

Secure Lead Forms

To have a secure (HTTPS) form on your website, you must have the **Secure Lead Form Component**. If an active or inactive instance of the **Secure Lead Form Component** is not present in your component library, please contact your ARI Customer Success representative or submit an email to Updates@arinet.com and ask to have the **Secure Lead Form Component** added to your account.

Activating the Secure Lead Form Component

When an instance of the **Secure Lead Form Component** is not already enabled on the website, do the following to turn the component on.

1. In the ARI CMS, go **Account > Components**. Click on the **Inactive Components** tab.
2. Navigate to the **Secure Lead Form Component** and slide the On/Off toggle (next to the trash can icon) to the **On** position.
3. Go to the **Active Components** tab. Scroll down to the component in the list and click on the gear icon to proceed to configure the form settings.

Adding a New Instance of an Active Component

If an instance of the component is already enabled on the website, do the following to create a new instance of the component.

1. Go the **Account > Components**. Remain on the **Active Components** tab.
2. Navigate to the **Secure Lead Form Component**. Below the title, click the link labeled, “**Add Another**”. A new instance of the component will be created and listed underneath the original component.
3. Click on the gear icon to proceed to configure your form.

Configuring the Component for a Custom Form

IMPORTANT: When adding a custom form that includes fields for capturing sensitive customer data, **DO NOT use the Lead Component**. You must only ever use the **Secure Lead Form Component** in these situations.

The **Secure Lead Form Component** provides added security on the website by rendering the form on a secure (HTTPS) page.

Additionally, the component will provide database encryption for designated form fields if a **Dealer Administrator** configures the component to do so.

1. In the **ARI CMS**, go to **Account**. Find the applicable website in the **Sites** list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Apply a **Page Rule**, to specify on which page (or pages) the form will display.
4. Apply a **Section Rule** of **Main Content**, unless the form is intended to reside in another section. If that is the case, choose the section where the form should display.
5. Under **Component Settings**, users have the ability to configure the following items:

- a. **Form:** The user selects the form that will display on a secure page on storefront.
 - i. **Default Forms:** To select a system form, ensure that the green button below the “Form” label says **Default Forms**. Then click into the form field to select from one of the available options.
 - ii. **Custom Forms:** To select a custom form, ensure that the green button below the “Form” label says **Custom Forms**. Then click into the form field to select from one of the available options.
- b. **Customize Form Title:** This adds a custom title at the top of your form on storefront.
- c. **Form Message:** This adds a custom message to the top of your form on storefront.
- d. **Submit Button Text:** This field replaces the form button text of “Submit” with a custom value (Example: “Apply Now”, “Go”, etc.)
- e. **Render privacy policy (Checkbox):** When selected, a link to the website privacy policy page is added to the form.
- f. **Wrap form in border (Checkbox):** When selected, the form is wrapped in a border on storefront.
- g. **Form Width:** This menu gives users three pre-set options for determining how wide the form should display on the secure web page. Options are Narrow, Medium and Full.
- h. **Form Alignment:** This menu gives users three pre-set options for determining how the form is aligned on the secure web page. Options are Left, Center, and Right.
- i. **Global Lead Forms Settings:** These options are applied to ALL of the forms on your website. Changing them in one component will update them in all other form components.
 - i. **Send automatic email reply to customer:** When enabled, an auto-reply email is sent to the user who submits the form (provided that they have entered their email address into the form).
 - ii. **Show "Receive Offers" checkbox:** This adds a “Receive Offers” opt-in checkbox to all site forms. On storefront, when Receive Offers displays it is unchecked by default. This feature cannot be configured to function as an “opt-out” (ie. making the checkbox checked by default).
- j. Click **Save Settings** and **Publish Changes**.

Custom Secure Forms: Adding Password Protection to View Custom Form Fields

Custom secure forms can include fields that will be hidden in the lead record unless a user enters a password. This added layer of security makes it impossible for anyone (including ARI staff) without the form password to retrieve the encrypted form data.

IMPORTANT: If a form has custom fields (ie any field that is not part of an equivalent system form) to capture sensitive customer information (SSN, Driver’s License ID, etc.), these fields WILL NOT be viewable in corresponding lead records in the ARI CMS unless and until someone in the role of **Dealer Administrator** configures a password in the **Secure Lead Form Component** settings. This requirement is in place to protect dealers and consumers from security breaches.

Without a password being applied, non-custom form fields in the lead record will display to users, but custom fields will be hidden. Additionally, custom fields are permanently inaccessible on lead records captured prior to a password being configured for the form. In short, it's very important to add a password as close to the deployment of the form as possible, so that captured customer information isn't irretrievably lost.

It is not possible for an ARI employee to configure the password settings on a secure form. For security purposes, only users in the role of **Dealer Administrator** can manage the password settings for the component.

1. In the ARI CMS, go to **Account**. Find the applicable website in the **Sites** list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Under **Component Settings**, scroll to the following form fields:
 - a. **Secure Password**: Enter a password (minimum of 6 characters)
 - b. **Confirm Password**: Re-enter the password
 - c. **Show Password**: This merely decrypts the password in the browser view, so that a user can visually verify that they have entered the password as intended.
4. Click **Save Settings** and **Publish Changes**.

Change Password

If a Dealer Administrator wishes to change the password on the Secure Lead Form Component, they must know the current password. To change the password when the current password has been forgotten, please see Secure Leads: Forgotten Password.

1. In the ARI CMS, go to Account. Find the applicable website in the Sites list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Under **Component Settings**, scroll to **Password Set**.
4. Click the **Change Password** button.
5. Enter the existing password in the field labeled **Current Password**
6. In the **Secure Password** field, enter a password (minimum of 6 characters)
7. Re-enter the password in the **Confirm Password** field
8. Click **Save Settings** and **Publish Changes**.

Forgot Password

IMPORTANT: Encryption is the highest level of protection offered for a secure form on an ARI Responsive Website. Once your data is encrypted, ARI cannot access the data/submissions nor do we have the ability to view or change your encryption password.

If a dealership has forgotten the password on the **Secure Lead Form Component**, a Dealer Administrator can create reset the password and set a new one. But it is imperative that you memorize or store your secure form password in a safe place. Passwords are not saved by ARI. If you're unable to remember your password, or the password is not working properly, the option is to reset your password via the

Forgotten Password function. When a password is changed via the **Forgot Password** process, all previously captured custom fields for that form are permanently purged from the lead records. This is a security measure that cannot be bypassed.

1. In the ARI CMS, go to Account. Find the applicable website in the Sites list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Under **Component Settings**, scroll to **Password Set**.
4. Click the **Forgot Password** button. This generates a link and sends it to the email account for the **Dealer Administrator**.
5. Clicking the emailed link will bring the user to a screen where they can enter and confirm a new password.
6. In the **Secure Password** field, enter a password (minimum of 6 characters)
7. Re-enter the password in the **Confirm Password** field
8. Click **Save Settings**.

Accessing Password Protected Lead Records

If someone in the user role of **Dealer Administrator** has set a password on the **Secure Lead Form Component**, then any form submissions that are captured in the ARI CMS system can only be accessed when that password is entered in the lead record.

It's important to note that not all form data is encrypted on password-protected forms. Basic information, like the customer's name, telephone, and email address, will display in lead records without inputting a password. But any custom fields in the lead record, including fields meant to capture "customer-sensitive" information, WILL NOT display UNLESS the password for the form is entered.

1. In the **ARI CMS** navigation menu, go to **Leads > Leads**
2. Find the password-protected lead record that you wish to access and select "**View**". You may use the refinement filters at the top of the page to help find the correct record.
3. On the **Lead Detail** page, you should see a blue **Decrypt** button on the upper right side of the page. Click **Decrypt**.
4. A **Decryption Password** modal window will open. Enter the form password and click **Submit**.
5. If the password entered is correct, you'll be returned to lead detail page and the previously encrypted form fields will now display.

NOTE: In order to access encrypted form data, the form password must be entered each time you open the lead record. If you have more than one password-protected lead record to view, you will have to re-enter the password for each individual record.