

Microsoft Dynamics® CRM 2013/2015/2016

XRM.WebForm Add-On

User Guide

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Solution Introduction

CRM.WebForm Solution allows users to create a customized and pre-configured Dynamics CRM WebForm and expose it on your Website, while referencing and defining Entity Forms and business logic in Dynamics CRM. CRM.WebForm exposes a form in a website. Key features of the CRM.WebForm:

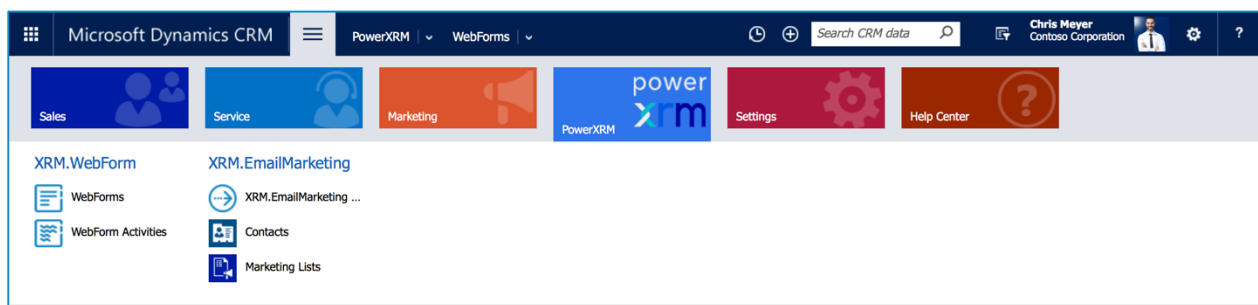
- ◆ Custom business logic and workflow, either through a targeted CRM Entity or Custom Entity form
- ◆ Support for all Entity field types and validation
- ◆ Specific WebForm submission rules
- ◆ Multi-column WebForm layout, custom CSS and JavaScript
- ◆ Easily capture website visitor information
- ◆ Secure data with Entity permissions
- ◆ WebForm activities access

The ability to render and edit a WebForm in CRM without the intervention of a Developer is a purpose-made feature of the CRM.WebForm solution. WebForms have also additional properties that can be specified in CRM to override default design limitations and add custom CSS and custom JavaScript.

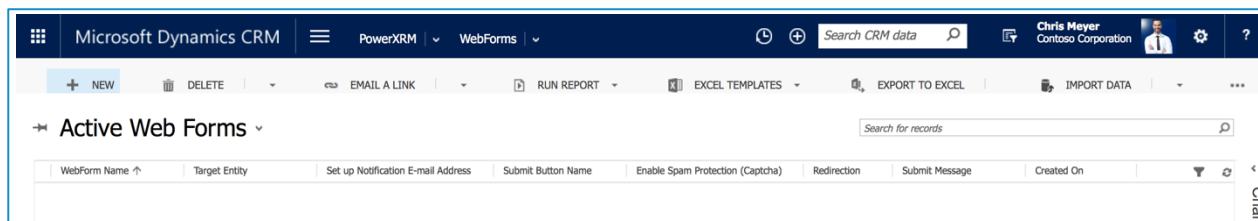
Access to XRM.WebForm Solution

After a successful installation of the XRM.WebForm Add-On, a CRM user can start to fully use all of its functionalities. Creating a new WebForm that we will be deploying to our preferred Website later on is a straightforward process. In the User Guide we will be showing how to set up the [WebForm Attributes](#), how to configure the [WebForm Fields](#) and how to expand the WebForm by adding custom [CSS](#) and [JavaScript](#).

When the XRM.WebForm is installed, a new area called “[PowerXRM](#)” will appear on the Dynamics CRM web application navigation bar, or sitemap. On the expanded Sitemap, the selectable area “[XRM.WebForm](#)” with its two subarea entities: [WebForms](#) and [WebForm Activities](#). Click on the “[WebForms](#)” area to open the view with all [Active Web Forms](#).



Click on the button “New” on the Dynamics CRM ribbon to create a new Web Form.



Setting up WebForm Attributes

The Form where the Web Forms are to be edited consists of four tabs: [General](#), [WebForm Fields](#), [Custom CSS](#), and [Custom JavaScript](#). In this section, the first tab: [General](#) contains all WebForm attributes. They are divided into two sections: [General Information](#) and [WebForm Details and Submission Settings](#).

WEB FORM : INFORMATION
New Web Form

General settings

WebForm Name * --

Target Entity

Web form details and submission settings

Field Label Position * **Top**

Enable Spam Protection (Captcha) * **No**

Set up Notification E-mail Address * --

Submit Button Name * --

Redirection * **None**

WebForm Fields

Field Label Name	Target Entity Field	Required	Field Type	Length	Vertical Field Position	Horizontal Field Position
To enable this content, create the record.						

Custom CSS

Upload CSS files

-
-
-

+ ADD ANOTHER RESOURCE

WebForm Attributes

WEB FORM : INFORMATION
New Web Form

Custom CSS

Upload CSS files

-
-
-

+ ADD ANOTHER RESOURCE

Write CSS

--

Custom JavaScript

Upload JS files

-
-

+ ADD ANOTHER RESOURCE

Class selector

WebForm Class --

Submit Button Class **submitButton**

WebForm Attributes

Let's explore field by field.

WebForm Name

The name of the WebForm that is not visible on the WebForm published on the Website. This required name is used only within Microsoft Dynamics CRM for WebForm identification.

Target Entity

This is the entity where new entity records will be created after WebForm is submitted. You can type the name of the entity (it has autocomplete property) or you can select it from the drop down list. If you create

custom entities for your CRM instance, you will have the possibility to create records into this entity too. Just make sure the custom entity doesn't have the property "Can be customized" set to False. With this property, entity would not be visible on the drop down list. If you don't want entity records to be created when the web form is submitted, you can choose not to associate a Target Entity. In this case, you will still get the notification email with the data about the visitor's submission, if the Email notification field is inserted.

Field Label Position

This attribute refers to the position of the label names on the WebForm. You can select a value from the option set list containing: Top, Left and Inline. "Top position" means that the labels will be shown above input fields on the form, "left position" means that the labels will be shown left of the input fields and "inline position" means that all labels and input fields will be in one row (in order: label 1, input field 1, label 2, input field 2...).

Enable Spam Protection (Captcha)

This is the setting where you can choose to include Captcha where the visitor will need to confirm the checkbox or to perform image recognition while submitting on your website. This feature is used to prevent from spamming and abuse of WebForm on your website. Captcha that is being used is Google's reCAPTCHA that showed to have the best results. Additional details that needs to be taken care of when Google's reCAPTCHA is included can be found in the chapter "Previewing and deploying Web Form".

Set up Notification Email Address

An Email Address where e-mail will be sent after a WebForm is submitted. E-mails include the list of submitted values and if the submission was successful, the link of the WebForm Activity. Otherwise, error message that caused submission failure will be presented in that e-mail. Additional information can be found in chapter Email notifications.

Submit Button Name

This field is required and it implies the name of the Submit button on WebForm. It will appear as the text written on the button.

Redirection

This attribute refers to the redirect to a specific call-to action after the visitor's submission. It determines how the submission will appear to the visitor, meaning what will happen from the visitor's perspective, when he or she clicks on submit button. You can select a value from the option set list containing:

- ◆ None – when the WebForm is submitted and if this option is chosen, WebForm will refresh and all input fields will be cleared from submitted values. The visitor will not be redirected anywhere.
- ◆ Auto – if this option is chosen, new field “Redirection URL” on this CRM WebForm form will appear. That field will require you to enter valid URL. When the WebForm is submitted, visitor will be automatically redirected to the webpage specified by that URL. Take care that if the WebForm is deployed to your website as iframe, webpage specified by “Redirection URL” will appear only in that iframe.
- ◆ Link – this redirection mode will cause appearance of intermediate page between the WebForm and webpage specified by **“Redirection URL”**. That intermediate webpage will contain submit message and a link redirecting to the specified URL. Choosing this option for redirection will cause appearance of fields: “Redirection URL”, **“Redirection text”**, **“Submit Message”** under the same section and the fields **“Submit Message Class”** and **“Link/Button Class”** under the tab “Class selector”. “Redirection URL” is the URL that the visitor will be redirected to when he or she clicks on the link on that intermediate page. “Redirection text” refers to the text written on that link. “Submit message” refers to the message written on the top of the intermediate page. Also, you can add class selectors to submit message and to the link: “Submit Message Class” refers to the class selector of submit message and “Link/Button Class” refers to the class selector of the link (both can be found under the tab “Class selector”).
- ◆ Button – this redirection mode will cause appearance of intermediate page between the WebForm and webpage specified by **“Redirection URL”**. That intermediate webpage will contain submit message and a button redirecting to the specified URL. Choosing this option for redirection will cause appearance of fields: “Redirection URL”, **“Redirection text”**, **“Submit Message”** under the same section and the fields **“Submit Message Class”** and **“Link/Button Class”** under the tab “Class selector”. “Redirection URL” is the URL that the visitor will be redirected to when he or she clicks on the button on that intermediate page. “Redirection text” refers to the text written on that button. “Submit message” refers to the message written on the top of the intermediate page. Also, you can add class selectors to submit message and to the button: “Submit Message Class” refers to the class selector of submit message and “Link/Button Class” refers to the class selector of the button (both can be found under the tab “Class selector”).

Creating WebForm Fields

Next step after filling out the General settings tab and saving them is to add fields for your web form.

WebForm Fields

Field Label Name	Target Entity Field	Required	Field Type	Length	Vertical Field Position ↑	Horizontal Field Position ↑	
1. WHAT TYPE OF WORK DO YOU ...		No	Label		1	1	
Implementation	cs_implementation	No	Check Box		2	1	
Customization	cs_customization	No	Check Box		2	2	
Development	cs_development	No	Check Box		2	3	
Other	cs_other	No	Check Box		2	4	
2. WHAT IS YOUR PROJECT STAR...		No	Label		3	1	
Project start date	cs_projectstart	No	Drop Down List		4	1	
3. YOUR ORGANIZATION DETAILS		No	Label		5	1	
Name	cs_name	Yes	Text		6	1	
Organization	cs_organization	No	Text		6	2	

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Page 1

Existing WebForm Fields subgrid

Click on the “+” button above the WebForm Fields subgrid and a form for creating WebForm field will open. As you can see on next picture, form consists of three sections: General information, WebForm field details and CSS class selector.

NEW SAVE SAVE & CLOSE NEW FORM EDITOR

FORM FIELD : INFORMATION

New Form Field

General

Field Label Name * --

WebForm * Contact us

Target Entity cs_powerxrmlead

Target Entity Field Select an Entity Field:

Field Type * Text

Display Label Name Yes

Default Value --

Required No

Vertical Field Position * --

Horizontal Field Position * 1

Tooltip --

Field Length --

Placeholder --

Row Class row

Section Class col-md- col-sm- col-lg- col-xi- form-group

Input Class form-control

Label Class form-label

1 - 10 of 15

Page 1

Adding/Creating a new WebForm Fields

FORM FIELD : INFORMATION

Implementation

General

Field Label Name * Implementation
 WebForm * Contact us
 Target Entity cs_powerxrmlead
 Target Entity Field Implementation (cs_implementation)

Field Type * Check Box
 Default Value Yes
 Vertical Field Position * 2
 Tooltip --

Display Label Name No
 Required No
 Horizontal Field Position * 1
 Field Length --

Row Class wpcf7-form-control-wrap checkbox-59 wpcf7-form-control wpcf7-checkbox wpcf7-validates-as-re Section Class
 Input Class wpcf7-list-item-label check Label Class inner

Existing WebForm Fields

The meaning of each field is as follows:

Field Label Name

Value entered into this field has two purposes. First purpose is to give a name to the WebForm field that will be used within CRM for its identification. Second purpose is to give the label to the form field. It is the text that will be written next to the input field on the WebForm (its relative position to the input field will be determined by “Label position” attribute of the WebForm) if the “Display Label Name” is set to “yes”.

WebForm

Identifier for WebForm associated with WebForm Field. It is read-only field.

Target Entity

Entity where new entity records will be created after WebForm is submitted. It is also read-only field.

Target Entity Field

This field will appear only if the parent WebForm has target entity. It allows you to choose whether this WebForm field will map to certain field of target entity. It basically means following: if the WebForm has a target entity, new entity record will be created with each submission and that entity record will have fields set to submitted values. By this field, you choose which WebForm field will map to each specific entity's field. It is made as autocomplete field, but it can also appear as drop down list from which you can select specific entity field. Drop down list contains only the fields of chosen entity, which can be modified. If the parent WebForm does not have a target entity, this field will not appear. In addition, even if the parent WebForm has a target entity, WebForm field does not necessarily need to have target entity field. Therefore, certain WebForm field will not map to anything into CRM, but its value will be visible through

WebForm Activity and e-mail (if the e-mail address for notifications is set). The example of that field could be “I agree to the terms and conditions” checkbox that is very frequent on the WebForms. It could be set as required so the WebForm cannot be submitted if the checkbox is not checked, but there is no need to save that information into entity record.

Field Type

This field determines the type of field that will be created in terms of its look on the WebForm. From option set you can choose from a diverse list of types for fields on your Web form. These include:

- ◆ Text

This is classical HTML text input field. Single line of text can be entered in this field. No additional validation is provided.

- ◆ Label

This field type will result in showing only label and not the any field for input. Therefore, WebForm visitor cannot submit any value associated with this field and consequently this WebForm field cannot be mapped to field of entity record that is being created by submission. It is mainly used to accomplish more structured look & feel of WebForm.

- ◆ Number

Field type that represents number. It will be visible on the WebForm as HTML number control. If you are not mapping it to a CRM entity record which has some number type (i.e. Whole number), you can change the number precision that is the value between 0 and 6. Number precision is the number denoting allowed number of decimal places. It also determines the step attribute of that field when it becomes HTML number control. Number precision with value 0 means whole number. The default value for precision is: 2 meaning the precision is 0.01, 3 means 0.001, etc.

- ◆ Multiple Text

Multiple lines of text can be entered in this field. This field will render as textarea.

- ◆ Drop Down List

Field type that represents list of item for user to choose one value from a list. It will render as HTML SELECT control. When chosen, additional “Options” field will appear, allowing you to enter values for dropdown list. Insert each dropdown option in new line of Options field. In case you already selected a Target Entity Field that has type “Option set”, this field will be populated automatically and it will be read-only, because these values for dropdown options were already determined by the definition of CRM entity’s field. If the default

value is set, it should have the same name as one of the options. In that case, when the WebForm is loaded, that value will be selected by default.

◆ Radio Button

Field type that represents list of bullets for CRM user to choose only one of a predefined set of options. It will be rendered as the list of HTML radio buttons. When chosen, additional “Options” field will appear, allowing you to enter values for that list of radio buttons. Insert each radio button text in new line of Options field. In case you already selected a Target Entity Field that has type “Option set”, this field will be populated automatically and it will be read-only, because these values for radio button options were already determined by the definition of CRM entity’s field. If the default value is set, it should have the same name as one of the options. In that case, when the WebForm is loaded, that value will be selected by default.

◆ Check Box

Field with this field type will render as HTML check box. The label of this field will be written next to the check box. Also, default value needs to be set for this WebForm field because when the WebForm visitor checks it, WebForm will automatically set the value of that field to its default value. Otherwise, WebForm field will not be submitted at all. Therefore, if the field maps to “Two Options” typed entity’s field, it would be a good practice to put as default value the option that is NOT default option for that field. For example, “no” option is the default option and in that case, “yes” option’s label should be written as default value. When the WebForm visitor submits the WebForm, if he or she checks the checkbox, “yes” option will be set for that entity’s record. Otherwise, field will not be submitted, but when the entity record is created, it will set its field value to “no” option since it is the default option.

◆ Date

This field will render as HTML input field with “date” as its type. By default, date format is YYYY-MM-DD. Its appearance will be largely determined by the browser type, whether they support this HTML input field type and how they render it. In the worst case, it will look like regular HTML input field with type “text”. However, irrespective to the browser, the same validation will be retained, meaning that the WebForm will not be allowed for submission if the correct date format is not inputted.

◆ Phone Number

Phone number will not render into any specifically designed HTML input control, but it will rather appear as HTML text input field. However, it has custom validation logic that will require input of the phone number. It should cover most of the phone number formats all around the world.

◆ Zip Code

Zip code will not render into any specifically designed HTML input control, but it will rather appear as HTML text input field. However, it has custom validation logic that will require input of valid ZIP code. Most of ZIP codes should satisfy this validation.

✦ Email

This field will render as HTML control with type of e-mail. It will have appearance of HTML text input control, but it will contain standard HTML validation for e-mails.

✦ Hidden

A hidden field will be rendered as HTML input control with hidden type, meaning that this field will not be visible on the WebForm. If it has set default value, then that default value will be set each time the WebForm is submitted. Otherwise, no data will be submitted. This type of field can be used if submitting always the same value is required. For example, if two distinct WebForms are used for creating records of the same entity, then hidden field can be used to make distinction between those two WebForms – putting different values as default values for those two WebForms.

Be aware that list can be filtered depending on a selection from a Target Entity Field. For example, if you choose a field on entity which Attribute Format is set to Email, you cannot select Text or Label as field type. XRM.WebForm attempts to reduce the space for WebForm visitor making error, so not each field type can be used for capturing data to every CRM entity field.

Display Label Name

True/False option that can allow WebForm editor to hide/show the label next to the field.

Default Value

Property where you can set default value on field of the Web Form. If the field type is Drop down list or radio button, default value should be the one from the Option set values. If the field type is Check box, the default value will be set as the value of that field when the WebForm is submitted.

Required

Defines whether the field is required to be filled in, in order for the form to be submitted. If this option is chosen and the label is visible on the WebForm, class selector “required” will be added for label class. This class selector will result in added red “*” sign next to the label of that field on the WebForm.

Tooltip

Tooltip can be set and it will appear on hover over the WebForm field.

Field Length

Maximum number of characters that can be typed in to a WebForm field.

Placeholder

Property where you can set placeholder element on a field. Text, date, zip code, phone number, e-mail, number and drop down list are field types that can have placeholder.

Vertical Field Position

Vertical order of the field on the Web form (i.e. 1st, 2nd, 3rd, etc.). It determines the row in which the WebForm field will be placed. All fields with the same vertical field position will appear in the same row and the maximum number of the fields in one row is 6. If certain row does not contain any field, it will not take any space on the WebForm. So the blank space cannot be made by putting one field in 1st row and the next field in 101st row. If there is no field in between, they will appear one after another.

Horizontal Field Position

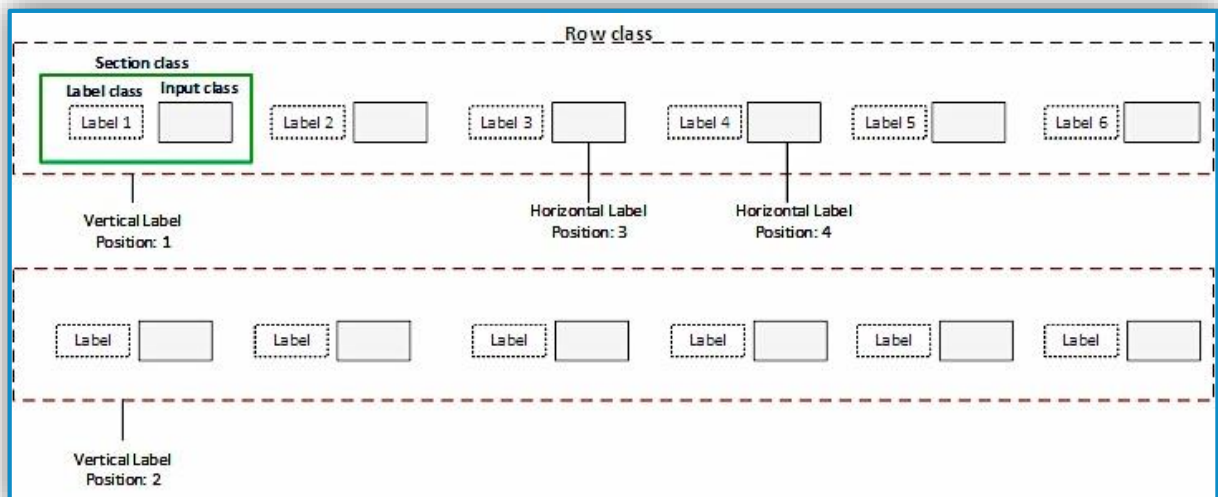
Property with option set list from where you can select horizontal order of the field in the row of the Web form. Selected can be value between 1 and 6. WebForm fields that have the same vertical field position, i.e. being in the same row, will be rendered in the horizontal order determined by the horizontal field position. The field with the smallest horizontal field position will be the leftmost field and the one with the greatest value will be the rightmost.

CSS class selector

On CSS class selector section, you can enter CSS selectors for certain elements on the Web form fields and form itself. This section includes:

- ◆ [Section class](#)
- ◆ [Row class](#)
- ◆ [Label class](#)
- ◆ [Input class](#)

Selector values have default values when opened a new WebForm field, used by Bootstrap, but it is not mandatory to use them, so you can use your own classes for styling. For more explanation, please see chapter Setting up CSS and JavaScript and schema picture.



Schema 1: CSS class selector elements and field position relation

Business Required WebForm Fields

In addition to the business logic of the WebForm Add-On, when creating a new WebForm with selected Target Entity, we expand its functionalities to automatically create all business required fields regarding its entity (e.g. when creating Lead WebForm form, fields Topic and Last Name will automatically populate on subgrid of this form). In case of updating the WebForm, for example when changing the Target Entity from Lead to Account, business-required fields for Account will be created, insuring at the same time that the previous entity records are not deleted. If you find this form field redundant, it can be deleted. Form fields for previously selected entity can be recognized as entity records without the Target Entity Field on the subgrid. Depending of the format and type of a business-required field, Field Type is properly set. If a business required field type is created as an Option set, Dropdown list will be selected inside Field Type value.

WEB FORM : INFORMATION

Register

General settings

WebForm Name *

Target Entity

Web form details and submission settings

Field Label Position *	Top	Redirection *	Link
Enable Spam Protection (Captcha)	No	Redirection URL	http://www.powerxrm.com
Set up Notification E-mail Address	contact@powerxrm.com	Redirection Text	Thank you!
Submit Button Name *	Register	Submit Message	--

WebForm Fields

Field Label Name	Target Entity Field	Required	Field Type	Length	Vertical Field Position ↑	Horizontal Field Position ↑
Topic	subject	Yes	Text		1	1
Last Name	lastname	Yes	Text		2	1

Figure 4: Subgrid with an example of creating business required form fields (Topic, Last name)

Setting up CSS and JavaScript

On the tabs “Custom CSS” and “Custom JavaScript”, the custom CSS and JavaScript for the WebForm can be specified. Adding CSS and JavaScript is the most powerful way to manipulate the WebForm. Any CSS property of any element on the WebForm can be set and any JavaScript code can be triggered on any event that make the WebForm a flexible solution. One of the most important feature above all is the ability for the WebForm to be adaptable to the look&feel of the parent website where the WebForm will be embedded. If CSS and JavaScript are manipulated carefully, the WebForm can be customized in the way that the web site visitor does not recognize that the WebForm is not an inherent part of its Website.

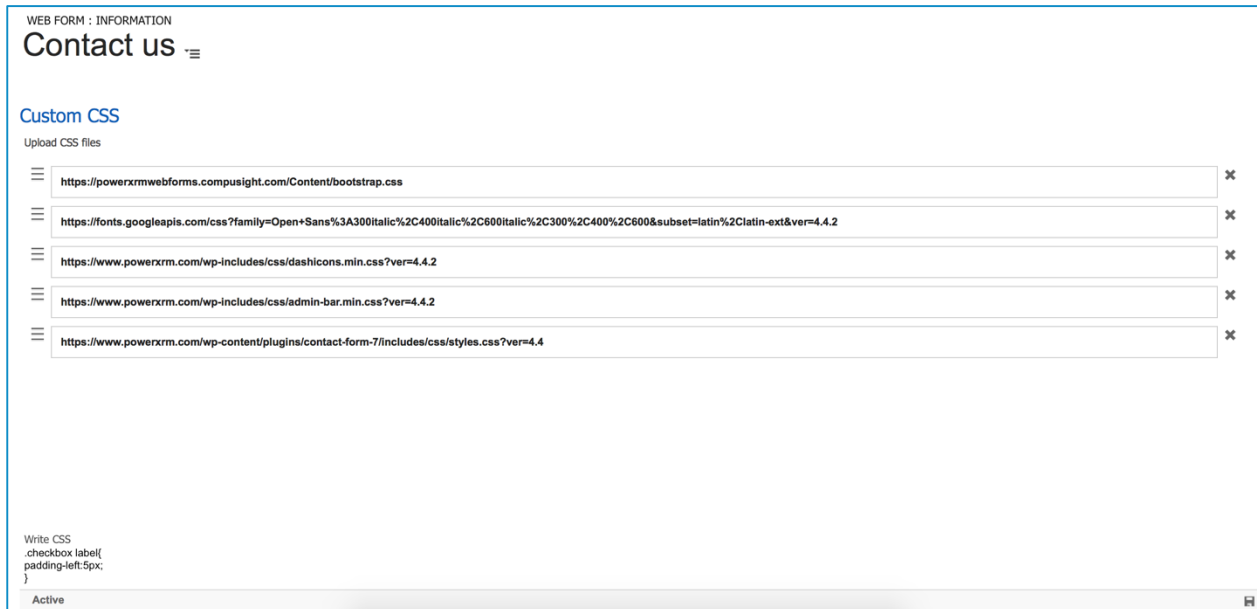


Figure 5. Contact Us WebForm with CSS files

The recommended way to add CSS and JavaScript to the WebForm is by adding CSS and JavaScript files available through their URLs. The most common is to take all CSS and JavaScript files of the parent website and add them to the WebForm. Additionally, new files can be created, uploaded to the Web Server (i.e. Web Server where the parent website is located) and attached to the WebForm. On each tab, there is a section called “[Upload CSS/JS files](#)” where any number of CSS/JS files can be added. Each file is added to one field. If there are not enough Fields, new Fields can be easily added by clicking

on “[+ Add new resource](#)” button. Those Fields that are to be accessed can be removed by clicking on “X”, right of each field. Empty Fields will be ignored. Files should be accessed by their URL and Dynamics CRM will make sure that the URL is written down. It should contain “https://” or “ftp://” protocol prefix. Do not use “http” protocol due to security issues, but use instead “https”. Thing to have in mind with adding CSS and JS files that are deployed to external Web Server is that, if that Web Server has SSL certificate, that certificate needs to be the one recognized as secure by most of browsers. If the browser does not recognize CSS and JS files, it means that these files are blocked because Web Server has insecure SSL certificate. If the aim is only to preview the WebForm, it can be done by opening root URL of that Web Server through browser and marking its SSL certificate as secure. That would enable preview of these CSS or JS files for that specific browser, but it will not work for any other browser and for any other user. One of correct solutions would be:

- Moving those CSS and JS files to Web Server with secured SSL certificate
- Copying created WebForm as HTML and incorporating that HTML to parent website. This solution will work only if these CSS and JS files are on the same Web Server as the parent website. In that

case, when the user accesses website through browser, it will accept SSL certificate and by that, he/she will see the complete WebForm, together with all CSS and JS files. If the CSS and JS files with problematic SSL certificate are on some other Web Server, this solution will not work.

- If the problem is with CSS file, it can be opened and its complete content can be copied to “Write CSS” field. This will allow keeping CSS attributes, but their origin will not be problematic CSS file, but rather inline CSS.

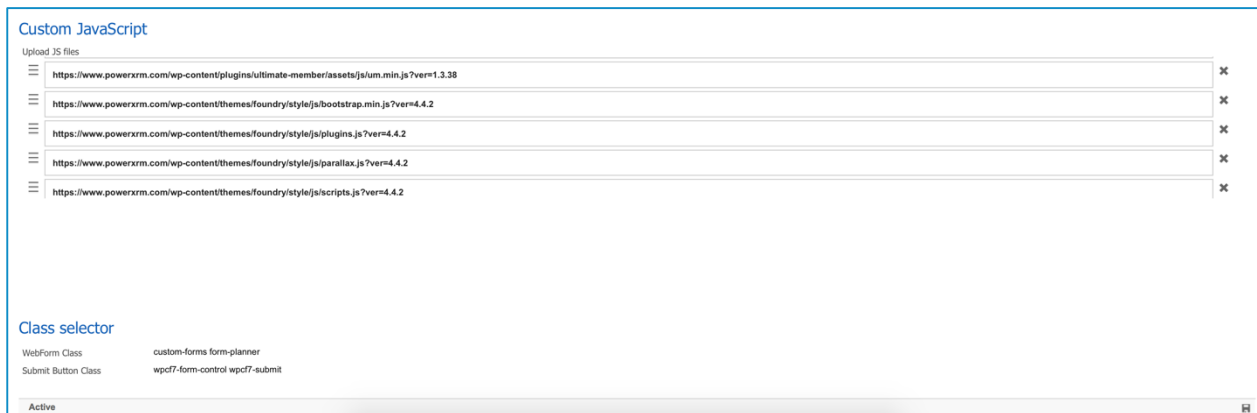



Figure 6. Contact Us Form with JS files

Another option is resorting fields with files. Position of the field can be changed by dragging left-sided symbol , click on that symbol and drag the field up or down in order to position it in the correct position. The order of the specified files is important, because files will be added to the WebForm in the same order. If the order of files is not correct, several CSS properties can override the others, or specific JavaScript code could stop working. It is important to make sure that the order of the files added to the WebForm is in the same order as the one on the parent website.

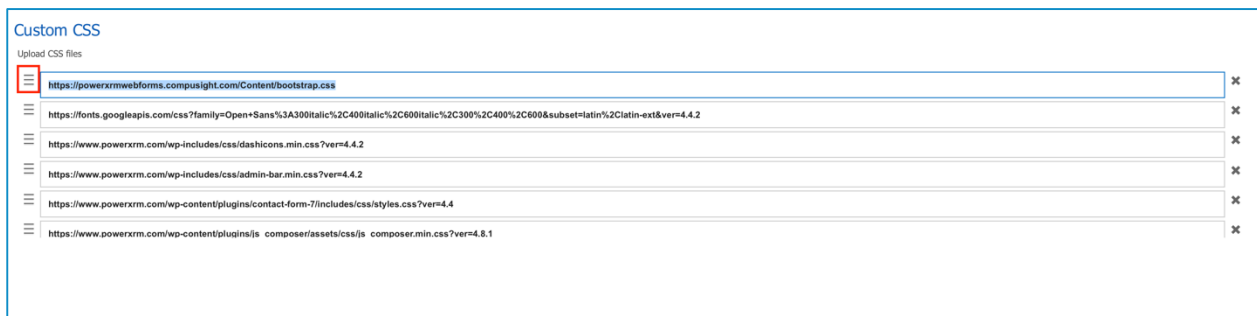


Figure 7. Drag option

By default, Bootstrap and XRM.WebForm CSS files are added. With JavaScript files, jQuery is added. These files can be removed, but it is highly recommended to have them included. They help the WebForm to

maintain its structure, the size and position of Fields and Buttons. Consequently, the CRM users don't need to add any custom CSS or JavaScript if that's not necessary, still the WebForm will look sharp due to Bootstrap, jQuery and XRM.WebForm CSS file.

Besides attaching files, CSS can be written directly in the CRM. In the field labeled "Write CSS", CSS can be written directly and it will be added after other CSS files. This makes sure that it overrides certain properties defined in different way in the files. Catch WebForm elements by ID or Class Selector and write any CSS that would make the WebForm look better.

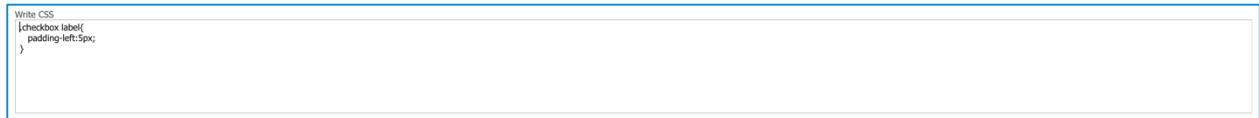


Figure 8. Write CSS Field

XRM.WebForm allow users to add class selectors to certain elements. Class selectors can be used by CSS or JavaScript to retrieve specific elements and add them to certain properties or events. CSS properties are usually added primarily to the class selectors. By adding selectors to certain elements on the Web Form, they automatically inherit those properties. When it comes to the WebForm, following elements can get classes:

- form ("WebForm Class" field), submit button ("Submit Button Class" field), submit message ("Submit Message Class" field) and link or button used for redirection ("Redirection Link/Button Class" field). When it comes to Form Field and its class selectors, they are explained in details in the chapter: "Setting up Form Fields". If an element has several class selectors they will be written in the corresponding field, separated by a blank space. By default, all of them have certain class selectors and user may remove them or change them, according to CSS and JavaScript definitions. However, if the WebForm includes Bootstrap, it is necessary to keep them, so that the WebForm pulls out the Bootstrap's properties.

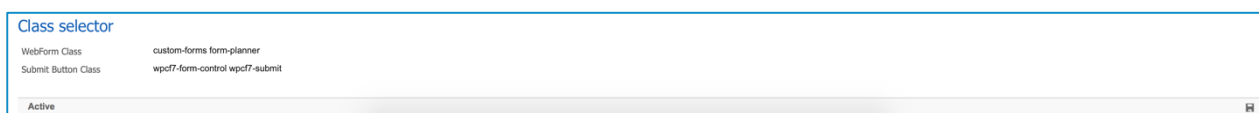


Figure 9. Class Selectors

Previewing and Deploying Web Form

When the WebForm is completely configured with all its attributes, all form fields added and configured, and CSS and JS files attached, it can be published and previewed. The “[Preview and Deploy](#)” button allows to preview how the WebForm will look on the website before it can be published. All these functionalities are provided on the pop-up when “[Preview and Deploy](#)” button from the ribbon is selected.

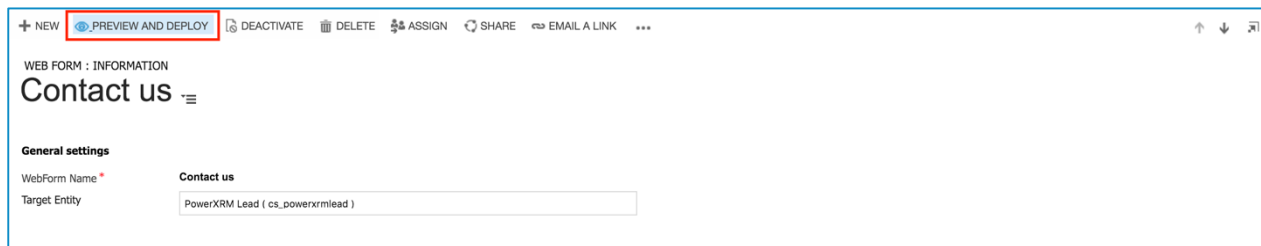


Figure 10. Preview and Deploy button

When the pop-up is clicked, the preview of the WebForm can be viewed. If the WebForm has been previously published, then the published version will be shown as well. If the WebForm provides the best user experience the CRM user, then “[Publish](#)” button should be clicked. Otherwise, popup can be closed without any changes applied, and new changes can be made. After the required changes are done, “[Preview and Deploy](#)” button can be clicked again to preview the adapted WebForm.

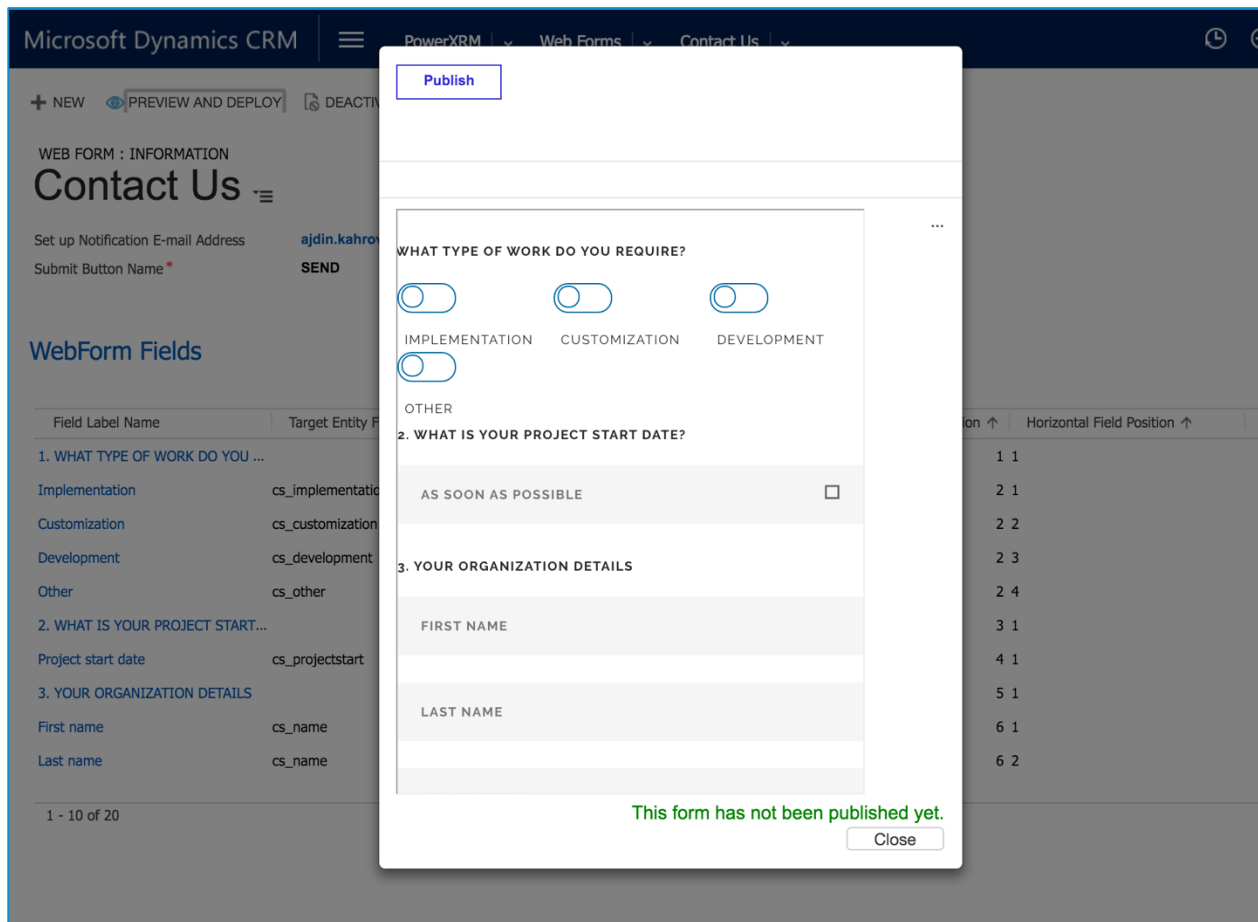


Figure 11. Dialog before “Publish” button is clicked on the Contact Us WebForm

After clicking the “Publish” button the WebForm is published. If the older version of it existed, it will be overwritten by the current version (details of it are explained under “Updating Web Form” section). New buttons will appear: “Copy as URL”, “Copy as iframe” and “Copy as HTML” as three ways of deploying it to the websites. In general, WebForm is primarily available by its unique URL and that URL will be copied to clipboard on “Copy as URL” button click. If “Copy as iframe” is clicked, it will create <iframe> HTML tag, embed the URL of the WebForm to it and specify default width and height of the iframe. That HTML tag will be copied to user’s clipboard and the user can see it by pasting it anywhere. URL and iframe are intended to be placed on the website (as iframe or perhaps anchor) and therefore they should be pasted into a website editor.

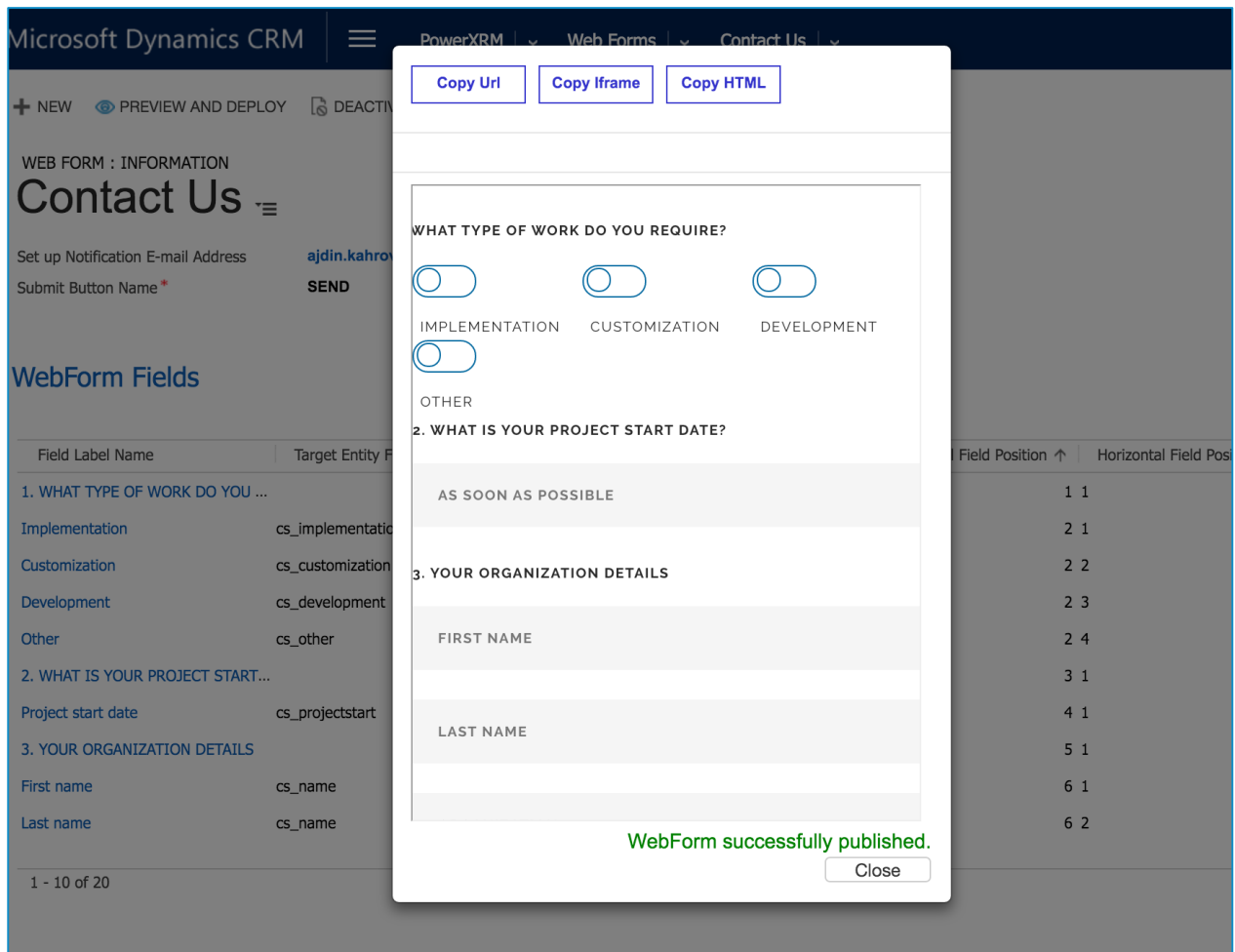


Figure 12. Dialog after “Publish” button is clicked

Alternatively, the WebForm can be taken and deployed as HTML content directly. When the button “Copy as HTML” is clicked, it copies all HTML content of the WebForm, embedded into <div> HTML tag, to the CRM user’s clipboard. Next, HTML content can be directly injected into the HTML of the website. However, it is not recommended, because, when the updates are made to the WebForm, they will not be automatically applied to the WebForm and deployed to the website, as it is the case with deploying it as iframe or URL (please refer to section “Updating and deleting Web Form” for further details). The same scenario is with deleting the WebForm, when copied as HTML content, it will not be removed automatically from the websites. The major advantage of copying WebForm as HTML content is that, when deployed to the parent website, it will automatically inherit all CSS properties and JavaScript events from the parent website, and that is not the case when the WebForm is embedded as iframe to the website.

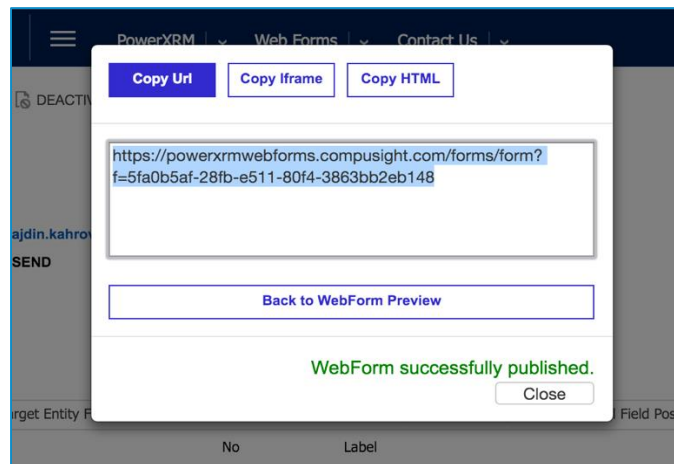


Figure 13. Dialog after “Copy Url” button is clicked

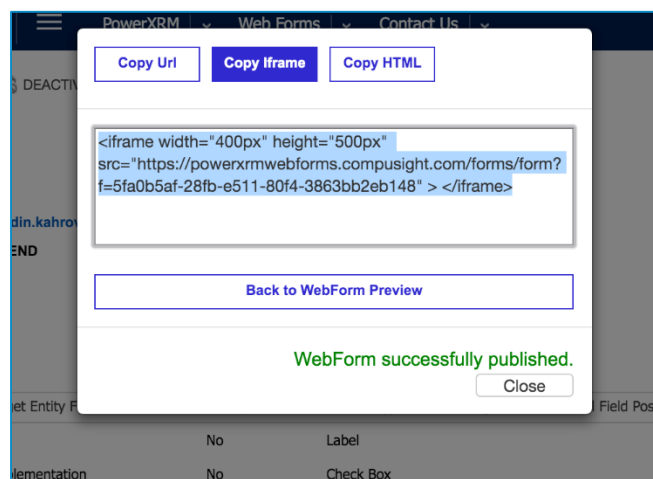


Figure 14. Dialog after “Copy Iframe” button is clicked

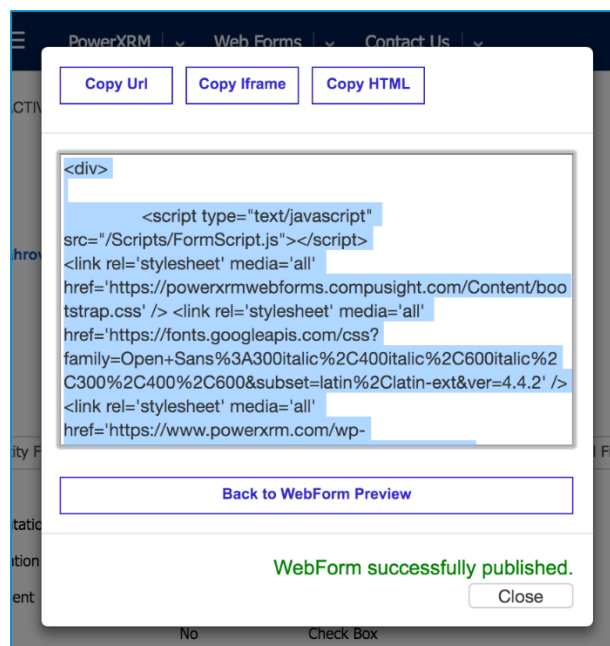


Figure 14. Dialog after “Copy HTML” button is clicked

Another very important WebForm feature is Spam protection or Captcha, when deploying WebForm as HTML content. As it was explained under section: “[Setting up WebForm attributes](#)”, XRM.WebForm uses Google’s reCAPTCHA (<https://www.google.com/recaptcha/intro/index.html>).

In order for reCAPTCHA to work properly, it needs a valid API key from Google and Google requires list of all domains where its reCAPTCHA will be embedded. Embedding reCAPTCHA in websites deployed on a domain out of that list will result in an Error. Domain of XRM.WebForm where all Web Forms are deployed has been registered and all captchas on Web Forms used as iframe or URL will work properly. However, if the WebForm that contains Captcha is going to be taken and used as HTML content embedded into website, it needs to have a valid API key. An API key with a registered domain of the website where the WebForm will be deployed. In order to register a domain and get a valid API key, a CRM user should have a valid Google’s account and visit the following URL:

<https://www.google.com/recaptcha/intro/index.html>

In the case of Captcha presence on the Web Form, after “[Copy as HTML](#)” button is clicked, the field for entering API key will appear. After obtaining a valid API key from Google, it should be marked into this field. HTML content will be copied to clipboard only after entering a valid API key and pressing the “[OK](#)” button. XRM.WebForm will make sure of embedding that API key into HTML content in a right way.

Tracking WebForm Submissions

When the WebForm is deployed to the website, whether as anchor, iframe or HTML content, it becomes available for all website visitors. Any of them can come to the website, fill the WebForm down and click on the Submit button. From website visitor’s perspective, WebForm submission results in an action specified when the WebForm is created, removing values from all fields, and redirecting to a page with Submit message or redirecting to a certain URL straightforward.

However, from CRM user’s perspective, variety of steps occur in that process. The greatest advantage of XRM.WebForm is that it is hidden from website’s visitor. Even if an error occurs, it is hidden from the WebForm user and the the submission with all its steps will go well. Those steps include:

- attempt to create entity record based on data submission, creating WebForm Activity in order to track submissions and receiving Email notifications under certain circumstances.

Each of these steps is described in following chapters

Creating Entity Record

All submitted data is preserved within XRM.WebForm, whether an entity record is successfully created or not, the submitted data is never lost. If the entity record is successfully created, it can be found on the views of that entity. For instance, if the WebForm has Lead as target entity, when the WebForm is submitted, a new Lead record is created and it can be found on the views of the Lead entity. When the form of that entity record is open, the activity that created that record is visible under [“Activities”](#). It is provided whose credentials (what CRM user) were used on that WebForm and when the entity record is created. It also has link to WebForm Activity that can be open on double click (this is explored in further details in the next chapters).

Note: in certain rare occasions, it might happen that the entity record is not created. Those situations include some of following:

- Microsoft Dynamics CRM instance is not available, entity meta-structure has changed (fields removed, entity deleted...), CRM users who gave their credentials for creating entity records changed their credentials, etc. In that case, WebForm Activity will not be created because that is seen as one transaction. However, the submitted data is not lost in that scenario: WebForm CRM users will receive Emails with the description of error and submitted data.

WebForm Activity

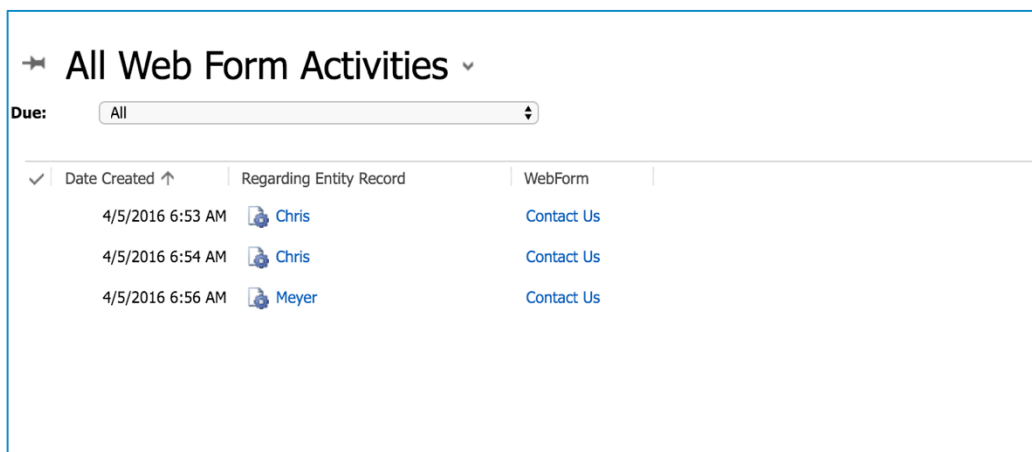
[“WebForm Activity”](#) is constantly created with the entity record. Each WebForm Activity represents one WebForm submission and therefore contains the data that describes that submission:

- what WebForm that Activity is associated with
- when the WebForm is submitted, what entity record is created
- when that entity record is created (in case of a standard procedure, it will be the same time as the time of WebForm submission, in case of errors, it may be postponed)
- whose credentials were used to create entity record
- It also has the list of WebForm Activity Details, where each detail represents one field of that Web Form, accompanied with the submitted value

As mentioned in previous chapters, WebForm Activity can be accessed by going to entity record created by WebForm submission and displaying WebForm Activity from there. However, CRM users will not know what entity record is created by what WebForm (especially if there are several WebForms with the same referencing entity) and what entity record is created manually. Like this, WebForm Activities can be

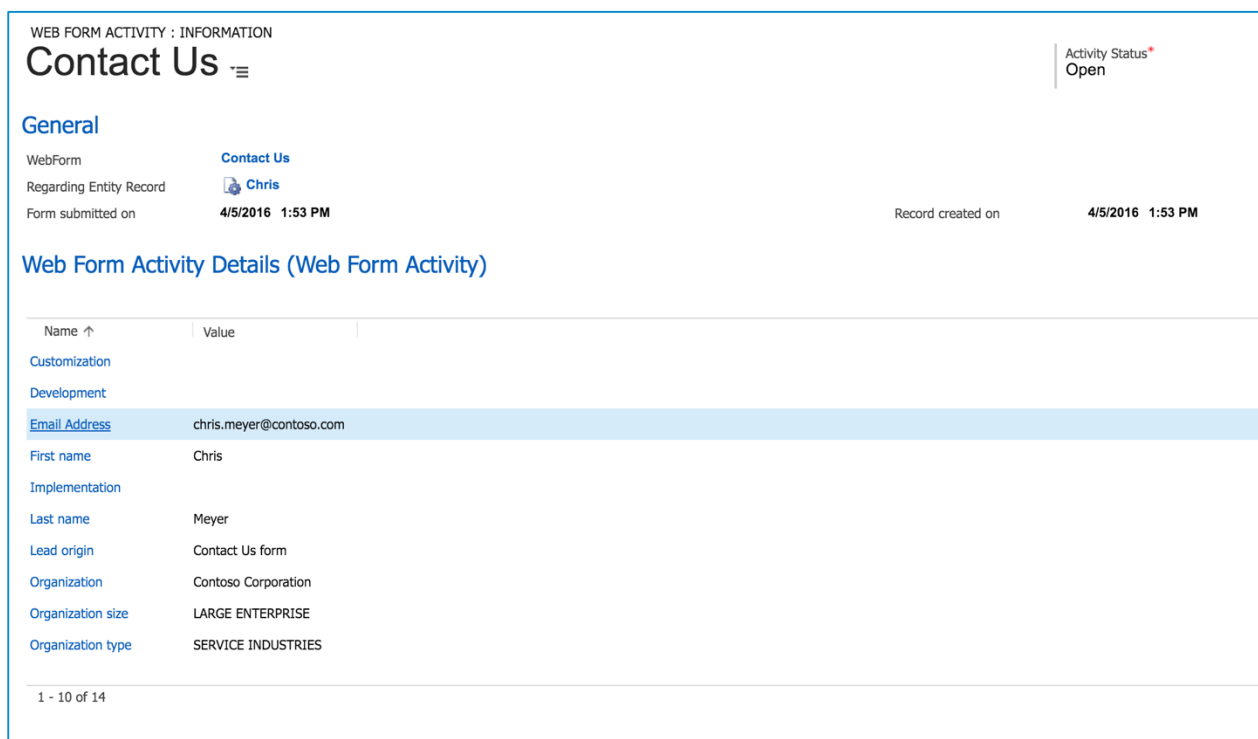
retrieved from their views (just as any other Dynamics CRM entity) and then, target entity record can be extracted and displayed. The view can be accessed from “PowerXRM” area on the sitemap:

As mentioned, each WebForm Activity contains the set of data answering questions: who, when and which entity record. Besides those, on the form of WebForm Activity, sub-grid containing all Activity details is visible. Each detail represents the pair of WebForm’s field and the submitted value in that field. By double-clicking on any of the records in that sub-grid, form of that Detail will be opened containing modest data about the field and the submitted value.



✓ Date Created ↑	Regarding Entity Record	WebForm
4/5/2016 6:53 AM	Chris	Contact Us
4/5/2016 6:54 AM	Chris	Contact Us
4/5/2016 6:56 AM	Meyer	Contact Us

Figure 16. All WebForm Activities



WEB FORM ACTIVITY : INFORMATION

Contact Us

Activity Status
Open

General

WebForm

Chris

Regarding Entity Record

Chris

Form submitted on

4/5/2016 1:53 PM

Record created on

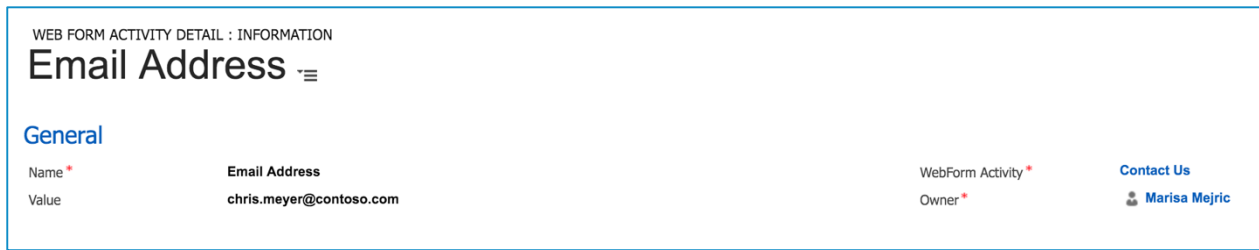
4/5/2016 1:53 PM

Web Form Activity Details (Web Form Activity)

Name ↑	Value
Customization	
Development	
Email Address	chris.meyer@contoso.com
First name	Chris
Implementation	
Last name	Meyer
Lead origin	Contact Us form
Organization	Contoso Corporation
Organization size	LARGE ENTERPRISE
Organization type	SERVICE INDUSTRIES

1 - 10 of 14

Figure 16. WebForm Activity



WEB FORM ACTIVITY DETAIL : INFORMATION

Email Address

General

Name *	Email Address	WebForm Activity *	Contact Us
Value	chris.meyer@contoso.com	Owner *	Marisa Mejric

Figure 17. WebForm Activity Detail Form

Email Notifications

When the WebForm is created and configured, if the correct e-mail address is written in the field “[Set-up email address notifications](#)”, that Email address will receive an e-mail after each WebForm submission. Email content will contain the data and time of the submission, list of submitted values and the URL of WebForm Activity associated with that WebForm submission. In the case that Email address was not provided, Email notifications will not be sent after successful submissions.

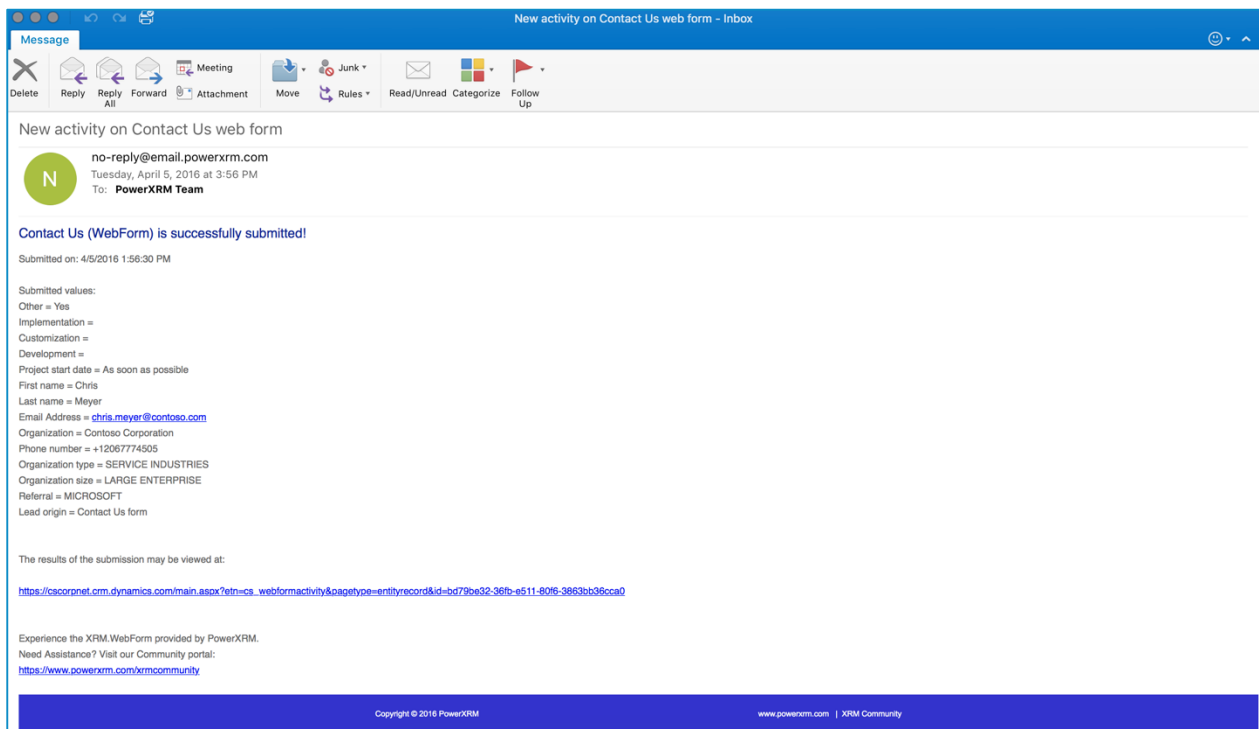


Figure 19. New Activity on WebForm - Successful Email submission

If the submission fails for any reason (Microsoft Dynamics CRM instance is not available, entity meta-structure is changed: fields removed, entity deleted..., user who gave his/her credentials for creating entity records changed their credentials, etc.), the Email will be sent to the specified Email address with the data and the time of WebForm submission, the list of submitted values and the reason entity record creation failed. In the case that submission fails and the Email address was not provided, an Email with previously described content will be sent to the Email address used for registration on www.powerxrm.com.

Updating and Deleting WebForm

XRM.WebForm allow users to easily update and completely remove existing Web Forms, regardless to whether they are deployed or not.

Updating WebForm

In order to update the WebForm, the form needs to be accessed. It can be done by selecting “PowerXRM” from sitemap and clicking on “WebForms” entity. That would lead to the default view of WebForms. Double-click on the WebForm that needs be edited will open its form.

Field Label Name *	WebForm *	Target Entity	Target Entity Field
	Contact us	cs_powerxrmlead	Select an Entity Field:

Field Type *	Text	Display Label Name	Yes
Default Value	--	Required	No
Vertical Field Position *	--	Horizontal Field Position *	1
Tooltip	--	Field Length	--
Placeholder	--		

Row Class	row	Section Class	col-md- col-sm- col-lg- col-xi- form-group
Input Class	form-control	Label Class	form-label

Figure 21. Adding a new Field on the WebForm

On that form, changing values of WebForm's attributes, adding new Form Fields, changing or removing existing ones can be made. However, saving the form would not automatically update the existing form. When all necessary updates are done, "Preview and Deploy" button from the ribbon should be clicked and it will open a popup dialog, similar to one opened when the WebForm is created for the first time.

If the WebForm wasn't published before, the popup dialog will look like if the WebForm is just created. If it looks acceptable, it can be published by clicking on the "Publish" button. Otherwise, the popup dialog can be closed and new changes can be made to that WebForm.

If the WebForm has already been published, two Web Forms will be visible:

1. the one already published, with its unique URL that actually represents the original version of that WebForm
2. the new one that reflects the changes made to the Web Form

Two versions can be compared and if the updates are acceptable, button "Publish" should be clicked. Otherwise, popup dialog should be closed and new changes can be made to the WebForm.

If "Publish" button isn't clicked, none of the new changes will apply to the existing WebForm. It is only a preview of the changes made and an opportunity to compare those changes to the original version of the WebForm.

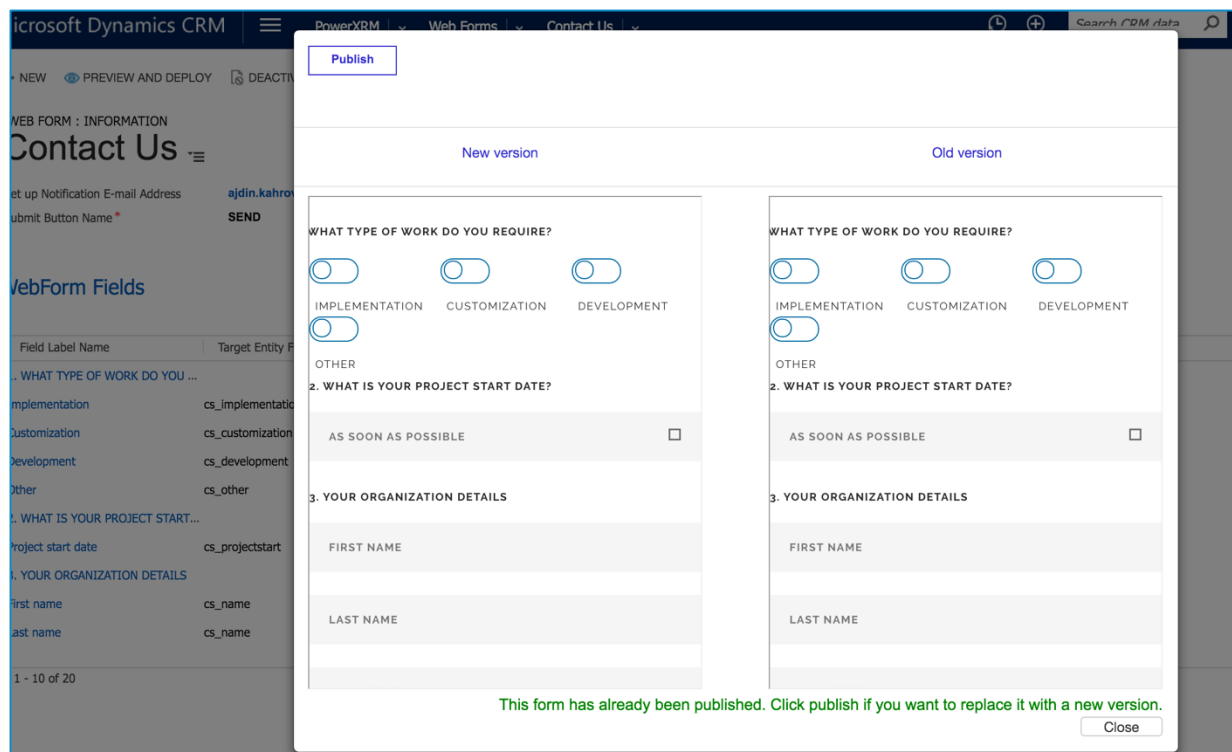


Figure 22. Old and New Version

If the “Publish” button is clicked, the WebForm will be deployed and URL and HTML of that WebForm will be generated. If the WebForm has been published previously, the old version of the WebForm will be automatically replaced with the newer one. When the URL of the old WebForm has been visited, the updated version will be displayed. This means that, if the WebForm was deployed to the website as the anchor to URL or as an iframe, the WebForm on that website will be automatically replaced. On the other side, if the WebForm was deployed as HTML (by incorporating <div> element with HTML to the website), automatic updates will not occur. In that case, the button “Copy as HTML” should be clicked and new HTML should be manually placed on the website.

Deleting WebForm

WebForm can be easily deleted and that would lead to its complete removal. It can be deleted as any other CRM entity record:

- visiting the view of the WebForm (selecting “PowerXRM” from sitemap and clicking on “WebForms” entity), selecting the right WebForm record that wants to be deleted and clicking on the “Delete” button on the ribbon. An alternative procedure is to open the WebForm’s form and then to click on the “Delete” button. In any case, that WebForm with all appending Form Field entity records will be deleted from CRM. On the other side, deleting WebForm will not cause deleting WebForm Activities related to that WebForm and specifically not entity records created by submissions of that Web Form.

WebForm Name	Target Entity	Set up Notification E-mail Address	Submit Button Name	Enable Spam Protection (Captcha)	Redirection	Submit Message	Created On
Contact us	cs_powerxrmlead	contact@powerxrm.com	SEND	No	None	Register	4/4/2016 1:15 AM

Figure 24. View with marked “Delete” button

Deleting WebForm will remove the web form completely. The URL used to access the WebForm will become invalid after deleting the WebForm from CRM. If the WebForm was deployed to the website as iframe or anchor, it will be invalid on the website as well and that iframe or anchor should be removed from the website (WebForm will not be visible on the website after deleting it from CRM). On the other side, if the WebForm was deployed by copying its HTML to the website, the WebForm will still be visible on that website, but submissions will not work, and each time the WebForm is submitted, a browser will show the

error to users and neither entity record will be created nor an Email will be sent. Therefore, deleting the WebForm should be performed carefully: when it is deleted from CRM, all traces of its existence on all websites should be completely removed.

Solution Package Information

For more details regarding the XRM.WebForm solution, please visit:

<http://www.powerxrm.com/xrmwebform>

For more information regarding User Guide, see: [Installation and Configuration Guide](#)

For more details regarding CRM Solution Packages please visit the following documentation on MSDN <http://msdn.microsoft.com/en-us/library/gg334530>

or contact PowerXRM at:

<http://www.powerxrm.com/contact>

contact@powerxrm.com