

GetLeadForms.com Test Project

Feature: **Download Webhook URLs to CSV**

Overview:

This is a small feature for just one customer, but we will make this feature widely available inside of the dashboard. Your task will be to create the feature and deploy it to the GetLeadForms dashboard so the customer can begin to use it.

- Project type: New feature
- Priority: High (customer impact = largest customer)

User Story:

One of our largest customers of our platform (99calls.com) is using our webhook feature to post leads into their CRM. The webhook is set up inside of the dashboard for each form. This customer has created over 1,000 forms on our system, as a result, sometimes they add the wrong webhook endpoint to the form, causing leads to send to the wrong customer. To give the user an easy way to check their endpoints we will create a feature called **Download Webhook URLs to CSV**

Requirements:

*Must pull from all LeadForms across the account. It's important to note that one account could have hundreds to thousands of LeadForms.

- Link in webhook section of dashboard with Label: 'Download Webhooks to CSV'
- Add button to Lead Delivery > Webhook Settings (**see mockup**)
- Loading icon for feedback loop while waiting for item to download
- Data downloads as CSV to user's all device
- Accessible through all account types
- Data that downloads to CSV - [example sheet that was manually pulled from database](#)
 - LeadForm Name
 - page_urls
 - Custom_post_url
- Info icon that explains what it is when user hovers:
 - By clicking 'download webhooks to CSV' the system will generate a CSV that contains all of the webhooks across all of your LeadForms. This is useful if you you'd like to audit your webhooks to ensure that leads are posting to the correct endpoints'
- Add feature to staging site and let John (client) know and provide code with documentation to client to review
- Upon approval, push to production

Acceptance Criteria:

- The end user is able to see a button inside of the Dashboard that says ‘Download Webhooks to CSV’
- Upon clicking the button the webhooks will download to CSV which contains
 - LeadForm Name
 - page_urls
 - Custom_post_url

Mockups

Add webhook to Lead Delivery > Webhook Settings (see mockup)

The screenshot displays the getLeadForms dashboard interface. At the top, a navigation bar includes 'Design', 'Steps', 'Settings', 'Lead Delivery' (highlighted with a red box), and 'Publish'. Below this, the 'Lead Delivery' section is active, showing a 'SAVE CHANGES' button and a list of integration options under 'Email Service & CRM'. The 'Webhook Settings' option is highlighted with a red arrow. To the right, a preview of a form titled 'Get a Fast Free Quote' is shown, featuring a question 'Is this service for your home or business?' with two buttons: 'Home/Residence' and 'Business'. A progress bar indicates 50% completion, and a notification states '1,604 people requested a quote!'. On the far right, a 'List of Steps' sidebar lists: 'Contact form', 'describe', 'intro question', 'name', 'service type', 'Thank you message', and 'zip code', with an 'Add step +' button below.

Mockup

