Dynamic Forms & Processes
Exhibiting use cases

Enabling teams to complete high velocity sales
By Sneha Chowdhary
Agenda

○ Industry Specific Cases
  ○ Education
  ○ Lending & Insurance
  ○ Healthcare
  ○ Field Services

○ Overall Benefits
Typical Industry specific cases: Education
Enrolling an existing student in a demo
Updating an Enrolled students details
Lending & Insurance
Adding a New Loan Applicant
Adding a New Loan Applicant - Application type ‘Used’ vehicle
Adding a New Loan Applicant - Filling relevant details for Used vehicle

Loan Application - Application Details

- Make *
- Model *
- Variant Name *
- Ex Showroom Price
- Repayment Type *
- Ex Showroom Price (Used Bike) Enter Value
- Repayment Type
- Promo Code
- Life Credit Cover
- Tenure In Months *
- ROI
- Enter Value
- Bank Hypothecation

Next →
Adding a New Loan Applicant - Selecting co-applicant

Harley Davidson Loan Application - Application Information

Title *
Italia

Applicant Middle Name

Applicant First Name *
Test

Applicant Last Name *

Gender *

Date of Birth *

Do you have a Co applicant
Yes

Parent or Spouse First Name *

Parent or Spouse Middle Name

Quick Add Lead
New Application
Add New Lead
Import Leads
Import Lead Tags

leadsquared
Land More Leads, Close More Deals
Adding a New Loan Applicant - Filling ‘Co-applicant’ information
### Updating New Applicant Details

#### Smart Views

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<tr>
<th>Lead Name</th>
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Healthcare
Proposing Healthcare activities for Patients
Proposing Healthcare activities for Patients
Scheduling meeting appointments with Doctors

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Scheduling meeting appointments with Doctors

PJP Form

Doctor Details
Doctor Name: Dr Namitha Kapoor
Address 1: Apollo Cardle, Brookfield

Meeting Dates
Meeting B1: 14/02/19 1:30 PM
Meeting B2: 23/02/19 2:00 PM

Category:
Target Monthly Revenue: Enter Value
Field Services
Triggering a Process on completion of a Document collection task
On task completion - capturing the outcome of the task for a new vendor
Uploading documents as part of the task outcome
What Dynamic Forms can do for your users

**Data capture made easy**
- Lead, Activity & Location (Via mobile soon)

**Customization & Flexibility**
- Designer & Rules help you set up how your users see your form
- Use Custom Field Sets to upload files in their respective fields in forms
- Define specific ‘Condition - Action’ rules to show, hide or set the values of field
- Choose what to show & when to show it

Upload files/documents from key places
That’s all folks!