields in the “config” block:

```
"Name": "#selectedNameCaption" "SecondName": "#selectedSecondNameCaption"
```

3. Before calling the function to create a lead, add a function, which describes the logic of the [*Name*] and [*Surname*] fields taking the value from the [*Name*] field.