

# Agile CRM Drupal Module

## Agile CRM Drupal Module Features

1. Simple to integrate web rule & web stats, no need of coding knowledge.
2. Show real-time web popups to get more info about your website visitors and also increase the number of subscriptions or sign ups
3. Easily integrate customized web forms to your website or app to create or update contacts and log subsequent web activity.
4. Easily integrate attractive landing pages with your website using this plugin.
5. Schedule bulk Email Campaigns for newsletters or other marketing activity, with simple drag-and-drop features

## Steps to Install Agile CRM Drupal Module

### Step1:Download the Module

Download the Agile CRM Drupal Module

Direct URL for zip file

[Login to your Drupal admin panel](#) and go to

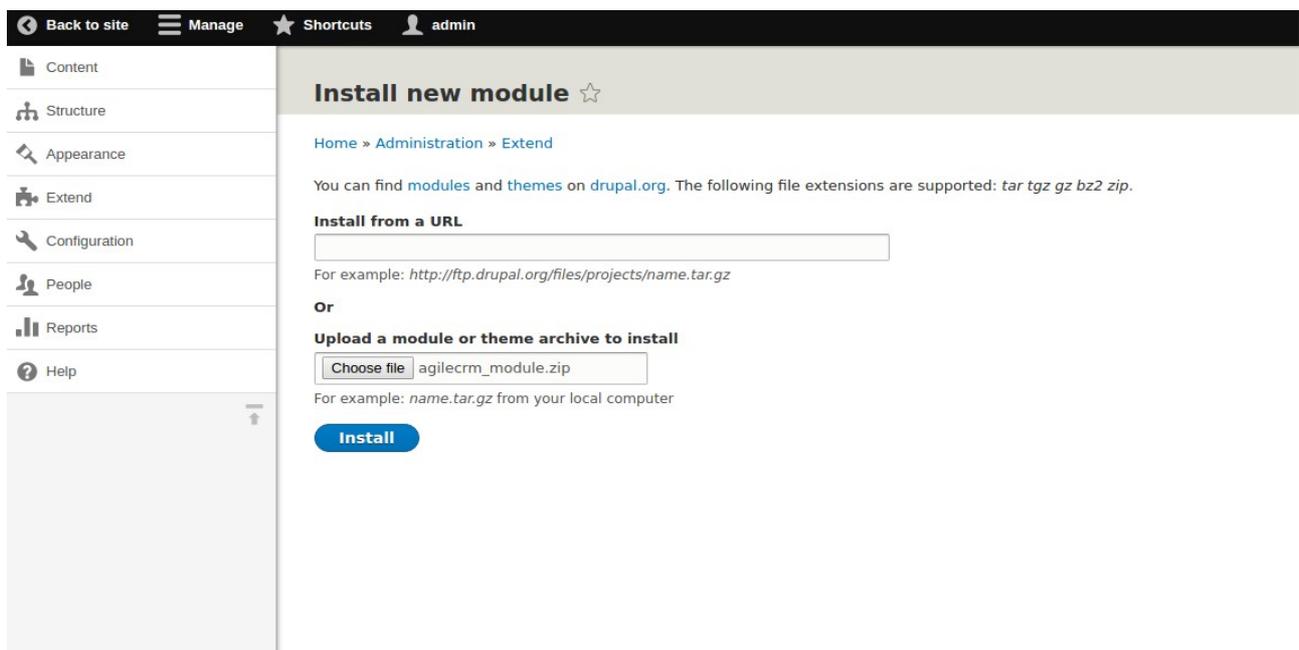
“Extend”->“List”

Click on the Button

**+ Install new module**

You will be redirected to Install new Module Page and upload the Agile CRM Drupal module Zip file

And Click the Install Folder



The screenshot shows the Drupal administration interface. At the top, there is a navigation bar with 'Back to site', 'Manage', 'Shortcuts', and 'admin'. On the left, a sidebar menu lists various administrative sections: Content, Structure, Appearance, Extend, Configuration, People, Reports, and Help. The main content area is titled 'Install new module' and includes a breadcrumb trail: 'Home » Administration » Extend'. Below the title, there is a text box for 'Install from a URL' with a placeholder example: 'http://ftp.drupal.org/files/projects/name.tar.gz'. An 'Or' section follows, with a 'Choose file' button and a text box containing 'agilecrm\_module.zip'. An 'Install' button is located at the bottom of the form.

## Drupal Site Name

Installing AgileCRM\_Module



## Drupal Site Name

### Update manager

✓ Installation was completed successfully.

### AgileCRM\_Module

- Installed *AgileCRM\_Module* successfully

### Next steps

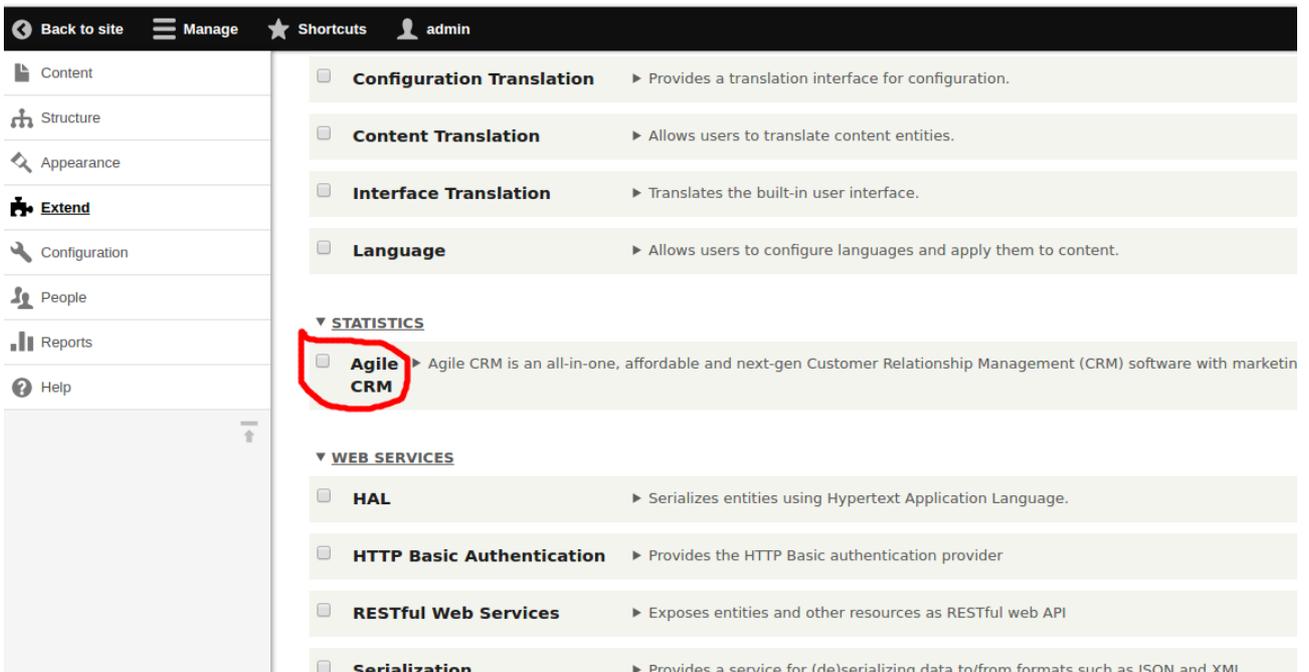
- [Install another module](#)
- [Enable newly added modules](#)
- [Administration pages](#)

After Successfull Installing the Agile CRM Module Click on the [Enable newly added modules](#)  
You will be redirected to the Extend ->List

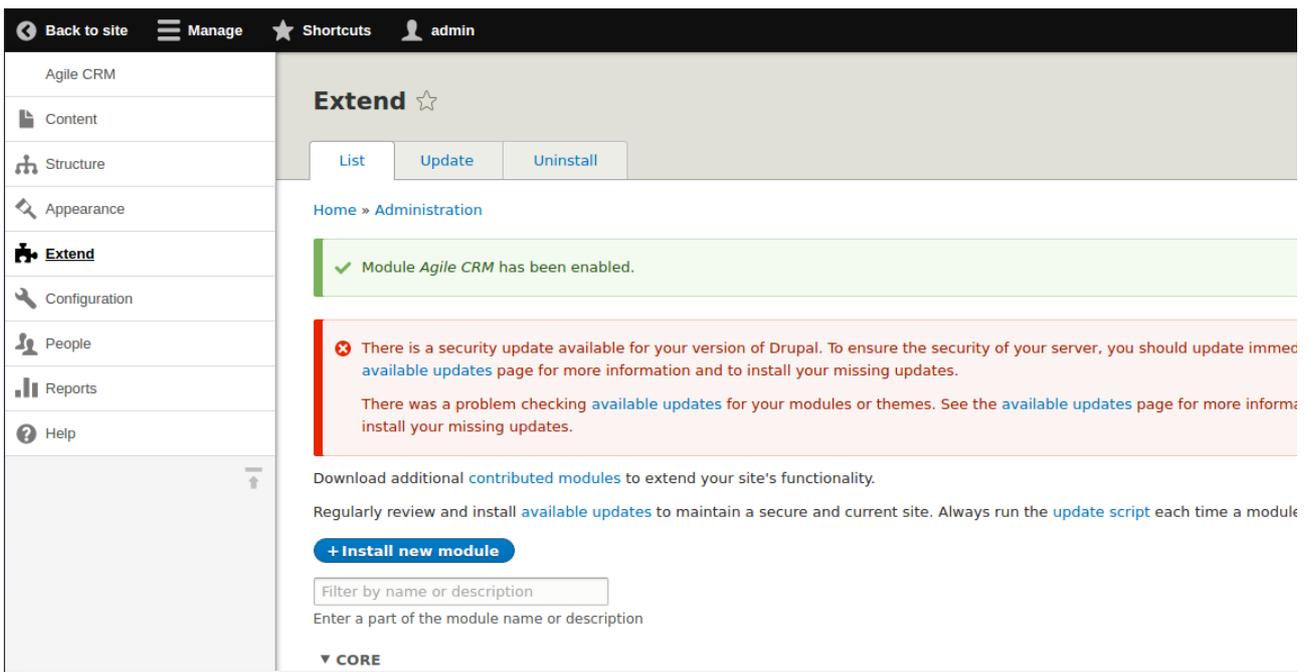
You have to Enable the Module

Check the Agile CRM in the List and Click the install Button

**Install**



After the enabled of the Agile CRM Module



You can see the Agile CRM Menu in Main menu

## Step2:Setting up Agile CRM account

After Clicking It will redirect to Setting Page

Creat an Agile CRM account if you don't have an account. OR Fill the Agile CRM Settings

Home Manage Shortcuts admin

Agile CRM

- Home
- Web Rules
- Form Builder
- Landing Pages
- Email Campaigns
- Web Stats
- Refer a Friend

Settings

- Content
- Structure
- Appearance
- Extend
- Configuration

Agile CRM

AGILE CRM SETTINGS

Domain Name: \*

User ID (Email Address): \*

Password: \*

Submit

Benefits of Agile CRM Plugin

- Simple to integrate web rule & web stats, no need of coding knowledge.
- Show real-time web popups to get more info about your website visitors and also increase the number of subscriptions or sign ups.
- Easily integrate customized web forms to your website or app to create or update contacts and log subsequent web activity.
- Easily integrate attractive landing pages with your website using this plugin.

After Successfully Configuration it will be Saved and Webrules and Webstats are Automatically Enabled

Back to site Manage Shortcuts admin

Agile CRM

- Home
- Web Rules
- Form Builder
- Landing Pages
- Email Campaigns
- Web Stats
- Refer a Friend

Settings

- Content
- Structure
- Appearance
- Extend
- Configuration

Settings ☆

Home » Administration » Agile CRM

✓ successfully saved

Agile CRM

AGILE CRM SETTINGS

Enter Domain Name: \*

User ID (Email Address): \*

Password: \*

Submit

Benefits of Agile CRM Plugin

Home page

**Agile CRM**

- Home
- Web Rules
- Form Builder
- Landing Pages
- Email Campaigns
- Web Stats
- Refer a Friend
- Settings

- Content
- Structure
- Appearance
- Extend
- Configuration
- People



**WEB RULES**

Web Rules automate actions in response to user activity on your website.



**FORM BUILDER**

Agile helps you create your custom Web Rules at ease and place it on your website.



**LANDING PAGE**

The Landing Page Builder create high converting landing pages.



**EMAIL CAMPAIGNS**

Send newsletters and track performance with Agile CRM's email marketing tools.



**WEB STATS**

Agile gives you deep insight into customer behavior and website performance.



**REFER A FRIEND**

Our in-app referral program of Agile CRM's users is quite effective.

## Web Rules

**Agile CRM**

- Home
- Web Rules**
- Form Builder
- Landing Pages
- Email Campaigns
- Web Stats
- Refer a Friend
- Settings

- Content
- Structure
- Appearance
- Extend
- Configuration
- People



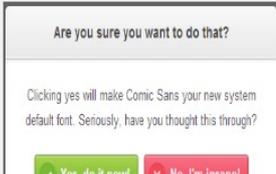
### Templates



Go



Go

### Web Rules

Web Rules allow you to set action items for your website visitors. Based on the action you can place a popup, increase the lead score, and many other things through Web Rules.



For example, when visitors are about to leave your website, show them a sign-up popup. When contacts in Agile visit a specific product page, send them an email asking if they need a demo.

### Setup Tracking Code

To start using Web Rules, please setup our [tracking code](#).



## Landing Page

The screenshot shows the Agile CRM interface. On the left is a navigation menu with options like Home, Web Rules, Form Builder, Landing Pages, Email Campaigns, Web Stats, Refer a Friend, Settings, Content, Structure, Appearance, Extend, Configuration, People, and Reports. The main content area is titled 'Landing Pages' and includes a breadcrumb trail: Home » Administration » Agile CRM. Below the breadcrumb is the Agile CRM logo and a 'Template' section showing a preview of a landing page with the text 'eHTML Builder to drag and drop your way to a beautiful and functional site!' and a 'Go' button. To the right, there is a 'Landing Page' section with a description: 'Landing pages are your lead magnet - a page created to gather leads online. Create a landing page in Agile CRM and link it to your website, email messages or online.' Below this is a smaller preview of a landing page and a 'How to use Landing Pages?' section with the text: 'Landing page is your lead magnet - a page created to gather leads online. Create a landing page in Agile CRM and link it to your website, email messages or online.'

## Step3: Setting up Form Builder and Landing Pages

After that Go to Menu and click

Manage -->Content authoring -->Text formats and editors

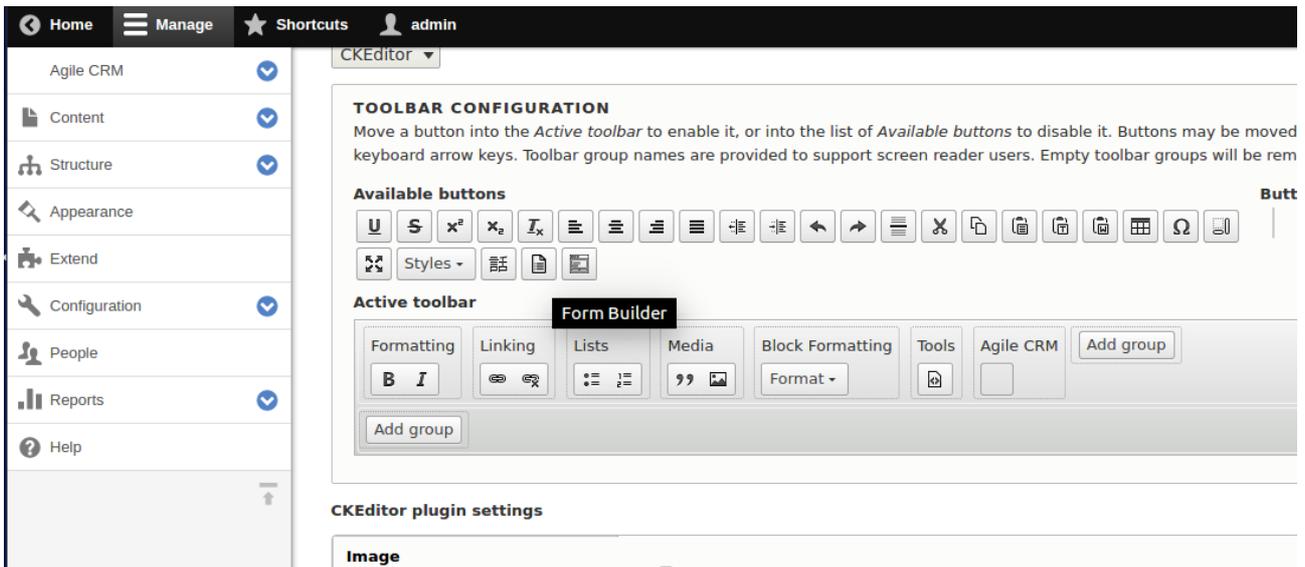
The screenshot shows the Drupal administration page for 'Text formats and editors'. The breadcrumb trail is Home » Administration » Configuration » Content authoring. A red warning box at the top states: 'There is a security update available for your version of Drupal. To ensure the security of your server, you should update immediately! See the available updates page for more information and to install your missing updates.' Below the warning, there is explanatory text: 'Text formats define how text is filtered for output and how HTML tags and other text is displayed, replaced, or removed. Improper text format configuration is a security risk. Learn more on the Filter module help page. Text formats are presented on content editing pages in the order defined on this page. The first format available to a user will be selected by default.' A '+ Add text format' button is visible. Below is a table with columns: NAME, TEXT EDITOR, ROLES, and OPERATIONS. The table lists four text formats: Basic HTML, Restricted HTML, Full HTML, and Plain text. Each row has a 'Configure' button. At the bottom, there is a 'Save changes' button.

NAME	TEXT EDITOR	ROLES	OPERATIONS
Basic HTML	CKEditor	Authenticated user,Administrator	Configure
Restricted HTML	—	Anonymous user,Administrator	Configure
Full HTML	CKEditor	Administrator	Configure
Plain text	—	<i>This format is shown when no other formats are available</i>	Configure

Click on the Configure

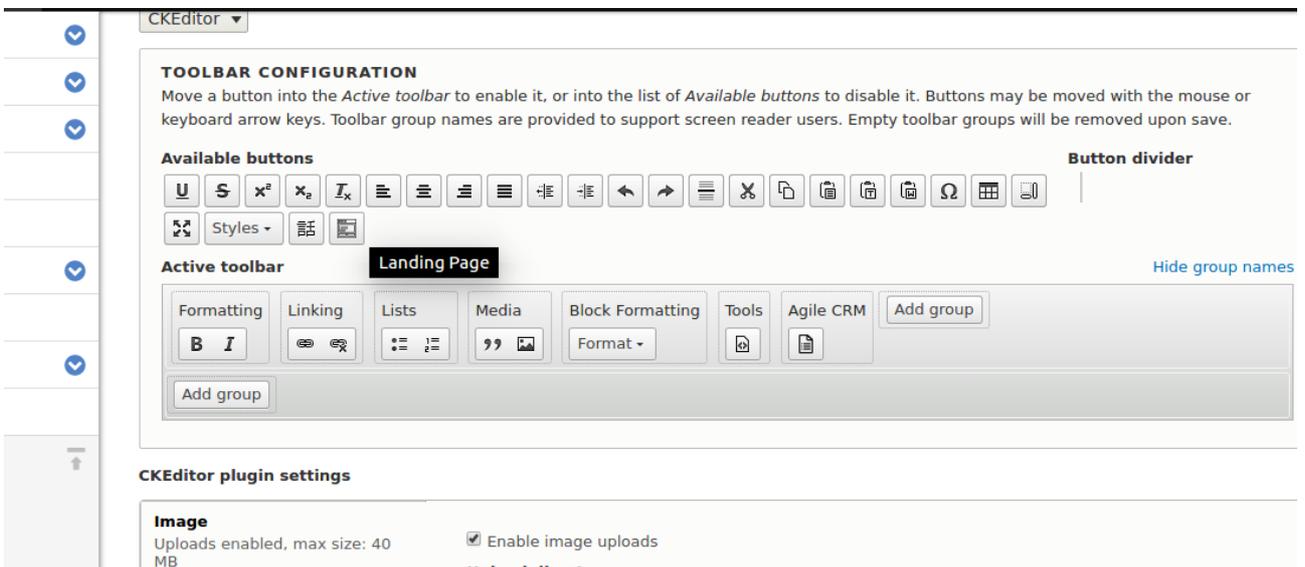
Agile CRM Form Builder

Under the Tool bar Configuration there are Available Buttons you can See the Form Builder Icon drag the Form Builder Icon and in to Active tool bar



## Agile CRM Landing Pages

Under the Tool bar Configuration there are Available Buttons you can See the Landing Page Icon drag the Form Builder Icon and in to Active tool bar



## \*Filter Settings Field :

In the Allowed HTML tags you should mention

<iframe src width height frameborder>

## Filter settings

**Limit allowed HTML tags and correct faulty HTML**  
Enabled

**Allowed HTML tags**

A list of HTML tags that can be used. By default only the *lang* and *dir* attributes are allowed for all HTML tags. Each HTML tag may have attributes which are treated as allowed attribute names for that HTML tag. Each attribute may allow all values, or only allow specific values. Attribute names or values may be written as a prefix and wildcard like *jump-\**. JavaScript event attributes, JavaScript URLs, and CSS are always stripped.

Display basic HTML help in long filter tips

Add rel="nofollow" to all links

[Save configuration](#)

After dragging the both icons and adding Iframe click the [Save Configuration](#)

The screenshot displays the CKEditor configuration interface. At the top, there's a dropdown menu for 'CKEditor'. Below it, the 'TOOLBAR CONFIGURATION' section provides instructions on moving buttons between the 'Available buttons' and the 'Active toolbar'. The 'Available buttons' section shows a row of icons for various editing functions like bold, italic, underline, link, list, media, and block formatting. The 'Active toolbar' section shows a row of buttons for 'Formatting', 'Linking', 'Lists', 'Media', 'Block Formatting', 'Tools', 'Agile CRM', and 'Add group'. Below this, the 'CKEditor plugin settings' section is visible, with the 'Image' plugin settings showing 'Uploads enabled, max size: 40 MB' and a checked box for 'Enable image uploads'.

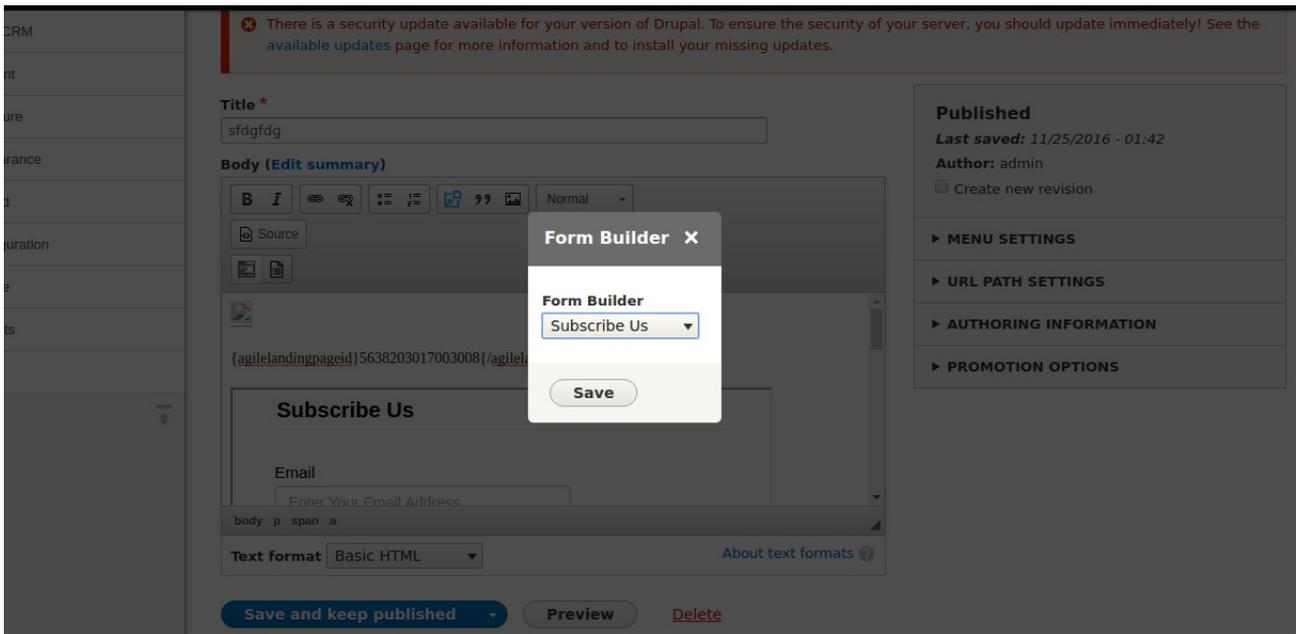
## Adding Form Builder and Landing Page to Dual Pages

Click on the [Content](#) in menu

[+ Add content](#)

In the Body (Edit summary) you can find the Form Builder and Landing Pages Icons in the editor when you click on the icons you can see the POPUP as shown below

## Form Builder



## Agile Landing Page

