

Automate CRM data entry with webhooks

An introduction to CRM data entry automation.



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What are webhooks?

Manually transferring data from your online forms to your CRM can be time-consuming and prone to errors. Automating the process not only saves time but also boosts process efficiency and eliminates the risk of human error.

Webhooks are an innovative solution that seamlessly connects your online forms to your CRM, enabling automatic data entry and streamlining your workflow.

In this guide, we will explore the power of webhooks, the benefits of using webhooks, and how they can be used with Inflowcare to supercharge your data entry process.

In this ebook, you will learn how webhooks work, how to apply webhooks, and the benefits of using webhooks.

Webhooks are a method of connecting two different applications to enable seamless and automated data transfer. Webhooks allows one application to send data to another application in real-time through a predefined mechanism.

Instead of relying on manual data entry or periodic imports/exports, webhooks allow applications to communicate instantly and trigger actions based on specific events or data changes.

How webhooks work?

Webhooks act as event-driven triggers that initiate the transfer of data between two applications. When a specific event or action occurs in the source application, such as a form submission or an update, a webhook is triggered.

The triggered webhook sends an HTTP POST request to the specified destination with the payload as the request body. The destination application, which is often a CRM system in this context, receives the request, processes the payload data, and performs the desired actions, such as updating records, creating new entries, or triggering notifications.

A webhook example



When a lead submits an inquiry form, a webhook can be configured to send the data directly to your CRM.

This eliminates the need for manual data entry and ensures that the CRM is instantly updated with the new lead information.

Using webhooks in homecare



Patient Inquiry Form Submission

When a potential patient or their family fills out an inquiry form on the homecare agency's website, a webhook can instantly capture and forward the form data to the agency's CRM.

This real-time integration ensures the agency is immediately notified and can promptly follow up with the inquiry, assess the patient's needs, and initiate the intake process without delays.



Caregiver Application and Hiring Process

By integrating webhooks with their applicant tracking system or HR software, the agency can receive real-time notifications whenever a caregiver application is submitted.

This enables the agency to promptly review applications, conduct interviews, and streamline the hiring process, ensuring timely recruitment of qualified caregivers.

Why choose to use webhooks?

By using webhooks, you empower your agency with seamless integration, streamlined processes, and enhanced efficiency. It's a solution that transforms your data entry process, improves productivity, and enables you to leverage the full potential of your CRM system.

Webhooks initiate the intake process without delay and streamlines the hiring process, ensuring the timely recruitment of qualified caregivers.

Why use webhooks?

Without webhooks

- Manually enter lead information in CRM
- Data entry is time consuming leading to delays
- Manual process prone to errors
- Missed opportunities due to delays and inaccuracies
- Difficult to identify gaps and make data-driven decisions

With webhooks

- Lead details automatically added to CRM
- New leads are instantly available
- Automated process ensures complete accuracy
- Maximized conversion rates with timely follow-up
- Holistic view enables data-driven decision-making

5 benefits of using webhooks

1. Automation

Webhooks automate the data entry process, eliminating the need for manual data entry. Webhook automation saves valuable time and resources, allowing your team to focus on more strategic and revenue-generating tasks.

2. Timeliness

Webhooks transfer data in real-time. As soon as an event or action, like a form submission, takes place, the data is immediately sent to your CRM. This ensures that your CRM is always up-to-date with the most recent information.

3. Accuracy

Webhooks eliminate manual data entry, reducing the risk of errors that are prone to manual data entry. Webhooks transfer online form data directly to your CRM, thereby creating accurate records for informed decision-making and correct lead engagement.

4. Accountability

Each form submission triggers a webhook, capturing and delivering the data to your CRM system. This accountability ensures that no potential lead is missed, enabling prompt follow-ups and maximizing conversion rates.

5. Reporting

Webhooks allow you to collect extra data points to include in your CRM reports and analytics. For example, by obtaining a comprehensive view of your lead sources, you can measure performance, identify trends, and make data-driven decisions to optimize your marketing strategies.

Using webhooks with Inflowcare

Webhooks enable seamless real-time information exchange between your various applications and Inflowcare. By utilizing webhooks, you can effortlessly send leads from your website, Google or Facebook campaigns, and any other landing pages directly to Inflowcare.

With webhooks, you can ensure that every lead generated is automatically and instantly added to Inflowcare, eliminating the need for manual data entry.

Once a webhook is triggered, Inflowcare will instantly create a new lead, ensuring timely follow-up and efficient lead management.

This streamlined process allows you to focus on nurturing and converting leads, with Inflowcare handling the lead creation seamlessly in the background.

Start using webhooks today and revolutionize your data entry process for improved efficiency, increased conversion rates, and agency growth.

Schedule a demo today

inflowcare.com/demo

FAQs

What is a webhook?

A webhook, also known as a web callback or HTTP push API, allows web applications to communicate with each other in real time.

How can I use webhooks in Inflowcare?

Automatically create Inflowcare leads by sending details via webhooks from your website, Google and Facebook campaigns, and landing pages.

What information can be captured?

- **Contact info:** Contact First Name, Contact Last Name, Contact Phone, Contact Email
 - **Patient Info:** Patient First Name, Patient Last Name, Patient Phone, Patient Email
 - **Campaign Info:** Campaign Name, Landing Page, Ad Set, Ad
 - **Other Fields:** Interested in, Additional notes
-

How long does it take for the data to appear in Inflowcare?

Leads created via webhook are immediately available in Inflowcare.

Which apps support webhooks?

Most WordPress forms and landing pages support webhooks.

How simple is it to create a webhook in Inflowcare?

Webhooks can be easily configured with just a few simple steps.
Schedule a demo today to learn more. Visit: inflowcare.com/demo