# Gravity Forms – SuiteCRM Integration

## Installation

### WordPress Dashboard

- Go to 'Admin' -> 'Plugins' -> 'Add New'.

- Click on 'Upload Plugin'.

- Upload plugin zip.

- Activate plugin.

### WordPress Multisite Network Dashboard

- Go to 'Network Admin' -> 'Plugins' -> 'Add New'.

- Click on 'Upload Plugin'.

- Upload plugin zip.

- Only install plugin zip in 'Network Admin' and do not activate it.

- Activate plugin site wise ('Site' -> 'Admin' -> 'Plugins').

### Configuration

- Go to 'Admin' -> 'GF – SuiteCRM' -> 'Configuration'.

- URL: Add your SuiteCRM instance URL. Like https://example.com/

- Username: Add your SuiteCRM admin account username.

- Password: Add your SuiteCRM admin account password.

- Click on 'Save Changes' button.

### Integration

- Go to 'Admin' -> 'GF – SuiteCRM' -> 'Integration'.

- You can see list of Gravity Forms forms.

**obtaincode**  ☰

- Click on 'Filter' button to filter module fields.

- Check 'SuiteCRM Integration?' checkbox if you want to integrate SuiteCRM.

- Select 'Create Module Record' or 'Create/Update Module Record' action event.

  - Create Module Record: On form submitted, it will add record.

  - Create/Update Module Record: If form submitted email address match with existing record, it will update record. If form submitted email address not match with existing record, it will add record.

- Map Gravity Forms form fields to SuiteCRM module fields.
  Below module wise fields are required in the SuiteCRM and it must be mapped with Gravity Forms form fields.

  - Case: Subject

  - Contact: Last Name

  - Lead: Last Name

  For 'Relationship' type field (Assigned To), create hidden field in the form and map it with 'Relationship' type field.

  - For Lead Owner, create hidden field in the form with value Lead Owner ID.

  - For Contact Owner, create hidden field in the form with value Contact Owner ID.

- Click on 'Save Changes' button.

**API Error Logs**

- Go to 'Admin' -> 'GF – SuiteCRM' -> 'API Error Logs'.

- You can see SuiteCRM API error logs.

**Settings**

- Go to 'Admin' -> 'GF – SuiteCRM' -> 'Settings'.

- API Error Notification: Add 'Subject' and 'Send To'. Will be sent SuiteCRM API error to the specified email.

**obtaincode**

## Can't find what you're looking for?

We also provide custom developed plugins, add-ons, extensions and themes. Collaborate with us today to get the best-fit solution for your business and we will ensure that our team is available at your service to answer all your queries.

CONTACT US

BLOG    CONTACT US    PRIVACY POLICY    TERMS & CONDITIONS

Copyright 2020 © Obtain Code