# Title: Developer's Guide For Forms / Fields (Server-side)

Form's data from service can be accessed using Swagger [formserv-staging.freshpo.com](http://formserv-staging.freshpo.com)

Here, Forms GET API can be used to fetch the Form details from service. We need to provide service\_form\_id from lead\_forms / contact\_forms tables in place of {{docId}}

We are using the Gem <https://github.com/freshdesk/formserv-gem> which takes care of:

1. Interacting with Form Service through REST APIs during Form / Field CRUD
2. Establishing the relationship between Default Models (i.e, Lead, Contact) and Custom field Models (i.e, LeadCustomField, ContactCustomField)

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As it is very common that we need **meta** for fields when we work on some CORE features, this document will draw a picture about "what are the already available methods of forms/fields" and "where can you make changes to extend/add functionality".

============================================== Form Methods ==============================================

==> Below methods are available as part of **lib/form\_service/form\_methods.rb** All the methods which does some kind of filtering on top of fields are available here.

**Collecting the default fields**

     current\_account.cached\_default\_form\_for('Lead').default\_fields

**Collecting the custom fields**

     current\_account.cached\_default\_form\_for('Lead').custom\_fields

**Collecting default and custom field. This is most commonly used method.**

     current\_account.cached\_default\_form\_for('Lead').default\_and\_custom\_fields

**Collecting required fields**

    current\_account.cached\_default\_form\_for('Lead').required\_fields

**Collecting Editable fields group by custom. Result will be two arrays(default and custom) with only editable fields.(i.e, Non read-only)**

   current\_account.cached\_default\_form\_for('Lead').editable\_fields\_group\_by\_custom

**Finding a specific field using some property ex: name. We can use any other property such as :label, :id etc.,**

   current\_account.cached\_default\_form\_for('Lead').find\_field\_by(:name, 'job\_title')

============================================== Field Methods ==============================================

==> Below methods are available as part of **lib/form\_service/form\_methods.rb**  All the instance methods on Field's object such as .choices / .i18nized\_label / .system\_field? are available here.

**Collecting field's choices.**

  field = current\_account.cached\_default\_form\_for('Lead').find\_field\_by(:name, 'time\_zone')

  field.choices

**Accessing a field's Label.**

 Since we store field's name as label in Form service, when we need a field's label we **should not use field.label**instead, we should be using **field.i18nized\_label.**The later will take care of i18nizing the label

 based on Account's language settings.

============================================== Field CRUD ==============================================

==> Below methods are available as part of the Form service Gem that we use. Refer: <https://github.com/freshdesk/formserv-gem> We can override these methods in **lib/form\_service/form\_methods.rb**

**Creating a Field**

  current\_account.cached\_default\_form\_for('Lead').create\_field(label: "Sample Field",  
                                                                                                     type: Formserv::Constants::FIELD\_TYPE\_KEYS\_BY\_TOKEN[:dropdown],  
                                                                                                     choices: [ {value: "choice 1", position: 1}, {value: "choice 2", position: 2} ])

**Updating a field**

   current\_account.cached\_default\_form\_for('Lead').update\_field(field\_id, { label: "Sample Field 2", required: true })

**Deleting a field**

  current\_account.cached\_default\_form\_for('Lead').update\_field(field\_id, { deleted: true })

============================================== Field Types ==============================================

**Types of Custom Fields allowed to create currently**

1. text  
2. paragraph  
3. decimal  
4. checkbox  
5. dropdown  
6. radio  
7. date\_time

8. auto\_complete (lookup field)

**Types of fields that should be handled or taken care during development**

1. text  
2. paragraph  
3. decimal  
4. checkbox  
5. dropdown  
6. radio  
7. date\_time  
8. date => there are few default fields of this type (expected\_close and closed\_date in Deals)

9. auto\_complete