# **Template – CRM RFI With Dupe Check**

The template named “Template – CRM RFI With Dupe Check” is applicable to CampusNexus CRM.

## Purpose and Outcome

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

The workflow checks the CampusNexus CRM database for a duplicate email address. If a lead record is found with same email address, the existing lead will be updated with the information provided in the form. If no matching email address is found, a new lead record will be created. Once the lead record is updated or created, the workflow sends a confirmation email to the user. In case of errors, for a better user experience, the form will not show any of the error messages.

## 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 | 3.6 |
| Web Client for CampusNexus CRM | 12.1 |
| Workflow Composer | 2.7 |
| Packages installed from Package Manager in Workflow Composer | Activities and Contracts (CRM) 12.1.0  Forms Builder Contracts 3.6 |
| Workflow Tracking Database | N/A |
| Staff STS 2.0 | 2.0 |

## Configuration

The web.config file in the CMCFormsRenderer\_V3 folder must contain the following:

* SMTP settings to enable confirmation emails to be sent
* Database connection details to enable the workflow to query the database.

## 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 form sequence will be imported:

## Step 2: In Form Designer…

1. From the **Forms** slide out, select the **Lead Details** 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 **Status** form.

## Step 3: In Sequence Designer…

1. Locate the **RFI with Dup 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, select the **End State Form** named “Status”.
3. **Save** the sequence**.**

## Step 4: In Workflow Composer…

This template does not require any changes to the workflow. The steps below just point out the elements in the workflow and to provide references for additional information.

1. Open the workflow for your **RFI with Dup Check** sequence.

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

1. Select the **Arguments** tab and note that the *lead* argument has been created due to entity fields on form.

* [Updating a Form After Creation of a Sequence](https://help.campusmanagement.com/FB/3.x/Content/AddingEntities.htm) and [Binding](https://help.campusmanagement.com/FB/3.x/Content/ComponentBinding.htm).

1. Double-click the **Lead Details** state and note the CreateEntity<Lead> activity.

* [CreateEntity activity](https://help.campusmanagement.com/WF/Content/Workflow/CreateEntity.htm)

1. Double-click the **Next** transition and note the WaitForFormBookmark activity in the Trigger section.

* [WaitForFormBookmark activity](http://cltcvuehelps/fb/3.x/Content/Workflow/WaitForFormBookmark.htm)

1. Double-click the **DupCheck** sequence in the Action section of the Next transition.

Note that the **ExecuteODataQuery<Lead>** activity checks the Lead values in the CampusNexus CRM database and determines if there are duplicates.

* [ExecuteODataQuery< > activity](https://help.campusmanagement.com/WF/Content/Workflow/ExecuteODataQuery.htm)

1. Review the logic of the **If** activity below the ExecuteODataQuery<Lead> activity.

* If the Condition dupcheck=false is met, the lead entity is saved.
* If the Condition dupcheck=false is not met, the GetEntity<Lead> activity is executed, values are assigned, and the lead entity is updated.

In both cases, a confirmation email is sent.

1. Update the **From** email address in both **SendMail** activities as needed for your environment.

* [SendMail activity](https://help.campusmanagement.com/WF/Content/Workflow/SendMail.htm)

## 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 **RFI with Dup Check** sequenceand copy the **URL** to the clipboard.
2. Paste the URL into a browser and complete the form sequence.
3. Verify that a confirmation message is sent to the email address provided in the form
4. In CampusNexus CRM, verify that the lead record is updated or 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 **RFI with Dup Check**..
3. Clear the **Enabled** check box and click **Save**.