

## Gravity Forms CRM Plugin - Setup

Agile CRM integrates with a bunch of web forms including Gravity Forms. Others forms that can be directly integrated with Agile are Wufoo and Unbounce. Agile additionally has a custom form builder which provides for creating your custom web-forms with ease.

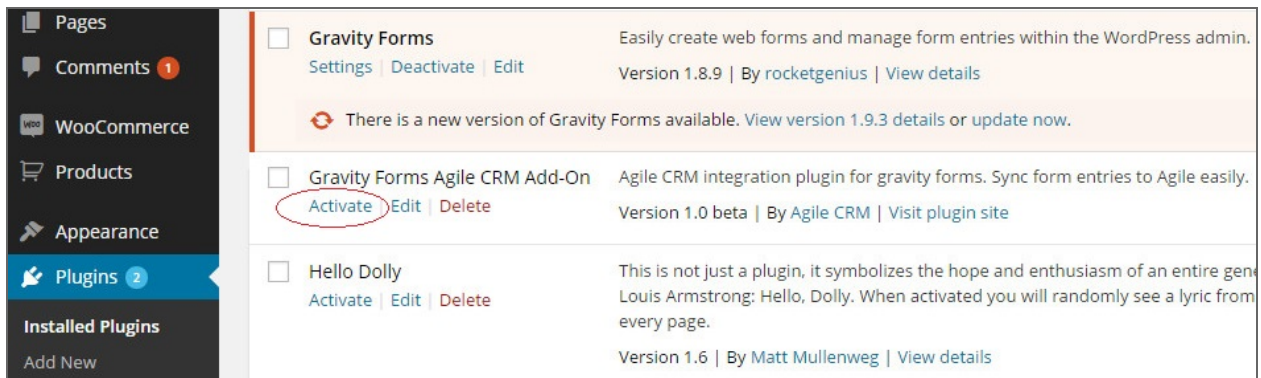
Upon integrating Gravity Forms with Agile, whenever a visitor submits his information in the web form on your site, it gets directed to the CRM without any data leaks and a contact is created with all the data submitted.

### Here's how you set up Agile Gravity Forms integration:

Note: Agile CRM is compatible with Gravity Forms 1.8 or the later versions only.

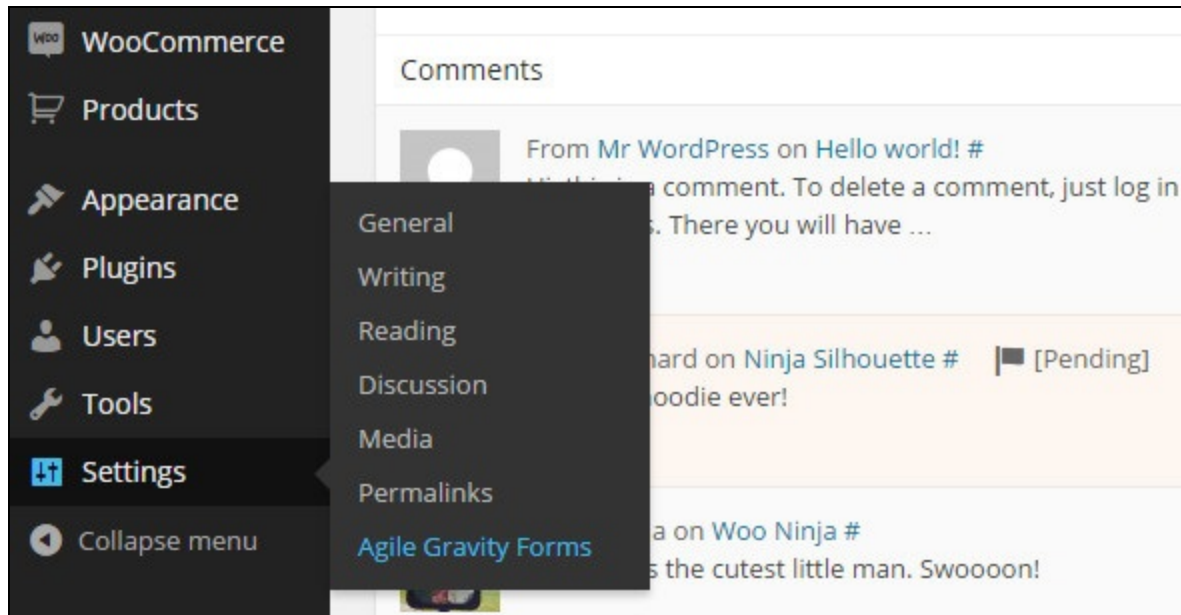
#### 1. Install the Agile CRM Gravity Form Plugin

Firstly, go the Gravity Forms [web-page](#) on the Agile CRM website and download the plugin zip file from the 'Try the Agile Gravity Forms Plugin' button over there. Now, login to your WordPress interface, go to Plugins in the menu bar, on the left side of the dashboard and click on the 'Add New' button. Upload the zip file. Click on the 'Installed Plugins' button over there and activate the Agile CRM Gravity Forms plugin among the list of other plugins.



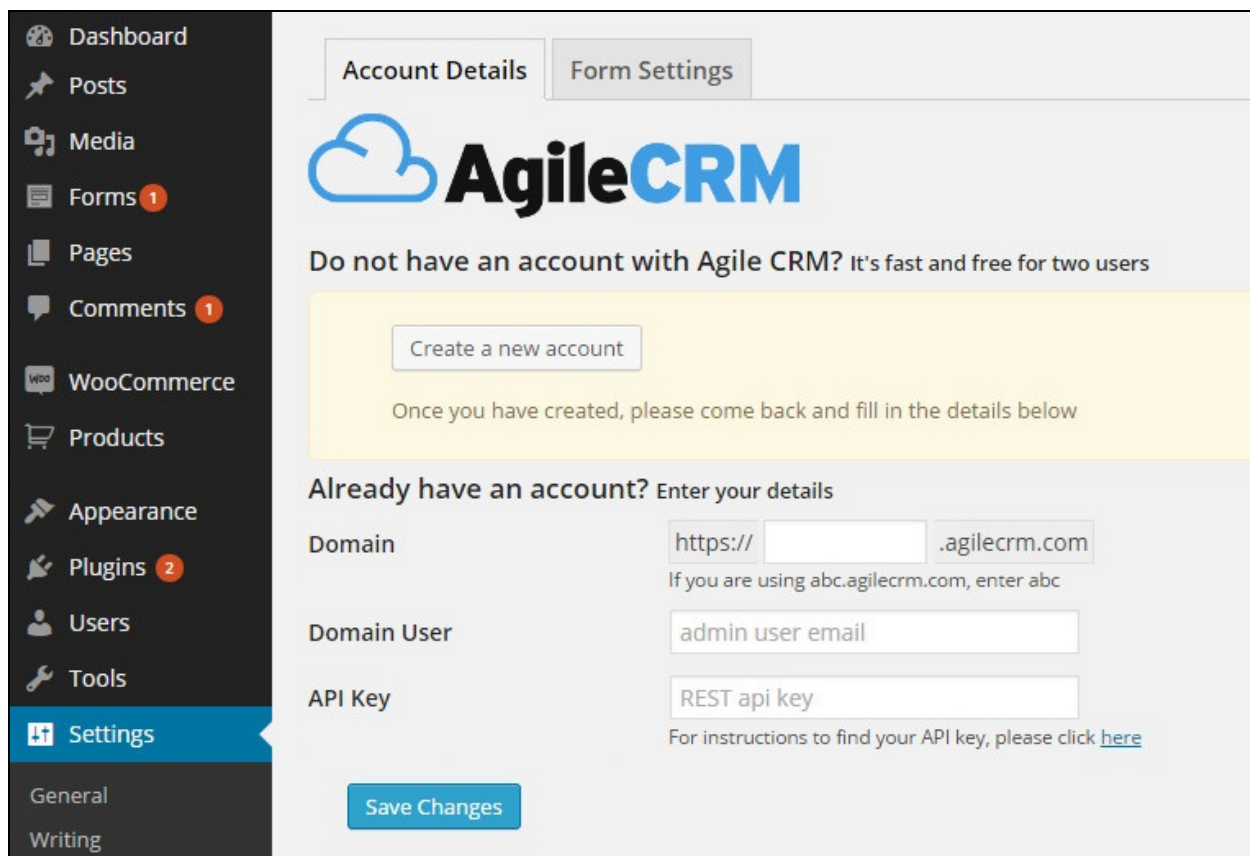
#### 2. Navigate to the Plugin Page

Once the plugin has been successfully installed, move to the settings in the menu bar on the left and navigate to Agile Gravity Forms. You'll now see a new window that requires your Agile CRM account information.



### 3. Enter your Agile domain details

In the new window, enter your Agile domain name (eg: **ikosystem.agilecrm.com**), user email id and REST API key in their respective fields and save the details. (For API key, login to your Agile domain, go to Admin Settings ---> API & Analytics ---> REST API key.) When you're done, move to the next tab - Form Settings in the same window.



#### 4. Map the Agile Property with Gravity Form fields

In the Form Settings tab, choose the Gravity Form that you'd like to integrate with Agile. Now, map the Gravity Form fields to the Agile Property fields over there.

Here's how you do the mapping:

The screenshot shows the 'AgileCRM Plugins' settings page in a WordPress dashboard. The left sidebar contains navigation options: Dashboard, Posts, Media, Forms, Pages, Comments (1), WooCommerce, Products, Appearance, Plugins (2), Users, Tools, Settings (selected), General, Writing, Reading, Discussion, Media, Permalinks, Agile Gravity Forms, and Collapse menu. The main content area is titled 'Gravity Form' and shows 'Agile Test' selected in a dropdown menu. A checkbox 'Integrate this form with Agile' is checked. Below this is the section 'Map Gravity form fields to Agile CRM contact properties'. It features a table with two columns: 'Agile property' and 'Form field'. The rows are: First name \* (Name (First)), Last name \* (Name (Last)), Company (Company), Job description (empty), Tag (Tags), Email \* (Email), Phone (empty), Website (empty), Address (Address (Street Address)), City (Address (City)), State (Address (State / Province)), Zip (Address (ZIP / Postal Code)), and Country (Address (Country)). At the bottom, there is a section 'Add a tag to all contacts created from this form' with a 'Tag' dropdown set to 'GF' and a note: 'Tag name can not have special characters except space and underscore.' A 'Save Changes' button is located at the bottom left.

Agile property	Form field
First name *	Name (First)
Last name *	Name (Last)
Company	Company
Job description	
Tag	Tags
Email *	Email
Phone	
Website	
Address	Address (Street Address)
City	Address (City)
State	Address (State / Province)
Zip	Address (ZIP / Postal Code)
Country	Address (Country)

Add a tag to all contacts created from this form

Tag: GF  
Tag name can not have special characters except space and underscore.

Save Changes

Once you're done mapping all the fields, save the details. That's it! You've successfully integrated your Gravity web forms with Agile.

**Related Links:**

[Gravity Forms Plugin - Agile CRM](#)

[Wufoo Integration - Agile CRM \(blog\)](#)

[Unbounce - Agile CRM Integration \(blog\)](#)

Thanks for checking out!