



CRM Solutions by LeadMaster



PROPOSAL AND DOCUMENT GENERATOR

Step-By-Step Instructions for LeadMaster's Proposal/Document Generator

OVERVIEW

Since its inception, LeadMaster has provided the ability to extend the finite amount of application fields by incorporating Flexform (Custom Form) functionality. In other words, whatever information you would want to capture on a LeadMaster record can be achieved through the use of a Custom Form. The look and feel of the form – although very easy to use and interact with – is very basic in nature and not ideal for printing and sending to a 3rd party.

But, now, with the advent of the Proposal/Document Generator, you will have the ability to create eye-pleasing MS Word documents and merge them with your Custom Form document. The Proposal Generator in the LeadMaster CRM allows you to merge data from the CRM into a Word document. The Word document can be any type of documents - for example, a legal document or a proposal.

PREREQUISITES

MENUS

In order to create material used in LeadMaster's Document Generator, you will need two menu items added to the Custom Forms/Web Forms/Quotes accordion folder of the Main Admin menu of the specific workgroup. These two menu items are:

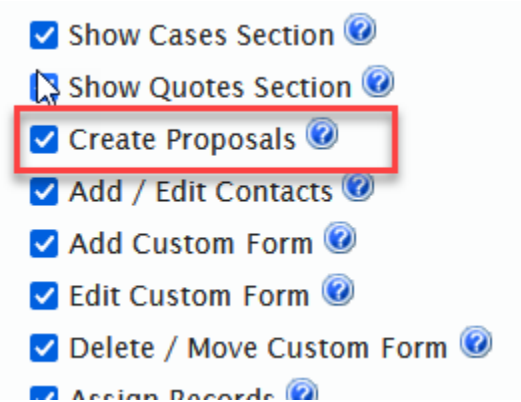
- a) Create & Map HTML Forms to Custom Forms
- b) Proposal Generator – Manage Documents.



LOGON PRIVILEGE

User must have the privilege to create Proposals

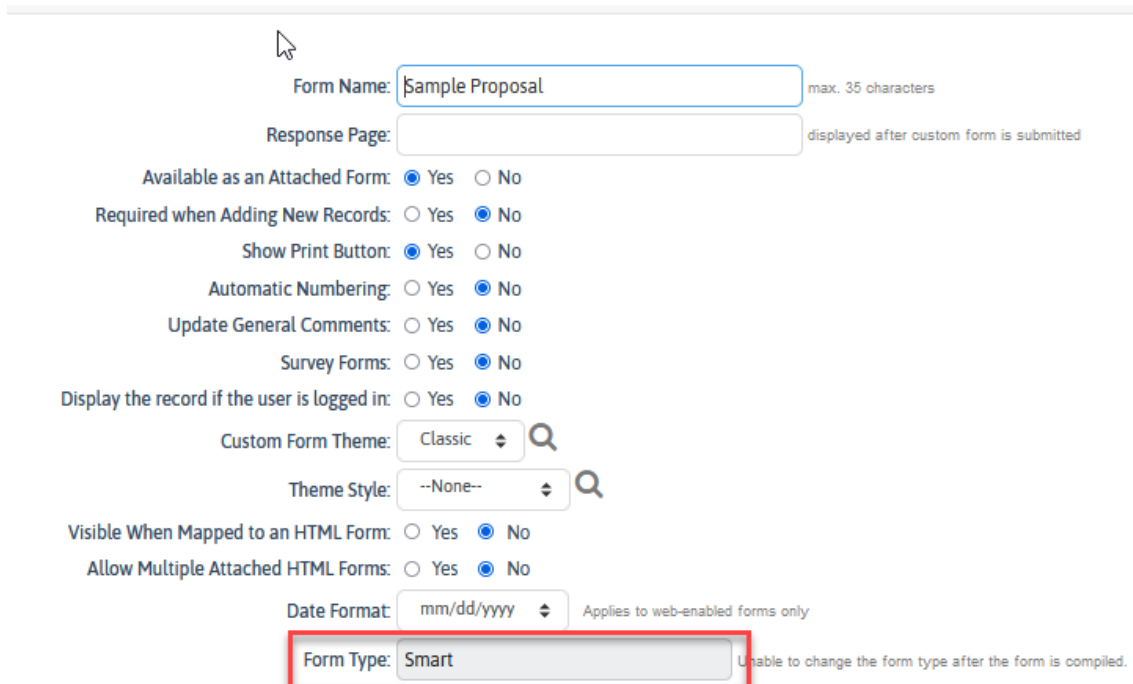
Logon Management Page > Viewing/Editing Records > **Create Proposals** must be checked/enabled



☒ Show Cases Section ?
☒ Show Quotes Section ?
☒ **Create Proposals** ?
☒ Add / Edit Contacts ?
☒ Add Custom Form ?
☒ Edit Custom Form ?
☒ Delete / Move Custom Form ?
☒ Assign Records ?

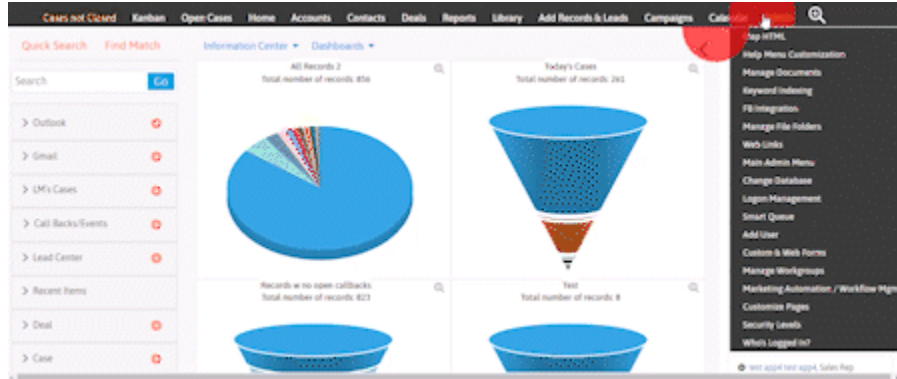
INSTRUCTIONS

1. Add and Design Custom Form as you normally would but upon adding, you will need to choose "Smart" as your Form Type.



Form Name: max. 35 characters
 Response Page: displayed after custom form is submitted
 Available as an Attached Form: ☒ Yes ☐ No
 Required when Adding New Records: ☐ Yes ☒ No
 Show Print Button: ☒ Yes ☐ No
 Automatic Numbering: ☐ Yes ☒ No
 Update General Comments: ☐ Yes ☒ No
 Survey Forms: ☐ Yes ☒ No
 Display the record if the user is logged in: ☐ Yes ☒ No
 Custom Form Theme: ?
 Theme Style: ?
 Visible When Mapped to an HTML Form: ☐ Yes ☒ No
 Allow Multiple Attached HTML Forms: ☐ Yes ☒ No
 Date Format: Applies to web-enabled forms only
 Form Type: Unable to change the form type after the form is compiled.


















2. Once the Custom Form is compiled, navigate to the Main Admin menu and click the Custom Forms/Web Forms/Quotes accordion folder. From there, choose the **Create & Map HTML Forms** option which will navigate you to the Webforms Template List.
3. Click **Add Webform Template** button



4. Select the **HTML Custom Form** you want to map from the Select Custom Form drop down menu
5. Choose the field from the Custom Form you want to insert into the Content section.
6. Click **Submit** button at bottom of page when completed.

Webform Templates List

[Add Webform Template](#)

Smart Form	Custom Form	Type	Status	
Homeowner Form	Homeowner Form	Smart	Active	 
3-Test HTML LeadDB Fields	Test HTML LeadDB Fields	Smart	Active	 
SL - 3407	SL - 3407	Smart	Active	 
3407 - mapped	SL - 3407 - Mapped	Smart	Active	 
HTML New Lead	Smart - Mapped - New Lead	Smart	Active	 
HTML New Contact	Smart - Mapped - New Contact	Smart	Active	 
SMART - UPLOAD	Smart - Upload File	Smart	Active	 
Smart Inline	Smart - Inline	Smart (Inline)	Active	 
Sample Proposal	Sample Proposal	Smart	Inactive	 

[Cancel](#)

7. Navigate back to **Main Admin** menu and click the **Custom Forms/Web Forms/Quotes accordion** folder (although the folder may still be open) and choose **Custom Forms and Proposal Generator – Manage Documents**.
8. Click **Manage Folders** button and create a folder.
9. Click **Document Templates** button to navigate back to previous screen
10. Click **Add Document** button, name your document, select folder for storage, and upload your Word document.

Note: These instructions do not cover the creation of the Word document to be used. Please contact your LeadMaster consultant for help with Word document creation..

11. Once your Word document is loaded, click the **Document to Custom Form Map** button.
12. Click **New Document to Custom Form Map** button.
13. Select Document and Custom Form from their respective drop-down menus.
14. Map the fields.
15. Click **Submit** Button at bottom.

Once all this is set up, you can now navigate to a record, attach the HTML custom form, and fill out the pertinent information on the form.

When completed, hover your mouse over the **Record Options** button, choose **Create Document** shortcut, choose folder containing document, choose document and click **Create**.

MS Word will launch and you will be able to view your nice, new document with all the custom form fields.