What’s new in Forms and Process
Agenda

• New Features in Forms and Process

• Use Cases for:
  • Education
  • Health Care
  • Insurance and Lending
  • Field Services

• Tip on how to leverage Forms and Process
Introducing Tasks in Forms

Create Form
Configure your form properties

Give your form a name
Doctor’s Appointment

Choose the type of fields to use

- Lead Fields
- Activity fields
- Task fields

Type: Select Task

Create with default options  Next
Effective Scheduling Using Calendar View

- New Calendar View within Forms to show users and their availability
- Assign Tasks to users based on their availability
- Filter users to be shown based on conditions

Session Information

Book Session On *
12/11/19 2:30 PM to 12/11/19 3:00 PM | IST - (GMT+05:30) | Check Availability

Name of the Counsellor *
Suryateja G

Subject of the Meeting *
Outdoor Meeting:
New Date Validations

• Min and Max Dates along with Dynamic Date Ranges
• Applicant’s date of birth should be before April 1993
• Car Purchase date should be 2015 or later
• Loan Applicants should be between 25-28 years age
• Last Visitation should be less than a month ago
• Next visitation should be after 6 months
• Appointment should be set for the next 2 weeks only
Use Cases for Tasks within Forms

- Education
  - Counselor Sessions
  - Demo Classes
  - Home Visits

- Health
  - Appointments
  - Follow Up Meetings

- Insurance and Lending
  - Meetings
  - KYC Appointments
  - Follow Up Meetings

- Field Services
  - On Site Visitations
  - Meetings
  - Follow Up Meetings
Using Forms in Agent Pop Up

• New Work Areas to support Forms in Agent Pop Up

• Separate Work Areas for Inbound Phone Calls and Outbound Phone Calls

• Control on Forms to be shown based on User Conditions

• Allow Multiple Forms within the Form with easy toggle
Using Forms in Agent Pop Up

Form Title 1

Section 1

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stephen</td>
<td>Strange</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:Stephenstrange@email.com">Stephenstrange@email.com</a></td>
<td>Steve Rogers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subject</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting:</td>
<td>Bangalore</td>
</tr>
</tbody>
</table>

Cancel | Save
Using Forms in Agent Pop Up

Incoming Call - #SR 12122 (+91-8764442678)
+91-7642223456

Outgoing Call - #SR 12122 (+91-8764442678)
Dr Stephen Strange

Form Title 1

Tab 1  Tab 2  Tab 3

 biodiversity

Section 1

First Name: Stephen
Enter First Name: 

Last Name: Strange
Enter Last Name:

Email: Stephenstrange@email.com
Enter Email:

Owner: Steve Rogers

Subject: Meeting:
Location: Bangalore

Cancel  Save

Form Title 1

Tab 1  Tab 2  Tab 3

Section 1

First Name: Stephen

Last Name: Strange

Email: Stephenstrange@email.com

Owner: Steve Rogers

Subject: Meeting:
Location: Bangalore

Cancel  Save

leadsquared
Setting Values Using API’s/LAPP’s

Configure Rules

Rule 1

If All of the following conditions are met:

- City contains data

Then perform following actions:

- Set Value
  - Field: Subjects Offered
  - Data From API: https://api.lsqclasses.com/v1//get/courses/@L
    - Subjects Offered: courses
Others

• Adding Multiple Activities of the Same Type
  • Using “Add More” Features within Sub forms

• Saving Context and Submission Validation in Process
  • Pick where you left off from while using Forms
  • Use 3rd Party Validations while Form Submissions
THANK YOU