

Web forms

Website and portal

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Website and portal

Web forms

Collect enquiries, applications or requests from the public straight into Hesabu ERP records.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Offered in **custom packages**. Contact us to ask about it.

Overview

A **Web Form** is a form on your website that creates a record when someone submits it, for example a **Lead** from an enquiry or a **Job Applicant** from a careers page.

Steps

1. Search for **Web Form** and click **Add Web Form**.
2. Enter the **Title**, and choose the **DocType** that will be created, such as *Lead*.
3. The **Route** is its web address, for example `contact-us`.
4. Tick **Published**. Leave **Login required** unticked if the public may submit it.
5. In the **Web Form Fields** table, choose the fields the visitor should fill, and mark the important ones **Mandatory**.
6. Write the **Success Message** that appears after submitting.
7. Tick **Allow Editing After Submit** or **Allow Multiple Responses** only if visitors should change or submit several records. Save. Open `/contact-us` on your site, and submit a test.
8. Check the new record, for example in **Lead**.

Practical example

A hardware shop publishes a *Request a quote* form creating Leads. Each enquiry arrives in the sales team's list, and a notification email alerts them. See Workflows and notifications.

Important notes

- Public forms attract spam. Keep the number of fields small and enable the captcha option if your version has one.
- Do not collect sensitive data, such as ID numbers or card details, on a public form.
- Tell visitors how you will use their information.

Common mistakes

- Choosing too many fields, so people give up.
- Forgetting to test it.

Next steps

Read The customer portal.

Related documentation

- Website and portal overview
- Leads and opportunities
- Recruitment