



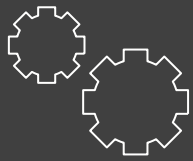
**WEB TO MODULE**



**URDHVA TECH**

**Version 4.0**





## 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 security groups
- ✓ 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 SuiteCRM 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 SuiteCRM. 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 SuiteCRM 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.



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

 [WEB TO MODULE](#) [SALES](#) [MARKETING](#) [SUPPORT](#) [ACTIVITIES](#) [COLLABORATION](#) [ALL](#)

WEBTOMODULE LICENSE CONFIGURATION: MANAGE AND CONFIGURE THE LICENSE FOR WEBTOMODULE

 **To Locate Your Key**

1. Login to [SuiteCRM Store](#)
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

VALIDATE

© Supercharged by SuiteCRM © Powered By SugarCRM

# 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' form creation interface. At the top is a dark navigation bar with a home icon, menu items (WEB TO MODULE, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, ALL), a 'CREATE' button with a dropdown arrow, a search bar, and a user profile icon labeled 'Administrator'. Below the navigation bar, the 'Web To Module' section is active, indicated by a play button icon. On the left, a vertical sidebar contains six numbered steps: 1. Select module: (orange), 2. Select module field(s) (green), 3. Set Default Value (green), 4. Select required field(s) (green), 5. Duplication (green), and 6. Configuration (green). The main area is titled 'Step 1: Select module:' and features a 'Select module:' label with a dropdown menu currently showing 'Accounts'. At the bottom right of the main area are three buttons: 'Back', 'Save and Continue', and 'Publish'.

WEB TO MODULE SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE Search... Administrator

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 1: Select module:**  
Select module: Accounts

Back Save and Continue Publish

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

WEB TO MODULE

SALES

MARKETING

SUPPORT

ACTIVITIES

COLLABORATION

ALL

CREATE

Search...

Administrator

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 2: Select module field(s)

ADD ALL FIELDS

You can also have option to add all the fields at once.

Available fields

Address

Alternate Phone

Annual Revenue

Employees

Fax

Geocode Status

Latitude

Longitude

Ownership

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

Preferred Call Time

Description

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

SALES

MARKETING

SUPPORT

ACTIVITIES

COLLABORATION

ALL

CREATE

Search...

Administrator

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:	Urdhva Tech	<input type="checkbox"/>
Billing City:	Ahmedabad	<input type="checkbox"/>
Billing Postal Code:	380060	<input type="checkbox"/>
Industry:	Technology	<input type="checkbox"/>
How did you know about us ?	<div><div><input type="radio"/> Google Search</div><div><input type="radio"/> Facebook</div><div><input type="radio"/> Existing Customer</div><div><input type="radio"/> Word of Mouth</div><div><input type="radio"/> Conference</div><div><input type="radio"/> Referred by Friend</div><div><input checked="" type="radio"/> Website</div><div><input type="radio"/> Other</div></div>	<input type="checkbox"/>
Need Newsletter ?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Office Phone:	123-123-1231	<input checked="" type="checkbox"/>
Billing Street:	Science City	<input type="checkbox"/>
Billing State:	Gujarat	<input type="checkbox"/>
Billing Country:	India	<input type="checkbox"/>
Company Incorporation Date	08/11/2017 (mm/dd/yyyy)	<input type="checkbox"/>
Preferred Call Time	<div><div>8AM - 11 AM</div><div>11AM - 2PM</div><div>2PM - 6PM</div></div>	<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

SALES

MARKETING

SUPPORT

ACTIVITIES

COLLABORATION

ALL

CREATE ▾

Search...

🔍

🔔

👤 Administrator ▾

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

Preferred Call Time

**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 checks duplicates in CRM.

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WEB TO MODULE

SALES

MARKETING

SUPPORT

ACTIVITIES

COLLABORATION

ALL

CREATE ▾

Search...

🔍

🔔

👤 Administrator

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 5: Duplication

Available field(s)

Billing City

Billing Postal Code

Industry

How did you know about us ?

Need Newsletter ?

Office Phone

Billing Street

Billing State

Billing Country

Check duplicates on

Name

Email Address

Duplication will be checked on these fields, Once user submit the WebForm.

Back

Save and Continue

Publish

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

**Web To Module**

**Step 6: Configuration**

Web to module record name: \* Generate Company

Form header: Membership Registration

Form description: Complete form below to register your business with us.

Submit button label: Submit

Post URL: http://localhost/projects/tagmetest/suitecrm790/index

Redirect URL: http://urdhva-tech.com

Assigned to: \* Will Westin SELECT

Module auto-response template: ① Generate Company WebToModule

Prevent duplicate update: ① ☒ Prevent record updation if system find duplicate record.

Security groups: ① --None--  
East Sales  
West Sales

Webform Upload URL: ① http://urdhva-tech.com

Google reCaptcha: ☒

Captcha key: \* ABCDEFGHIJKLM

Need File Control?: ① ☒

File Control Label: Upload Experience Certi

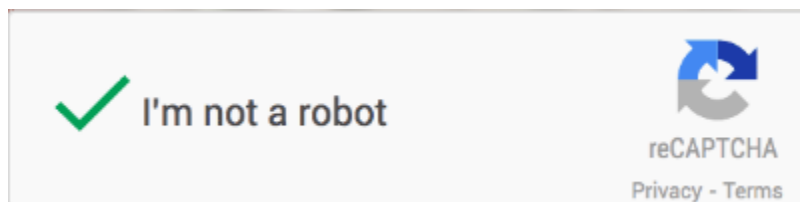
Form footer: By submitting, you agree to our Terms of Service and Privacy Statement.

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

The screenshot shows a web application interface for previewing a form. At the top, there is a navigation bar with links: WEB TO MODULE, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. On the right, there is a 'CREATE' button, a search bar, and a user profile icon labeled 'Administrator'. Below the navigation bar, there are 'SAVE FORM' and 'CANCEL' buttons. The main area displays a form titled 'Membership Registration' with the instruction 'Complete form below to register your business with us.' The form contains four required fields: 'Name' (populated with 'Urdhva Tech'), 'Billing Street' (populated with 'Science City'), 'Billing City' (populated with 'Ahmedabad'), and 'Billing State' (populated with 'Gujarat'). A red asterisk indicates required fields. A path indicator 'Path: style' is visible at the bottom left.

- Download the WebForm from ListView and DetailView.

The screenshot shows a table titled 'WEB TO MODULE' with columns: Name, Download Template, Module, Google reCaptcha, and Assigned to. The table contains one row with the following data: Name: Generate Company, Download Template: Generate Company.html, Module: Accounts, Google reCaptcha: [checked], Assigned to: Will Westin. A callout box with the text 'You can also download WebForm through ListView and DetailView.' points to the 'Download Template' column. The table has a 'BULK ACTION' dropdown and pagination controls at the bottom.

Name	Download Template	Module	Google reCaptcha	Assigned to
Generate Company	Generate Company.html	Accounts	<input checked="" type="checkbox"/>	Will Westin

# 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>	<b>Billing Street</b>
<input type="text" value="Urdhva Tech"/>	<input type="text" value="Science City"/>
<b>Billing City *</b>	<b>Billing State *</b>
<input type="text" value="Ahmedabad"/>	<input type="text" value="Gujarat"/>
<b>Billing Postal Code</b>	<b>Billing Country</b>
<input type="text" value="380060"/>	<input type="text" value="India"/>
<b>Industry</b>	<b>Company Incorporation Date</b>
<input type="text" value="Technology"/>	<input type="text" value="2017-08-11"/>
<b>How did you know about us ?</b>	<b>Preferred Call Time</b>
<input type="radio"/> Google Search	<input type="text" value="8AM - 11 AM"/>
<input type="radio"/> Facebook	<input type="text" value="11AM - 2PM"/>
<input type="radio"/> Existing Customer	<input type="text" value="2PM - 6PM"/>
<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>Need Newsletter ?</b>	<b>Description *</b>
<input checked="" type="checkbox"/>	<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..."/> Urdhva-tech Work Profile.pdf	
<b>Captcha</b>	
<input checked="" type="checkbox"/> I'm not a robot	
<input type="button" value="Submit"/>	

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

Office Phone field is not exist into WebForm as it is marked as hidden.

- 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.

Name \*

Please fill out this field.

Amnecubau

Billing Postal Code

380060

Industry

Technology

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

Browse...

No file selected.

Captcha

☐ I'm not a robot

  
reCAPTCHA  
Privacy - Terms

Billing Street

Science City

Billing State \*

Gujarat

Billing Country

India

Company Incorporation Date

2017-08-11

Preferred Call Time

--None--

8AM - 11 AM

11AM - 2PM

2PM - 6PM

6PM - 9PM

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

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.

Name \*

Urdhva Tech

Billing City \*

Ahmedabad

Billing Postal Code

380060

Industry

Technology

How did you know about us ?

☐Google Search

☐Facebook

☐Existing Customer

☐Word of Mouth

☐Conference

☐Referred by Friend

☒Website

☐Other

Need Newsletter ?

☒

Email Address \*

contact@urdhva-tech.com


Upload Experience Certificate

Browse...

No file selected.

Captcha

☐ I'm not a robot

  
reCAPTCHA  
[Privacy](#) - [Terms](#)

Billing Street

Science City

Billing State \*

Gujarat

Billing Country

India

Company Incorporation Date

2017-08-11

Preferred Call Time

--None--

8AM - 11 AM

11AM - 2PM

2PM - 6PM

6PM - 9PM

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

Please Validate Captcha.

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

Submit

- 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.

Name \*

Urdhva Tech

Billing City \*

Ahmedabad

Billing Postal Code

380060

Industry

Technology

How did you know about us ?

☐Google Search

☐Facebook

☐Existing Customer

☐Word of Mouth

☐Conference

☐Referred by Friend

☒Website

☐Other

Need Newsletter ?

☒

Email Address \*

contact@urdhva-tech.com


Upload Experience Certificate

Browse...

Urdhva-tech Work Profile.pdf

Captcha

☐ I'm not a robot

  
reCAPTCHA  
[Privacy](#) - [Terms](#)

Billing Street

Science City

Billing State \*

Gujarat

Billing Country

India

Company Incorporation Date

2017-08-11

August 2017

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

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

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

Submit



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

The screenshot displays the CRM interface with a top navigation bar and a main content area. The navigation bar includes a home icon, a list of tabs (ACCOUNTS, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, ALL), a 'CREATE' button, a search bar, and a user profile icon labeled 'Administrator'. The main content area is titled 'ACCOUNTS' and features a table with columns: Name, City, Billing State, Billing Country, User, Email Address, and Date Created. A single record is shown for 'Urdhva Tech' in Ahmedabad, Gujarat, India, assigned to 'Will Westin' with email 'contact@urdhva-tech.com' and created on '08/10/2017 18:45'. Below the table is a 'Security Groups: Mass Assign' section with 'ASSIGN' and 'REMOVE' buttons, and a 'Group' dropdown menu currently set to '--None--'.

Name	City	Billing State	Billing Country	User	Email Address	Date Created
Urdhva Tech	Ahmedabad	Gujarat	India	Will Westin	contact@urdhva-tech.com	08/10/2017 18:45

Security Groups: Mass Assign **ASSIGN** **REMOVE** Group: --None--

- While creating WebToModule record, we selected "Security Groups". The record shown in next screen has the security groups 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.

URDHVA TECH ☆

OVERVIEW MORE INFORMATION OTHER ACTIONS ▼

Name: Urdhva Tech

Company Incorporation Date: 08/11/2017

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

Email Address: contact@urdhva-tech.com (Primary)

Billing Address: Science City, Mumbai Maharashtra 400049, India

Shipping Address:

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.

Assigned to: Will Westin

Office Phone: 123-123-1231

How did you know about us?: Website

Need Newsletter?: ☒

SECURITY GROUPS

Name	Description
East Sales	
West Sales	

- 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.

ACCOUNTS

SALES

MARKETING

SUPPORT

ACTIVITIES

COLLABORATION

ALL

CREATE

Search...

Administrator

URDHVA TECH

OVERVIEW

MORE INFORMATION

OTHER

ACTIONS

Name:

Urdhva Tech

Company Incorporation Date:

08/11/2017

Preferred Call Time:

• 8AM - 11 AM

• 2PM - 6PM

Email Address:

contact@urdhva-tech.com (Primary)

Billing Address:

Science City  
Mumbai Maharashtra 400049  
India

COPY...

Office Phone:

123-123-1231

How did you know about us ?:

Website

Need Newsletter ?:

☒

Shipping Address:

COPY...

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.

Assigned to:

Will Westin

HISTORY

Subject	Status	Category	Contact	Date Modified	Date Created	Due Date	Assigned User
Create Note or Attachment							
Urdhva Tech-Urdhva-tech Work Profile	Note			08/10/2017 19:11	08/10/2017 19:11		Will Westin

# 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.

Name \*

Urdhva Tech

Billing City \*

Mumbai

Billing Postal Code

400049

Industry

Technology

How did you know about us ?

☐Google Search

☐Facebook

☐Existing Customer

☐Word of Mouth

☐Conference

☐Referred by Friend

☒Website

☐Other

Need Newsletter ?

☒

Email Address \*

contact@urdhva-tech.com

Upload Experience Certificate


Browse...

Urdhva-tech Work Profile.pdf

Captcha

✓

I'm not a robot

reCAPTCHA

Privacy - Terms

Billing Street

Science City

Billing State \*

Maharashtra

Billing Country

India

Company Incorporation Date

2017-08-11

Preferred Call Time

--None--

8AM - 11 AM

11AM - 2PM

2PM - 6PM

6PM - 9PM

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

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

Submit

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

ACCOUNTS

	Name	City	Billing State	Billing Country	User	Email Address	Date Created	
<input type="checkbox"/>	BULK ACTION							< < (1 - 1 of 1) > >
<input type="checkbox"/>	Urdhva Tech	Mumbai	Maharashtra	India	Will Westin	contact@urdhva-tech.com	08/10/2017 18:45	i
<input type="checkbox"/>	BULK ACTION							< < (1 - 1 of 1) > >

Security Groups: Mass Assign

ASSIGN REMOVE

Group: --None--

- 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.

Name \*

Urdhva Tech Pvt. Ltd.

Billing City \*

Ahmedabad

Billing Postal Code

380060

Industry

Technology

How did you know about us ?

☐Google Search

☐Facebook

☐Existing Customer

☐Word of Mouth

☐Conference

☐Referred by Friend

☒Website

☐Other

Need Newsletter ?

☒

Email Address \*

info@urdhva-tech.com


Upload Experience Certificate

Browse...

Urdhva-tech Work Profile.pdf

Captcha

☒I'm not a robot

  
reCAPTCHA  
[Privacy](#) - [Terms](#)

Billing Street

Science City

Billing State \*

Gujarat

Billing Country

India

Company Incorporation Date

2017-08-11

Preferred Call Time

--None--

8AM - 11 AM

11AM - 2PM

2PM - 6PM

6PM - 9PM

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

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

SALES

MARKETING

SUPPORT

ACTIVITIES

COLLABORATION

ALL

CREATE

Search...

Administrator

ACCOUNTS

BULK ACTION

< < (1 - 2 of 2) > >

	Name	City	Billing State	Billing Country	User	Email Address	Date Created
<input checked="" type="checkbox"/>	Urdhva Tech Pvt. Ltd.	Ahmedabad	Gujarat	India	Will Westin	info@urdhva-tech.com	08/10/2017 19:37
<input type="checkbox"/>	Urdhva Tech	Mumbai	Maharashtra	India	Will Westin	contact@urdhva-tech.com	08/10/2017 18:45

BULK ACTION

< < (1 - 2 of 2) > >

Security Groups: Mass Assign

ASSIGN




REMOVE

Group: --None--

# 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.

 EMAIL TEMPLATES SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE ▾    Administrator

GENERATE COMPANY WEBTOMODULE

Edit ▾

Type	Email
Name:	Generate Company WebToModule
Description:	
Subject:	Welcome At Urdhva Tech
Send Text Only	<input type="checkbox"/>
Body:	<div>Hello \$account_name,  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.</div>

Date Modified: 10/25/2016 15:40 by Administrator

Date Created: 10/25/2016 15:05 by Administrator

Assigned to: Administrator



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.



**URDHVA TECH**

## CONTACT US



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