

The logo for LongJump, with 'LONG' in blue and 'JUMP' in green, set against a background of blue rays and clouds.

LONGJUMP

CLOUD APPLICATIONS PLATFORM

I want to capture information using forms from
our website

Quick Start Guide

Introduction

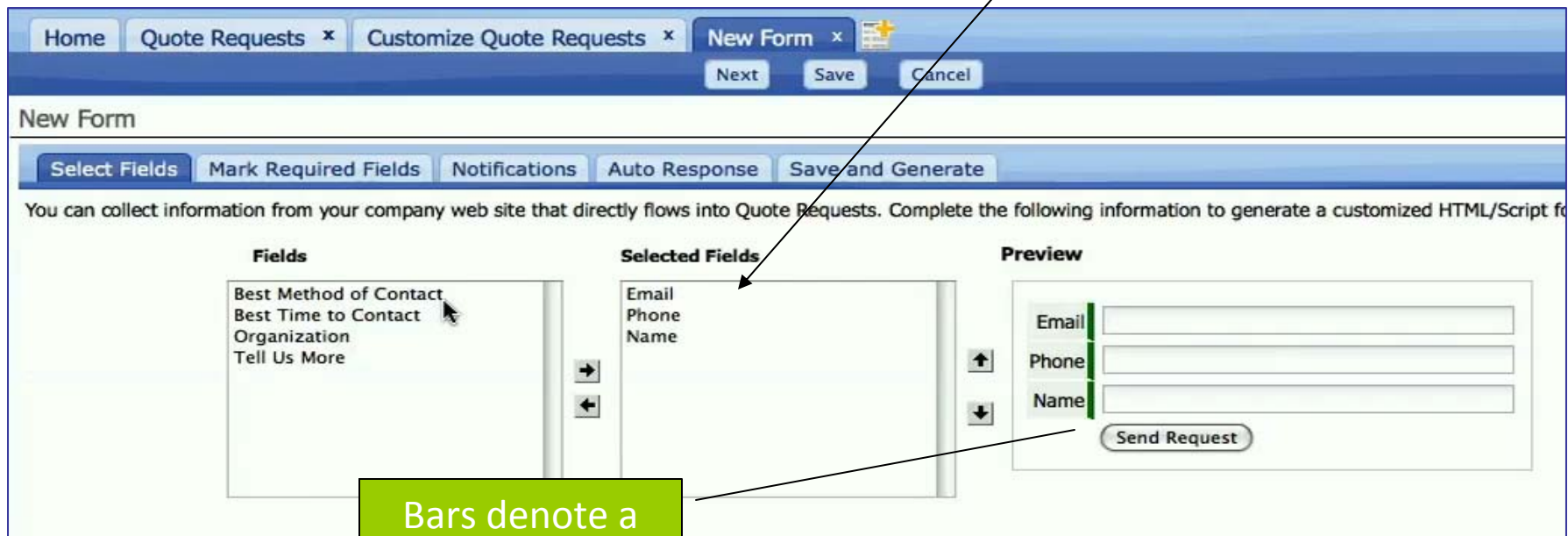
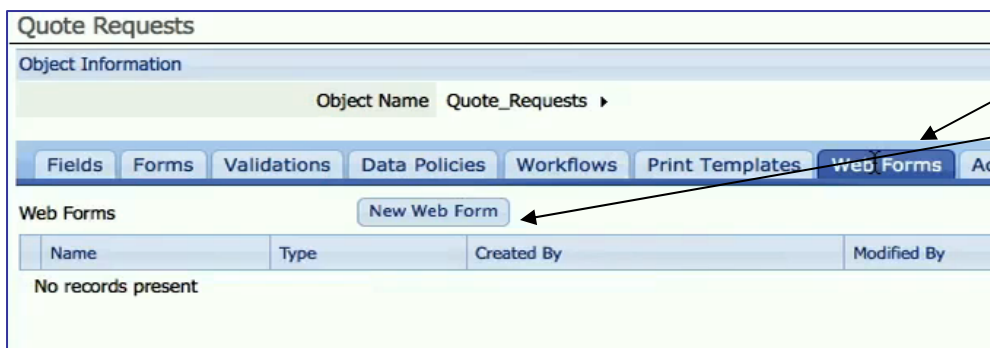
Welcome to our series of quick start guides designed to get you up and running fast.

If you have a website, blog or even an internal intranet, you can easily embed a form to a web page that will populate data into LongJump. This is ideal for requests, inquiries, mini-surveys, and lead capture and you won't have cryptic, unstructured emails to contend with.

This lesson teaches you to create a web form to enable a potential customer to request a quote. The form is embedded in a web page that automatically sends a notification to your team and a thank you to the submitter.



Getting to the Web Form customization controls



1. Select the object you want to add the web form to, and click **Customize**.
2. Then choose **Web Forms**.
3. Click **New Web Form**. Any required fields will already be listed.

Bars denote a required field

Choosing fields

Select Fields | Mark Required Fields | Notifications | Auto Response | Save and Generate

You can collect information from your company web site that directly flows into Quote Requests. Complete the following information to generate a customized HTML/Script for your v

Fields

Selected Fields

Name
Email
Phone
Best Method of Contact
Best Time to Contact
Organization
Tell Us More

Preview

Email

Name

Phone

Best Method of Contact Email Phone

Best Time to Contact Morning Afternoon Evening

Organization

Tell Us More

Send Request

- A. Select the fields you want to be included in the web form.
- B. You can re-order the fields as you like with the up/down arrows.
- C. The preview shows the current arrangement.

Marking required fields

Now mark any fields you want to be required when the user fills out the form. If the user doesn't fill out the form, they'll get an error message when they try to submit.

Select Fields **Mark Required Fields** Notifications Auto Response Save and Generate

Select Fields that you would like to be included as required fields

Fields	Required Field
Name	<input checked="" type="checkbox"/>
Organization	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>
Best Method of Contact	<input type="checkbox"/>
Best Time to Contact	<input type="checkbox"/>
Tell Us More	<input type="checkbox"/>

Preview

Name

Organization

Email

Phone

Best Method of Contact Email Phone

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Tell Us More



Setting up a notification email (optional)

To notify team members when someone submits information on the form, use the Notifications tab. This lets you create a mail merge email with data pulled from the record.

- A. Who gets the notification email
- B. Choose plain-text or HTML format
- C. Your message with variables, formatting, etc.
- D. Available variables for this record

The screenshot shows the 'New Form' configuration page for 'Quote Requests'. The page is divided into several sections:

- Record Owner Information:**
 - Select owner for the incoming record: Earl Treyes
 - Send Email Notification to record owner:
 - Additional Email Notification(s):
- Email Notification Details:**
 - Subject: New Request
 - Editor Type: HTML Editor
 - Description:
 - Paragraph
 - Arial
 - Size
 - HTML
 - \$Quote_Requests.quoterequests_name at \$Quote_Requests.organization
 - \$Quote_Requests.phone
 - \$Quote_Requests.email
 - Says: \$Quote_Requests.tell_us_more
 - Please \$Quote_Requests.best_method_of_contact
 - Best time: \$Quote_Requests.best_time_to_contact
- List of Available Mail Merge Fields:**

Category	Fields	Variable
Quote Requests Fields	Email	\$Quote_Requests.email

Setting up an auto-response email (optional)

Similarly, you can send a message to the person who submitted the form with an Auto Response.

This step can be used to configure an auto response to the user who submits the record using Web Form

A Email Field (To)

Subject

B Editor Type

Description

C

B **I** **U**

Paragraph HTML

Thank you, \$Quote_Requests.quoterequests_name.

\$Quote_Requests.owner.full_name will contact you shortly.

Press SHIFT+ENTER to create a new line.

D

List of Available Mail Merge Fields

Category	Fields	Variable
Quote Requests Fields	Quote Requests Owner Full Name	\$Quote_Requests.owner.full_name

Cut and paste the value from in the Variable field into the template.

- A. Field in record to use as email address
- B. Choose plain-text or HTML format
- C. Your message with variables, formatting, etc.
- D. Available variables for this record

Generate a single-line of drop-in HTML code

Save and generate code that you can embed into your web page. For simple forms with minimal customization, you can embed a script. This will allow you to add the form using a single line of code to your HTML.

Select Fields Mark Required Fields Notifications Auto Response **Save and Generate**

Title of this Web Form Request Form

Type Script HTML

Web Forms: Request Form

Web Form added successfully

Script

Copy and paste the following script in your HTML/JSP to see this web form.

Script `<script src='http://na.longjump.com/networking/Subscribe/f86b5be21eb44050b5a177a418508c4f-858606152'></script>`

Alternatively use the following link to access the Web Form directly
You can prefill the form by appending the corresponding parameters too:
[&fieldName1=value1&fieldName2=value2]

<http://na.longjump.com/networking/WebForm.jsp?sl=f86b5be21eb44050b5a177a418508c4f-858606152>

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Tell Us More

Send Request

Copy and paste
this code into
your HTML page

Web form will
look like this as
embedded

Generate raw HTML code

If you want to customize the form more extensively and know HTML, you can use the HTML option and get the raw code.

Select Fields | Mark Required Fields | Notifications | Auto Response | **Save and Generate**

Title of this Web Form | Request Form

Type | Script | HTML

URL of the page to which submitter should be redirected to | http://###

Provide a URL to a page to take the user after completing the form

Copy and paste this code into your HTML page

Web Form updated successfully

HTML

Copy and paste the following script in your HTML/JSP to see this web form.

```
hide_div('validation_80572');
var aDIVs = ylib_getObj('div_' +id);
if(aDIVs)
{
  aDIVs.style.display = 'none';
  return true;
}function hide_div(id){
  if(aDIVs.style.display
  != 'none')
  {
    aDIVs.style.display = 'none';
    return
  }
}function show_div(id){
  var aDIVs = ylib_getObj('div_' +id);
  var sText;
  if(aDIVs)
  {
    if(aDIVs.style.display != 'block')
    {
      aDIVs.style.display =
      'block';
    }
  }
  return false;}</script>
```

Preview

Name

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Send Request

Web form will look like this by default, but you can rearrange the form elements, change labels or even change the CSS formatting as required.

Live forms and resulting record creation

Once your form is embedded, anyone who completes it will add data to that object.

You can then track that information, report on it, or create processes around it as you would any LongJump data.

Quote Requests: David Finch		Show Relay Follow	
Basic Information ▾			
Owner	Earl Treves [Change]	Best Method of Contact	Email
Name	David Finch	Best Time to Contact	Morning
Organization	Calistoga Systems	Due Date	
Email	dfinch@calisys.com	Budget	
Phone	415-555-1212	Priority	Low
Tell Us More	I'm looking for a solution that will enable our team to maximize productivity while reducing dependance on licensed products.		

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