New Features Overview

For Users

Product News

18 December 2001

On Thursday 20 December 2001, you will notice a few changes to the application, specifically in the area of custom forms attached to records in your database. Below please find the details on these enhancements.

Custom Forms: More Powerful Features – and a New Look

The system now provides users with more ways to take advantage of the application's powerful custom form capabilities. The key changes include:

- **Multiple form capability:** You can now attach multiple custom forms to a single record.
- **Streamlined access to forms:** In order to manage the forms more easily, an Attached Form area has been added to the record Profile to display the name and summary of all supplemental, web and event registration forms attached to that record. **The Attached Forms list replaces the orange Custom Form tab that formerly appeared at the top of the Profile screen for records with a form attached.**
- **File attachments:** Supplemental, web and event registration forms can now include upload capability within the form so that users can attach documents to a form response. See the section below on File Attachments for more information.
- **More design choices:** New formatting styles have been added for users with access to the custom form design area, including a variety of color choices and styles for section headings and fonts.

Accessing Custom Forms

Each entry in the Attached Forms lists the date and time that the form was added to the record as well as the form name, form type and form status (See Figure 1). A newly attached form has a status of "New Entry" while a form that has been modified has a status of "Modified." **Note on access privileges: Only users with Full Edit privileges can update editable forms.**

To access and edit a custom form attached to a record: On the main Profile screen for the record, all custom forms currently attached to the record are displayed in the Attached Forms section below the Profile Summary (see Figure 1). **This section replaces the orange Custom Form tab that formerly appeared at the top of the Profile screen for records with a form attached**. To open a specific form, click on the appropriate Form Name in the list. The completed form will launch in a pop-up window. If the form is set up to allow editing, you can update the information by entering the desired changes and clicking the Update button at the bottom of the form. To close the window without making any changes, simply click the Close button. If editing is not permitted, the Update button will not be displayed.

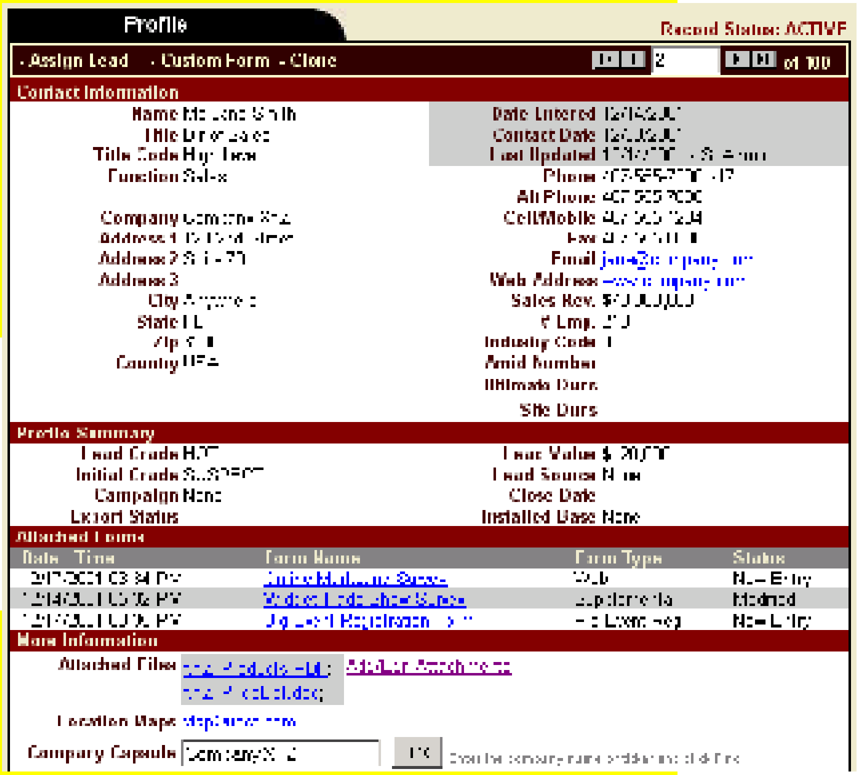

Figure 1: Attached Forms Area on the Profile Screen

Attaching Custom Forms

Supplemental, web and event registration custom forms can be attached to a record when it is first added to the database or can be appended at any time after the record is created. As described below in the overview of form types, sales and feedback forms are attached at the campaign level rather than at the individual record level.

To attach a custom form when manually adding a new record: To attach a supplemental, web or event registration form to a new record added manually into the system, on the Add New Record screen select the desired custom form from the Custom Form selection box at the top of the window. Enter all other information for this new record and then press Go. In the next step, the system will prompt you to enter the custom data. **Note on access privileges: Only users with Add Records permissions can utilize this function.**

To attach a custom form to an existing record: Supplemental, web and event registration forms can be attached to an existing record from either the Profile or the Edit Profile interface. From either screen, click on the Custom Form hyperlink near the top of the page, select the desired form from the list and click on Submit. Once an editable form has been attached, it can be updated as described in the previous section. **Note on access privileges: Only users with Full Edit privileges can utilize this function.**

About Files Attached to Forms

Supplemental, web and event registration forms now offer the capability of including fields within the form for attaching documents to the form response. If this upload files feature is included in a specific form, the user entering data into the form simply clicks on Add/Edit Attachments a hyperlink, browses the computer or network for the desired file and then clicks on Upload. When the form is submitted, in addition to seeing the form name in the Attached Forms List, the attachment(s) filename(s) will also be included Attached Files in the More Information section. Like all file attachment functions within the application, **file types authorized for upload are set by your Administrator**. There is a **3 MB file size limit** per attached document. **Note on access privileges: All users have attachment view permission but only users with Full Edit capability are able to upload and delete documents.**

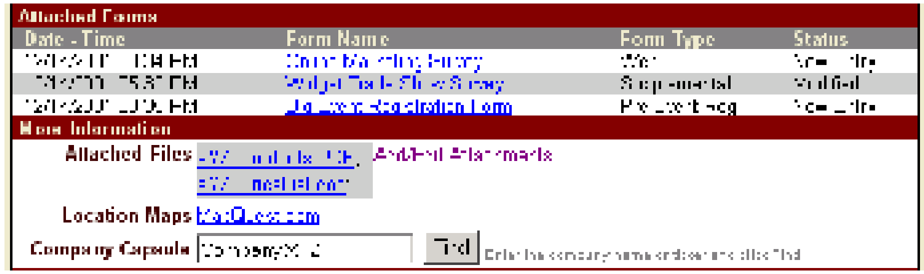

Figure 2: Attached Forms Area on the Profile Screen

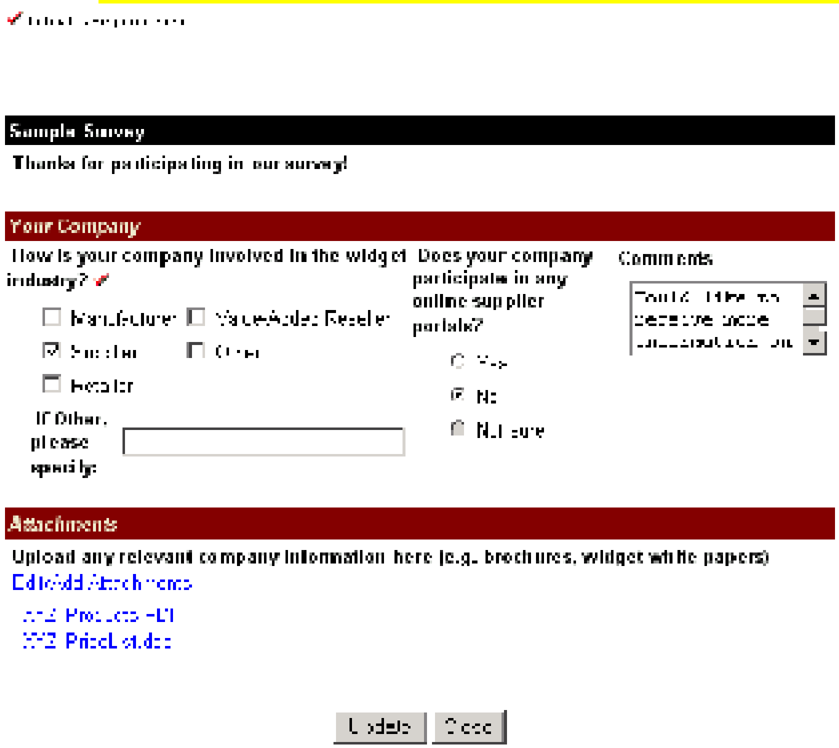

Figure 3: Attachment Links Displayed in Form Response

To view a document attached to a form response: On the record Profile, click on the desired filename in the Attached Files area of the More Information section to launch the document (see Figure 2). Authorized users can add, edit or delete documents attached to the form through this area by clicking on the Add/Edit Attachments hyperlink to the right of the attached files list. Alternately, you can open the relevant form and click on the filename where it appears under the relevant question on the form (see Figure 3). Authorized users can also add, edit or delete documents attached to the form by clicking on the Add/Edit Attachments hyperlink in the form.

Overview of Form Types

A number of form types are available within the application, each designed to suit various types of data collection, from telemarketing scripts to online event registration forms. A brief summary is included below as an introduction to form types. If you are interested in learning more about how to utilize the advanced form design features within the application, please contact your Administrator.

- **Supplemental form:** Supplemental forms can expand the current fields that exist in the system with user-custom fields. This area may be used to capture install based data, additional marketing interest, product or service interest, etc. When attached to a record, a supplemental form appears in the Attached Forms list on the record Profile and can be launched in a pop-up window by clicking on the form name (see Figure 2 above).
- **Web form:** A web form captures data from forms submitted from a website. Popular applications of the web form include information requests, product registrations, customer support inquiries and online marketing surveys. When attached to a record, a web form appears in the Attached Forms list on the record Profile and can be launched in a pop-up window by clicking on the form name (see Figure 2 above).
- **Event registration form:** The event registration form is ideal for collecting information from event registrants via the web. When attached to a record, an event registration form appears in the Attached Forms list on the record Profile and can be launched in a pop-up window by clicking on the form name (see Figure 2 above).
- **Sales form:** The sales update form is a powerful tool for collecting additional details on prospects and customers from sales and marketing team members, such as sales stage and product interests. When attached to a record, the questions and answers in a sales form appears inline at the bottom of the Sales Update screen, facilitating both easy updating and powerful data collection for future data mining. The sales form is assigned at the campaign level so that all records associated with that campaign will have the selected sales form attached. Only one sales form can be attached to each campaign.
- **Feedback form:** Custom forms allow you to tailor the responses you require from your sales channel. Oftentimes, these are basic yes/no or short answer questions designed to gather quick feedback from team members on issues such as lead follow-up, lead quality and next steps in the sales process. When attached to a record, the questions in the feedback form are inserted inline at the bottom of the Sales Update screen with alternating bands of color to distinguish each question from the next. The feedback form is assigned at the campaign level so that all records associated with that campaign will have the selected feedback form attached. Only one feedback form can be attached to each campaign.