



Creating CRM Forms

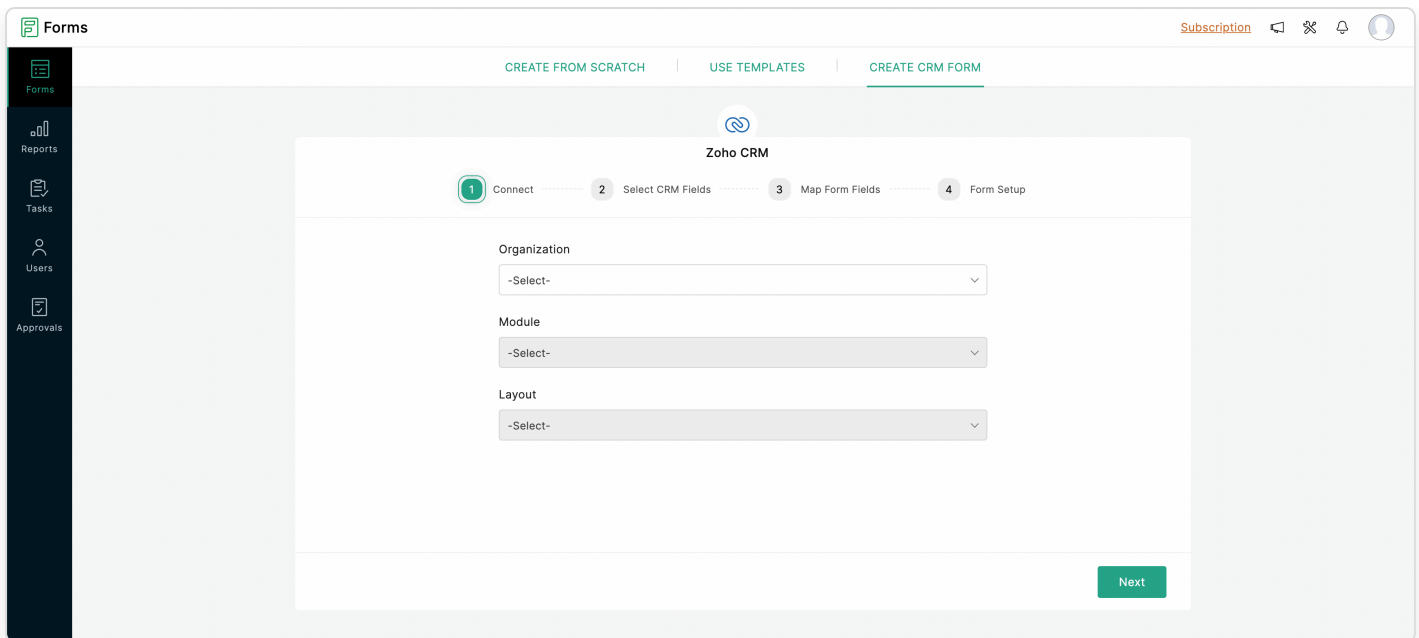
CRM forms typically refer to forms that are designed to work seamlessly with Zoho CRM. These forms are built to capture data and integrate it directly into Zoho CRM.

Normally, when you build a form, you can integrate it with various services like email marketing platforms, project management tools, and more through the **Integrations** tab in your form builder. However, if the main purpose of your form is to automatically feed data into your CRM system, you can take a more direct approach of creating a form that exactly fits the your needs of integration with the required fields for mapping. In simpler words, instead of creating a form and then setting up a separate integration with your Zoho CRM, you are creating a form with Zoho CRM in mind right from the start.



To build a form that is integrated with Zoho CRM,

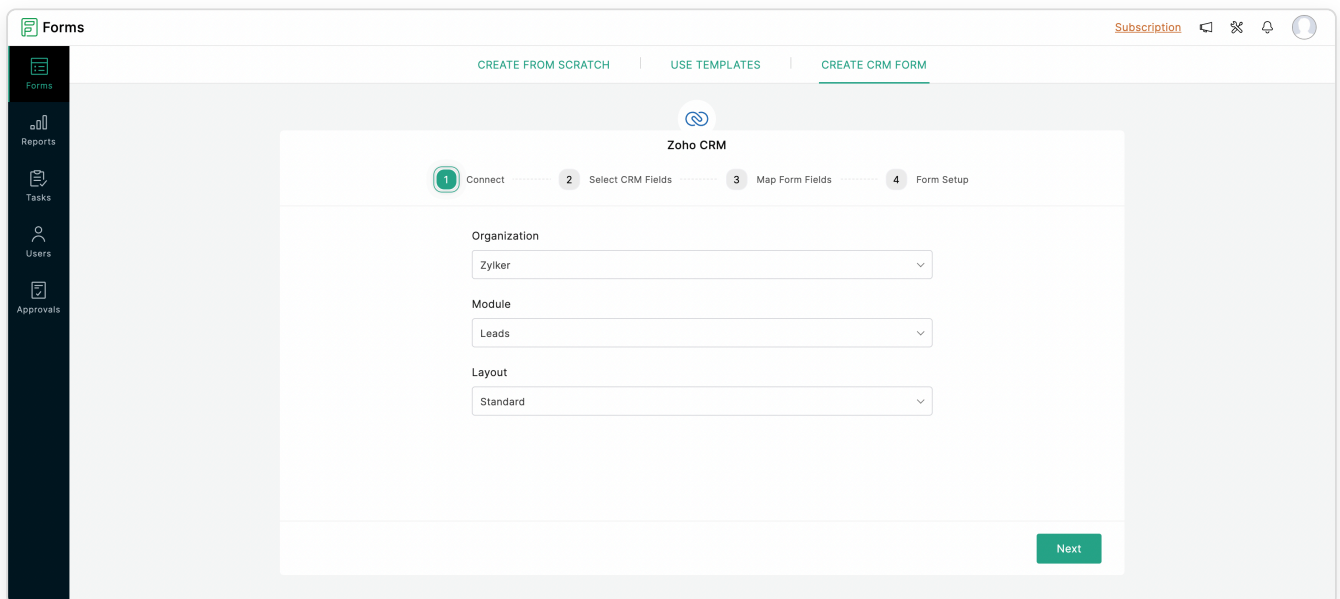
1. In your Zoho Forms account, under the Forms tab, click the **CREATE CRM FORM** tab.



2. You will find 4 sections to build an integration form:

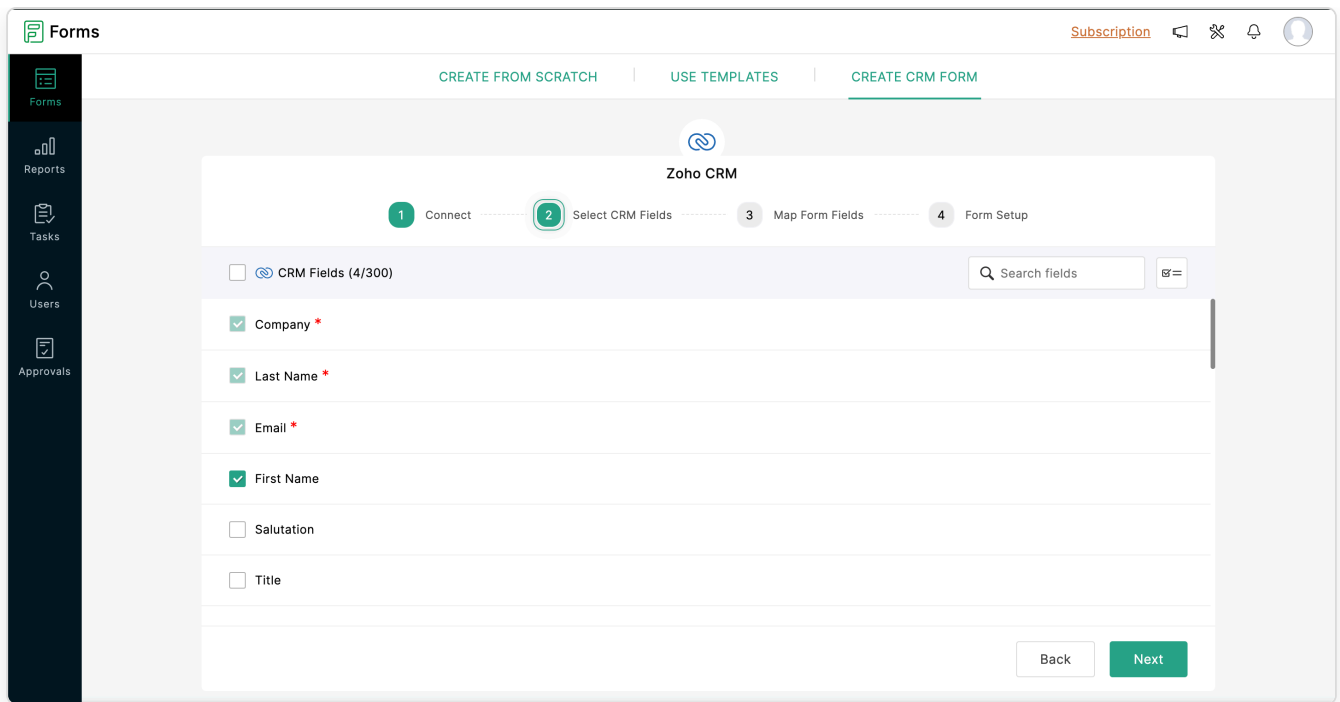
- **Connect**

Here, choose the Zoho CRM **organization** that you want to integrate your form with. Select the Zoho CRM **Module** and **Layout** where you want to push the form data on form submission. Click **Next**.



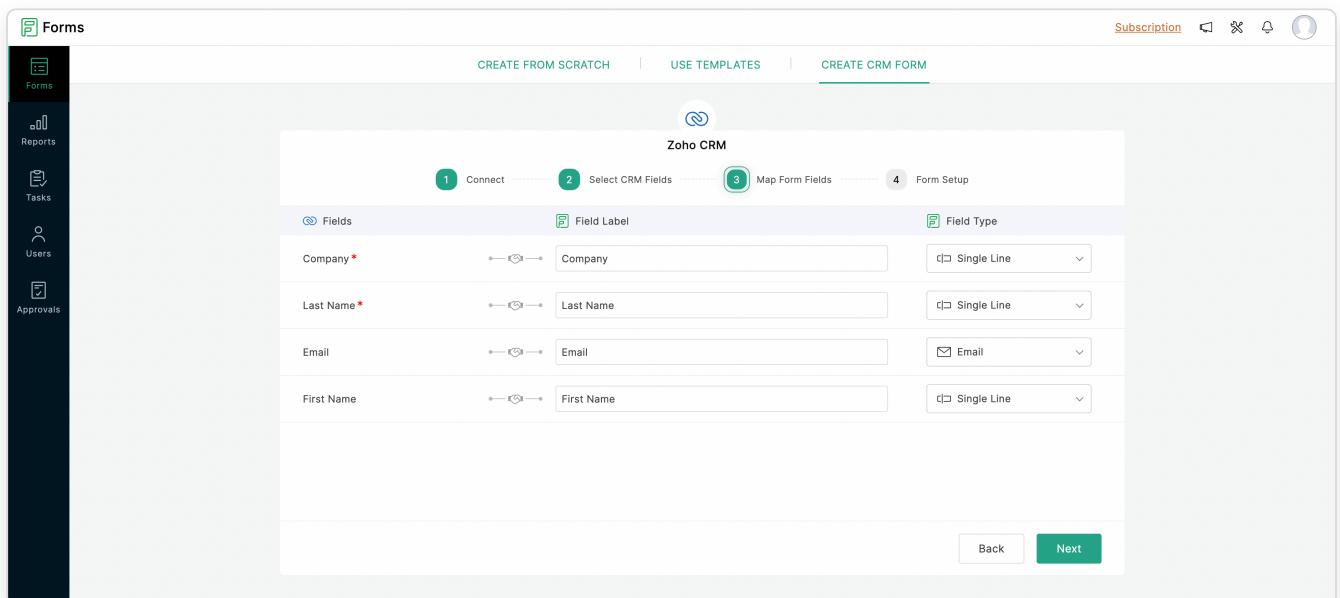
- **Select CRM Fields**

Here, all the Zoho CRM fields within the selected module will be listed. Select the CRM fields that you want to populate with data from your form.



• Map Form Fields

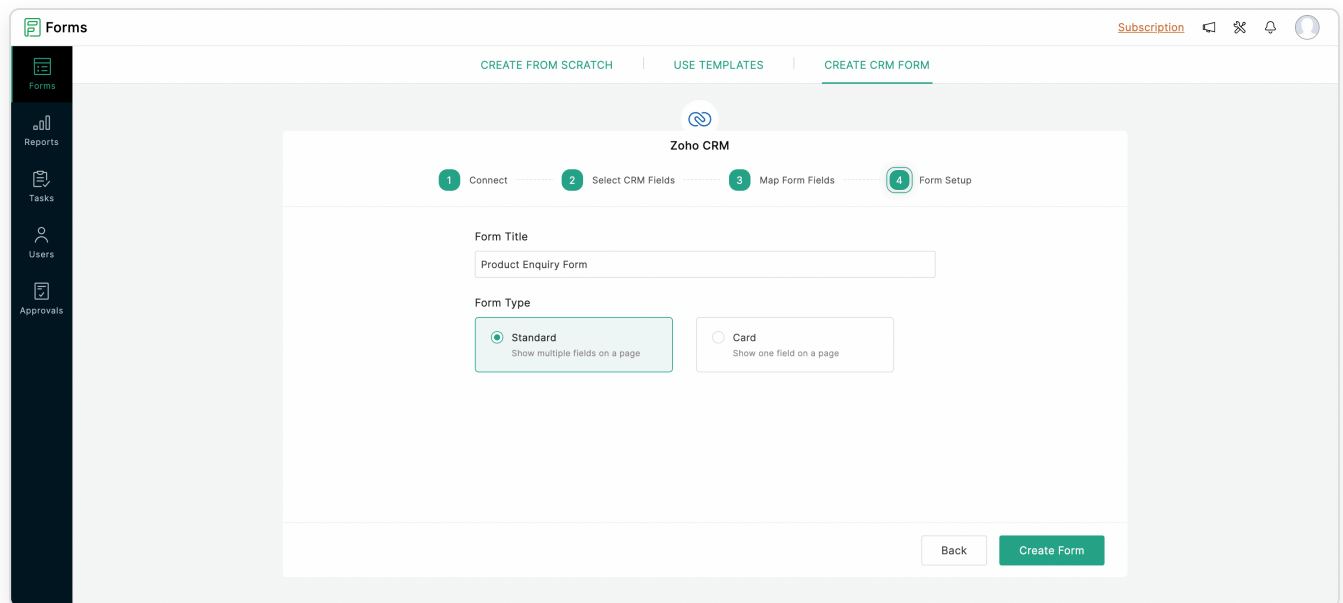
Here, map the selected Zoho CRM fields with the corresponding fields that you want to have in your form. Additionally, you can edit the names of the form fields and choose the appropriate field type from the supported fields that correspond to the Zoho CRM field types. Click **Next**.



- If you have set range values in Zoho CRM for the mapped Zoho CRM fields, these values will automatically be applied to the corresponding form field's properties in Zoho Forms.
- The choice values of Picklist/Multi-Select fields in Zoho CRM will be populated into the form field's choices of your form. If a default value is set for a Picklist/Multi-Select field in Zoho CRM, it will be set as the initial value for the corresponding form field in your form.
- If a field is marked as required in Zoho CRM, the corresponding form field will be created as a mandatory field in Zoho Forms.


• Form Setup

Here, give your form a title and choose the form type to be either standard or card.



3. Click **Create Form**.

4. Once the form is created, you will land on the integrations tab of your form builder.

 The option to create CRM forms is available only in our paid plans.

Supported Modules

You can integrate your forms with the following Zoho CRM modules:

Standard Modules:

Leads, Contacts, Accounts, Deals, Campaigns, Cases, Solutions, Products, Price Books, Vendors, Meetings, Tasks, and Calls.

Custom Modules:

Zoho Forms can be integrated with all custom modules in Zoho CRM.

Supported Field Types

The following table lists the Zoho Forms fields that can be mapped with the respective fields in Zoho CRM while creating CRM forms.

Zoho CRM field

Supported Zoho Forms fields

Single Line	Single Line Email Website Number Currency Decimal Slider Rating Phone
Multi Line	Multi Line Single Line Website Number Currency Decimal Slider Rating Phone
Email	Email Single Line
Picklist	Dropdown Radio
Phone	Phone Single Line
Date	Date
Multi Select	Checkbox Multiple Choice Dropdown Radio
Number	Number Slider Rating
Date Time	Date Time
Currency	Currency Number Slider Rating

Decimal	Decimal Number Slider Rating
Percent	Decimal Number Slider Rating
Long Integer	Number Slider Rating
CheckBox	Decision Box
URL	Website Single Line
Image Upload	Image Upload Signature
File Upload	File Upload Image Upload Signature
Record Photo	Image Upload