FORMS AND PROCESS DESIGNER

DYNAMIC FORMS

Dynamic Forms

The Forms and Process Designer features help your users create intelligent forms to capture lead data that's relevant to their departments, products, or processes.

Key Features of Forms

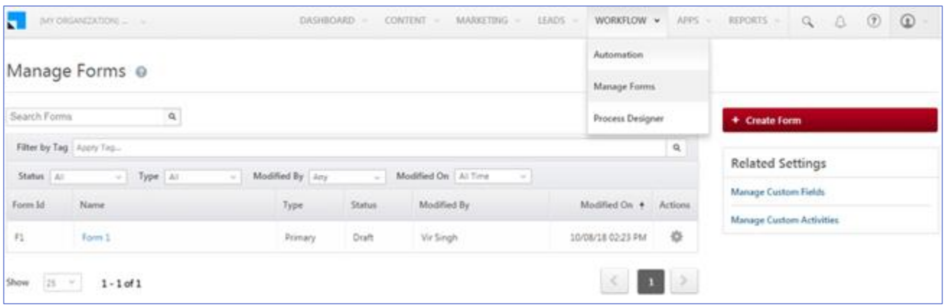
- The ability to capture lead, activity and task fields in the same form.
- Single-step and multi-step forms.
- Customizable sections, tabs, sub-forms and fields.
- Ability to configure rules to –
  - Show/hide sections/tabs/sub-forms and fields
  - Display values based on conditions and previous inputs.

You can customize forms to behave in ways specific to your use cases, and prompt users to collect the right information based on a lead's previous inputs.

Once you've created a form, the Process Designer helps you choose where, and to which users you want the form to appear. You can also use it to combine multiple forms into processes.

Manage Forms

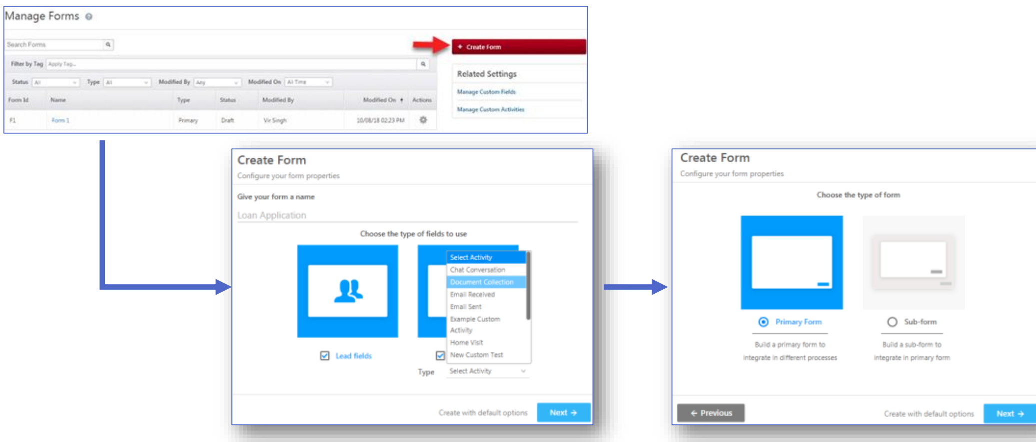
To access the **Manage Forms** page, navigate to Workflow → Manage Forms



All forms you create will appear on the grid. You can search for a form, filter by tags, and even filter based on status, type, modified by and modified on dates. The settings icon under the **Actions** column allows you to edit, delete, add tag, clone, rename or publish a form and test a published form.

Create Form

Click the Create Form button to create a new form.



On the **Create Form** pop-up –

1. First give your form a name.
2. Then choose whether you want the form to contain lead fields, activity fields or both. If you choose to include activity fields, you must select an activity type.
3. Click **Next**

Alternatively, you could click the **Create with default options** link at the bottom to create a form with only lead fields.

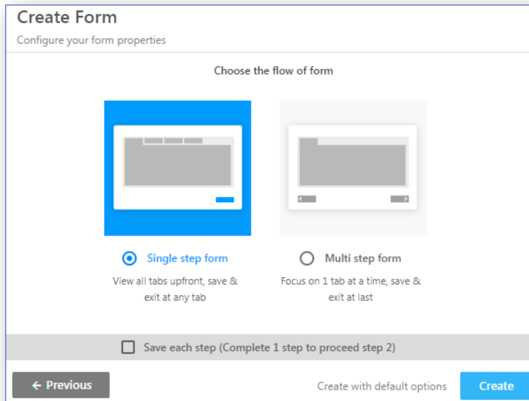
Note: If you want to use Custom Fields Sets (to upload documents), select the activity where the custom field set has been set up.

Choose the type of form you want to create –

- **Primary Form** – This is the main form that will appear on the Manage Forms grid. You can use the Process Designer to combine primary forms into processes.
- **Sub Form** – A sub-form can be integrated into a primary form. It will not show up on the Manage Forms grid.

Click **Next**, when you're done.

Create Form

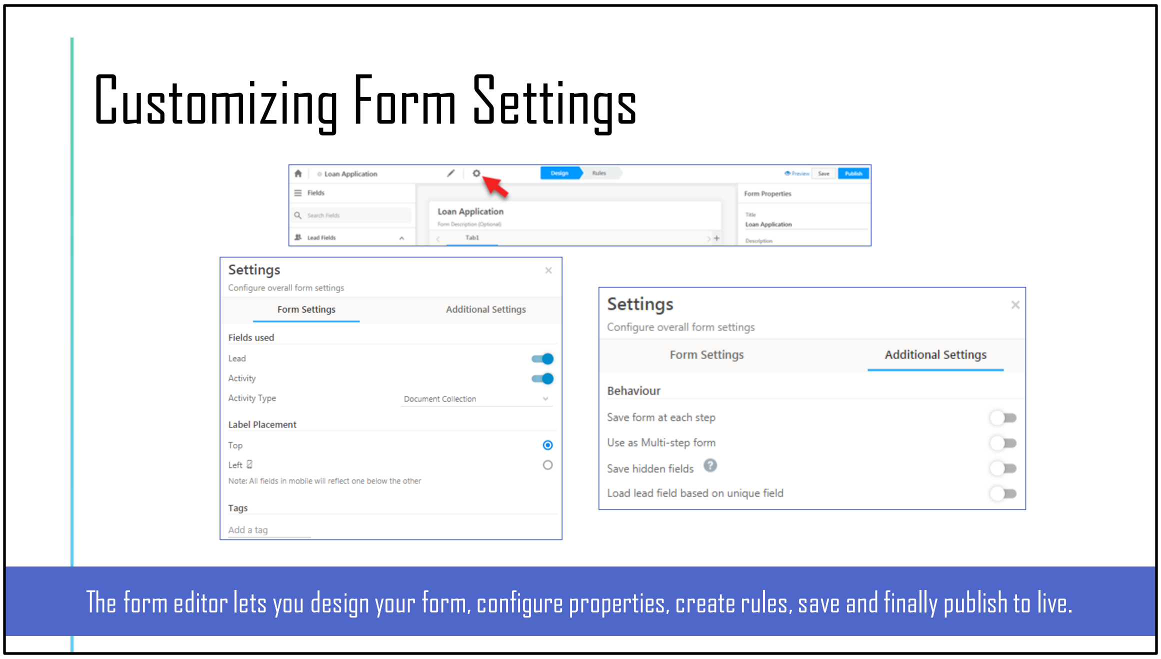


Single step form shows all the sections as tabs upfront. Multi step form allows user to fill one section before proceeding to next. Each section will be displayed as one tab at a time

Choose how you want your form to flow. Choose between –

- **Single step form** – All tabs will be visible upfront. You can switch between tabs, and save & exit while on any tab.
- **Multi step form** – Users will only see one tab at a time. You can only save and exit the form at the last step.

Then click **Create**.



To change the form name, click the edit icon alongside the form name at the top of the form editor.

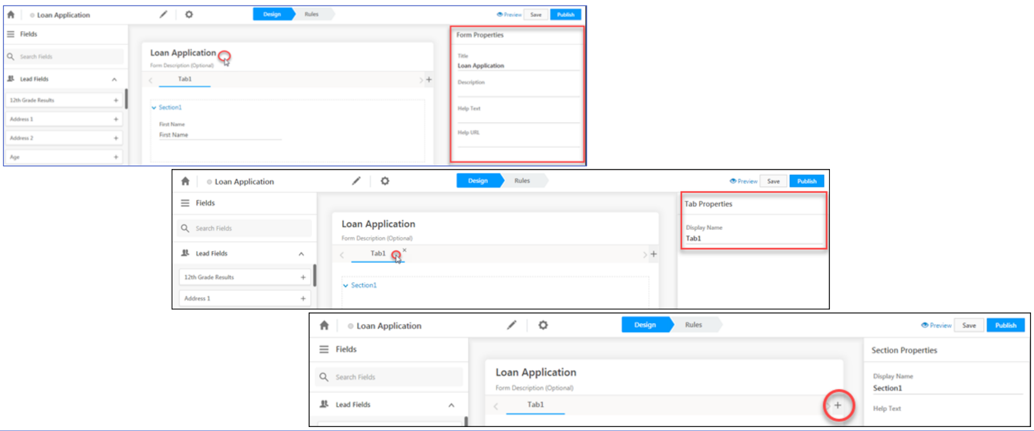
You can change some of the form properties you selected in the previous steps in the form settings menu. Click the settings icon to open the settings menu. Add/remove lead and activity fields, change the activity type, adjust the placement of the labels and add tags that you can later filter your forms by.

Click the Additional Settings tab for more options. You can –

- Set the form as single step or multistep
- Save hidden fields – When you set the value of a particular field and do not want leads to change it (for example, College Course = Bachelors of Technology), you can hide the field in your form. However, this value (e.g., Bachelors of Technology) will not get saved by default for the lead. Enabling the ‘Save hidden fields’ option will ensure that the field value is saved for every form submission.
- Load lead fields based on unique fields – When you enable this option and enter a phone number/email Id (or whichever field is marked unique in your account) of an existing lead, you will be prompted to auto-populate

the lead's details.

Design Form



With form design you can create and configure the tabs, sections and fields in your form.

Adjust Form Properties

1. Click the top section of your form.
2. You can adjust the form properties on the right pane. These include the form title, description help text and even a help URL you can direct users to.

Change the Tab Name

Click on a tab to change the display name using the tab properties panel on the right side of the page.

Click the Add button highlighted in screenshot to add a new tab to the form.

Form Rules

Rules let you configure the behavior of your form. You can show/hide and set values for fields based on certain conditions. You can also show/hide tabs, sections and sub-forms.

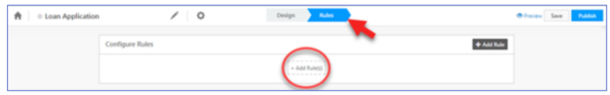
Note: You can also set conditions on multiple fields. For example, **if** 'Gender' is 'Male' and 'Age Group' is 'Adult' **then** show a 'Men's Clothing Preferences' sub-form to capture clothing preferences.

Rules – Use Cases

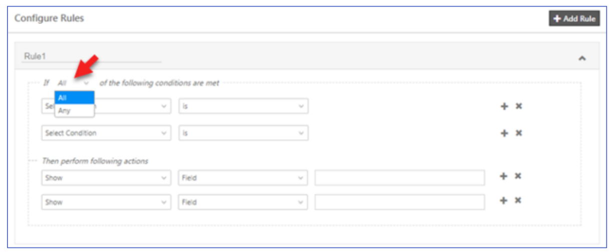
Capture Multiple Addresses	1. Create a field 'Is your permanent address the same as your mailing address?' 2. Create a 'Permanent Address' sub-form with fields Address 1, Address 2, City, State, Zip, Country 3. Create a rule where if the field 'Is your permanent address the same as your mailing address' is false then show 'Permanent Address' sub-form to capture the lead's permanent address.
Capture Co-Applicant information	1. Create a tab called 'Co-Applicant Information' with fields to capture the co-applicant's personal details, KYC details etc. 2. Create a field called 'Do you have a co-applicant' 3. Create a rule where if the field 'Do you have a co-applicant' is false then hide the 'Co-Applicant Information' tab.
Making fields Mandatory	1. Set up a field called 'Identification Type', with options for say, 'Passport' and 'Pan Card' 2. If 'Passport' is selected, make a 'Passport Number' field mandatory 3. If 'Pan Card' is selected, make a 'Pan Card Number' field mandatory

Setting Rules for Forms

To create a rule, click the **Rules** tab on the top menu. Then click **Add Rule**.



You can set multiple conditions and multiple action per rule by clicking the add + icon.



You can add multiple rules as well by clicking the **Add Rule** button. Be sure to select if you want the action to proceed if all rules are met or if any 1 rule is met

Rules – Conditions & Actions

Conditions will vary based on the data type of the field you're setting conditions on. For example –

- Number fields will give you options like 'Greater than equal to', 'Is Between' etc.
- Drop-down fields will let you choose between pre-defined options
- Text fields will give you options such as 'Contains', 'Does Not Contain' etc.

Actions will trigger when your condition(s) are met. You can trigger actions like –Show

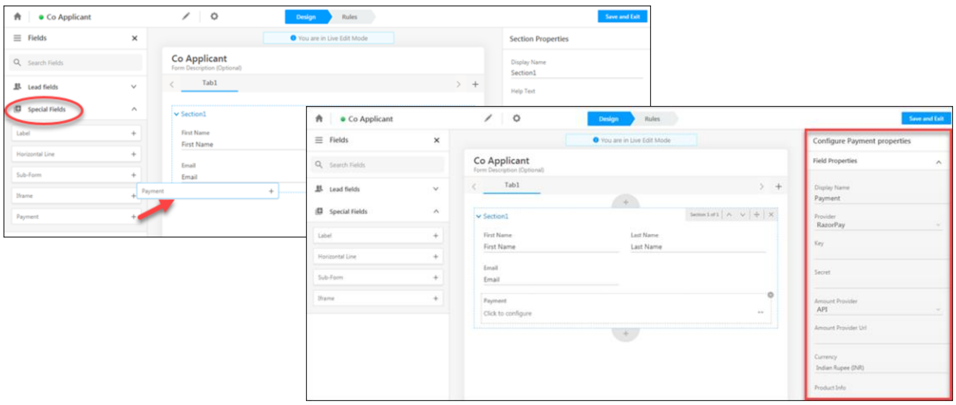
- Hide
- Set Value*****
- Make Read Only
- Make Mandatory

*****If you're using the action **Set Value**, you can set the value of a field –

- Through API data
- Mail Merge lead/activity fields
- Data from Lapps
- Perform calculations on numeric fields

Payment Gateway Integration to a Form

You can integrate a payment gateway directly into your forms to process transactions from leads.



We currently support the following payment gateways –

- Razorpay
- PayUMoney

While creating a form, on the left pane click **Special Fields**, then drag and drop the **Payment** field into your form.

1. Display Name: You may change the display name of the field from 'Payment' to a name of your choice.
2. Provider: The payment service provider you have an account with.
3. Key: The API keys associated with your payment provider account.
4. Secret: Secret Key of Payment API
5. Amount Provider: The payment amount can be fetched through an API or you can enter an Exact value.
6. Amount Provider URL: If you select the amount provider field as API, then you must enter the API URL here.
7. Amount: If you select the amount provider field as Exact, this option will appear. Note that you must enter the amount in the lowest currency denomination.
8. For example, for $50.50 (fifty dollars and fifty cents), you must enter 5050

9. Currency: Choose between Indian Rupee (INR), US Dollar (USD), European Euro (EUR) and Singapore Dollar (SGD).
10. Product Info: Enter the name of the product here.
11. Required: Makes this field mandatory.
12. Hide by Default: If you enable this option, the field will only appear if there is an explicit ‘Show’ form rule associated with it.

Now click the Payment field in your form and enter the following field properties in the right pane.

PROCESS AUTOMATION

Process Designer

The process designer lets you organize your forms into workflows. You can create workflows for any business process such as loan/insurance application, KYC collection, education applications, medical applications, etc.

After you've created one or more forms, use the process designer to –

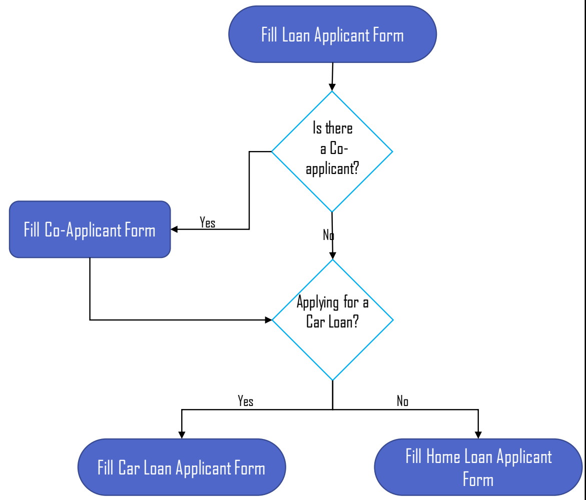
- Choose the work area (Manage Forms page, Manage Activities page, Smart Views, etc.) where you want to display your forms.
- Set conditions on users (show forms to particular teams, roles, sales groups, etc.) and form field values.
- Chain together multiple forms to create processes

Process Designer – Use Case

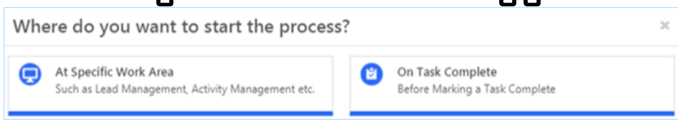
This example takes the use case of a simplified loan application process. Let's assume we've created the following forms –

- Loan Applicant form
- Co-Applicant form
- Car Loan form
- Home Loan form

Using the process designer, we can chain these forms together to create the following process –

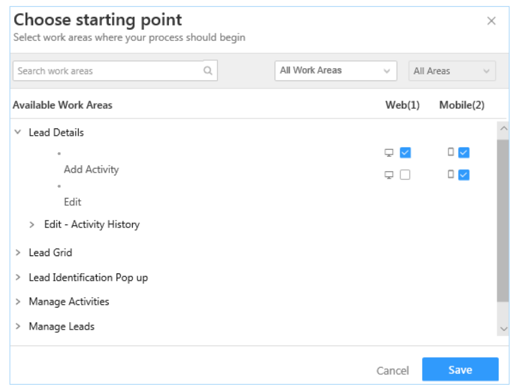


Process Designer – Define Trigger Point



At Specific Work Area

- If you select the At Specific Work Area trigger you can choose the page or area you want the process to be initiated from. You can choose multiple work areas to begin a process from.
- Under the Available Work Areas section, click on a Web and/or Mobile checkbox against the Work Area.
- Click **Save**.



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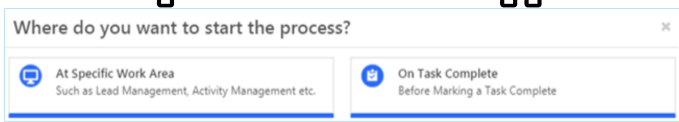
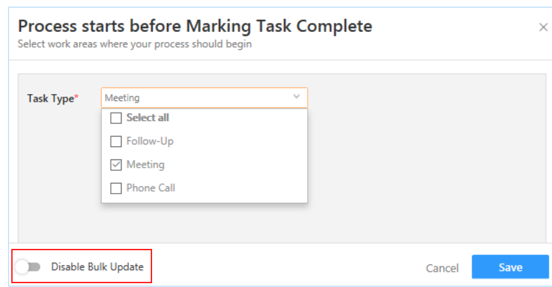


On Task Complete

- The On Task Complete trigger allows you to start the process when a user attempts to mark a task type complete.
- You must select the task types you want to initiate the process on by clicking the corresponding check-boxes.
- Click **Save** when you're done.



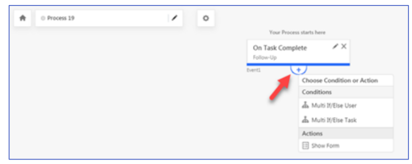
Note: When tasks are updated (completed) in bulk from the Manage Leads or Smart Views page, the process configured on a certain task type may not trigger. To ensure that users can't bulk update and complete a task type you've used as a trigger for a process, click the **Disable Bulk Update** option

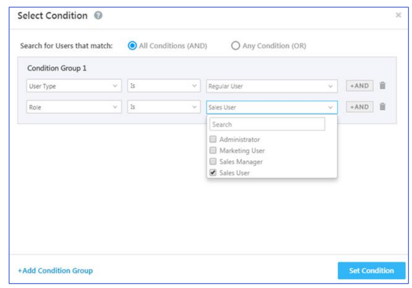
Process Designer – Setting Conditions

After setting a trigger, click the add + icon to view the subsequent conditions and actions.

User Conditions

- You can set up multiple conditions to choose which users can see your forms and processes. You can set up these conditions on any user attribute including role, team, sales group, etc.
- Under Conditions, click the Multi If/Else User option.
- You can create condition groups and set up multiple conditions.
- Click Set Condition when you're done.





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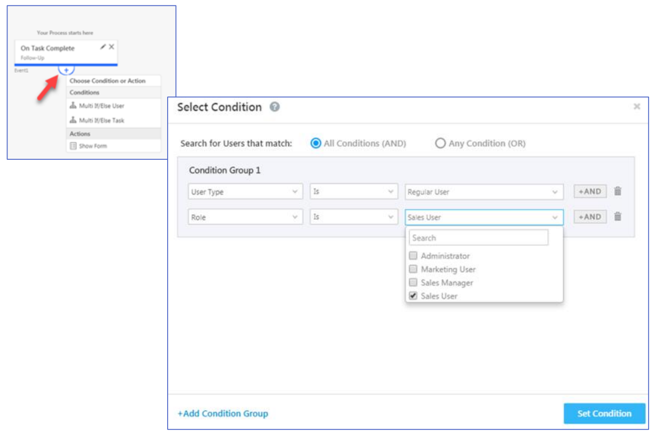
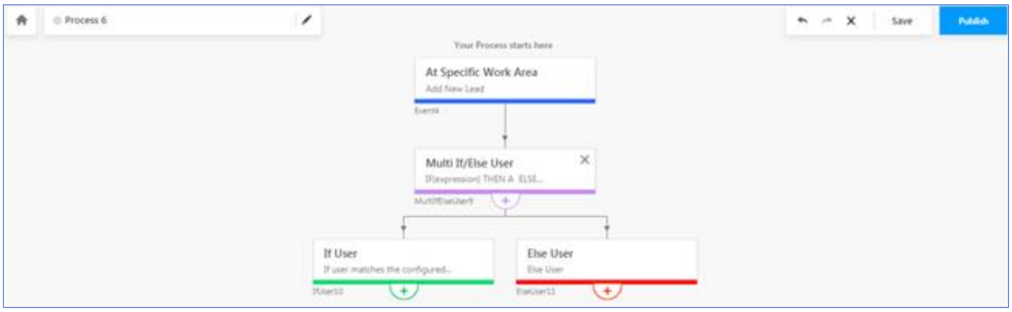


Process Designer – Setting Conditions

The process will branch out into a Yes path and a No path.



Click the add icon under each path to continue the process.

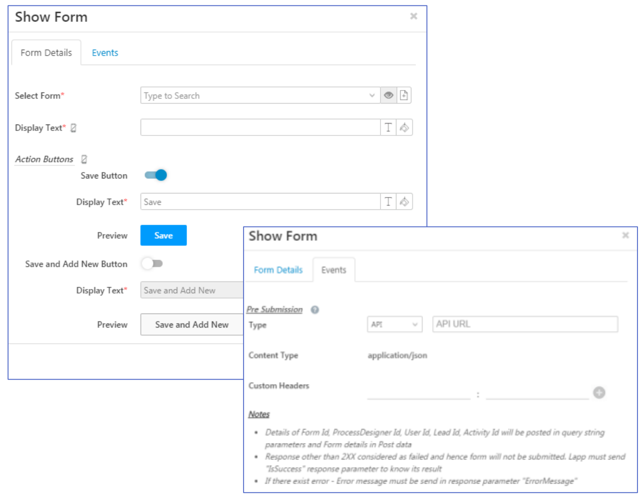
Process Designer – Action (Show Form)

Click the Show Form action to display a published form at any point in your process.

The Show Form pop-up has 2 tabs.

The **Form Details** tab lets you choose the form you want to display, how you want the initiate process button to look in the work areas you selected and how you want the action buttons within the form to appear.

The **Events** tab lets you call Lapps or an external API before a form is submitted. You can use this as a final validation for a form submission.



The API or Lapp should return 200 OK as the response code and content like *{“IsSuccess”:true}* or *{“IsSuccess”:false,”ErrorMessage”:”Your personal details and passport details do not match. Please check”}*

After selecting a form and setting all the configurations, click **Save**. Here’s an example of how the initiate process or open form button will appear

Please Complete Exercises

Open the Step-by-Step Exercise document from https://myleadsquared.sharepoint.com/:b:/s/LeadSquared_Training/EU_yRQVCvw5An__JukOam-UBBNGrKuOjwa8DovIRj6EbLw?e=s1qeJ5 and complete chapter 17

x

THANK YOU!