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LEADMASTER CRM GRAVITY FORMS INTEGRATION

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LEADMASTER AND GRAVITY FORMS

Never miss a Lead! Capture, track and nurture more leads from your Gravity Forms with LeadMaster's Gravity Post plugin! To help WordPress users automate the process of capturing and pushing leads to LeadMaster, now you can sync Gravity Form submissions directly into the CRM with LeadMaster's Gravity Post plugin. Upon integrating LeadMaster with Gravity Forms, all form submissions are pushed to the CRM as a lead via HTTP post.

NOTE:

LeadMaster Gravity Post works as an extension to the Gravity Forms plug in –to enjoy seamless and automated lead capture, the Gravity Forms plugin should be installed.

DOWNLOAD AND INSTALL THE LEADMASTER GRAVITY POST PLUGIN

- 1. To get started, install Gravity Forms plugin for Wordpress, if not yet installed.
- 2. Download the <u>LeadMaster WordPress Plugin for Gravity Forms</u>. Navigate to LeadMasterCRM.com > Under About Us go to Support and click on Help Videos to download the zip file.

WEBSITE INTEGRATION

- Integrating a Website / Landing Pages
- Lead-Xtreme Introduction
- Lead-Xtreme In-Depth
- Lead-Xtreme Form Captures
- Gravity Forms Instructions
- Gravity Forms Plugin (zip file)
- 3. Log into your WordPress Admin Dashboard.
- 4. Go to Plugins in the menu bar, on the left side of the dashboard and click on the 'Add New' button
- 5. Upload the downloaded zip file to install then Activate.



CONFIGURING LEADMASTER WITH GRAVITY FORMS

- 1. On your WordPress Admin Dashboard, navigate to Gravity Forms
- 2. Create or edit your existing gravity form that you want to use in sending data/leads to LeadMaster CRM.
- 3. Add 3 hidden text fields for the following required fields:

(If you wish to push the leads into a specific List or Campaign, you may do so by adding 1 more hidden field for the Campaign ID)

Name	Gravity Form Field Label	Default Value
Workgroup identifier	lp_CompanyID	Provided by your LeadMaster Consultant
Lead provider username	lp_Username	Provided by your LeadMaster Consultant
Lead provider password	lp_Password	Provided by your LeadMaster Consultant
Campaign ID	lp_CampaignID	Provided by your LeadMaster Consultant



Hidden : Field D 11	- <2 ×
Ip_CompanyID	
30254	
lp_Username	
hellollc	
Ip_Password	
cf2020	
Ip_CampaignID	
0001	

4. Once you are done adding the rest of your fields as you normally would, navigate to the Form settings and go to HTTP request sub-menu.



First Name Form Settings Confirmations Notifications Personal Data Http request Last Name	First Name Confirmations Notifications Personal Data Http request	🕜 Edit	🕰 Settings 🛛 💭 Entrie	s 👁 Preview
First Name Notifications Personal Data Http request	First Name Notifications Personal Data Http request		Form Settings	
Personal Data Http request	Personal Data Http request	First Name	Confirmations	
Http request	Http request		Notifications	
			Personal Data	
Last Name	Last Name		Http request	
		Last Name		

- 5. On the HTTP request settings page, start by entering the HTTP Post URL https://util1.crmtool.net/lp_NewLead.asp
- 6. Set Request Type to "Post Request"
- 7. Mark it as Active

Form Settings	Http request Settings		
Confirmations		-	
Notifications	Hello Settings		
Personal Data			
Http request	HTTP URL©	https://util1.crmtool.net/lp_NewLead.asp	
	Request Type🕖	POST Request 🗸	
	Active?		



MAPPING LEADMASTER FIELDS TO GRAVITY FORM FIELDS

- 1. On the HTTP request settings page, navigate to the Gravity Form Mapping section
- 2. Start mapping away by entering the field labels provided in the Lead Provider Integration Instructions in the Parameter field.

lp_CompanyID	Parameter lp_CompanyID
lp_Username	Parameter Ip_Username
lp_Password	Parameter Ip_Password
lp_CampaignID	Parameter Ip_CampaignID
First Name	Parameter Ip_ContactFirstName
Last Name	Parameter Ip_ContactLastName
Company	Parameter Ip_Company
Phone	Parameter Ip_Phone
Email	Parameter Ip_Email

3. Once you're done mapping all the fields, Click Save Changes.

That's it! You have successfully integrated LeadMaster with Gravity Forms.



References: LeadMasterCRM Help Videos Lead Provider Integration Instructions LeadMaster Gravity Post Plugin Tutorial Video

LEADMASTER GRAVITY FORMS PLUGIN Version 1.0



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