# **Template – RFI with Duplicate Check**

The template named “Template – RFI with Duplicate Check” is applicable to CampusNexus Student.

## Purpose and Outcome

This template provides a form sequence and supporting workflow for a Request for Information form which captures the users contact details (name, email, etc.) and area of interest (program, term).

The workflow checks the CampusNexus Student database for duplicate with the same first name, last name, email address, and phone number. If no duplicate is found, a new prospect record will be created.

## Prerequisites

The template was built with Forms Builder using the applications listed below. The template is forward compatible with later versions of the listed applications.

|  |  |
| --- | --- |
| **Application** | **Minimum Version** |
| Forms Builder Designer and Renderer | 3.4 |
| Web Client for CampusNexus Student | 19.0 |
| Workflow Composer | 2.6 |
| Packages installed from Package Manager in Workflow Composer | Activities and Contracts (V1) 19.0.0  Activities and Contracts (V2) 19.0.0  Forms Builder Contracts 3.4 |
| Workflow Tracking Database | N/A |
| Staff STS 2.0 | 2.0 |

## Step 1: Download and Import the Template

1. Download the template file to your environment (local drive or network location).
2. Log into **Forms Builder Designer**.
3. Click the **Export/Import** tile.
4. Select the **Import** tab.
5. Click **Select exported file** and navigate to the downloaded template file.
6. Click **Import**.

* [Export/Import](https://help.campusmanagement.com/FB/3.x/Content/ExportImport.htm)

The following forms will be imported:

* WelcomeNew
* Request for Information
* Default-Confirmation

## Step 2: In Form Designer…

1. From the **Forms** slide out, select the **Request for Information** form.
2. Customize the form for your environment. Modify properties on fields/components to make them required, etc., or add/remove fields on form.

Make sure you edit the text in the Labels and HTML controls as applicable for your institution.

* [Fields](https://help.campusmanagement.com/FB/3.x/Content/Fields.htm) and [Components](https://help.campusmanagement.com/FB/3.x/Content/Components.htm)

1. **Save** the form.
2. Repeat steps 1-3 for the **WelcomeNew** and Default-Confirmation forms.

## Step 3: In Sequence Designer…

1. Locate the **Request for Information with Dupe Check** sequence in the Sequences pane.
2. Click **Save As** to create a copy of the sequence/workflow and customize the copy for your use. This way you can always refer to the original sequence/workflow you downloaded.
3. Optional - Add a custom style (theme) associated with your campus.

* [Themes](https://help.campusmanagement.com/FB/3.x/Content/Themes.htm)

1. Select your saved sequence in the Sequences pane.
2. In the Properties Pane:
   * Ensure that the **Authentication Product** is **Student**.

* Select the **End State Form** named “Default-Confirmation”.

1. **Save** the sequence**.**

Click **Yes** on the message: *Validation errors detected (vm.models.prospectinquiryentity is assigned to more than one type of control). Do you still want to save?*

## Step 4: In Workflow Composer…

1. Open the workflow for your RFI with Duplicate Check sequence.

* [Opening Workflows for Sequences](https://help.campusmanagement.com/FB/3.x/Content/HostedEnv.htm)

1. Double-click the **Start Your Journey** transition.

Note the GetServiceInstance<IStudentService> activity following the WaitForFormBookmark activity labeled “Start Your Journey”.

The GetServiceInstance<> activity invoke the IStudentService method. One of the operations that can be executed using the IStudentService method is the CheckDuplicateCampusStudent operation. The response indicates whether one or more potential duplicate students are found or not.

The Assign activities below the GetServiceInstance<IStudentService> activity associate workflow variables in the workflow with

* [GetServiceInstance<>](https://help.campusmanagement.com/WF/Content/Workflow/GetServiceInstance.htm) and [IStudentService - CheckDuplicateCampusStudent](https://help.campusmanagement.com/WF/Content/Workflow/GetServiceInstanceDupeCheck.htm)

1. Locate the **If** activity below the assign statement and review the logic.

* If the Condition CheckDupeResponse.Students.Count > 0 is met (i.e., a duplicate was found), then a message is written to the log and a record is inserted into the electronic lead table.
* If the Condition CheckDupeResponse.Students.Count > 0 is not met (i.e., a duplicate was not found), then a prospect record is created with values that are assigned in the workflow.

1. In the **Else** branch of the If activity, expand the **Create Prospect** sequence.
2. Expand the **Assign Values** sequence and set the values for the following assignment statements correctly for your environment:

* *School Status*
* *Lead Type*
* *Lead Source*
* *Admin Rep*
* *CountryId*

Query your database or use lookup activities to determine appropriate values for the assignment statements.

## Step 5: In Forms Renderer…

Select your sequence and try it out! You should have a new prospect created upon completion.

* [Sequence List](https://help.campusmanagement.com/FB/3.x/Content/SequenceList.htm)

1. Find your **Request for Information with Dupe Check** sequenceand copy the **URL** to the clipboard.
2. Paste the URL into a browser and complete the form sequence.
3. In CampusNexus Student, verify that the prospect record is created containing the information submitted in the RFI form.

## Step 6: Lastly…

Once your updated sequence has been tested successfully, it is recommended that you disable the workflow for the original Template version.

1. In Workflow Composer, in the Server section of the ribbon, click **Open**.
2. Find the workflow named **Request for Information with Dupe Check**.
3. Clear the **Enabled** check box and click **Save**.