



Generate leads with WordPress

Bosbec Workflow Builder

English

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Introduction

This guide will explain how to use a workflow template in the low-code platform Bosbec Workflow Builder, which will generate a lead from a contact form on your WordPress page. Workflow templates are pre-defined solutions on your account which require minimal to no configuration to use.

Writing about products or services, a common way of measuring others interest is to include a contact form on the webpage. This contact form could imply different scenarios, such as a sign up for newsletters or discount codes. With this type of signup, you can establish a connection between the reader and the company, letting a company representative reach out to the webpage visitor who displayed their interest.

WordPress is a free, open-source content management system (CMS), and a popular tool used to write and publish blogs or create and manage websites for companies and organizations. WordPress features plugins and themes which is used to further expand the functionality of a blog or website. One of these common plugins is the Contact Form 7. This contact form is used for registrations on a WordPress website or blog, and an efficient way of generating a sales lead. Leads are information about a potential customer who has displayed interest in a service or product, sent to a sales department.

With this guide, you can generate a lead from your WordPress page and send it directly to a sales team. Solutions in the Bosbec Workflow Builder are dynamic, and you could easily expand this workflow to create a Ticket on your CRM (HubSpot) account whenever a contact form has been submitted. See our blog or help page for more information.

Prerequisites:

- You are logged in as an administrator at www.bosbec.io
 - *Permissions must be Moderator or higher to be able to create workflows.*
- You have an account on WordPress.
 - *This is the account where you create your contact form.*

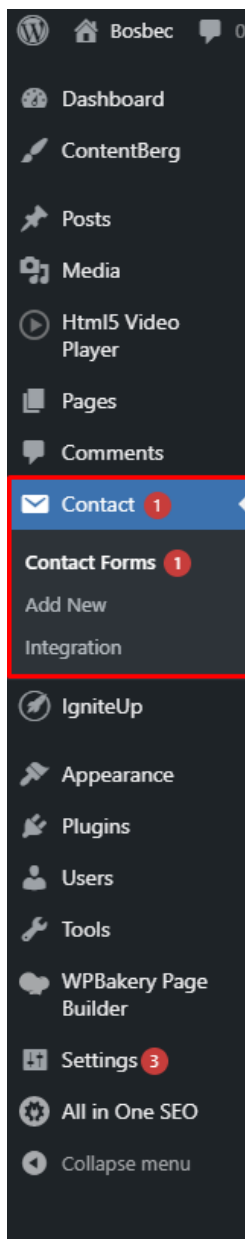
WordPress configuration

This section will present the steps required to set up your WordPress account.

Install the plugin

The first step of setting up your contact form is to install the Contact Form 7-plugin. Go to the WordPress dashboard and in the navigation bar to your left, select **Plugins > Add Plugin**. Search for Contact Form 7 and click **Install > Activate**. Since this is a very common plugin you can also find it in the first selection when you look in the “Popular” section.

Create a contact form



Now we are ready to create a contact form to post on our website or blog. Click on **Contact > Contact Forms** to go to your administration panel for contact forms. Either click on “Contact form 1” to customize the form, which was included in the installation, or click on **Contact > Add New**.

Once on the editor, navigate to the “Mail” section. To start the Bosbec workflow we need to trigger it with something, and in this case, an incoming email. Set the “To”-property to a unique email address with the domain “@qlnk.se”, which is the domain the Bosbec Workflow Engine listens to. We recommend that you use a GUID as the email address, e.g., [“bef04a52-fcab-4ee5-bc52-a168ec42b9de@qlnk.se”](mailto:bef04a52-fcab-4ee5-bc52-a168ec42b9de@qlnk.se) to make it unique. Remember to save this GUID someplace since we will use it in the Bosbec Workflow Builder when we configure the template.

This is as far as the prerequisite settings go for the connection between WordPress and Bosbec, your Contact Form can look however you want. Keep in mind to include the information you want your sales team to have in the email.

Finally, add your contact form to your website or blog post. The next and final step is to configure the workflow template in the Bosbec interface.

Modify the workflow template

With the WordPress contact form ready to initialize the Bosbec Workflow, we need to set up that endpoint. This section will entail how to create a new workflow, import the WordPress contact form template, and configure it for your WordPress settings.

Create a new workflow

In your administrative interface, <https://bosbec.io/>, in the navigation bar to your left, select “Workflow”. Once in the menu, click on the orange plus icon in the top right corner to create a new workflow, and give it a name. You will be prompted to activate it and open it in the editor, proceed with those instructions to enter the Bosbec Workflow Builder.

Import the WordPress template

The WordPress solution is already built and is found in the Workflow Library, along with other pre-defined solutions (such as the HubSpot-ticket creation). Go to the Workflow Library by clicking on “Edit” in the top navigation bar and click “Workflow Library”. Expand the “Template” folder and select the template named “Generate leads with WordPress”. Import it to your workflow.

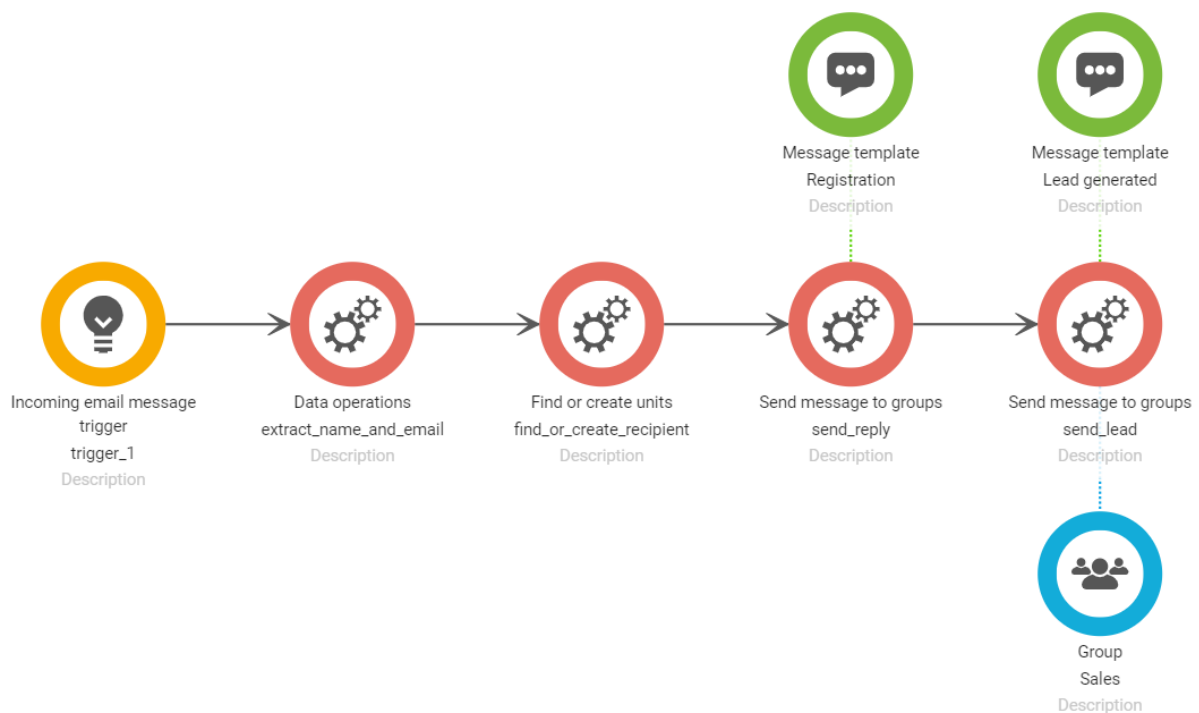
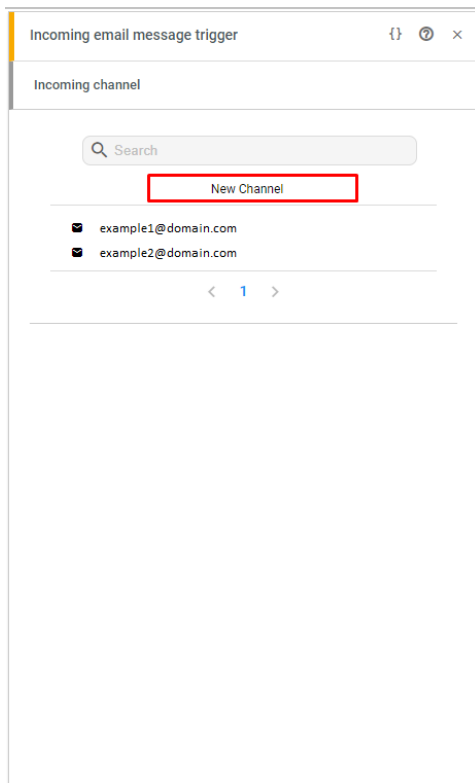


Image 1: “Generate leads with WordPress” workflow.



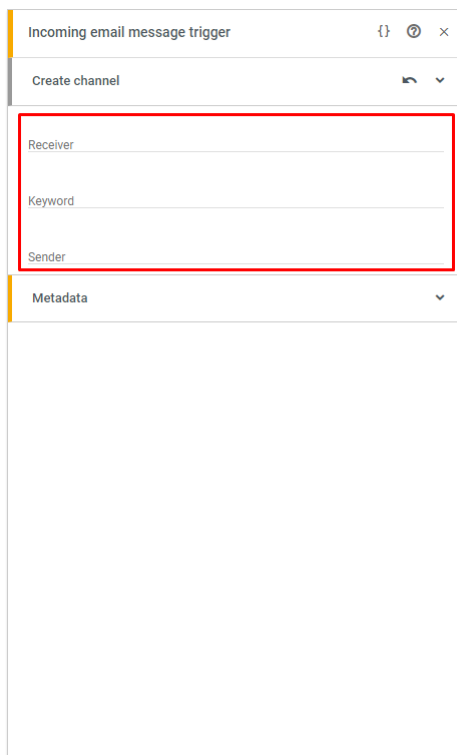
Configure the email trigger

Remember the GUID we chose for the email domain in the WordPress contact form? This information is necessary to configure the “Incoming Email Message Trigger”, which will react to the incoming form submission on WordPress.

Double-click on the trigger named “trigger_1”, which might look something like Image 2, to your left. A channel is a communication channel between two endpoints, which could be one email address or an entire domain. In this WordPress case, we will create a new Channel for the connection between Bosbec and WordPress.

Click on “New Channel” in the trigger property.

Image 2: “Incoming email message trigger”



Set the “Receiver” property to the same address you set in the “To”-property in the contact form settings in WordPress.

The Keyword is used to make the channel conditional, only incoming emails with the first word in the message body which matches the keyword, will initialize the workflow. You can leave this option blank in this case.

The endpoint is the email domain you own and use on WordPress.

Image 3: Set Receiver to the email domain you chose in the WordPress contact form. Keyword is optional, and Sender must be a domain you own on WordPress.

Write message templates

Double-click on the green message icons to change the message templates which are sent as replies or information to the sales team. You can also toggle the option “Is body html” if you have an HTML-styled email message body.

When you’re done configuring the workflow, click “Ctrl+S” on your keyboard to save the workflow, and make sure the workflow is active (orange toggle button in the top right corner).

Add members to the Sales group

Back in the administrative interface, go to your “Resources” and click “Groups”. Locate the group named “Sales” and click it. In the expanded panel to the right, add your sales representatives which will receive the lead information by email.

Now you are all set! This workflow can be further expanded by adding a request to the HubSpot CRM, which will result in a workflow that, not only sends an email, but also creates a Ticket on the HubSpot account.

Further reading

This solution is based on the concept of working with incoming and outgoing data in the Bosbec Workflow Builder. If you want to learn more about these concepts, read more at <https://help.bosbec.io/>.