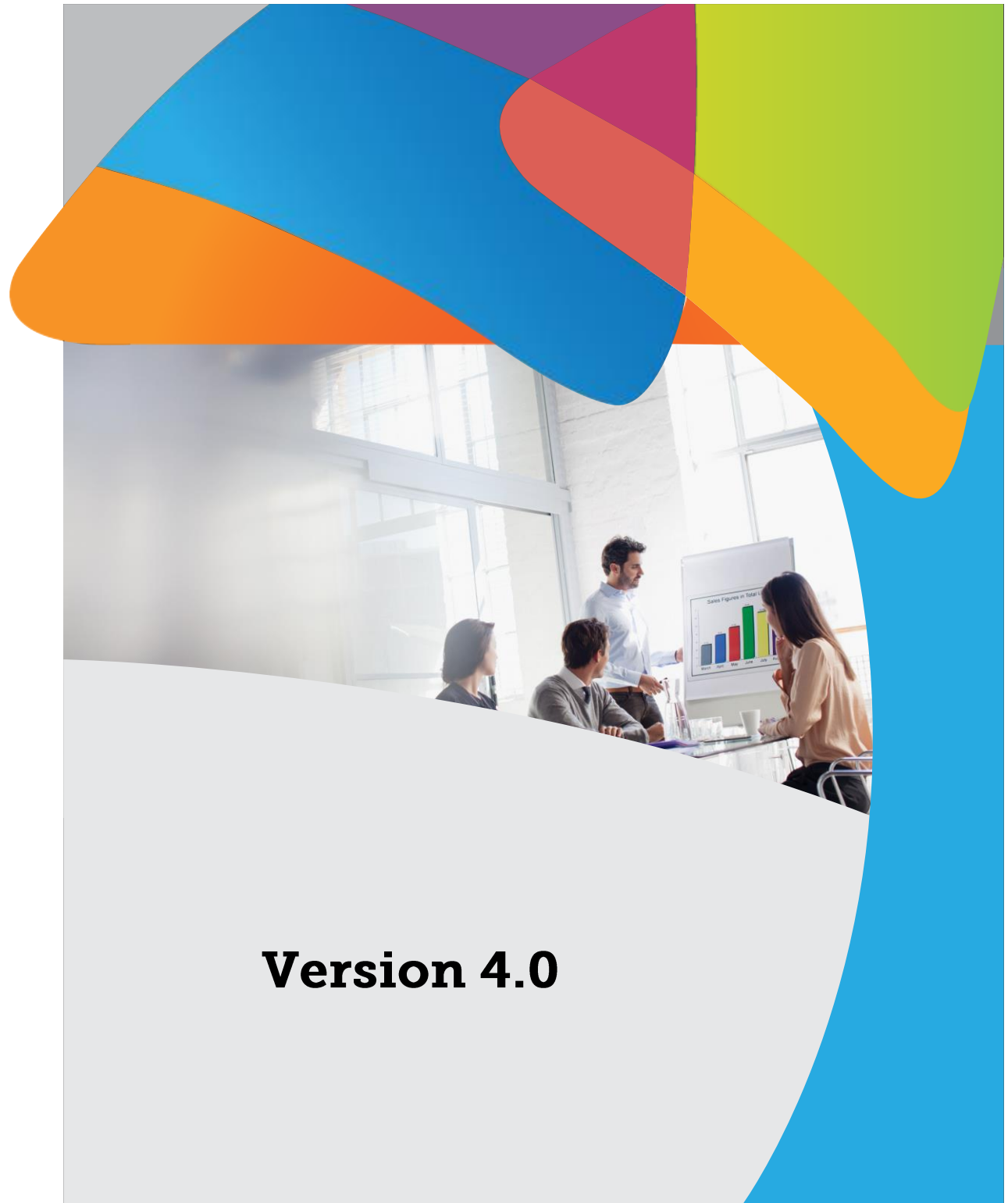




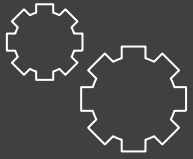
**WEB TO MODULE**



**Version 4.0**



**URDHVA TECH**



## KEY FEATURES

- ✓ Supports Built-in and custom modules
- ✓ Fully HTML5 based WebForms
- ✓ Leverage to choose custom fields for the WebForms
- ✓ Google reCaptcha for prevent spamming
- ✓ Auto-Response Email Notification
- ✓ Creation / Updation / Duplicate Prevention
- ✓ Assign record to specific user
- ✓ Assign record to teams
- ✓ Ability to collect documents

## Introduction

A web-to-lead form is an essential component of marketing and sales automation. Its purpose is to capture data submitted by website visitors, such as contact information and product interest, and store it as a "Lead" record in a SugarCRM product.

WebToModule serves a lot more than a simple web-to-lead, it allows the company to gather data to any pre-built or custom module of the SugarCRM. With additional features and more control over the standard webforms.

Need a landing page for your next campaign? A way for your customers to create support cases ? Do your sales reps need a way to enter leads? or any way to capture data to your SugarCRM via web form. With WebToModule you can create custom web forms for any built-in or custom module.

## How to get the plugin?

- For SugarCRM, Buy it from the link below.

[WebToModule - Sugaroutfitters](#)

- For SuiteCRM, Buy it from the link below.

[WebToModule - SuiteCRM Store](#)

## How to install?

- Navigate to **Admin > Module Loader** and select the zip file, that you would have received upon the purchase. Follow the installation process.

## Validate the license

- Once add-on is installed successfully, you have to provide valid license. Go to **Admin** and access “**WebToModule Configuration**” link shown as below.

**Process Author**  
Configure Process Author settings and view logs. Manage all BPM processes for all users via Process Management.

<a href="#">Settings</a>	Configure Process Author settings.	<a href="#">Process Management</a>
<a href="#">Log Viewer</a>	Access the Process Author log.	

**WebToModule Configuration**

<a href="#">WebToModule License Configuration</a>	Manage and configure the license for WebToModule	
---	--	--

- Provide the license key that you have received upon purchase and validate it.

### WebToModule License Configuration: Manage and configure the license for WebToModule

#### To Locate Your Key

1. Login to [SugarOutfitters](#)
2. Go to Account->Purchases
3. Locate the key for the purchase of this add-on
4. Paste into the License Key box below
5. Hit "Validate"

License Key

# Create WebToModule Form

- Select the module for which you want to generate the Web Form. The list of modules supports the built-in and custom modules, if any.

The screenshot displays the 'Web To Module' configuration interface. At the top, a navigation bar includes a home icon, a dropdown menu with 'Web To Module', and other modules: 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', 'Reports', 'Quotes', 'Documents', and 'Emails'. A search bar and a user profile icon are also present.

The main content area is titled 'Web To Module' and features a vertical sidebar on the left with six numbered steps:

- 1 Select module:** Select module to create form as base
- 2 Select module field(s)** Select field(s) to have in form
- 3 Set Default Value** Set Default Value
- 4 Select required field(s)** Mark field(s) required into webform
- 5 Duplication** Set field(s) to check duplication
- 6 Configuration** Configure form header, footer, assigned to etc...

The main workspace is titled 'Step 1: Select module:'. It contains a form with the label 'Select module: \*' and a dropdown menu currently showing 'Accounts'. At the bottom right of the workspace, there are three buttons: 'Back', 'Save and Continue', and 'Publish'.

- Select the field(s) you want to display on the Web Form.

The screenshot displays the 'Web To Module' configuration interface. At the top, a navigation bar includes a search box and a user profile icon. Below the navigation bar, the 'Web To Module' section is divided into a left sidebar and a main content area.

**Web To Module Sidebar:**

- 1 Select module:** Select module to create form as base
- 2 Select module field(s):** Select field(s) to have in form
- 3 Set Default Value:** Set Default Value
- 4 Select required field(s):** Mark field(s) required into webform
- 5 Duplication:** Set field(s) to check duplication
- 6 Configuration:** Configure form header, footer, assigned to etc...

**Step 2: Select module field(s)**

**Add All Fields** ← You can also have option to add all the fields at once.

**Available fields:**

- Alternate Phone
- Annual Revenue
- DUNS
- Employees
- Facebook Account
- Fax
- Google Plus ID
- Ownership
- Rating

**Form - first column:**

- Name
- Billing City
- Billing Postal Code
- Industry
- How did you know about us ?
- Need Newsletter ?
- Email Address
- Office Phone

**Form - second column:**

- Billing Street
- Billing State
- Billing Country
- Company Incorporation Date
- Preffered Call Time
- Description

**Buttons:** Back, Save and Continue, Publish

- Set default value for fields which are selected into previous step. We can also mark field as hidden if we do not want user to change the value into WebForm. Hidden field will not be added into WebForm.

Web To Module

Web To Module Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Search 1

### Web To Module

- 1 Select module:**  
Select module to create form as base
- 2 Select module field(s)**  
Select field(s) to have in form
- 3 Set Default Value**  
Set Default Value
- 4 Select required field(s)**  
Mark field(s) required into webform
- 5 Duplication**  
Set field(s) to check duplication
- 6 Configuration**  
Configure form header, footer, assigned to etc...

#### Step 3: Set Default Value

Field Label	Field Control	Mark As Hidden ?
Name:	<input type="text" value="Urdhva Tech"/>	<input type="checkbox"/>
Billing City:	<input type="text" value="Ahmedabad"/>	<input type="checkbox"/>
Billing Postal Code:	<input type="text" value="380060"/>	<input type="checkbox"/>
Industry:	<input type="text" value="Technology"/>	<input type="checkbox"/>
How did you know about us ?	<input type="radio"/> Google Search <input type="radio"/> Facebook <input type="radio"/> Existing Customer <input type="radio"/> Word of Mouth <input type="radio"/> Conference <input type="radio"/> Referred by Friend <input checked="" type="radio"/> Website <input type="radio"/> Other <input type="radio"/> None	<input type="checkbox"/>
Need Newsletter ?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Office Phone:	<input type="text" value="123-123-1231"/>	<input checked="" type="checkbox"/>
Billing Street:	<input type="text" value="Science City"/>	<input type="checkbox"/>
Billing State:	<input type="text" value="Gujarat"/>	<input type="checkbox"/>
Billing Country:	<input type="text" value="India"/>	<input type="checkbox"/>
Company Incorporation Date	<input type="text" value="08/11/2017"/> (mm/dd/yyyy)	<input type="checkbox"/>
Preferred Call Time	<input type="text" value="8AM - 11 AM"/> <input type="text" value="11AM - 2PM"/> <input type="text" value="2PM - 6PM"/> <input type="text" value="After 6PM"/>	<input type="checkbox"/>
Description:	<input type="text" value="Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high"/>	<input type="checkbox"/>

User can set default value into all those fields which are selected into Step 2.

Mark Office Phone as hidden fields.

Back Save and Continue Publish

- Out of the selected fields, mark the fields that have to be filled in compulsory.

**Web To Module**

**1 Select module:**  
Select module to create form as base

**2 Select module field(s)**  
Select field(s) to have in form

**3 Set Default Value**  
Set Default Value

**4 Select required field(s)**  
Mark field(s) required into webform

**5 Duplication**  
Set field(s) to check duplication

**6 Configuration**  
Configure form header, footer, assigned to etc...

**Step 4: Select required field(s)**

Available required field(s)

- Billing Postal Code
- Industry
- How did you know about us ?
- Need Newsletter ?
- Office Phone
- Billing Street
- Billing Country
- Company Incorporation Date

Selected required field(s)

- Name
- Billing City
- Email Address
- Billing State
- Description

These are the fields which are marked as required into WebForm.

List of all the fields which are selected into Step 2. We will mark fields required as per our needs.

Back Save and Continue Publish



- Select the field(s) that you want to check duplicates in CRM.

The screenshot shows a CRM configuration interface for 'Web To Module'. The top navigation bar includes 'Web To Module', 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', 'Reports', 'Quotes', 'Documents', 'Emails', a search bar, and a user profile icon. The main content area is titled 'Web To Module' and contains a vertical list of six steps:

- 1 Select module:** Select module to create form as base
- 2 Select module field(s)** Select field(s) to have in form
- 3 Set Default Value** Set Default Value
- 4 Select required field(s)** Mark field(s) required into webform
- 5 Duplication** Set field(s) to check duplication
- 6 Configuration** Configure form header, footer, assigned to etc...

The '5 Duplication' step is currently active. It is titled 'Step 5: Duplication' and contains two main sections:

- Available field(s):** A list of fields with a scroll bar: Billing City, Billing Postal Code, Industry, How did you know about us?, Need Newsletter?, Office Phone, Billing Street, Billing State.
- Check duplicates on:** A list of selected fields: Name, Email Address.

A callout box with a green border and a black dot points to the 'Email Address' field in the 'Check duplicates on' list. The text in the callout box reads: 'Duplication will be checked on these fields, Once user submit the WebForm.'

At the bottom right of the configuration area, there are three buttons: 'Back', 'Save and Continue', and 'Publish'.

- Add necessary details to WebForm like Form Header, Form Description, Submit Button Label, Auto-Response Template, Teams, Enable Google reCaptcha, Redirect URL, Form Footer etc...

The screenshot displays the 'Web To Module' configuration interface, specifically 'Step 6: Configuration'. The interface includes a navigation menu at the top with options like 'Web To Module', 'Accounts', 'Contacts', etc. On the left, there are six numbered steps: 1. Select module, 2. Select module field(s), 3. Set Default Value, 4. Select required field(s), 5. Duplication, and 6. Configuration (highlighted in orange). The main configuration area contains the following fields and callouts:

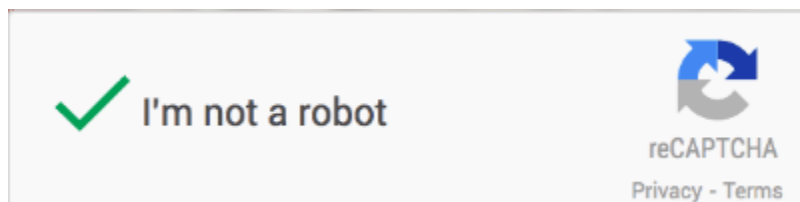
- Web to module record name\***: Generate Company. Callout: "This name field is used to identify record only."
- Form header:** Membership Registration. Callout: "The Auto-Response will be sent only if the selected module has Email Address selected within."
- Form description:** Complete form below to register your business with us.
- Submit button label:** Submit
- Post URL:** http://localhost/projects\_ut/webtomodule/trunk7x/index
- Redirect URL:** http://urdhva-tech.com
- Assigned to:\*** Administrator. Callout: "Prevent record updation if system find duplicate record."
- Module auto-response template:** Generate Company WebToModule
- Prevent duplicate update:**
- Teams:** -none-, East Sales Team, West Sales Team. Callout: "Relate teams to record created through WebForm."
- Webform Upload URL:** http://urdhva-tech.com. Callout: "Provide domain where form will be uploaded. WebToModule refuse to process if form will be posted from other domain by user."
- Google reCaptcha:** . Callout: "Allow option to add Google reCaptcha to protect spam and abuse while submitting the form using WebToModule. You can get valid Captcha key from Google."
- Captcha key:\***: [Redacted]
- Need File Control ?:** . Callout: "File Control will be added into WebForm. Only one file control will be allowed into WebForm. If user uploaded the file with this control Notes record will be created into CRM and it will relate with the parent module[Module for which WebForm is created]."
- File Control Label:** Upload Experience Certif
- Form footer:** By submitting, you agree to our Terms of Service and Privacy Statement.

At the bottom right, there are three buttons: 'Back', 'Save and Continue', and 'Publish'.

- ❖ Web to module record name: Name of the WebForm in CRM.
- ❖ Form header: Header of the generated form.
- ❖ Form description: Description content for the WebForm, Will be shown on the generated form.
- ❖ Submit button label: Label of the button that will be displayed on the form.

- ❖ **Post URL:** When visitor submits the form it will be posted to this URL. User cannot edit this URL as it needs to be fixed. Make sure your site\_url variable is correct in config.php else it will be posted to wrong address.
- ❖ **Redirect URL:** After submission of the form. Users will be redirected to this URL with predefined status. If you wish to show them message or greet on successful submission, you will have status as shown below.
  - "duplicate\_found": If prevent duplicate selected and duplicate found it will be redirect with status= "duplicate\_found" so you can show them appropriate message.
  - "created": When user submits the form and new record created, it will be redirected to URL with status="created".
  - "updated": If duplicate found and you have unchecked prevent duplicate. It will update the record and redirected with status="updated"
- ❖ **Assigned to:** Created/Updated record will be assign to specified user.
- ❖ **Module auto-response template:** Select the auto response email template to send email to the visitor upon form submission. Template will be parsed based on the selected module. Note: it will be send only if the module selected has email address in web form and not empty.
- ❖ **Webform Upload URL:** Provide the domain where form will be uploaded. WebToModule also process the request from sub-domain too. For Example, We have provided value http://urdhva-tech.com into "Webform Upload URL" field. Now if any users submit the form request from http://urdhva-tech.com or any other sub-domain like http://webtomodule.urdhva-tech.com then WebToModule accept it and process the request. If user submits the request from any other domain then WebToModule refuse to process.
- ❖ **Google reCaptcha:** Client side captcha validation to protect WebForm from spam. Check this if you want to have captcha enabled on your form.
- ❖ **Captcha Key:** Get the valid [Google Captcha Key](#)
- ❖ **Need File Control:** File Control will be added into WebForm. Only one file control will be allowed into WebForm. If user uploaded the file with this control, Notes record will be created into CRM and it will relate with the parent module[Module for which WebForm is created].
- ❖ **File control Label:** File Control Label: Text string for file control which will display into WebForm.
- ❖ **Form footer:** Footer of the generated form.

Google reCaptcha will appear on your WebForm as shown below.



- Preview your form. Default value is populated into it.

Membership Registration

Complete form below to register your business with us.

**Name \***  
Urdhva Tech

**Billing Street**  
Science City

**Billing City \***  
Ahmedabad

**Billing State \***  
Gujarat

- Download the WebForm from ListView and DetailView.

Web To Module

Name  My Items  Search Clear Advanced Search

Delete

You can also download WebForm through ListView and DetailView.

Name	Download Template	Module	Google reCaptcha	Assigned to
<input type="checkbox"/> <input type="star"/> <input type="refresh"/> Generate Company	<a href="#">Generate Company.html</a>	Accounts	<input checked="" type="checkbox"/>	Administrator


Delete

# Example

- In above WebForm creation steps we have selected Accounts module and its fields to be shown on form. Below is the generated WebForm. All the default values provided into Step-3 is populated into WebForm.

### Membership Registration

Complete form below to register your business with us.


<b>Name *</b> <input type="text" value="Urdhva Tech"/>	<b>Billing Street</b> <input type="text" value="Science City"/>
<b>Billing City *</b> <input type="text" value="Ahmedabad"/>	<b>Billing State *</b> <input type="text" value="Gujarat"/>
<b>Billing Postal Code</b> <input type="text" value="380060"/>	<b>Billing Country</b> <input type="text" value="India"/>
<b>Industry</b> <input type="text" value="Technology"/>	<b>Company Incorporation Date</b> <input type="text" value="2017-08-11"/>
<b>How did you know about us ?</b> <input type="radio"/> Google Search <input type="radio"/> Facebook <input type="radio"/> Existing Customer <input type="radio"/> Word of Mouth <input type="radio"/> Conference <input type="radio"/> Referred by Friend <input checked="" type="radio"/> Website <input type="radio"/> Other	<b>Preferred Call Time</b> <input type="text" value="-none-"/> <input type="text" value="8AM - 11 AM"/> <input type="text" value="11AM - 2PM"/> <input type="text" value="2PM - 6PM"/>
<b>Need Newsletter ?</b> <input checked="" type="checkbox"/>	<b>Description *</b> <input type="text" value="Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high quality SugarCRM and SuiteCRM development solutions covering all of your business needs with the entire responsibility of"/>
<b>Email Address *</b> <input type="text"/>	
<b>Upload Experience Certificate</b> <input type="button" value="Browse..."/> No file selected.	<b>Office Phone field is not exist into WebForm as it is marked as hidden.</b>
<b>Captcha</b> <input type="checkbox"/> I'm not a robot 	

By submitting, you agree to our [Terms of Service](#) and [Privacy Statement](#).

- Form validations are fully HTML5 based. It will check for all the required field(s) if you have any in your form. In our example, we have selected "Name", "Billing City", "Billing State", "Email Address" and "Description" fields as mandatory. It will validate as follows.

### Membership Registration

Complete form below to register your business with us.


<b>Name *</b> <input type="text"/> <small>Please fill out this field.</small>	<b>Billing Street</b> <input type="text" value="Science City"/>
<b>Billing Postal Code</b> <input type="text" value="380060"/>	<b>Billing State *</b> <input type="text" value="Gujarat"/>
<b>Industry</b> <input type="text" value="Technology"/>	<b>Billing Country</b> <input type="text" value="India"/>
<b>How did you know about us ?</b> <input type="radio"/> Google Search <input type="radio"/> Facebook <input type="radio"/> Existing Customer <input type="radio"/> Word of Mouth <input type="radio"/> Conference <input type="radio"/> Referred by Friend <input checked="" type="radio"/> Website <input type="radio"/> Other	<b>Company Incorporation Date</b> <input type="text" value="2017-08-11"/>
<b>Need Newsletter ?</b> <input checked="" type="checkbox"/>	<b>Preferred Call Time</b> <input type="text" value="8AM - 11 AM"/> <input type="text" value="11AM - 2PM"/> <input type="text" value="2PM - 6PM"/>
<b>Email Address *</b> <input type="text"/>	<b>Description *</b> <input type="text" value="Urdhva Tech is a Best-In-Class Software Company that is highly focused on"/>
<b>Upload Experience Certificate</b> <input type="button" value="Browse..."/> No file selected.	
<b>Captcha</b> <input type="checkbox"/> I'm not a robot  <small>reCAPTCHA Privacy - Terms</small>	

By submitting, you agree to our [Terms of Service](#) and [Privacy Statement](#).

➤ Sample of the Captcha validation.

### Membership Registration

Complete form below to register your business with us.

<b>Name *</b> <input type="text" value="Urdhva Tech"/>	<b>Billing Street</b> <input type="text" value="Science City"/>
<b>Billing City *</b> <input type="text" value="Ahmedabad"/>	<b>Billing State *</b> <input type="text" value="Gujarat"/>
<b>Billing Postal Code</b> <input type="text" value="380060"/>	<b>Billing Country</b> <input type="text" value="India"/>
<b>Industry</b> <input type="text" value="Technology"/>	<b>Company Incorporation Date</b> <input type="text" value="2017-08-11"/>
<b>How did you know about us ?</b> <input type="radio"/> Google Search <input type="radio"/> Facebook <input type="radio"/> Existing Customer <input type="radio"/> Word of Mouth <input type="radio"/> Conference <input type="radio"/> Referred by Friend <input checked="" type="radio"/> Website <input type="radio"/> Other	<b>Preferred Call Time</b> <input type="text" value="8AM - 11 AM"/> <input type="text" value="11AM - 2PM"/> <input type="text" value="2PM - 6PM"/>
<b>Need Newsletter ?</b> <input checked="" type="checkbox"/>	<b>Description *</b> <input type="text" value="Urdhva Tech is a Best-In-Class Software Company that is highly focused on"/>
<b>Email Address *</b> <input type="text" value="contact@urdhva-tech.com"/>	
<b>Upload Experience Certificate</b> <input type="button" value="Browse..."/> No file selected.	
<b>Captcha</b> <input type="checkbox"/> I'm not a robot  <a href="#">Privacy</a> - <a href="#">Terms</a>	

Please Validate Captcha.

By submitting, you agree to our [Terms of Service](#) and [Privacy Statement](#).

- WebToModule also allows date type field. When date type field is included into WebForm at that time it allows to select/change date from datepicker.

### Membership Registration

Complete form below to register your business with us.

<b>Name *</b> <input type="text" value="Urdhva Tech"/>	<b>Billing Street</b> <input type="text" value="Science City"/>
<b>Billing City *</b> <input type="text" value="Ahmedabad"/>	<b>Billing State *</b> <input type="text" value="Gujarat"/>
<b>Billing Postal Code</b> <input type="text" value="380060"/>	<b>Billing Country</b> <input type="text" value="India"/>
<b>Industry</b> <input type="text" value="Technology"/>	<b>Company Incorporation Date</b> <input type="text" value="2017-08-11"/>

**How did you know about us ?**


Google Search  
 Facebook  
 Existing Customer  
 Word of Mouth  
 Conference  
 Referred by Friend  
 Website  
 Other

**Need Newsletter ?**

**Email Address \***

**Upload Experience Certificate**  
 Urdhva-tech Work Profile.pdf

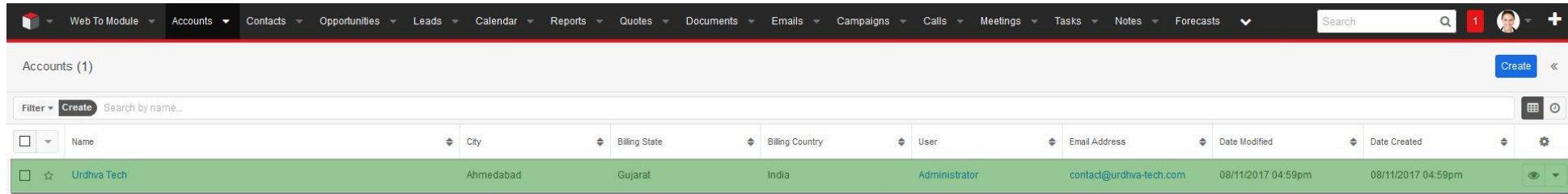
**Captcha**

I'm not a robot   
reCAPTCHA  
Privacy - Terms

By submitting, you agree to our [Terms of Service](#) and [Privacy Statement](#).



➤ After Submitting the WebForm, Account record has been created in CRM.



The screenshot displays a CRM interface with a dark navigation bar at the top containing various modules like 'Web To Module', 'Accounts', 'Contacts', etc. Below the navigation bar, the page title is 'Accounts (1)'. A search bar and a 'Create' button are visible. The main content area shows a table with one record for 'Urdhva Tech'.

<input type="checkbox"/>	Name	City	Billing State	Billing Country	User	Email Address	Date Modified	Date Created	<input type="checkbox"/>
<input type="checkbox"/>	Urdhva Tech	Ahmedabad	Gujarat	India	Administrator	contact@urdhva-tech.com	08/11/2017 04:59pm	08/11/2017 04:59pm	<input type="checkbox"/>

- While creating WebToModule record, we selected "Teams". The record shown in next screen has the team assigned. You can also notice the value of "Office Phone" field. We have marked it as hidden field. It's value saved successfully into CRM.

Web To Module Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Search 1

Ac Urdhva Tech ☆ Following Edit

Website

Company Incorporation Date  
08/11/2017

Preferred Call Time  
8AM - 11 AM, 2PM - 6PM

Assigned to  
[Administrator](#)

Billing Address  
Science City  
Ahmedabad, Gujarat 380060  
India

Teams  
Administrator  
East Sales Team (Primary)  
West Sales Team

Description  
Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high quality SugarCRM and SuiteCRM development solutions covering all of your business needs with the entire responsibility of performing the initial system study, design, development, implementation, support and training.

Date Created  
08/11/2017 04:59pm by [Administrator](#)

Industry  
Technology

How did you know about us ?  
Website

Need Newsletter ?

Office Phone  
123-123-1231

Shipping Address

Email  
[contact@urdhva-tech.com](mailto:contact@urdhva-tech.com)

Date Modified  
08/22/2017 06:26pm by [Administrator](#)

We have marked Office Phone as hidden with the value. It is saved successfully into CRM.

- While creating WebToModule record, we have included File Control. Notes record is created into CRM and it is relate with parent module that is Accounts. Following screenshot display Notes record into subpanel.

Website

Industry  
Technology

Company Incorporation Date  
08/11/2017

Preferred Call Time  
8AM - 11 AM, 2PM - 6PM

Assigned to  
[Administrator](#)

Billing Address  
Science City  
Ahmedabad, Gujarat 380060  
India

Teams  
Administrator  
East Sales Team (Primary)  
West Sales Team

Description  
Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high quality SugarCRM and SuiteCRM development solutions covering all of your business needs with the entire responsibility of performing the initial system study, design, development, implementation, support and training.

Date Created  
08/11/2017 04:59pm by [Administrator](#)

Date Modified  
08/22/2017 06:26pm by [Administrator](#)

[Show less](#)

Related **All** Filter **All Records** Search...

**Nt** Notes (1)

Subject	Last Modified	Date Created	Assigned User
Urdhva Tech-Urdhva-tech Work Profile	08/11/2017 04:59pm	08/11/2017 04:59pm	Administrator

# Duplication Check

- While creating the WebForm, We have selected Name and Email Address field for checking duplication. If record exist then it will update else new record will be created in CRM. Look at below, value has been changed for Billing City, Billing State and Billing Postal Code.

### Membership Registration

Complete form below to register your business with us.

Change the value for Billing City, Billing State and Billing Postal Code.

<b>Name *</b> <input type="text" value="Urdhva Tech"/>	<b>Billing Street</b> <input type="text" value="Science City"/>
<b>Billing City *</b> <input type="text" value="Mumbai"/>	<b>Billing State *</b> <input type="text" value="Maharashtra"/>
<b>Billing Postal Code</b> <input type="text" value="400049"/>	<b>Billing Country</b> <input type="text" value="India"/>
<b>Industry</b> <input type="text" value="Technology"/>	<b>Company Incorporation Date</b> <input type="text" value="2017-08-11"/>

**How did you know about us ?**


- Google Search
- Facebook
- Existing Customer
- Word of Mouth
- Conference
- Referred by Friend
- Website
- Other

**Need Newsletter ?**

**Email Address \***

**Upload Experience Certificate**  
 Urdhva-tech Work Profile.pdf

**Captcha**

I'm not a robot 

By submitting, you agree to our [Terms of Service](#) and [Privacy Statement](#).

After form is submitted, Account record has been updated as follows.

The screenshot shows a CRM interface with a navigation menu at the top. The 'Accounts' module is active, displaying a table with one record. A green notification banner at the top of the table states: "Account record has been updated. City and Billing State has latest value provided into WebForm." The table has columns for Name, City, Billing State, Billing Country, User, Email Address, Date Modified, and Date Created. The record for 'Urdhva Tech' shows the following details:

Name	City	Billing State	Billing Country	User	Email Address	Date Modified	Date Created
Urdhva Tech	Mumbai	Maharashtra	India	Administrator	contact@urdhva-tech.com	08/11/2017 05:54pm	08/11/2017 04:59pm

- Let's provide different Name and Email Address into Webform. Now new record will be created into CRM.

### Membership Registration

Complete form below to register your business with us.

Change the value for Name and Email Address.

<b>Name *</b> Urdhva Tech Pvt. Ltd.	<b>Billing Street</b> Hosur Road
<b>Billing City *</b> Bengaluru	<b>Billing State *</b> Karnataka
<b>Billing Postal Code</b> 560030	<b>Billing Country</b> India
<b>Industry</b> Technology	<b>Company Incorporation Date</b> 2017-08-11
<b>How did you know about us ?</b> <input type="radio"/> Google Search <input type="radio"/> Facebook <input type="radio"/> Existing Customer <input type="radio"/> Word of Mouth <input type="radio"/> Conference <input type="radio"/> Referred by Friend <input checked="" type="radio"/> Website <input type="radio"/> Other	<b>Preferred Call Time</b> -none- 8AM - 11 AM 11AM - 2PM 2PM - 6PM 6PM - 9PM
<b>Need Newsletter ?</b> <input checked="" type="checkbox"/>	<b>Description *</b> Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high quality SugarCRM and SuiteCRM development solutions covering all of your business needs with the entire responsibility of
<b>Email Address *</b> info@urdhva-tech.com	
<b>Upload Experience Certificate</b> Browse... No file selected.	
<b>Captcha</b> <input checked="" type="checkbox"/> I'm not a robot reCAPTCHA Privacy - Terms	

By submitting, you agree to our Terms of Service and Privacy Statement.

Submit

New record will be created into CRM as there is no duplication.

Accounts (2) Create

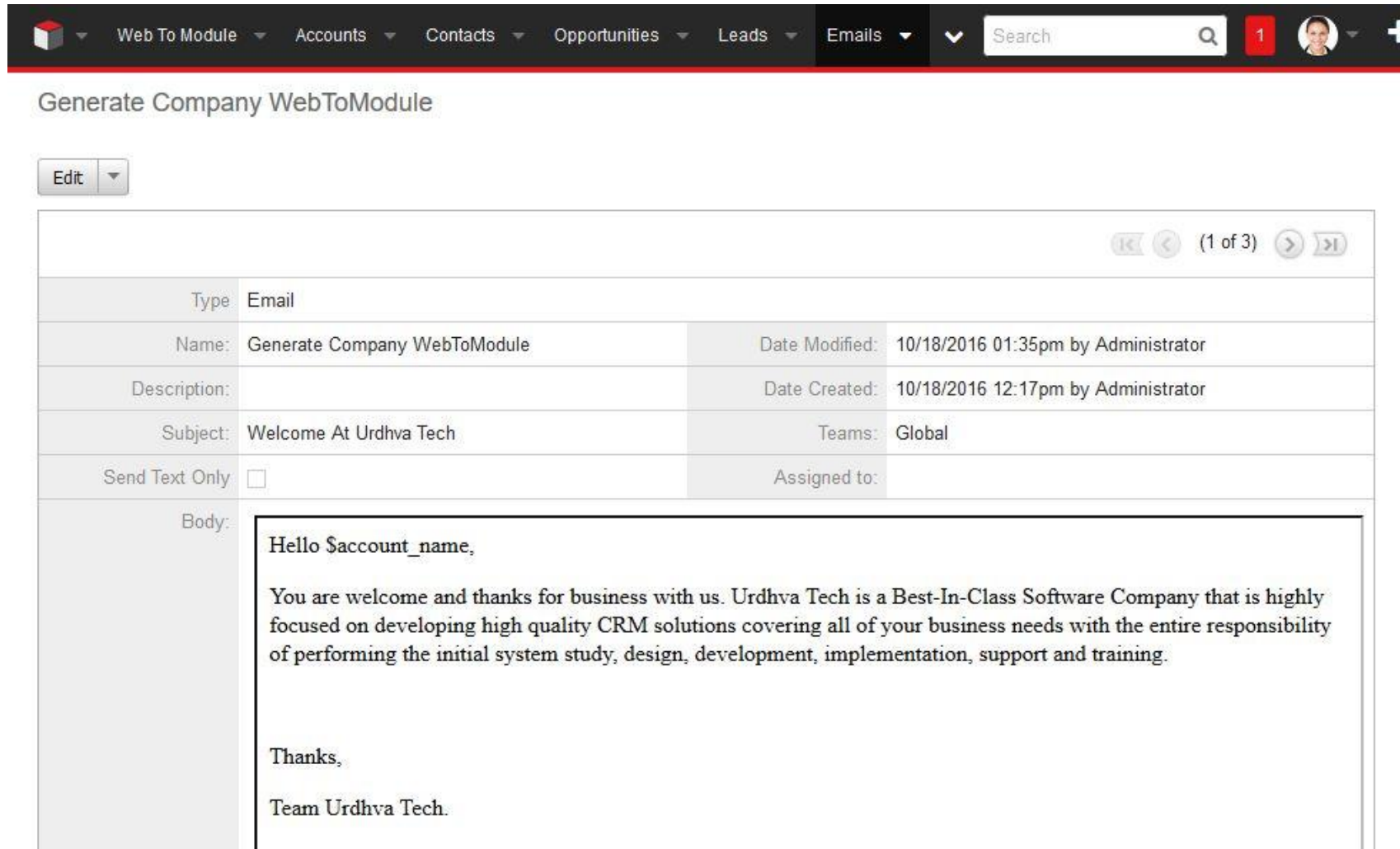
Filter Create Search by name... New record has been created into CRM.

<input type="checkbox"/>	Name	City	Billing State	Billing Country	User	Email Address	Date Modified	Date Created	
<input type="checkbox"/>	Urdhva Tech Pvt. Ltd.	Bengaluru	Karnataka	India	Administrator		08/11/2017 06:00pm	08/11/2017 06:00pm	
<input type="checkbox"/>	Urdhva Tech	Mumbai	Maharashtra	India	Administrator	<a href="mailto:contact@urdhva-tech.com">contact@urdhva-tech.com</a>	08/11/2017 05:54pm	08/11/2017 04:59pm	

# Auto-Response Email

- While creating the WebForm record, We have selected the Auto-Response Template “Generate Company WebToModule”. Also we have provided the valid Email Address while Submitting the form. So once record is saved, auto generate email will be sent to provided Email.

Email Template record into CRM.



The screenshot shows a CRM interface with a navigation bar at the top containing menu items: Web To Module, Accounts, Contacts, Opportunities, Leads, and Emails. A search bar and a notification bell with the number '1' are also present. Below the navigation bar, the record title is "Generate Company WebToModule". An "Edit" button is visible. The record details are displayed in a table format:

Type	Email		
Name:	Generate Company WebToModule	Date Modified:	10/18/2016 01:35pm by Administrator
Description:		Date Created:	10/18/2016 12:17pm by Administrator
Subject:	Welcome At Urdhva Tech	Teams:	Global
Send Text Only	<input type="checkbox"/>	Assigned to:	
Body:	<p>Hello \$account_name,</p> <p>You are welcome and thanks for business with us. Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high quality CRM solutions covering all of your business needs with the entire responsibility of performing the initial system study, design, development, implementation, support and training.</p> <p>Thanks,</p> <p>Team Urdhva Tech.</p>		



The email received by the visitor.

Welcome At Urdhva Tech



Inbox x



WebToModule Demo

to me ▾

12:33 PM (0 minutes ago) ☆



Hello Urdhva Tech,

You are welcome and thanks for business with us. Urdhva Tech is a Best-In-Class Software Company that is highly focused on developing high quality CRM solutions covering all of your business needs with the entire responsibility of performing the initial system study, design, development, implementation, support and training.

Thanks,

Team Urdhva Tech.



## CONTACT US



[CONTACT@URDHVA-TECH.COM](mailto:CONTACT@URDHVA-TECH.COM)



URDHVATECH



@URDHVATECH