

15-Second Leads – Creatio Marketplace Application Documentation

Integrating company landing pages directly to Creatio Leads can significantly improve customer response processes

Use cases

Reduce the cycle time of responding to a prospect inquiry received from a company website.

- Company leads distribution times are most often not real-time – hours to days
- Prospects submitting a ‘Contact-us’ form on your website are thinking about your company now
- Reaching out to them in seconds significantly increases the chance of generating new business
- While failing to connect in a critical timeframe loses their interest and substantially reduces the chances of any success

Key Features

The application includes a Landing Page definition that can be used with a typical company’s website *Contact Us* landing page form.

The application includes a prebuilt sample Email Template, that can be edited for a company’s branding and content, such as actual fields on the *Contact Us* form.

New System Settings for Notification setup that enable maintenance of the default Sales team’s names.

The application includes a predefined business process that reads the lead information from the Landing Page, creates, and saves the information in the Lead entity, formats the data in the prebuilt email template, retrieves the notification information from the System Settings and sends the email.

The default Notified user can be configured using a system setting, selecting the desired Contact record. Alternatively, you can redefine the “Get Primary Contact” business process to include your custom business logic to select the correct contact to notify, based on the lead properties.

SMS Notifications

Using a Text Request subscription (not included) users can receive SMS Notifications. The application contains a Template for the SMS notification, that can also be modified, including additional Lead fields, or changing the notification text.

Notes

The application contains a business process that is triggered automatically upon a Lead creation event. It contains a Send Email step configured with the *15 Second Leads Notification Template* (also included in the application).

Installation Guide

- 1- Install the application package
- 2- Setup the Landing Page code in your company page “Contact Us” Form.
 - a. [How to Setup a Landing Page](#)
- 3- Fill the System Settings with the Salesperson information

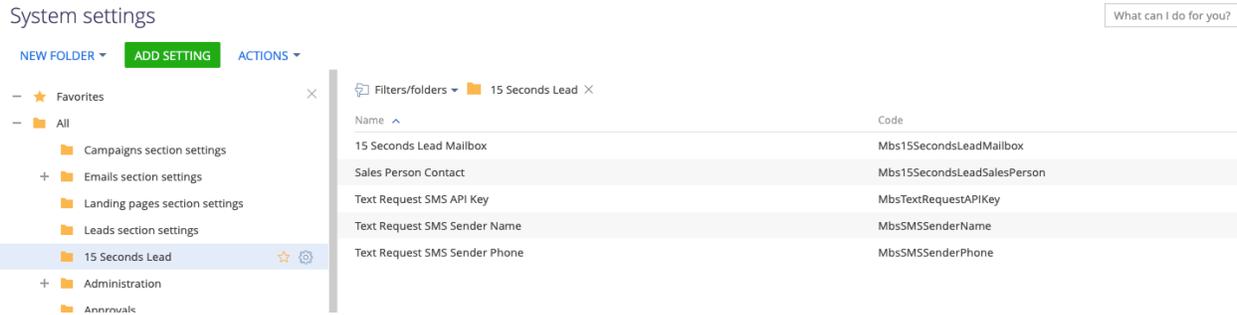


Figure 1 - Custom System Settings added with the 15 Second Leads application

Details:

- 15 Seconds Lead Mailbox: A mailbox must be configured to send email notifications. Select the desired mailbox that will be used to send email notifications.
 - Salesperson Contact: Select the contact that will receive notifications.
 - Optional: Text Request SMS API Key: Required for SMS Notifications. TextRequest key value related to the paid subscription.
 - Optional: Text Request SMS Sender Name: Required for SMS Notifications. Name of SMS Notification Sender.
 - Optional: Text Request SMS Sender Phone: Required for SMS Notifications. Phone Number of SMS Notification Sender.
- 4- Modify the existent email template with your notification format.
 - 5- Optional: Modify the existent SMS template with your SMS Notification format.
 - 6- Optional: Extend the included business process ‘Get Primary Contact’ to include your custom business logic to select the contact that will be notified based on the Lead Properties.

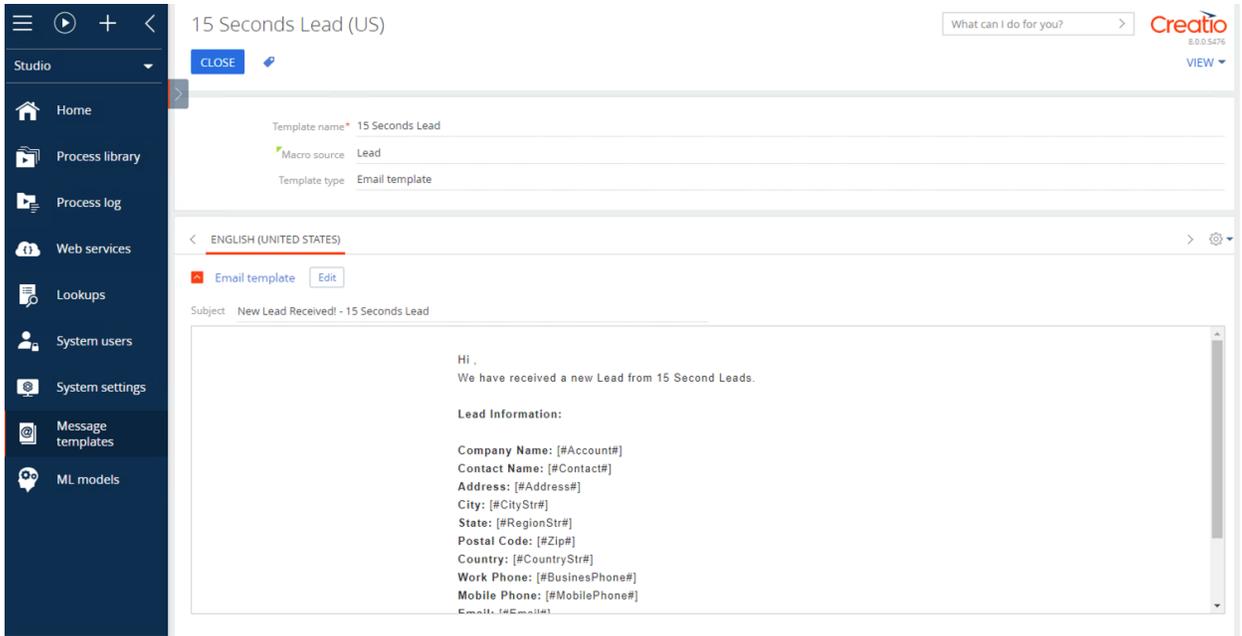


Figure 2 - Email Message Template included with 15 Second Leads application

Implementation Details

The application implementation consists of a business process called '15 Seconds Lead Notification Process' that is being initiated whenever a Lead entity is created in the CRM.

After setting the Lead ID parameter of the process with the newly created Lead entity Identifier, It calls the 'Get Primary Contact' business process to get the contact that will be used to notify, it updates the Lead record, setting the Owner to the selected Contact in the 15 Seconds Lead settings.

In the Send Email step of the process, the email template included in the application is used, and the newly created Lead Identifier is passed as parameter to the template and will be used to fill all the information related to the lead.

There are two other types of notification. SMS and Push Notification. SMS notifications will be sent if the related system settings were filled with TextRequest SMS Service subscription. Additionally, if the selected contact has downloaded the 15 Second Leads mobile application, a push notification will be sent to the application with the Lead Information.

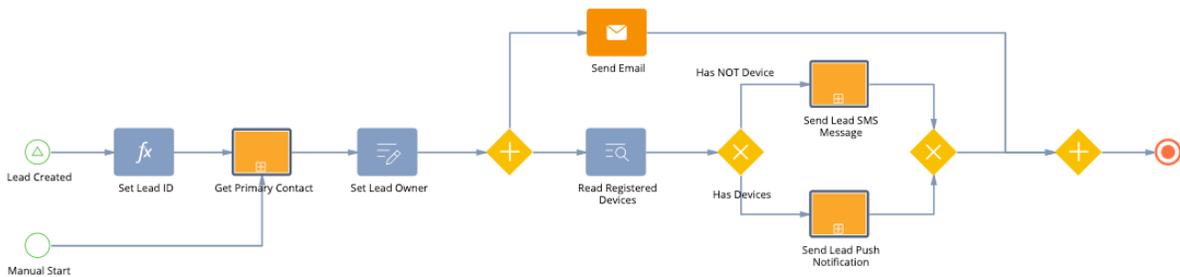


Figure 3 - 15 Second Leads Notification Process