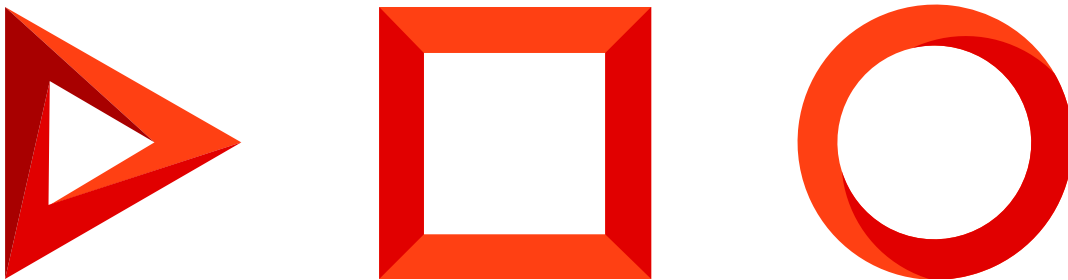


# Identify contacts in forms

Identify contacts that submit web forms

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

# Table of Contents

<b>Identify contacts that submit web forms</b>	<b>4</b>
Default contact identification mechanism	4
Customize the contact identification mechanism	4
Update the contact identification mechanism	5

# 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.