User guide for amoForms plugin

Contents
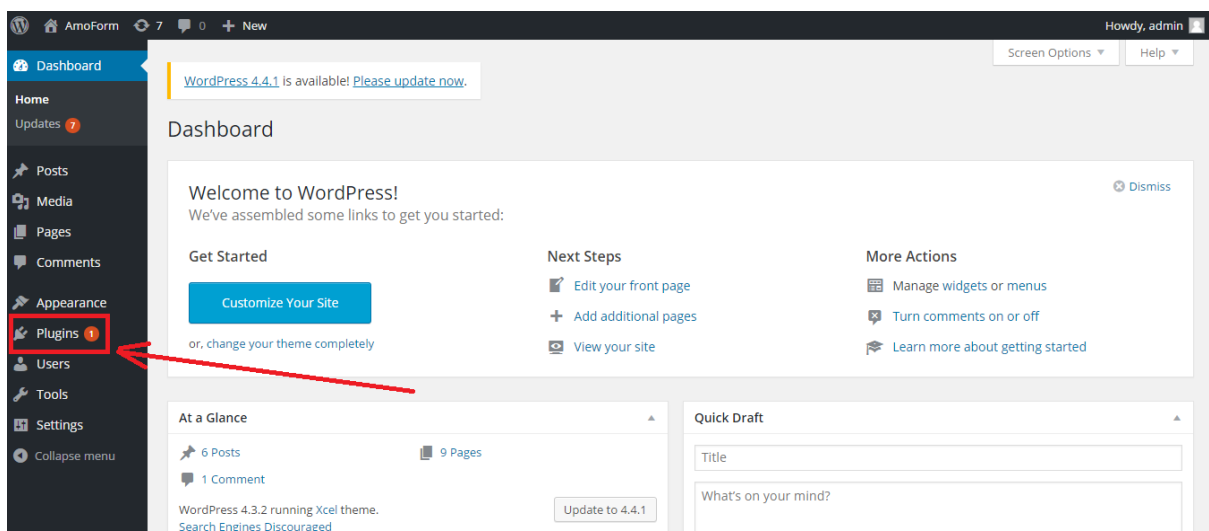
amoForms Installation and Setup

First of all, you need to log in to your account on your WordPress site page.
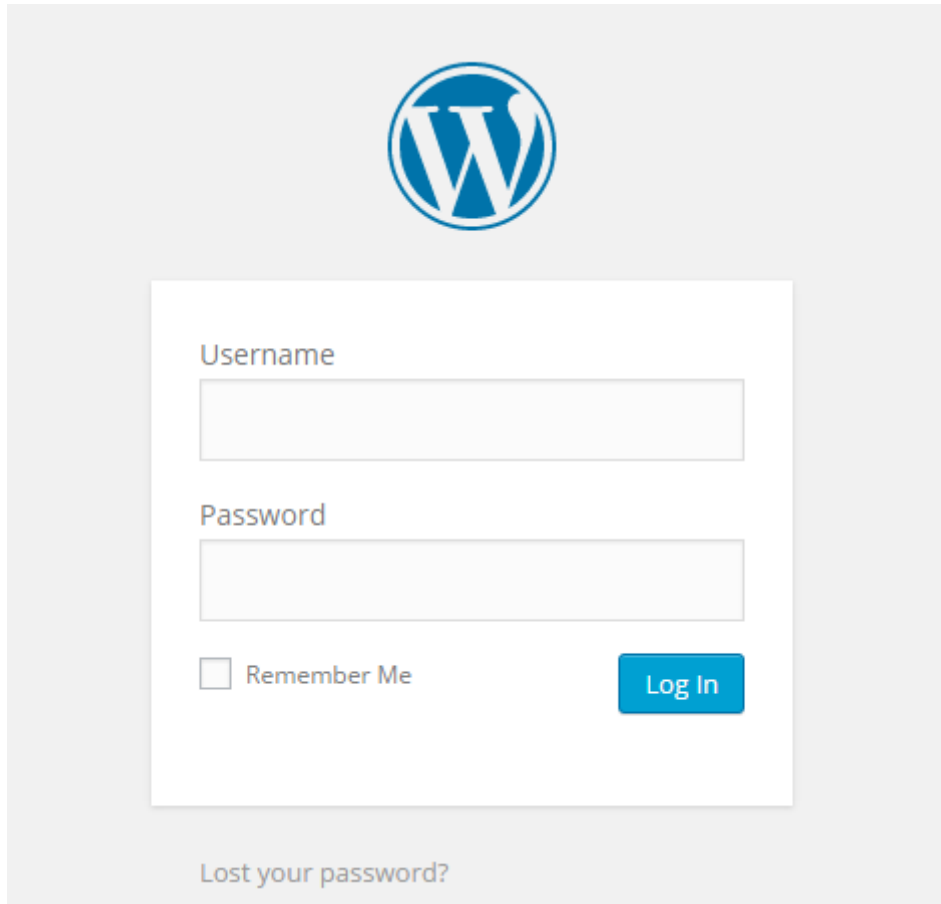

After logging in to your account you will see the Dashboard in your WordPress workspace. At the next stage you should select "Plugins" tab in the left column and click it.

Your click opened the subsection "Installed Plugins" of the "Plugins" section, where you can see all installed plugins you have. On this page you can activate, deactivate, edit and delete your plugins.
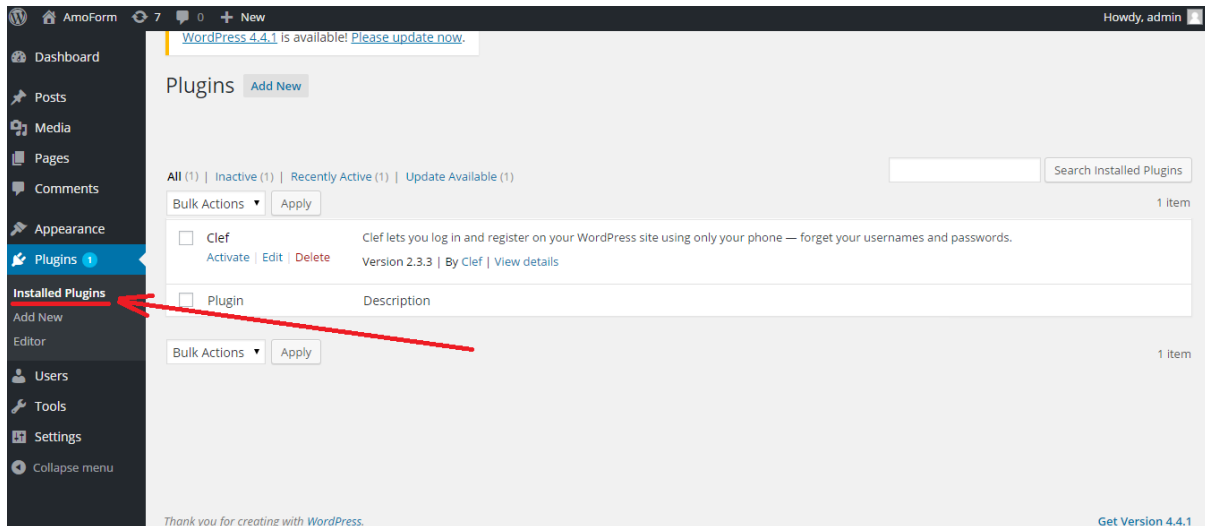

To install amoForms plugin you should select the "Add New" subsection of the "Plugins" section in the left column.
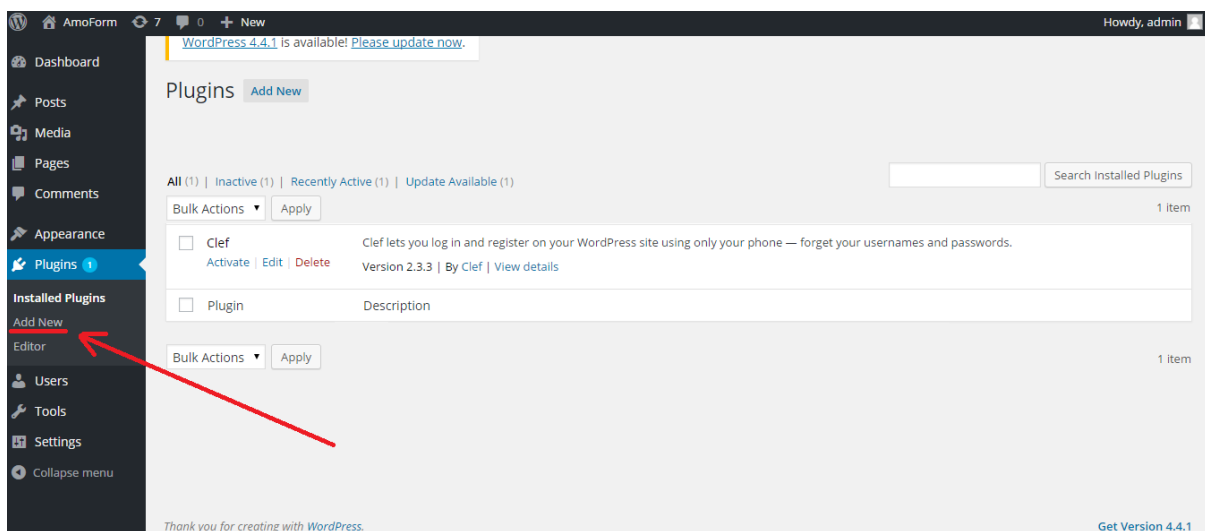

In the opened window you can find all plugins represented in WordPress. To find amoForms plugin you should input "amoforms" into the special field "Search Plugins":
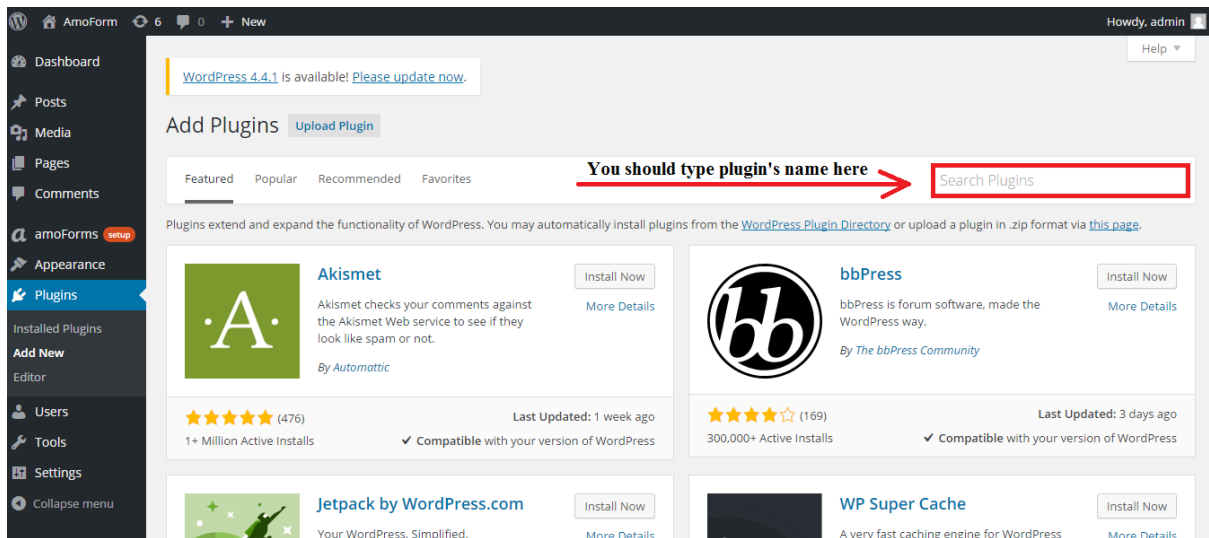
Type amoForms in the field "Search Plugins" and then press "Enter" button on your keyboard. Plugin will appear on the page. Press "Install Now" button to install amoForms plugin.
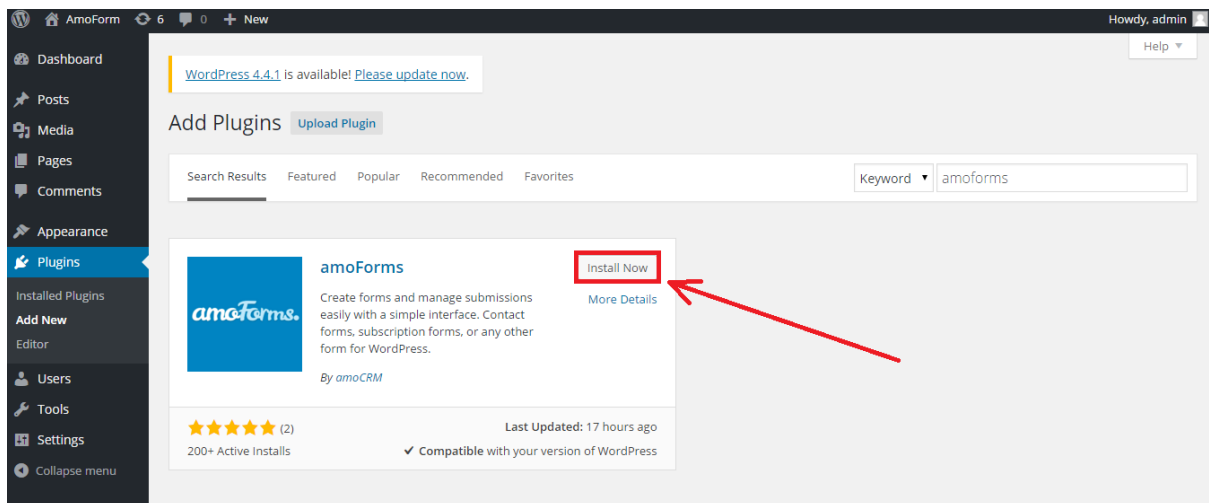
Wait for 5 seconds and then you will see the message about successful plugin installation in your browser tab:
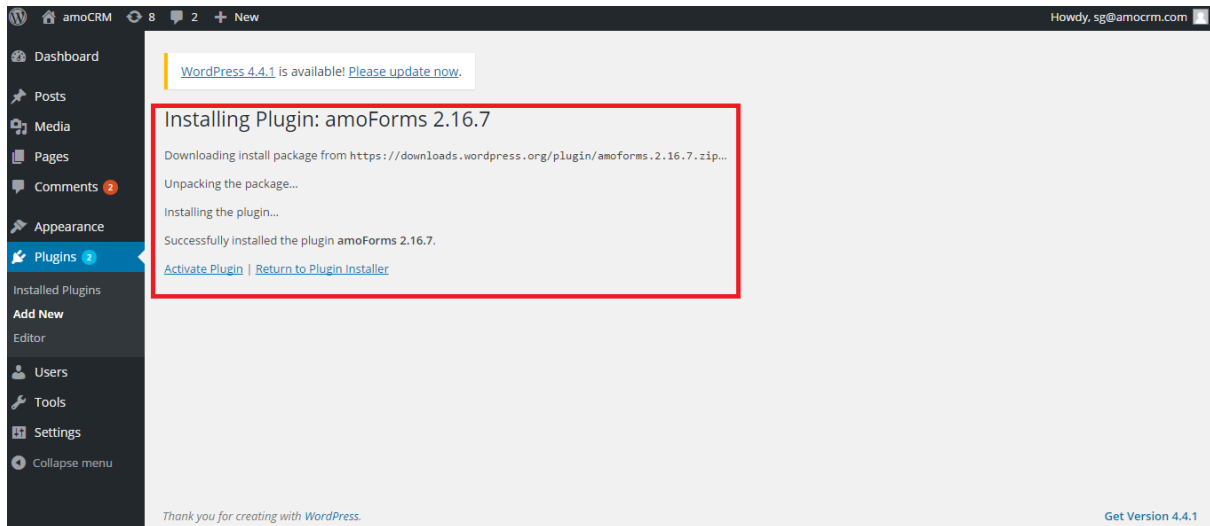
Click "Activate Plugin" to make amoForms active, it will appear in your plugin list with status "Active".
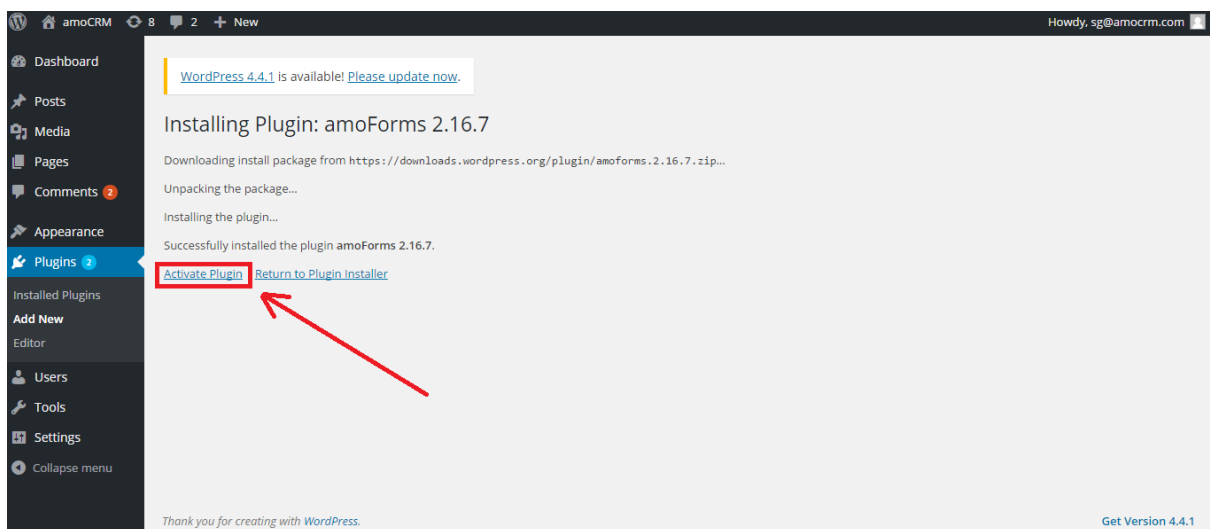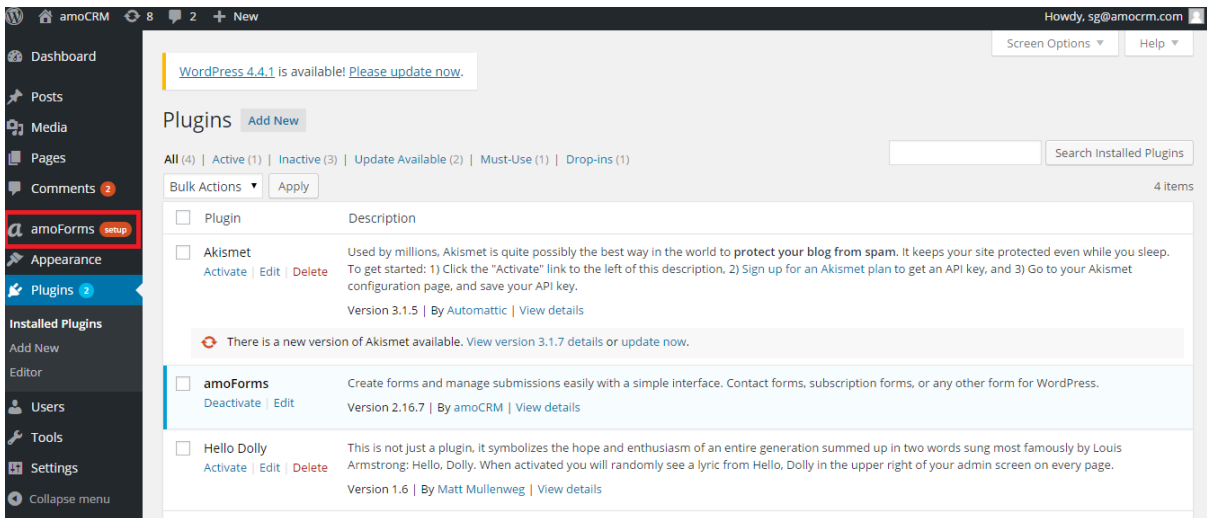

After this stage you will be redirected to the "Installed Plugins" page. In the top of the page you can see message about successful activation of amoForms plugin.
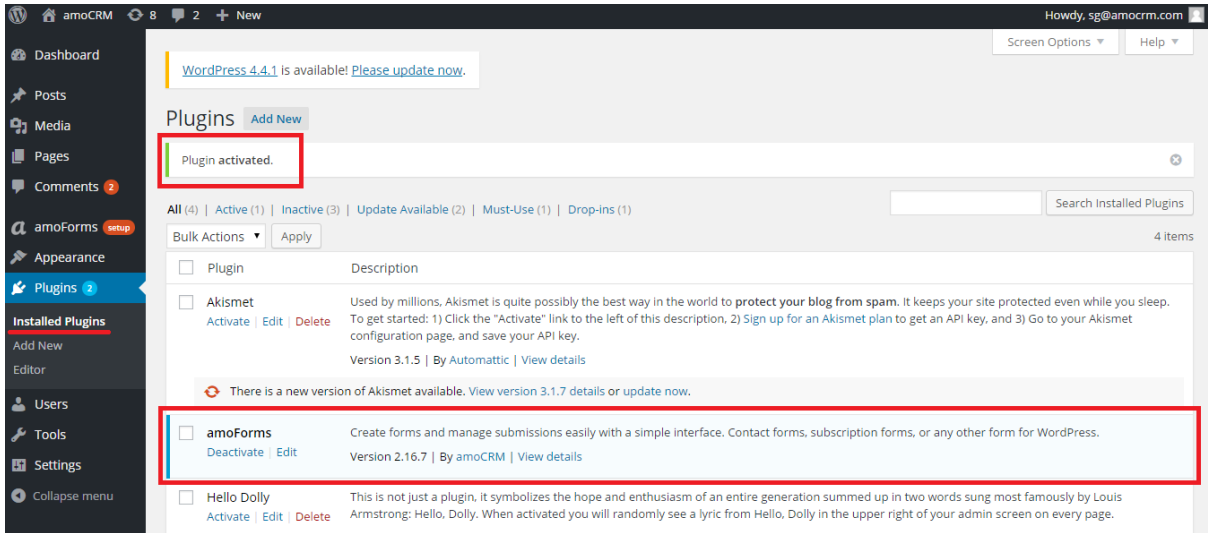
On this page you can also deactivate amoForms plugin. Find amoForms plugin in the list of installed plugins and press "Deactivate" button under the plugin name.
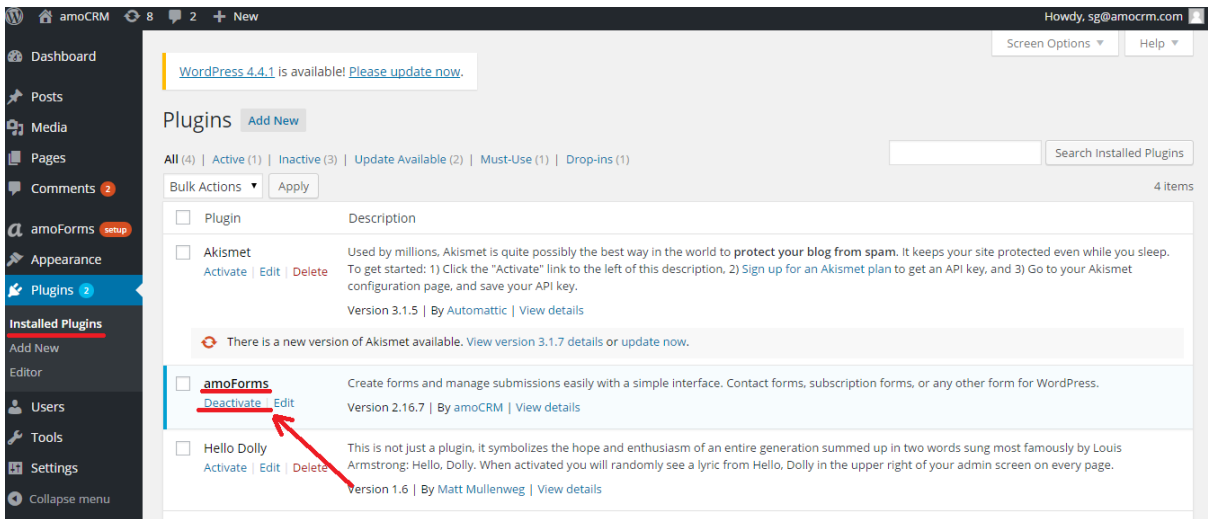
After plugin activation you can see amoForms tab and logo in the left column. Badge "Setup" means that you should set up your plugin, register in amoForms.

Click on the amoForms tab in the left column and you will be redirected to the amoForms "First Setup" page, Press "Get Started" button and the setting up process will start immidiately.
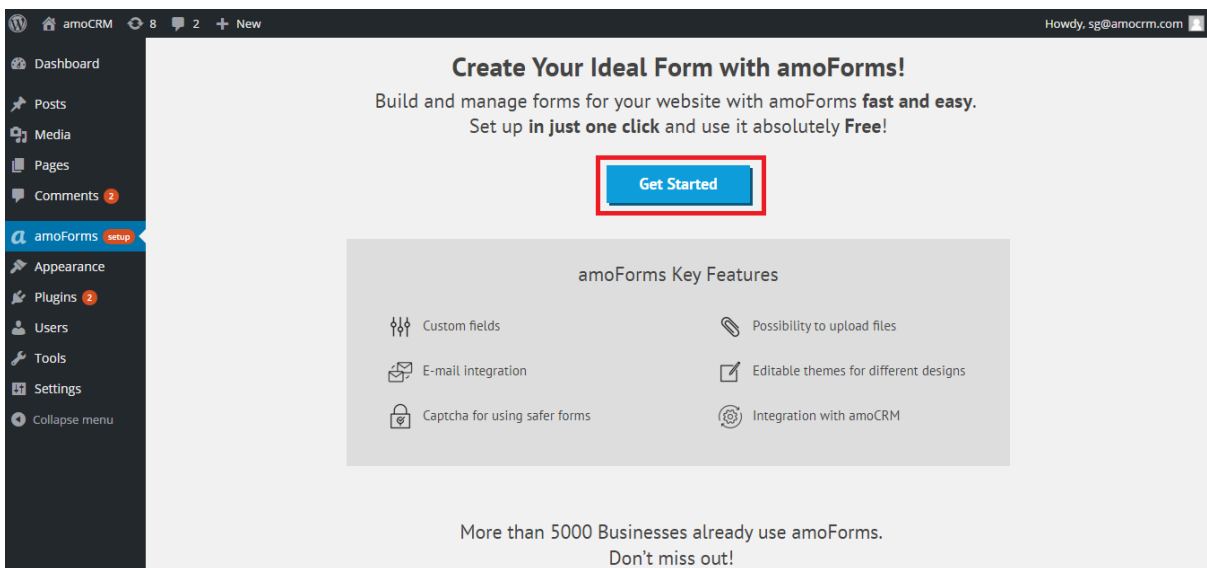

In the opened page you can see registration form where you need to enter your valid details to complete plugin setup. You should enter:

1) Name - this option sets the "From" display name of the email that is being sent;
2) Email subject - this option sets the subject of the email that is being sent;
3) Email - this option sets who submitted data being sent to;
4) Phone - contact phone number;
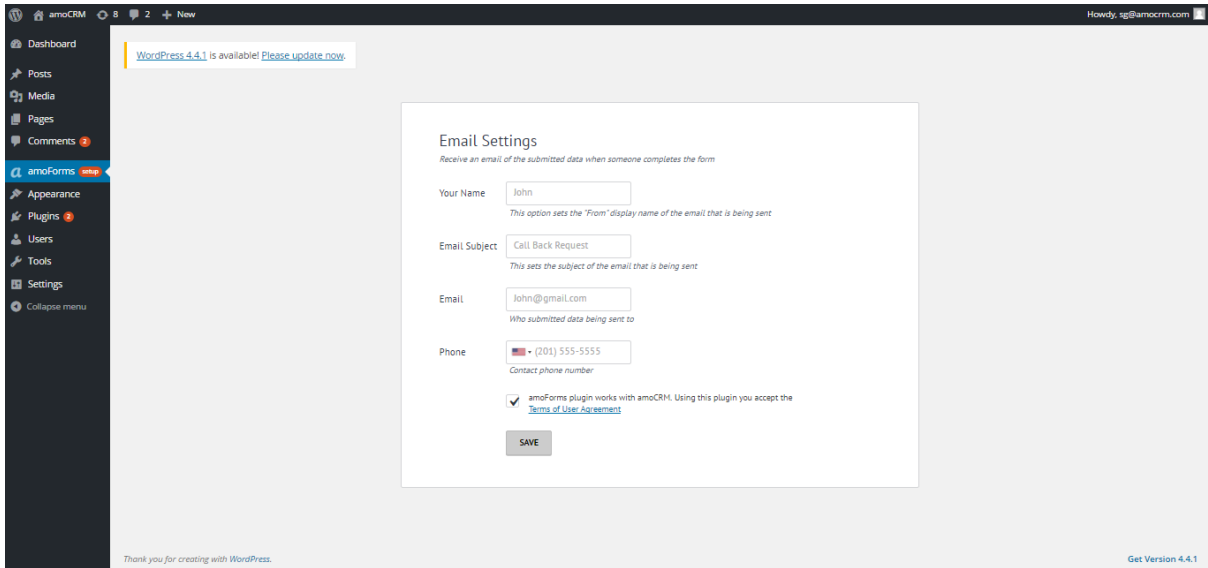
Check correctness of your details in all fields in this form and then press "Save" button.
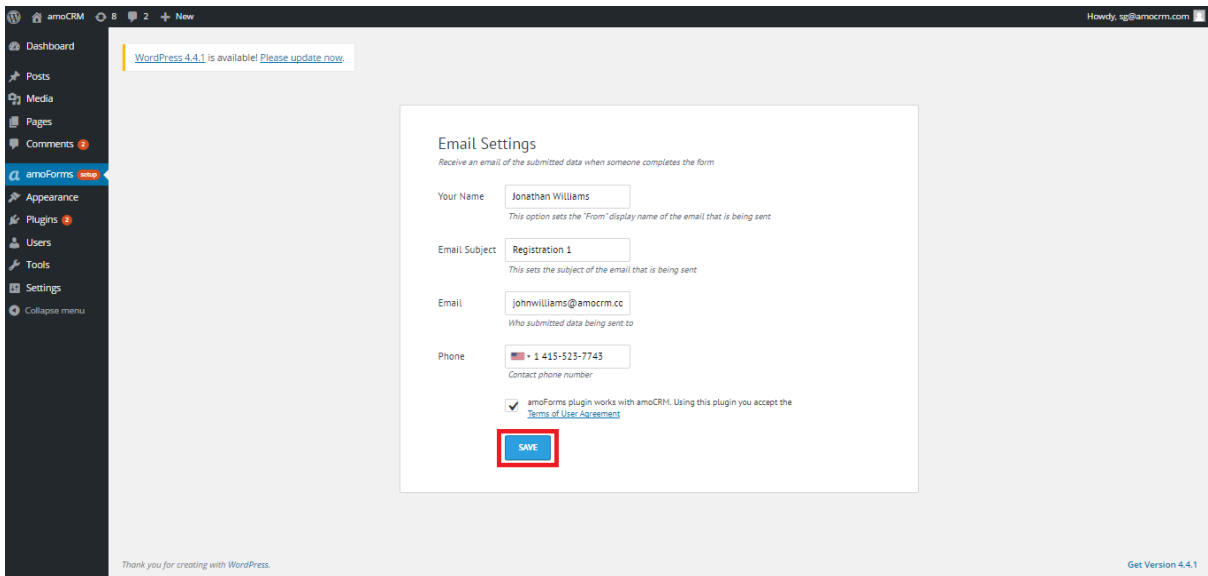
After you have pressed the "Save" button, you will see information message about successful registration of your account:
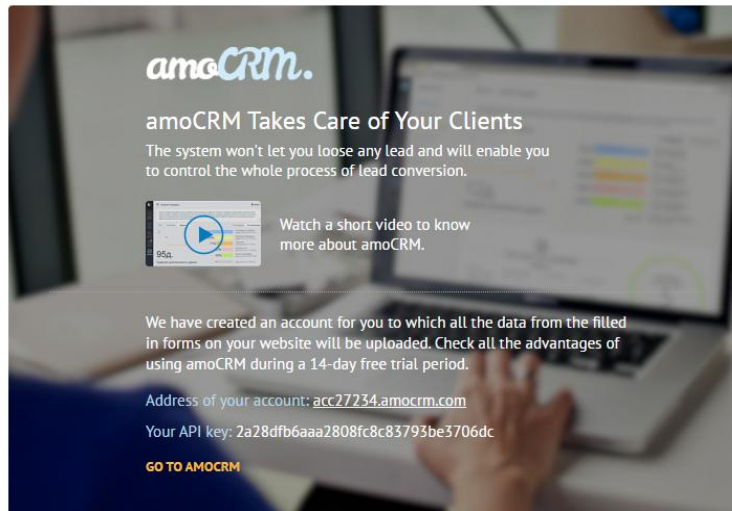

Information includes adress of your amoCRM account and your API key. You can see "GO TO AMOCRM" inscription below your API key. Click on it and you will be redirected to your amoCRM account without authorization.

Press "Continue" button to start using amoForms plugin!
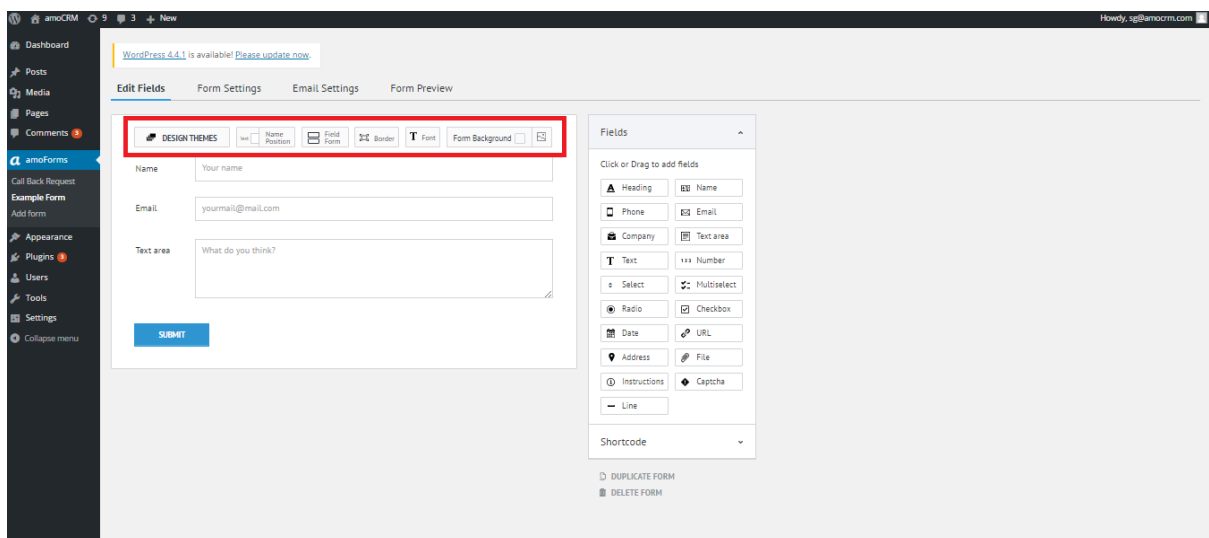
Using amoForms

After successful plugin installation and registration you'll be redirected to "Edit Fields" page:
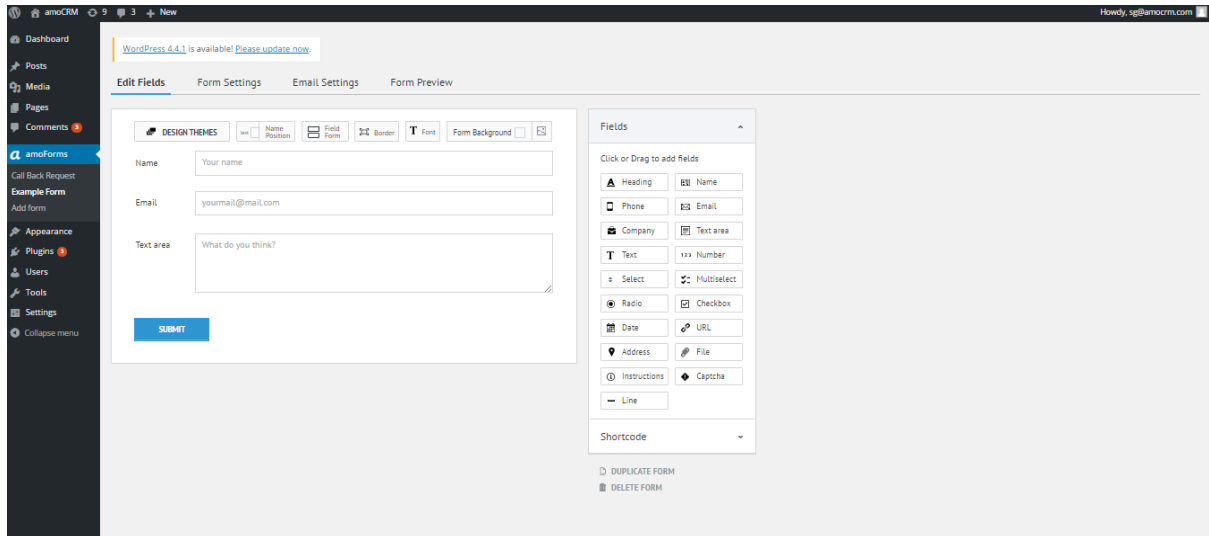
Here you can modify your form according to your requirements. Under the section names you can find the settings menue. Click on the required section to enter it.
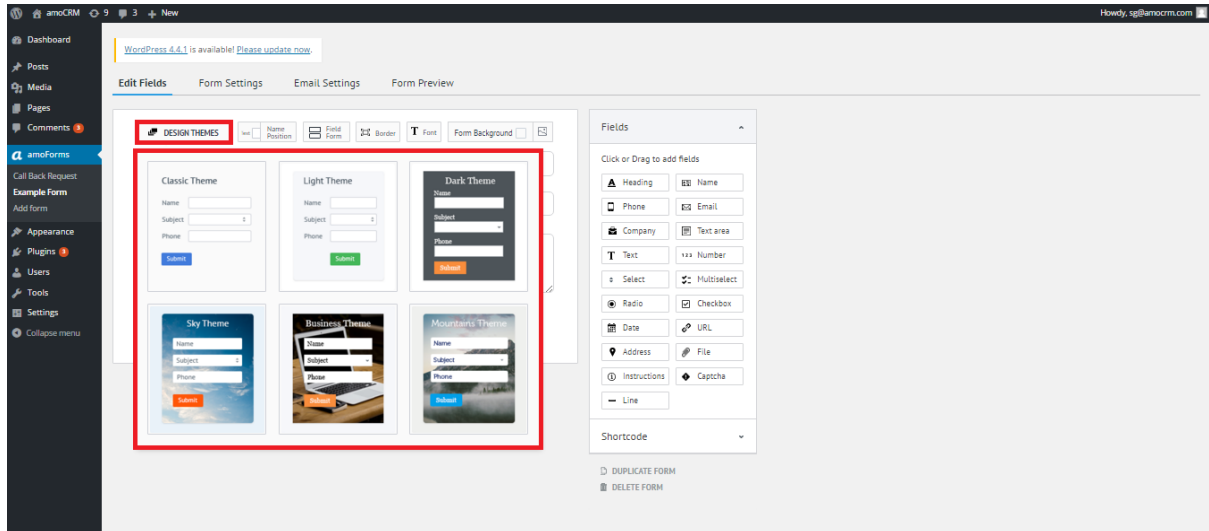
Edit Fields
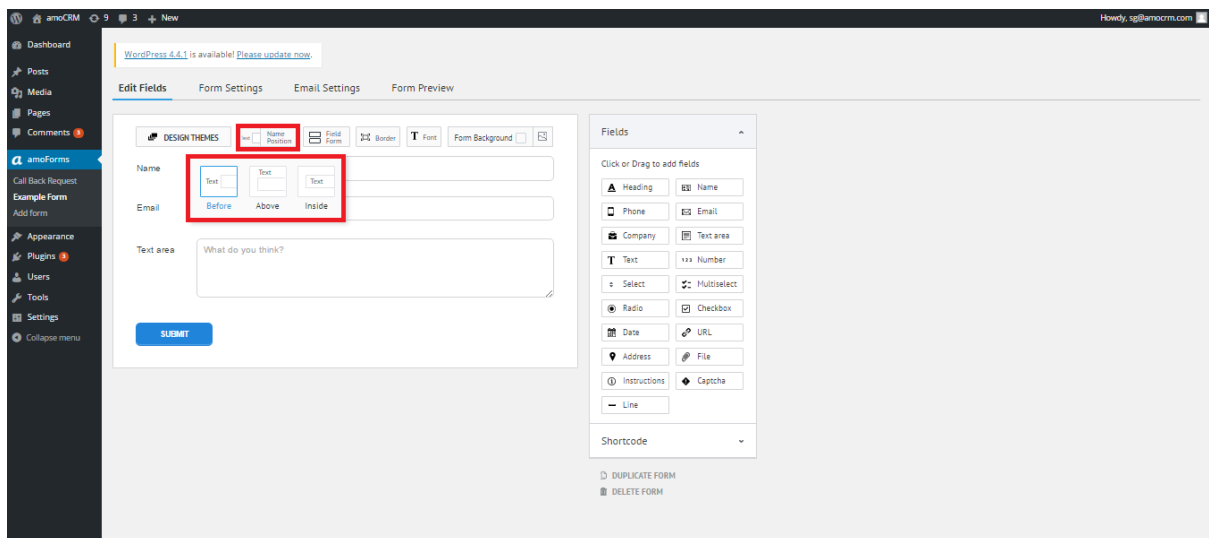
Form Design Settings

a) Design Themes

Here you can choose one of 6 form themes provided. You will be able to change it at any stage according to your requirements.
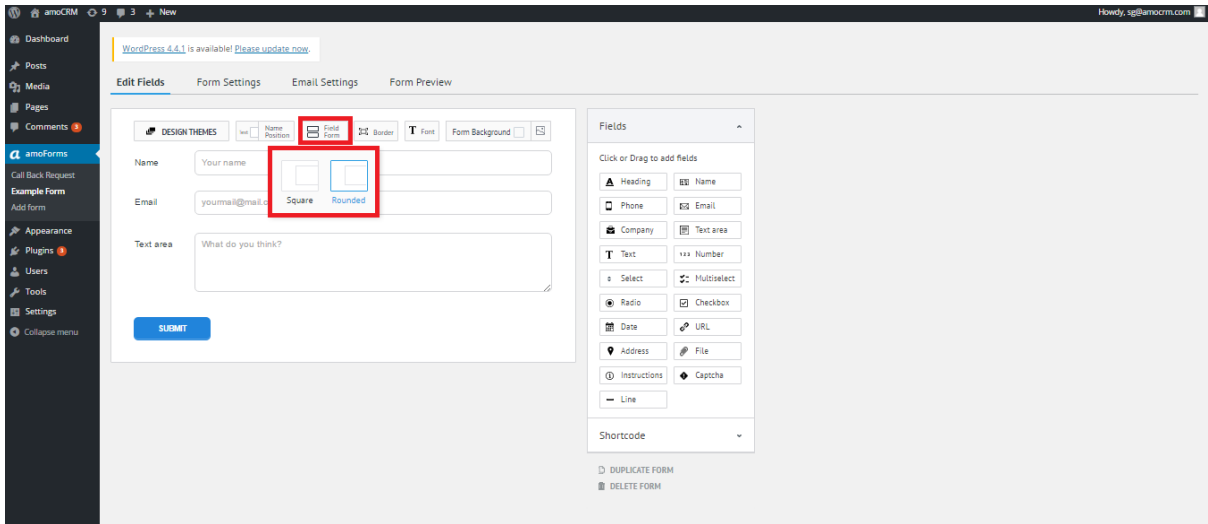

b) Name Position

In this section, you can setup the position of the field name. There are three options available: next to the field, over the field or inside the field.

c) Field Form

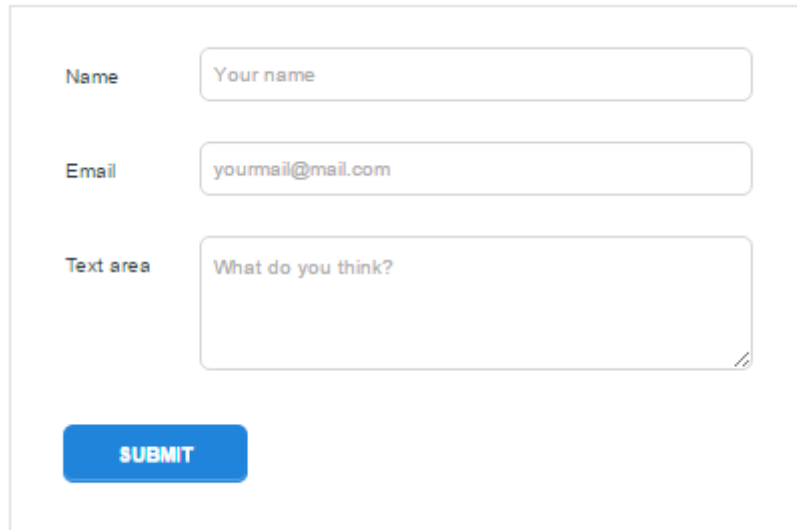In this section, you can modify the look of the fields (square edge or round edge)
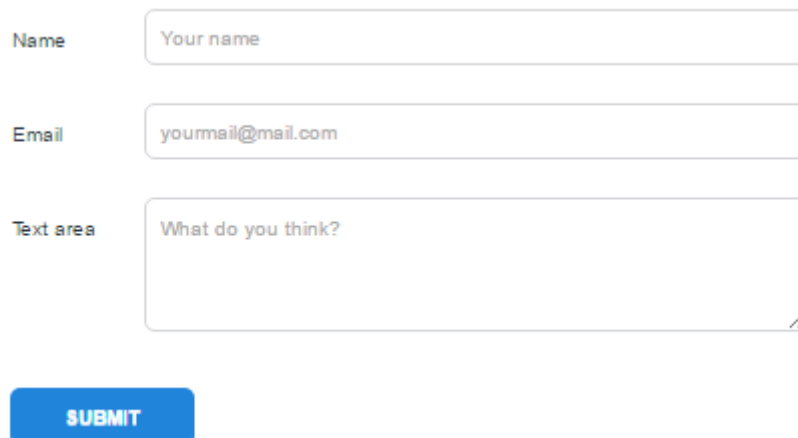

Square:

Rounded:

d) Border

Here you can choose whether you wish for your form to have the borders or not.

With borders:

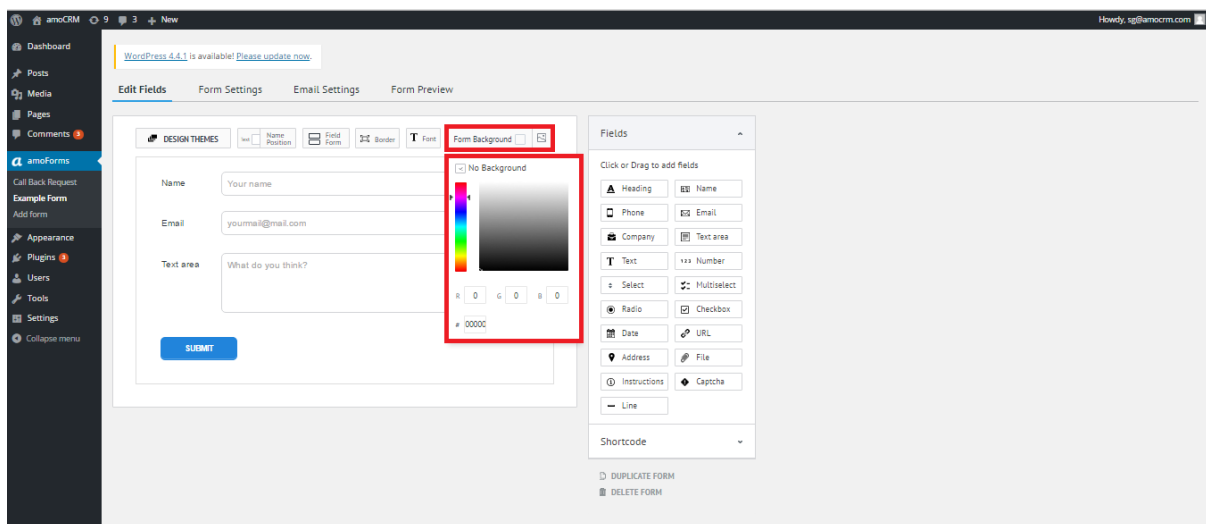

Without borders:

e) Font

You can choose fonts that will be used in your form in this section.
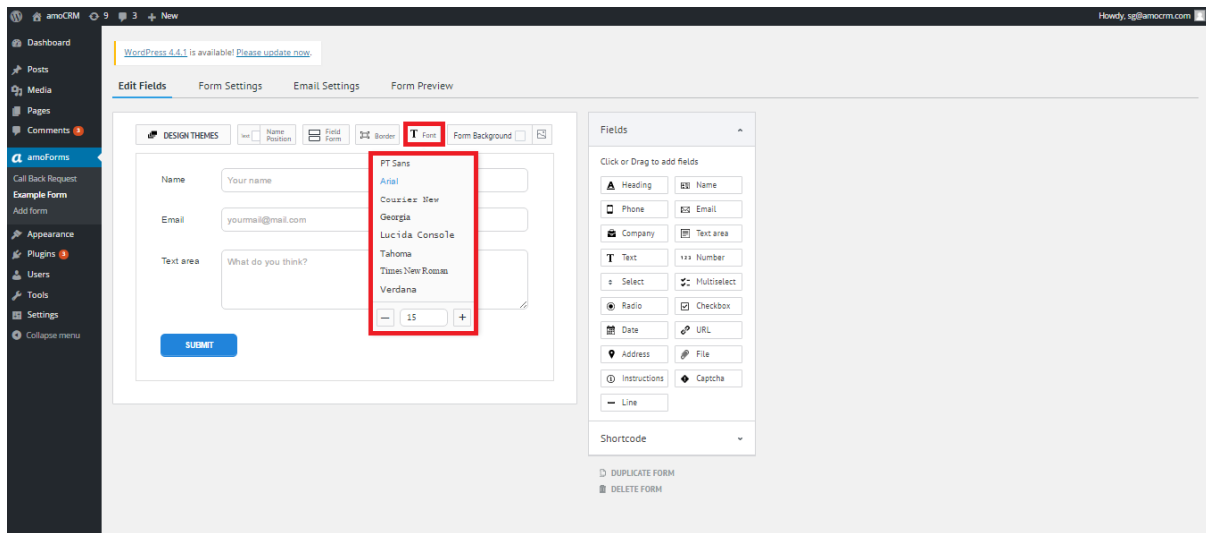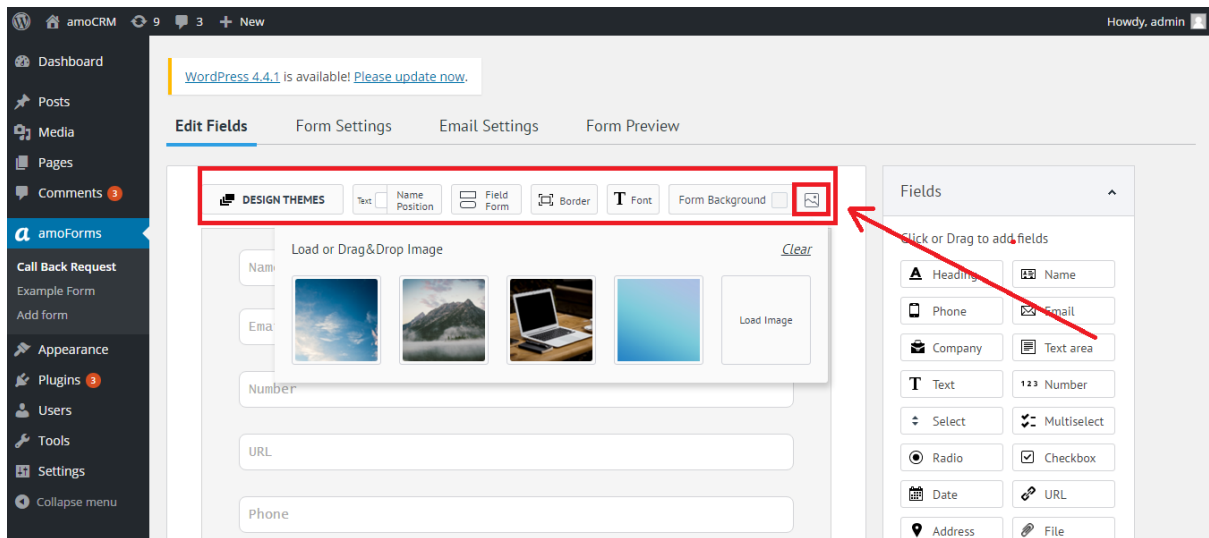

f) Form Background

Here you can change the background colour of your form.

Also, you can use a picture as a background for your form. Click on a "picture" icon next to "Form Background" and pick one of the preloaded pictures or download your own.
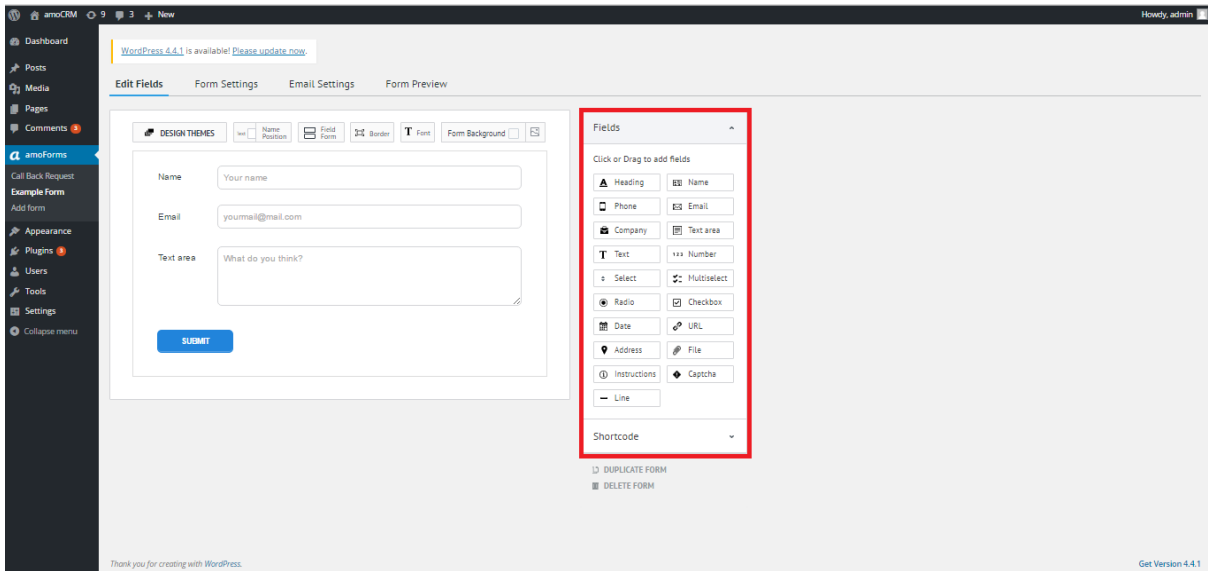
Form Fields

To the right of your form you can see a column with different fields that you can add to your form.
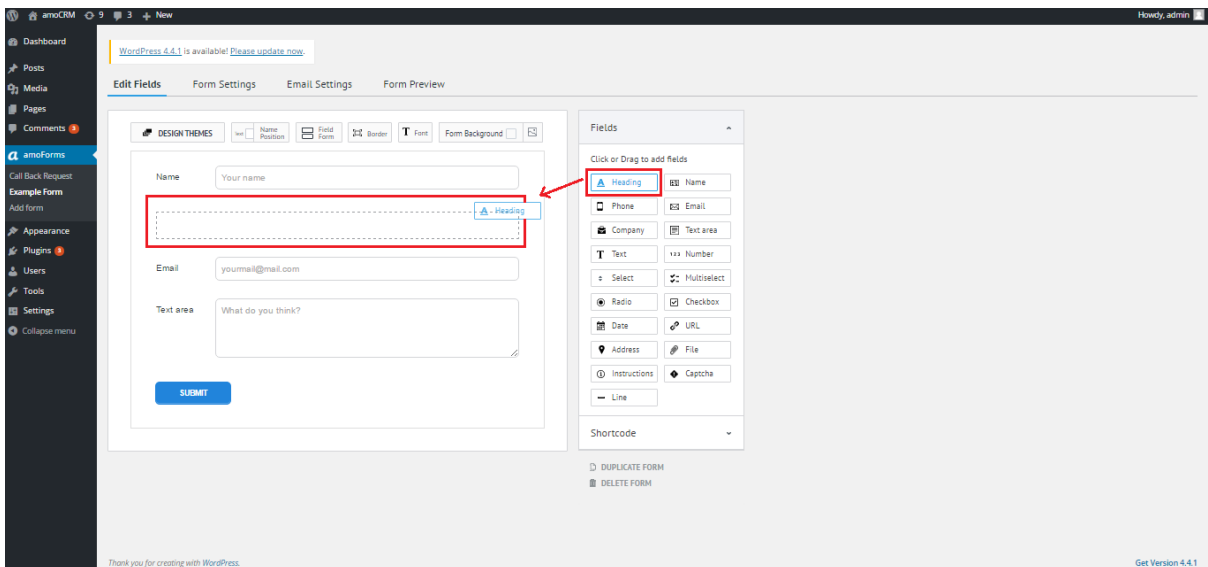
Available fields:
- Heading
- Name
- Phone
- Email
- Company
- Text area
- Text
- Number
- Select
- Multiselect
- Radio
- Checkbox
- Date
- URL
- Address
- File
- Instructions
- Captcha
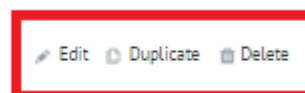- Line

Adding a field to your form

To add a field, click on it or simply drag and drop it to the required spot on the form.
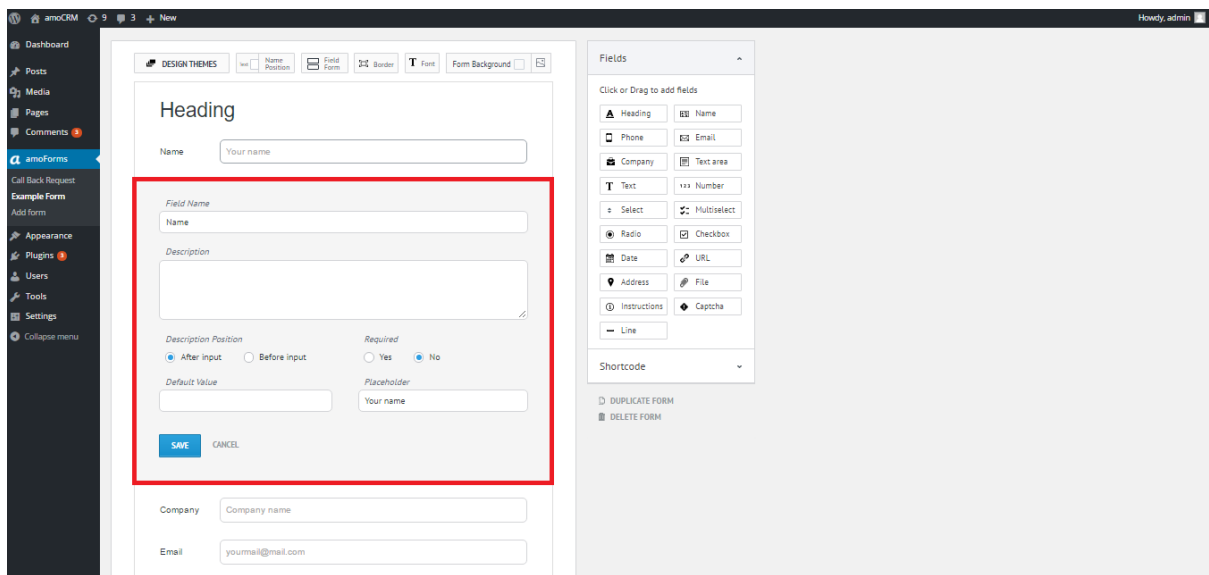

Editing fields

Once you've added a field to your form, you can edit it, duplicate or remove it. Just click at the field you wish to change and choose the required option in the appeared menu.

If you click Edit, the window with all available editable options will appear.
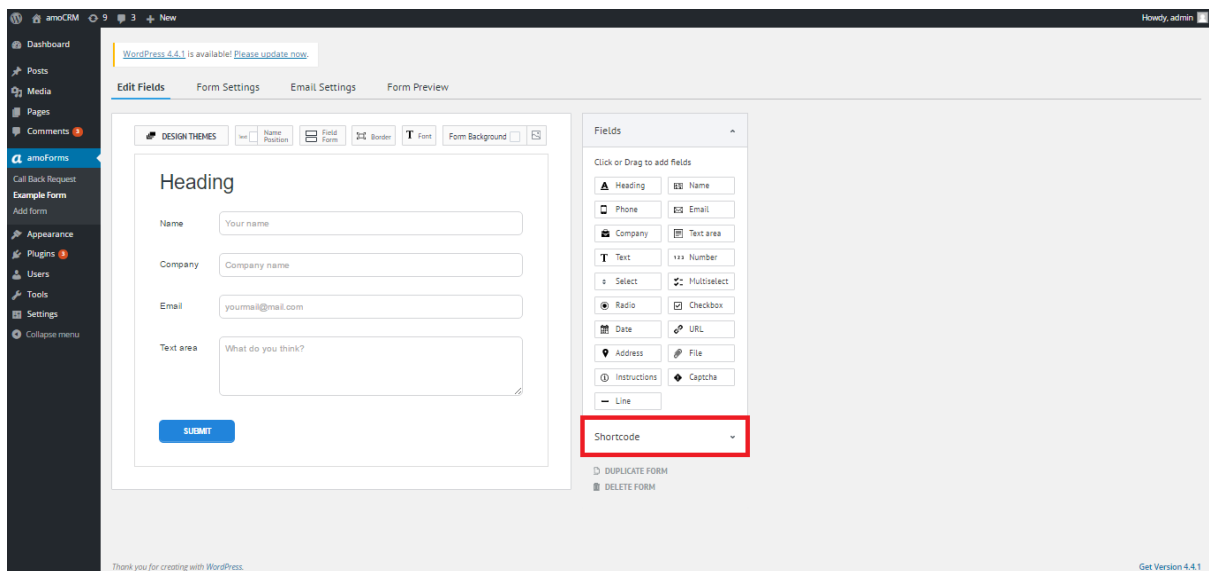

Confirm your changes by clicking Save or discard changes by cllicking Cancel.

Publish your form

To publish the form on your website, please use Shortcode.
Press the Shortcode button under the list of available fields to go into the corresponding menu.

The window will come up where you can see the Shotrcode of the form you created. You need to copy this code and insert it into the code of the webpage where you want your form to appear.
To do that, please go to Pages tab and choose the required page.
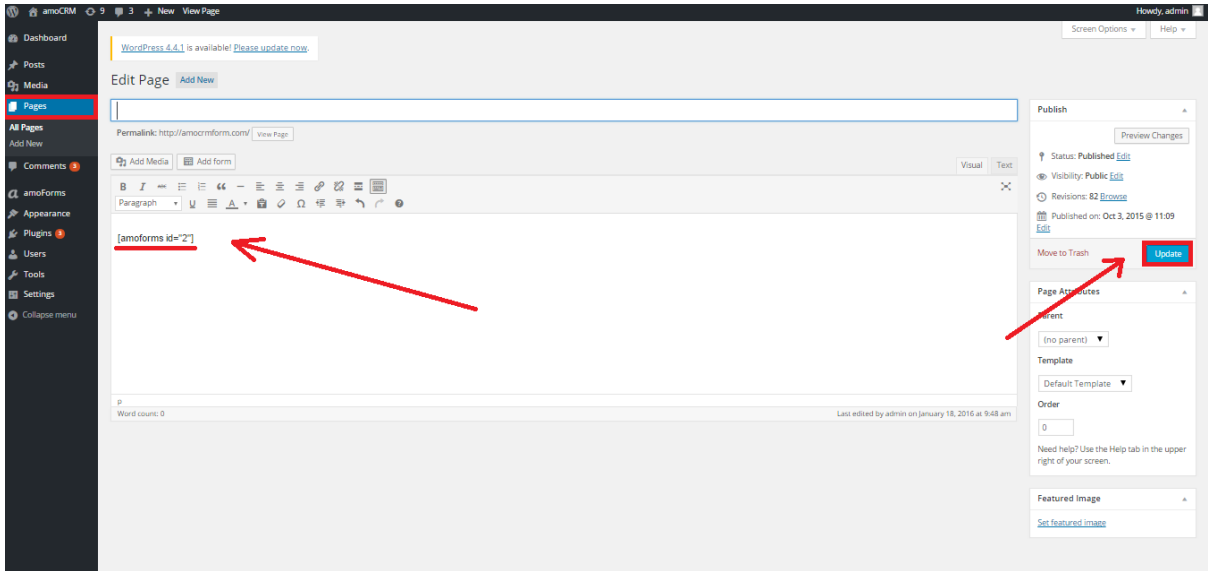
Insert your Shortcode into the designated field and press Update in the menue on the right. Now the form will appear on the webpage you chose.
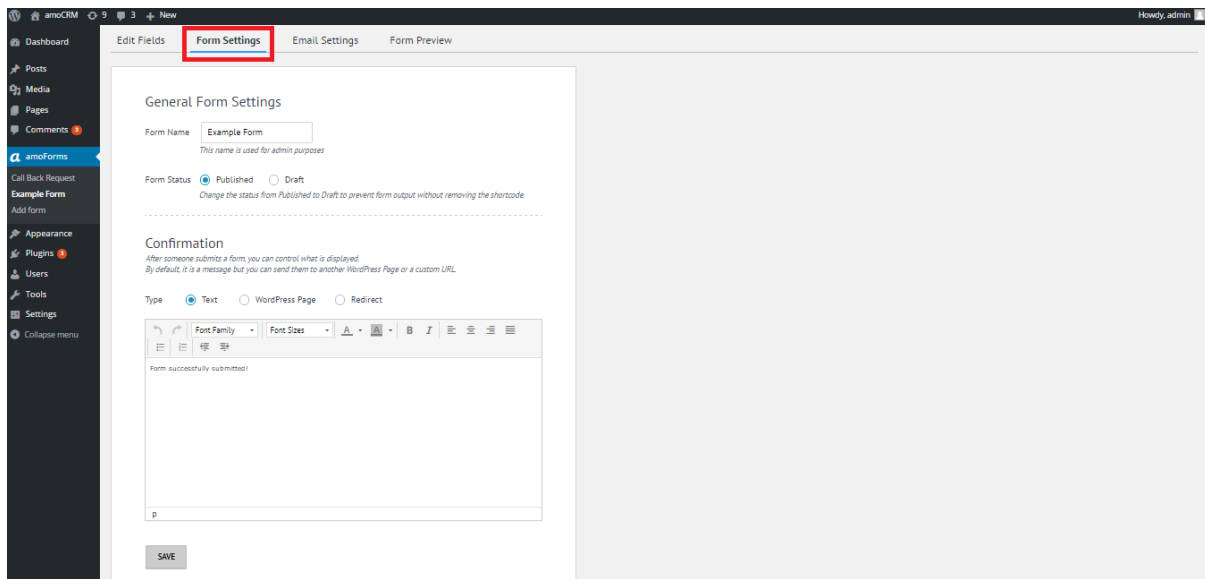
The form will not show if you selected "Draft" in the form settings. Please see section "Form Settings" of this manual.

You can also duplicate or delete your form. Please select a corresponding option from the menu.
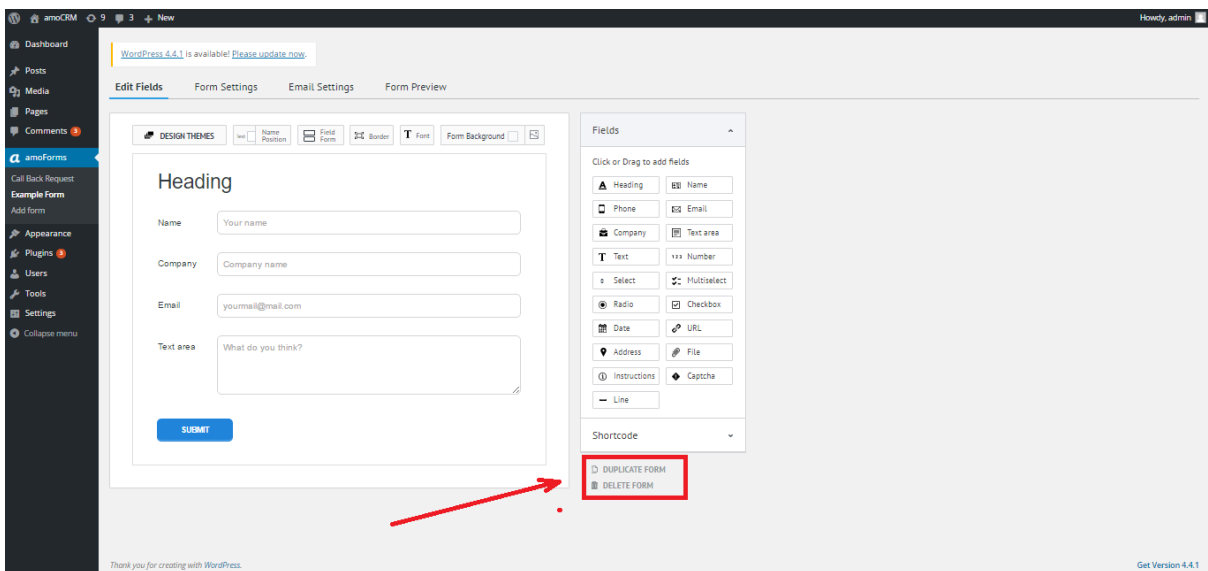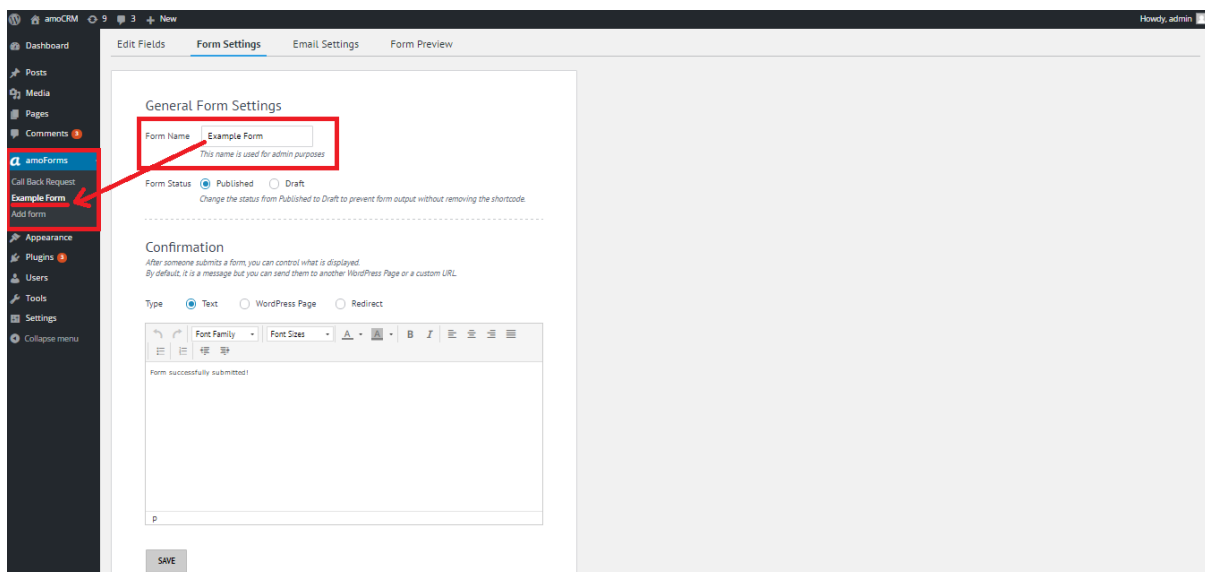
Form Settings

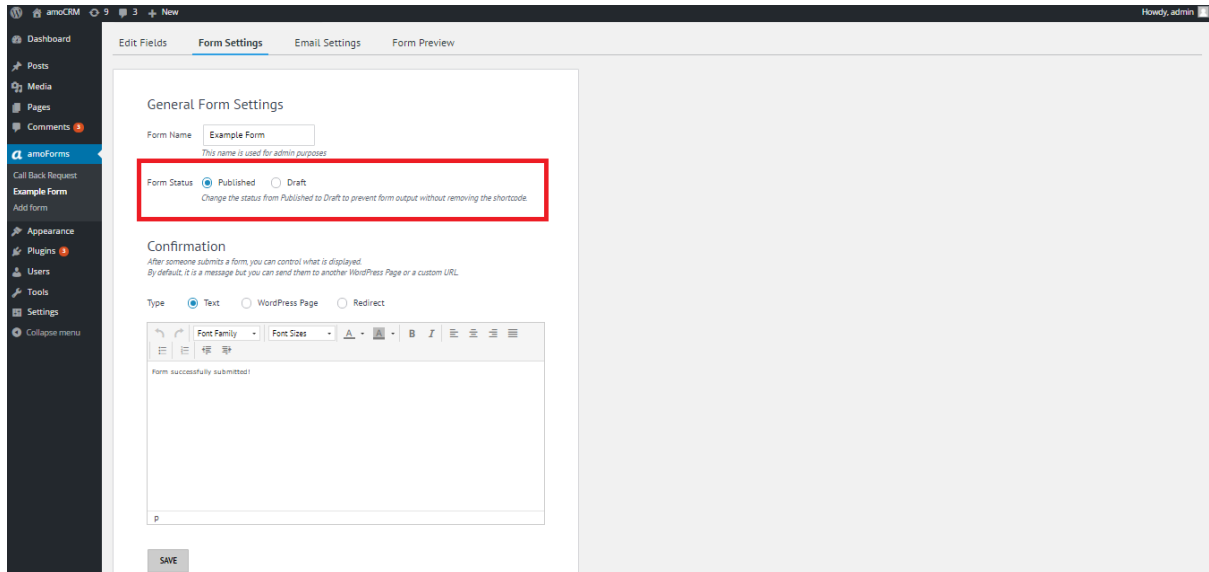You can adjust settings of Form Name, Form Status and Confirmation in this tab.

Form Name

This option allows you to change the name of your form. This name will appear in your list of forms.

Form Status

Here you can adjust the visibility of your form. The form with Published status will be visible to all the site visitors, whereas form with Draft status will be invisible.

Confirmation

This function allows you to change the message user will see once they completed the form and pressed Submit. You can use a text message, or a link redirecting user to another URL.
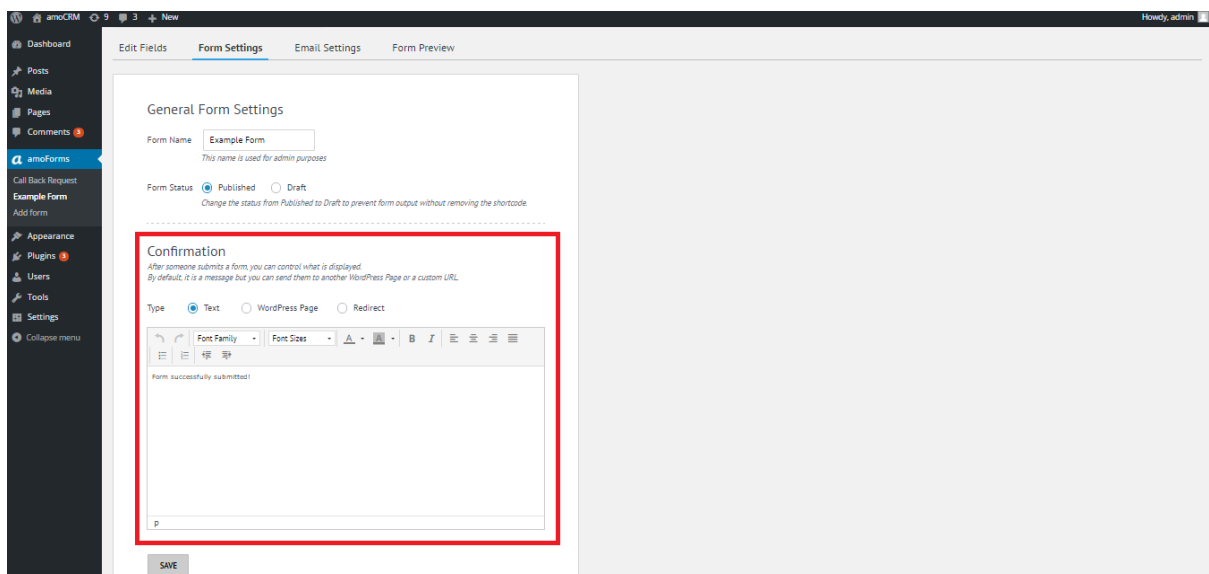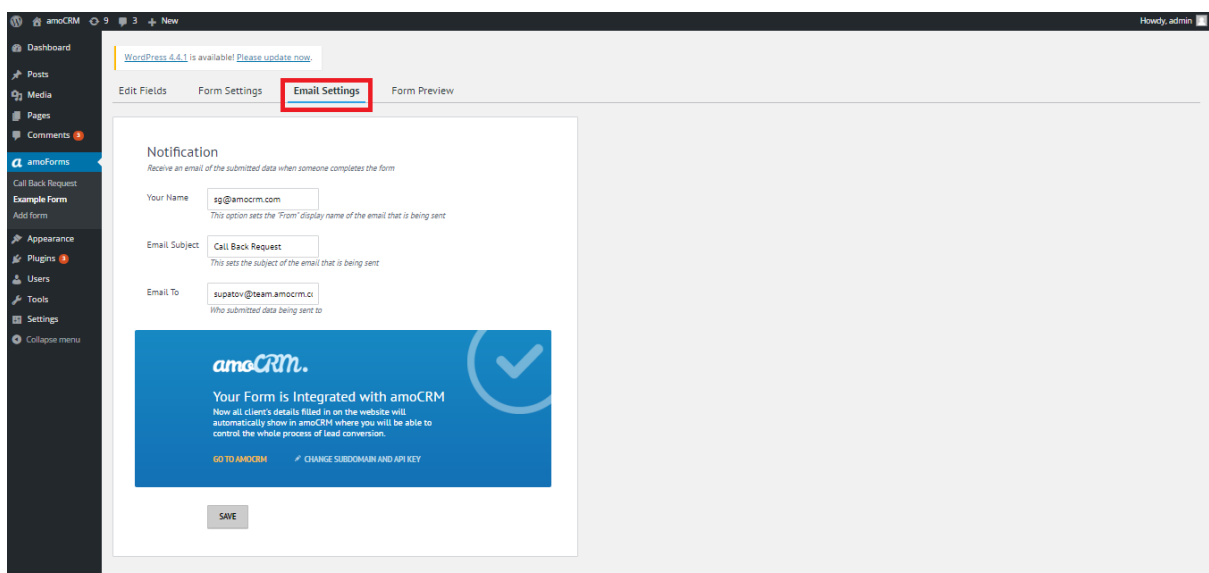
Email Settings

In this tab you can edit email receipt notification settings such as Your Name, Email Subject or Email To.
Once user filled in the form on your website, you'll receive a confirmation receipt containing their details on your email.

Your Name - will show how you will be addressed in messages.

Email Subject - this will set a subject for the notification email.

Email To - email address for notification receipts.

Message "Your Form is Integrated with amoCRM" means that the integration with amoForms is successful. Now you are not going to lose a single request from your clients who visited your website as they will go directly to your specified email address and stored securely in your amoCRM. Every completed form automatically becomes a lead in your amoCRM which will make your Sales Rep's job much easier and improve the quality of their work.
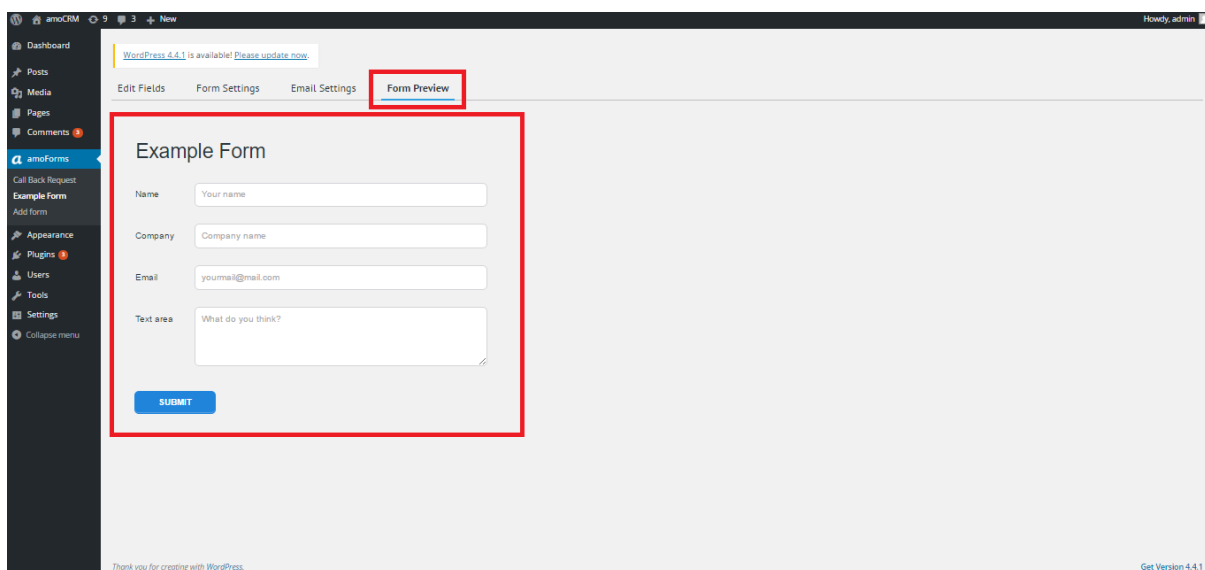
You can change the integration settings at any time. You can integrate your amoFORMS to any other amoCRM account. Just press CHANGE SUBDOMAIN AND API KEY and input new account details.
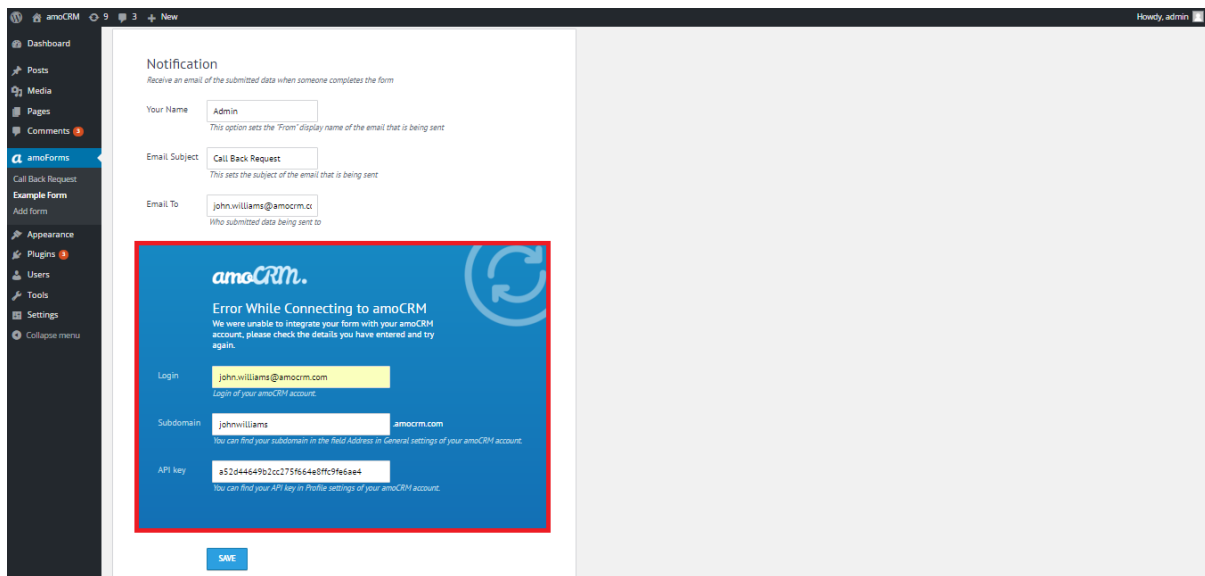
Press Save to keep the changes made to your form.

Form Preview

Open this tab to see what your form will look like after editing. You can submit your own form to test how it works.

Problems and Solutions

API Key Changes

If you wish to change the password or another information in your profile settings in amoCRM account:

Please note that after saving changes and refreshing web page your API key wil change:

Manage profile

Remove photo

Name: Jonathan Williams

Email: john.williams@amocrm.com

Mobile phone:

Work phone:

Language: English

Note:

Change password

New password: ••••••

Again: ••••••

✓ Notify me when I have new To-dos

Your API Key is 2efd5f550d0876189873ec02eeb18708

SAVE   CANCEL

Manage profile

Remove photo

Name: Jonathan Williams

Email: john.williams@amocrm.com

Mobile phone:

Work phone:

Language: English

Note:

Change password

New password:

Again:

Your API key
after changes

✔ Notify me when I have new To-dos

Your API Key is 67625551709c14bf04b0055b5bdaaf57

SAVE

If your API key has been changed it is nessessary to input valid API key in amoFORMS Email Settings:

Enter your new API key into the relevant field and press "Save" button.

If you have input correct login details after pressing "Save" button you will see this message:
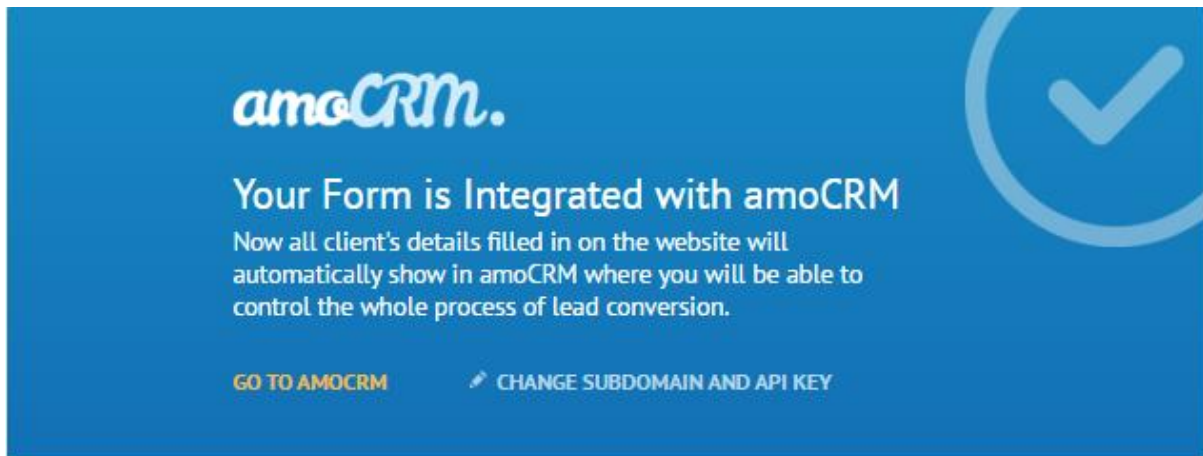
Now you can continue to work with amoForms.

Email Notifications

There is a special feature in amoForms that allows you to recieve email notifications if plugin had problems connecting to your account. There are two types of email notifications related to connection errors:

1) amoForms Account Authorization Blocked

You will recieve this message when amoForms lose connection to your account. It may be caused by your changes in the profile settings in amoCRM account. For example if you changed your password and so API key was changed. So you need to set valid API key in amoForms Email Settings.

2) Wordpress Form Blocked

You will recieve this message when amoForms has made 12 attempts to connect to your account. To unblock your form you should repair connection to your amoCRM account. You must enter valid login details in the Email Settings of amoForms to do so.
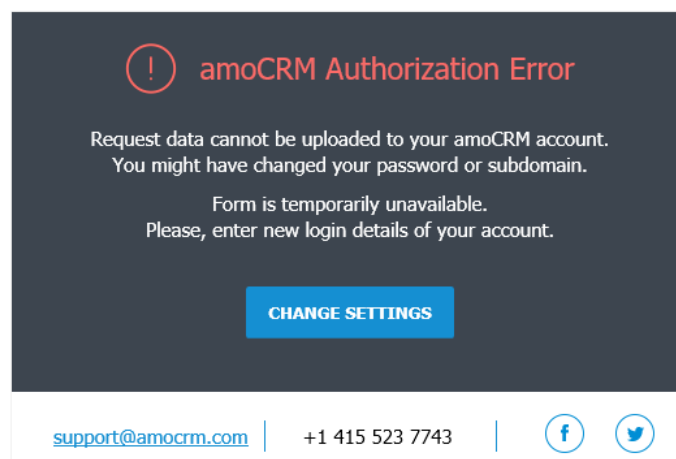
Every message contains direct link to the Email Settings of amoForms plugin, where you can input valid login details of your account.

After recovery of the connection to your amoCRM account you can continue to work with amoForms plugin.