MANAGE CUSTOM FORMS

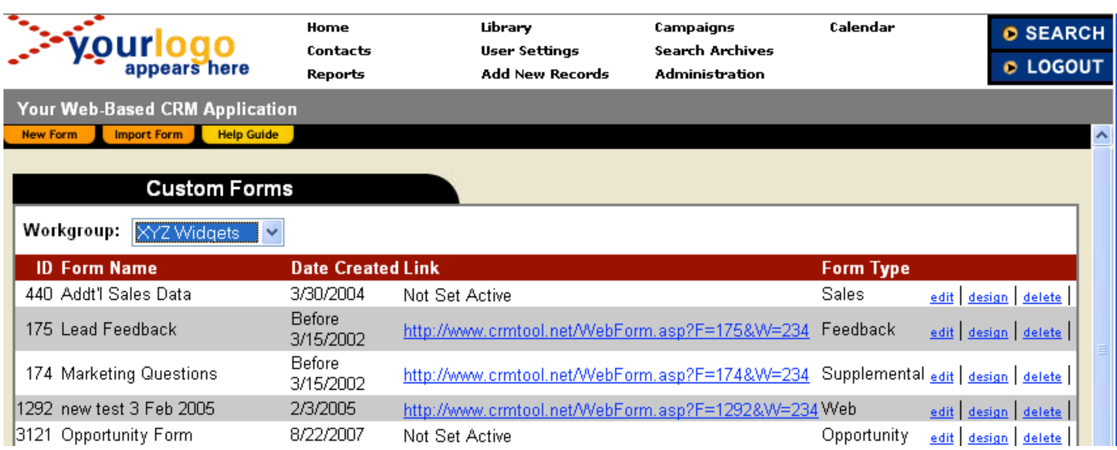
Custom Forms are forms that can be attached to a record to hold variable information for a particular customer. This is an extension of the basic application and allows for customization for customer special requirements. One of the unique features of Custom Forms is that it allows for the "extension" of the application's basic search capabilities to many of the fields on the Custom Forms.

Types of Custom Forms:

- Supplemental Form – can be attached to a profile when records are manually added to the application or anytime after adding a record
- Web Form – developed the same way as Supplemental Forms but can be made available for direct web input into the application database (via a special plug-in development tool)
- Sales Update Form – developed the same way as Supplemental Forms but can be linked "in-line" into the Sales Update screen (instead of just being an attachment via a pop-up screen this form appears as if it is part of the actual Sales Update screen) and can be made variable by individual campaign
- Feedback Form – this form appears "in-line" at the end of the Sales Update screen and can contain a series of questions regarding the lead (used for Sales Feedback purposes)
- Sales Opportunity Form – this form appears in the Sales Opportunity section of the Edit Profile and Record Update screen and can be customized for a particular workgroup

Custom Forms are built via a unique tool that was developed for use with this application. This is only available to personnel that have Manage Custom Forms enabled and have been trained in the use of the tool and the resulting forms.

The following is the main Custom Form screen:

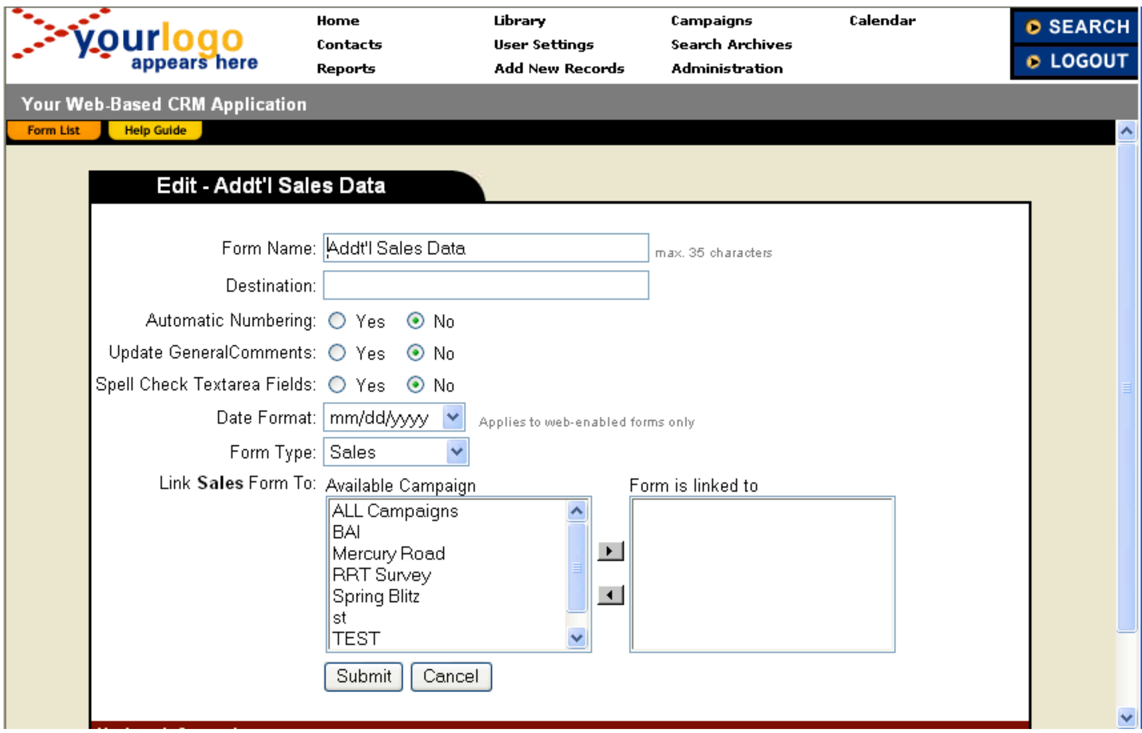


The Custom Forms screen lists all the custom forms that are available for a particular workgroup. If the user has access to more than one workgroup then the individual workgroups will appear in the Workgroup pull-down table.

The New Forms tab brings up the basic parameters screen for defining a Custom Form.

The Import Form tab allows the user to import (copy) custom forms from another workgroup (if they have access to more than one workgroup).

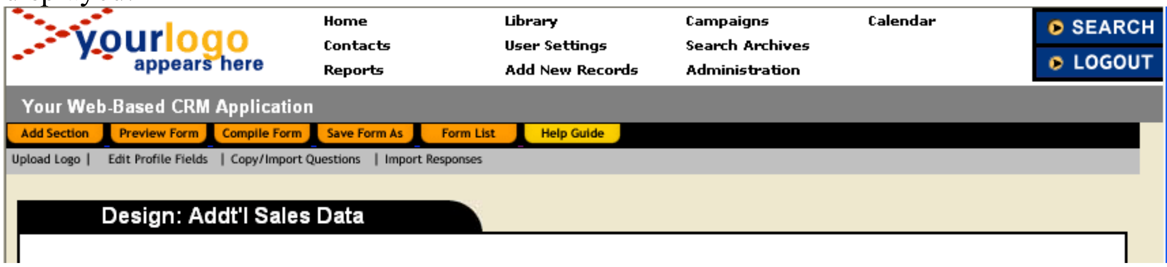
By clicking on the edit hyperlink the basic parameters screen for the Custom Form are displayed:



Edit screen fields:

- Form name – name of Custom Form (can be modified after being created)
- Destination – [an internal application field]
- Automatic Numbering – whether individual question should be numbered or not
- Update General Comments – whether entire Custom Form should be written to the Campaign Survey/Responses field in the Lead Detail
- Spell Check Textarea Fields – Enable/Disable automatic Spell Check on this custom form
- Date Format – define data form to be used for form fields [mm/dd/yyyy or dd/mm/yyyy]
- Form Type – designate whether a Custom Form is Supplemental, Web, Sales, Feedback or Sales Opportunity
- Link Sales Form To: - if Custom Form type is Sales then what campaigns it applies to
- Link Feedback Form To: - if Custom Form type is Feedback then what campaigns it applies to

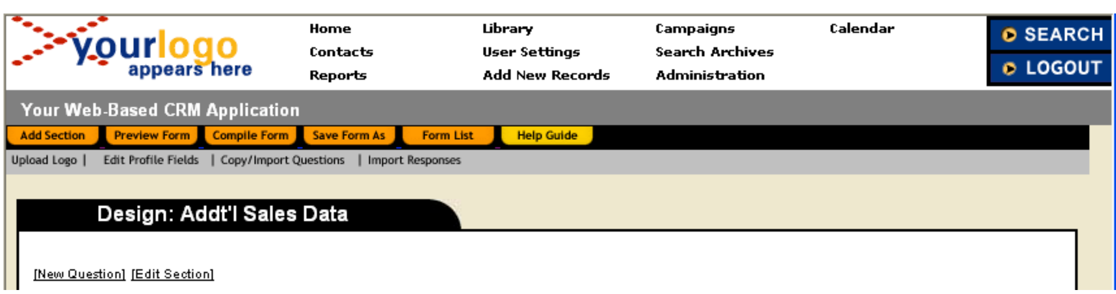
By clicking on the design hyperlink the basic parameters screen for the Custom Form are displayed:



Screen Tabs:

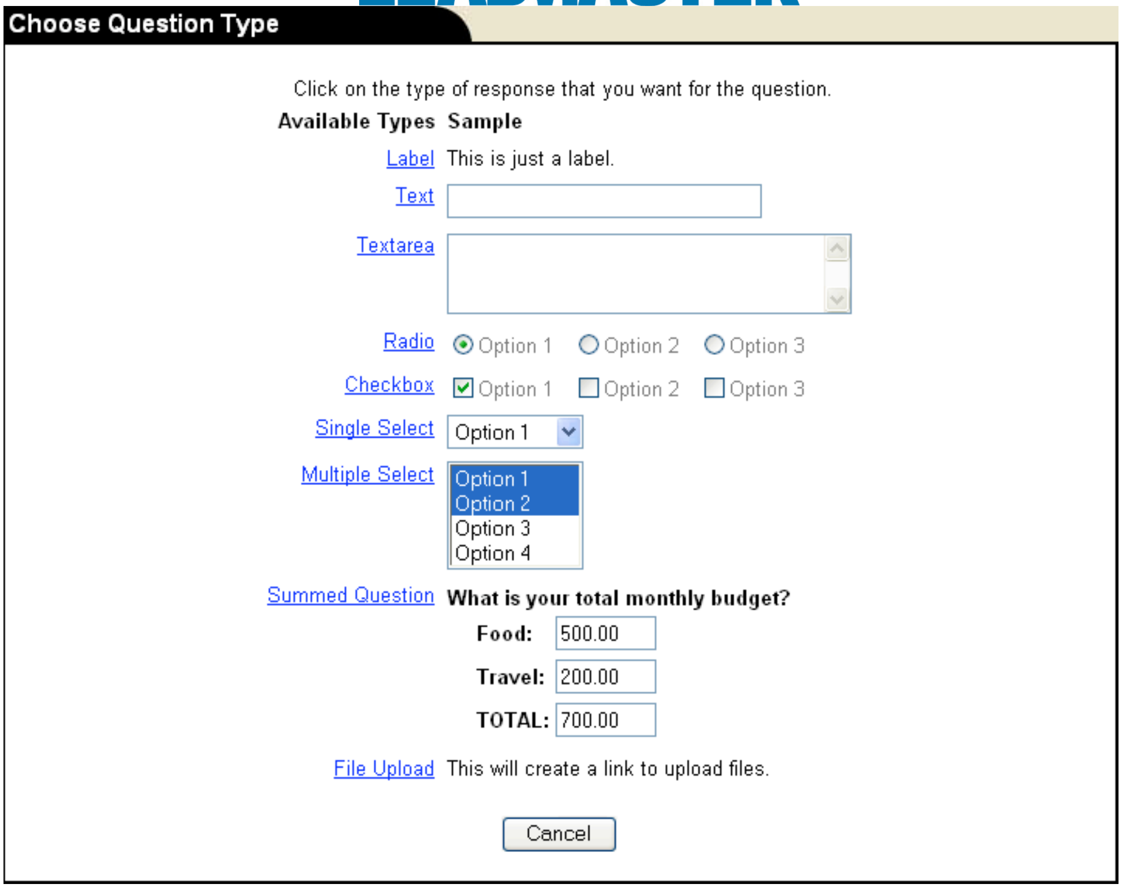
- Add Section – this allow for the creation of sections within the custom form (see below)
- Preview Form – this allows for viewing what the form will look like to the user
- Compile Form – this compiles the form and makes it available for selection by the user Forms should be developed and finalized before compiling them into a "production" mode (questions and answers should never be deleted from a compiled custom form once "live" data is input)
- Save Form As – this allows for the "cloning" of an existing form within the workgroup list of Custom Forms (when this feature is used the saved form will be in the un-compiled mode)
- Form List – takes user back to the main Custom Form list screen
- Upload Logo (gray tab) – allows for upload of a company logo to be used when displaying the Custom form
- Edit Profile Fields (gray tab) – allows for inclusion of basic fields on the Custom Form
- Copy/Import Questions (gray tab) – allows for copying and importing questions from other custom forms into an existing custom form
- Import Response – allows for importing of responses into radio or multiple choice type questions [file must be one column of responses and be in .txt fomat]

The following shows what a Supplemental Custom Form would look like after creating the Section Header above (the Section Header can be edit by clicking on the Edit Section hyperlink):



Questions can be added to a Section by clicking on the New Question hyperlink:

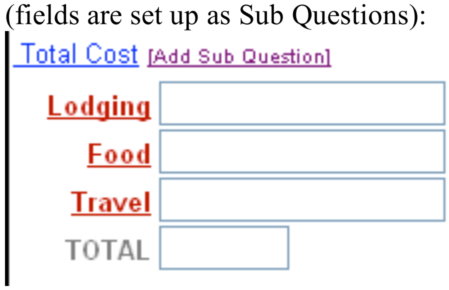
LEADMASTER



Field types:

The following can be selected from the Choose Form Type screen:

- Label – This allows for setting up the display of a text value label [no input values will be associated with it]
- Text – basic text field
- Textarea – field for input of large amount of text (user can defined size of field and box)
- Radio – for use where user will select one response
- Checkbox – for user where user can select more than one response
- Single Select – pull-down box where user select one table entry
- Multiple Select – pull-down box where user can select multiple table entries (by holding down the CTRL and SHIFT key)
- Summed Question – this allows for the setup numeric values with an automatic total field (fields are set up as Sub Questions):

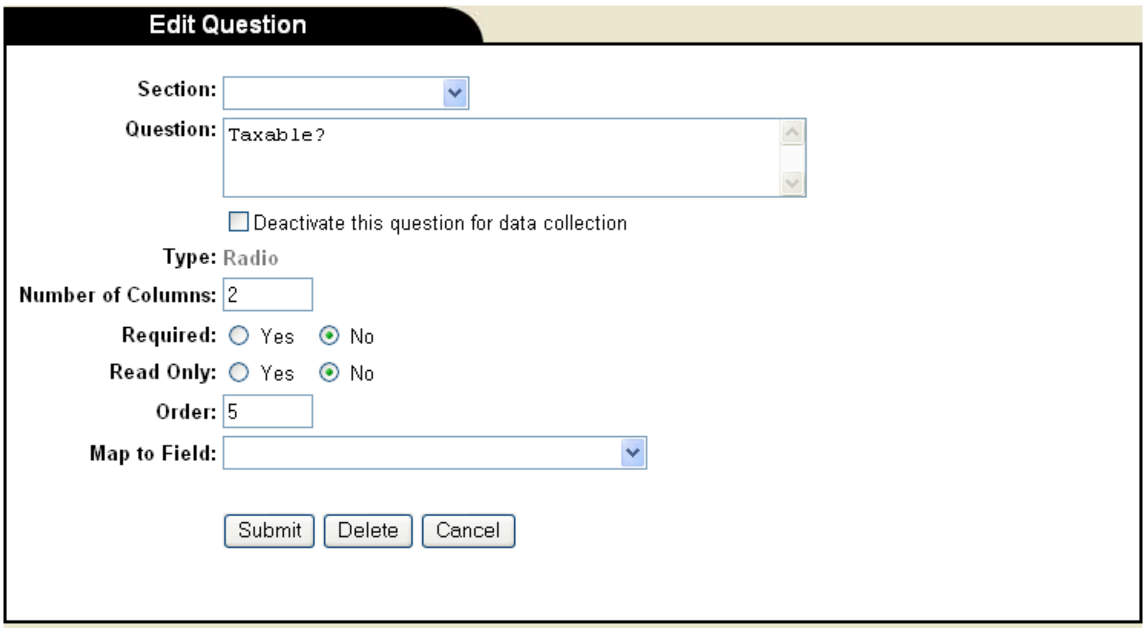


- File Upload – option for allowing user to upload a file via a Custom Form

[NOTE ➔ Checkboxes should be used whenever possible for multiple responses type questions versus a Multiple Select type field because a user my "wipe out" multiple responses by clicking on one entry while not using the CTRL or SHIFT key]

To select a particular type of field the user clicks on the field name hyperlink and a pop-up screen will allow for the setting up of the parameters for that fields type.

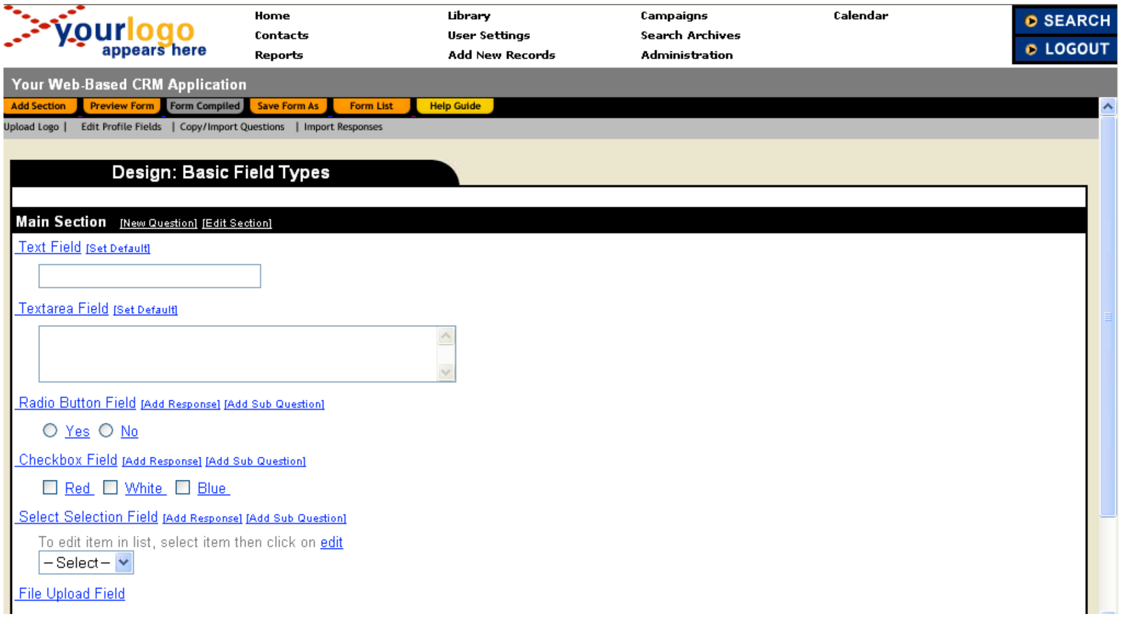
The following is a sample screen that has been filled in for a Checkbox type field:



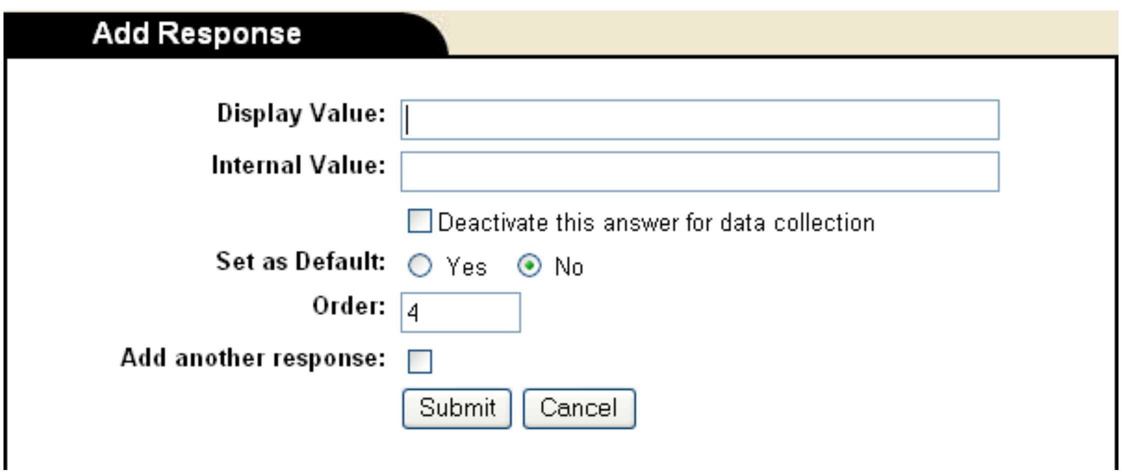
<u>Field Descriptions:</u>

- Section – defines what Section that this field belongs to
- Question – Question or field tag to be displayed with this field
- Deactivate – Once a Custom Form is compiled and is being used for data collection a field can be "deactivated" (Question or field tag as well as answers will be grayed out on the Custom Form and further editing will be turned off)
- Type – Such as Checkbox, Text, Radio, etc
- Number of Columns – the number of columns that will be used to display the answers for this particular field
- Required – whether this is to be a required field on the Custom Form (marked with a check and requiring entry in this field for the Custsom Form to be submitted
- Read Only – remove update capability on this individual field
- Order – order of this field within the section
- Map to Field - Custom Form fields can also be mapped directly to key fields within the SQL database (this requires technical knowledge of the actual SQL DB field names)

The following is the design screen for a basic Supplemental form showing a Main Section header and a sample of the different kinds of fields that can be created with a Custom Form:



For those field types that have responses these can be added by clicking on the Add Response hyperlink next to each field question/field tag. This will pop-up a definition screen as follows (example is for the Checkbox field above):



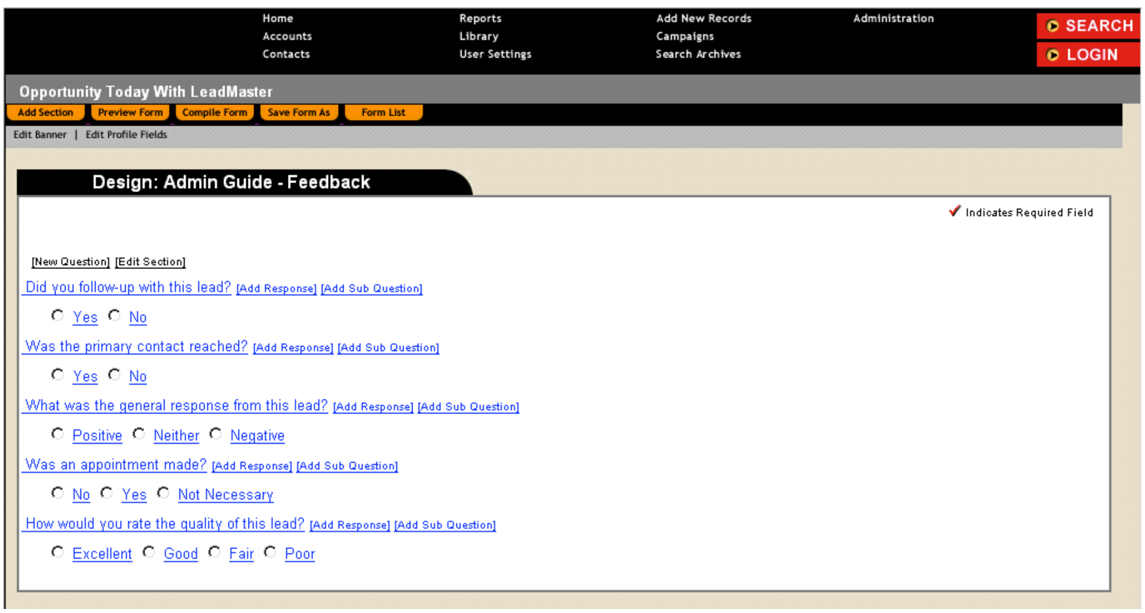
<u>Field Descriptions:</u>

- Display Value - response value that is displayed on the Custom Form
- Internal Value - response value that is stored internally in the DB field (this is for use in scripting where a unique answer such as “Phase/Definition” my be desired versus just “Definition”

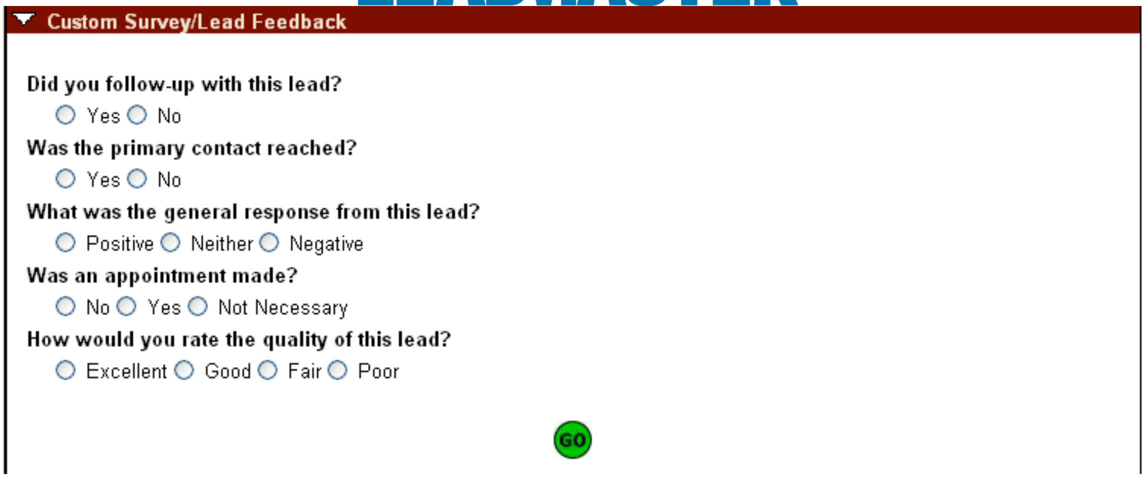
- Deactivate answer – this will gray out a particular answer on the Custom Form and allow for display of prior selection of this answer but will not allow further selection or editing of this answer
- Set as Default – ability to set this value as the default value
- Order - sequential order of this field within the response for this question/field tag
- Add another response – this allows you to bring up another blank Add Response screen when you click on Submit instead of having to go back to the custom form and click on the Add Response hyperlink again

Editing of existing answers can be edited by clicking on the individual answer (or in the case of Single or Multiple select on the edit hyperlink next to the answer).

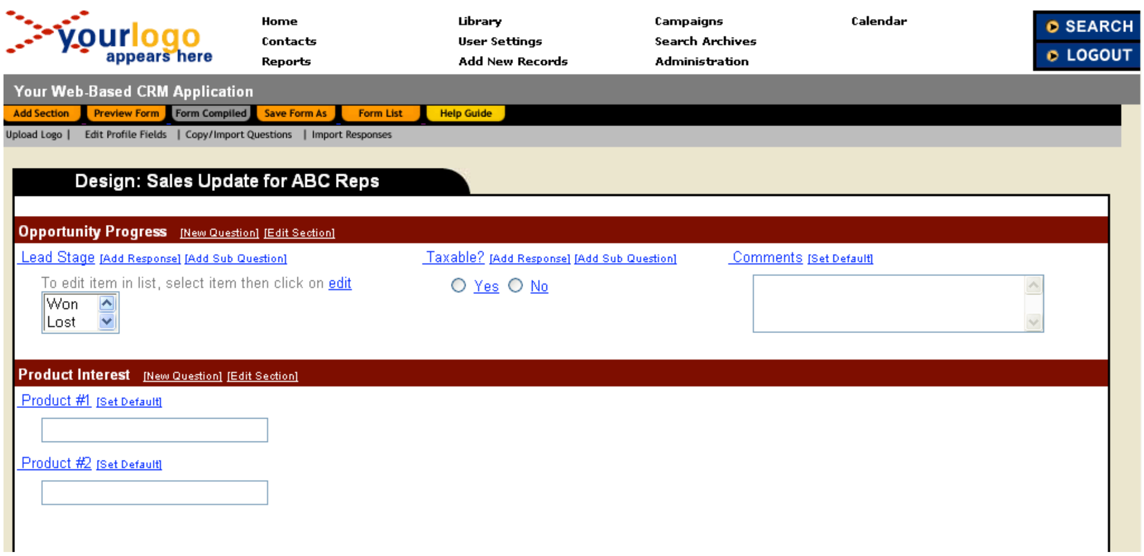
The Feedback type Custom Form is "attached" to the bottom of the Sales Update Screen and can be used to capture feedback from sales and marketing personnel. The Feedback type Custom Form can be assigned by Campaign via the edit hyperlink on the Custom Forms screen. The following is an example of what might be coded in a Feedback Custom Form:



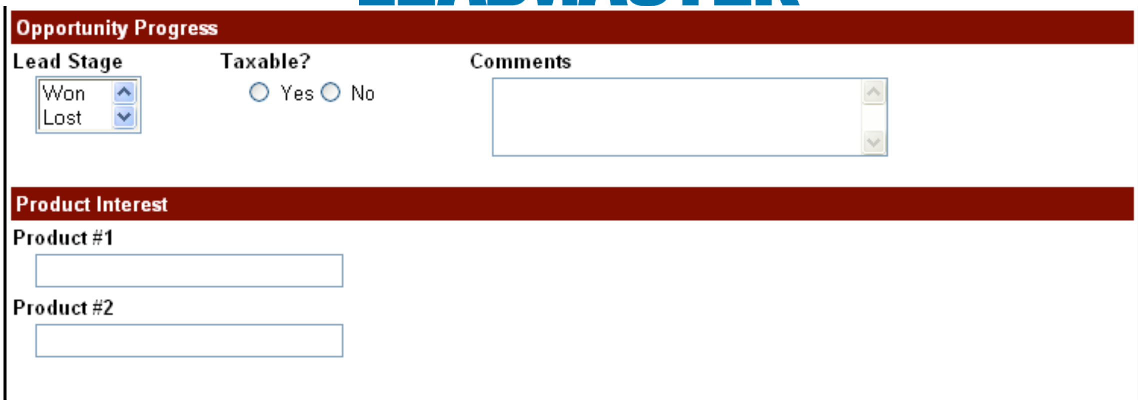
The following is what this Feedback type Custom Form would look like at the bottom of the Sales Update screen (partial screen):



The Sales type Custom Form is displayed in the middle of the Sales Update Screen right below the standard Sales Progress section. The Sales type Custom Form can be assigned by Campaign via the edit hyperlink on the Custom Forms screen. The following is an example of what might be coded in a Sales Custom Form:

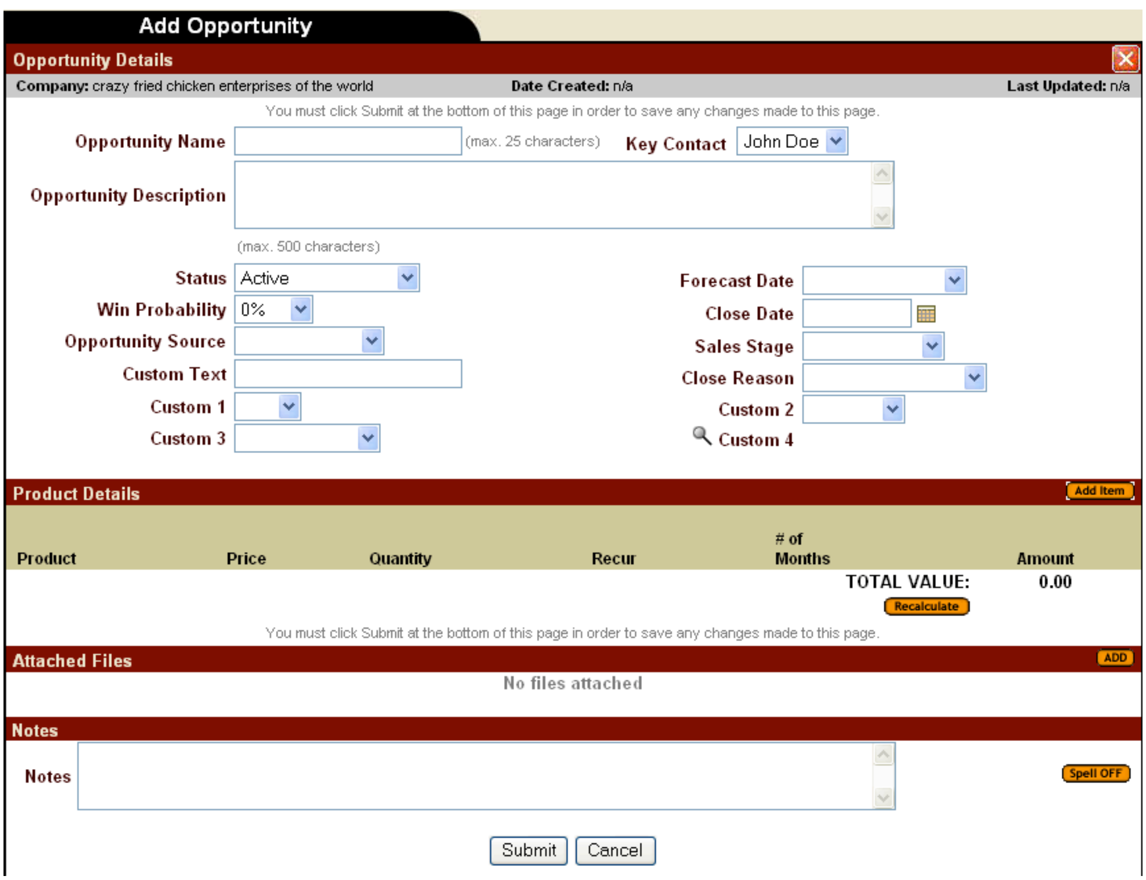


The following is what this Sales type Custom Form would look like in a Sales Update screen (partial screen):



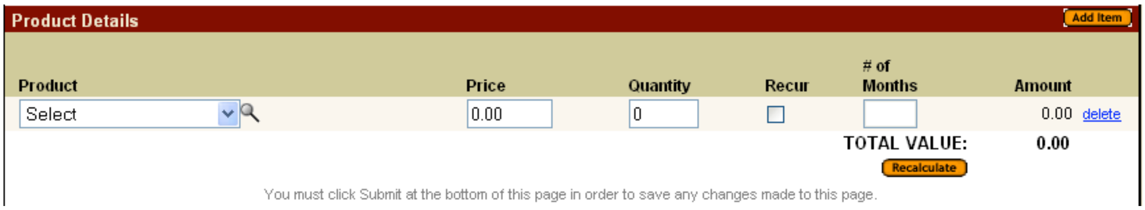
The Opportunity type Custom Form is associated with Opportunities [Opportunties is a function that can be turned on/off by workgroup. If Opportunities is Enabled then am Opportunities section will appear in the Edit Profile and Sales Update screen right below the Sales Progress section of the screen:

Clicking on the ADD button will bring up the Add Opportunity screen:



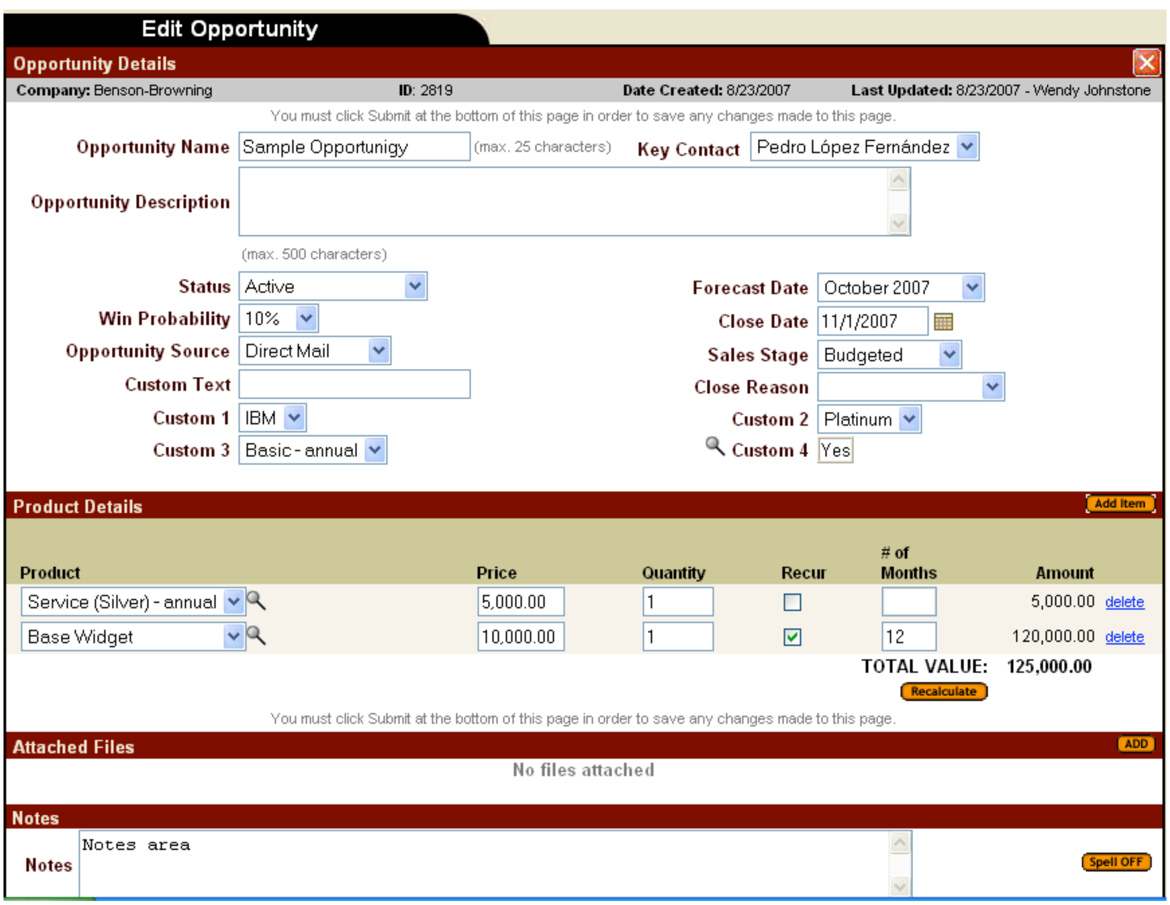
Multiple Opportunities can be set up per record. All of the field tags are controlled by the Custom Labels function and the pull-down field values can be set up and maintained via the Manage Reference Tables function.

The following is what the Product Details pop-up screen looks like when you click on the Add Item button above:



The Product table can be set up and controlled via the Manage Reference Tables and includes the Unit Price. The Recur/# of Months feature is an option that can be set up in the Workgroup record.

The following is a sample of what a filled out detail Opportunity and Product Detail section might look like:



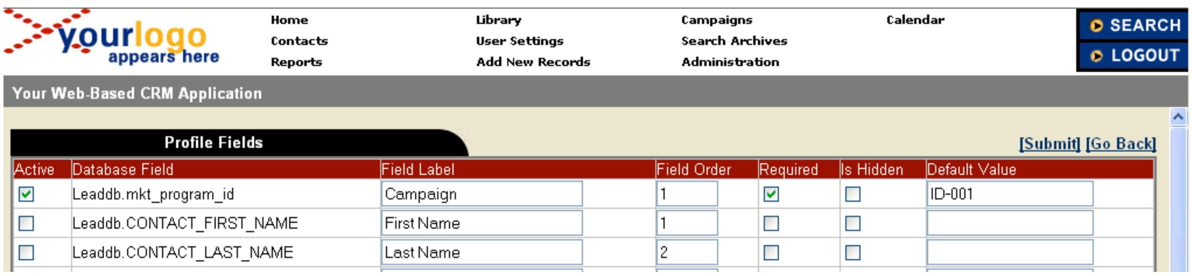
The Opportunity type Custom Form allows for additional custom fields to be displayed in the Opportunity Details section above (just below the four standard custom fields). These can be built in the same way as the other type of Custom Forms.

Profile Fields

NOTE: This feature is primarily used with Web type Custom Forms.

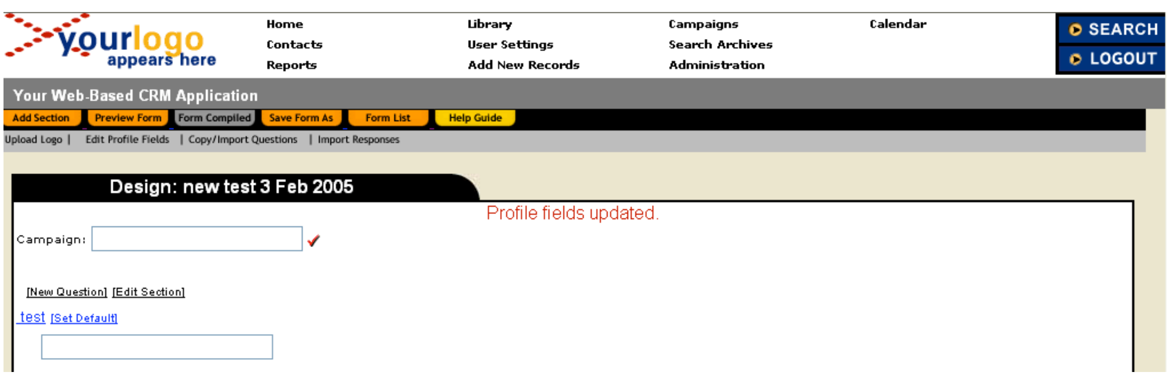
The Custom Forms contain an additional gray tab called Edit Profile Fields that allows for the inclusion of some of the applications standard fields on the Custom Form.

The following is the Edit Profile Fields screen (partial):

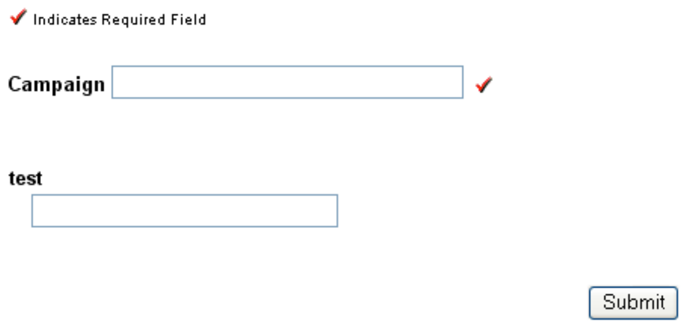


In the example above, the field Campaign ID would be included at the top of the Custom Form and a value of "ID-001" would be written to the Campaign ID field in the record and be a required field.

The following is what the Custom Form would look like in design mode:



The following is what the Custom Form would actually look like if run via the Link hyperlink on the Custom Forms screen:


✔ Indicates Required Field

Campaign ✔

test

Submit