

CONTACT US FORM DEPLOYMENT GUIDE

OVERVIEW

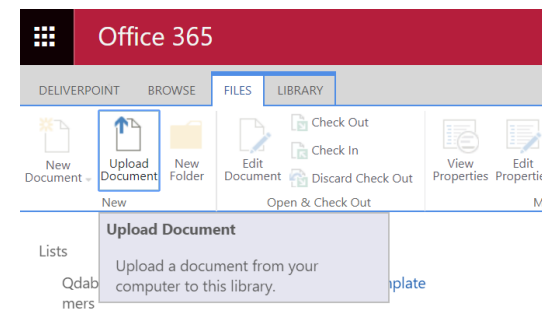
This document details how to deploy the latest Contact Us form to your SharePoint site. Open it in FormsViewer and add SharePoint workflows.

BEFORE YOU START

- The FormsViewer app is ready to use in your SharePoint environment. If not, you can download the installation guide [here](#).
- You are using an account that is a Site Collection Administrator in the site where you plan to use FormsViewer. You must be a Site Collection Administrator in order to upload and manage form templates.

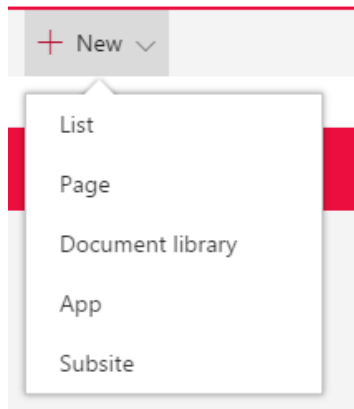
CREATE THE LIBRARY AND LIST USING THE TEMPLATE FILE

1. Navigate to the Site settings of your SharePoint site.
2. Under Web Designer Galleries, click **List templates**.
3. Select the Files tab and click Upload Document.



4. Browse on the template (.stp) files included in this package (you can find these in the STPs folder) and upload each to the site. For the purpose of this document, we will refer to these template files as:
 - ContactUs – Appointments.stp
 - SupportTimeSlots.stp
 - SupportSlots.stp
 - SupportResources.stp
 - Contacts.stp
 - Contact Us – External.stp
 - Feedback.stp

5. Once the template files are uploaded, click the Gear icon in the header bar and click **Site contents**.
6. In the sub-header, click + New, and then click App. This should take you to the Your Apps page.



7. In the search box, enter the template file name, then press enter. For example:

ContactUs - Appointments ✕

1 app matches your search [Newest](#) [Name](#)



ContactUs - Appointments

[App Details](#)

8. Using the order below, create the lists and libraries based off these templates.

Lists:

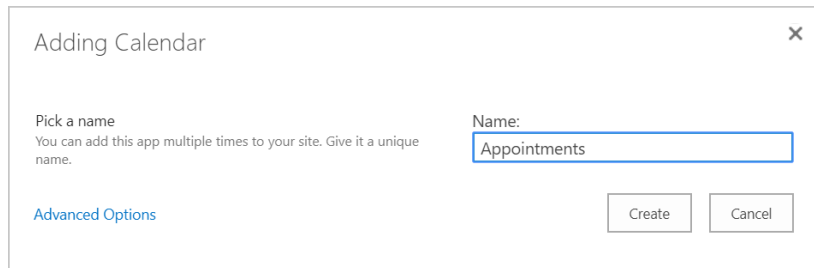
1. ContactUs - Appointments
2. SupportTimeSlots
3. SupportSlots
4. SupportResources
5. Contacts

Libraries:

6. Contact Us - External
7. Feedback

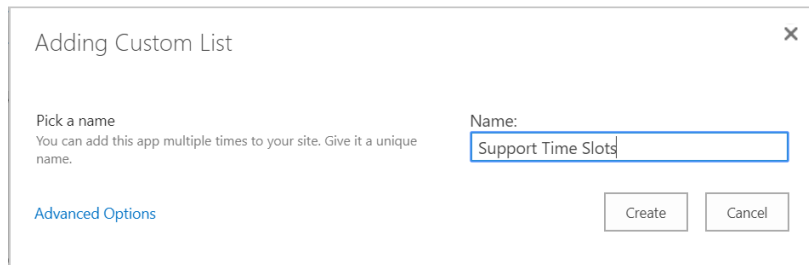
Important: When creating the lists and libraries, you will be asked to enter a name – you must use the exact names for the list and libraries so the Contact Us form can find it. The next steps will guide you in naming the lists and libraries.

9. ContactUs – Appointments.stp – Name this **Appointments**.



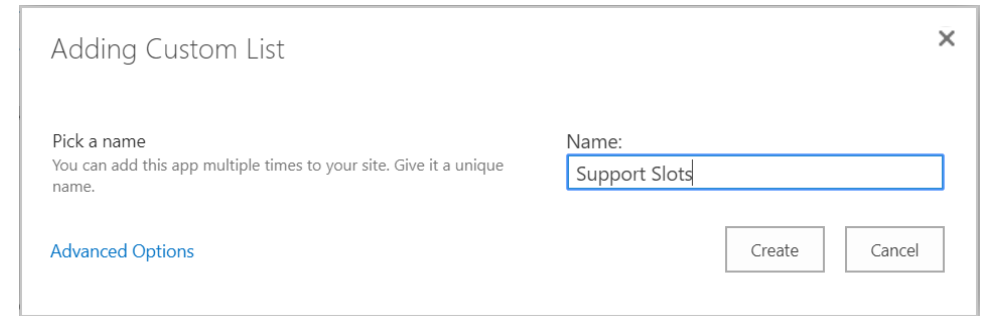
The screenshot shows a dialog box titled "Adding Calendar". It contains a text input field labeled "Name:" with the text "Appointments" entered. Below the input field are "Create" and "Cancel" buttons. To the left of the input field, there is a section titled "Pick a name" with the text "You can add this app multiple times to your site. Give it a unique name." and a link labeled "Advanced Options".

10. SupportTimeSlots.stp – Name this **Support Time Slots**.



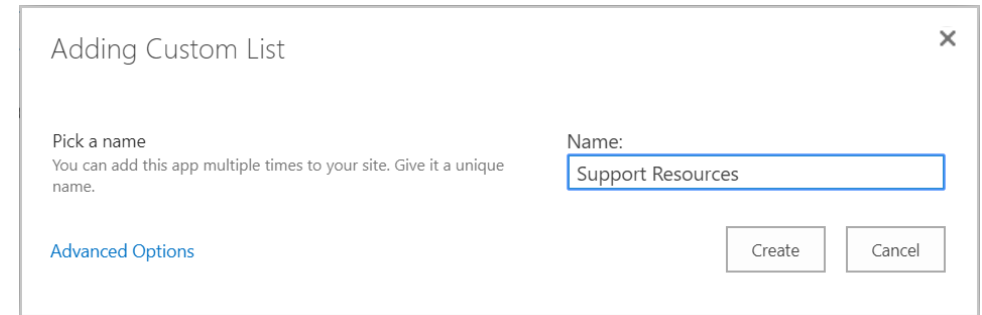
The screenshot shows a dialog box titled "Adding Custom List". It contains a text input field labeled "Name:" with the text "Support Time Slots" entered. Below the input field are "Create" and "Cancel" buttons. To the left of the input field, there is a section titled "Pick a name" with the text "You can add this app multiple times to your site. Give it a unique name." and a link labeled "Advanced Options".

11. SupportSlots.stp – Name this **Support Slots**.



The screenshot shows a dialog box titled "Adding Custom List". It contains a text input field labeled "Name:" with the text "Support Slots" entered. Below the input field are "Create" and "Cancel" buttons. To the left of the input field, there is a section titled "Pick a name" with the text "You can add this app multiple times to your site. Give it a unique name." and a link labeled "Advanced Options".

12. SupportResources.stp – Name this **Support Resources**.



The screenshot shows a dialog box titled "Adding Custom List". It contains a text input field labeled "Name:" with the text "Support Resources" entered. Below the input field are "Create" and "Cancel" buttons. To the left of the input field, there is a section titled "Pick a name" with the text "You can add this app multiple times to your site. Give it a unique name." and a link labeled "Advanced Options".

13. Contacts.stp – Name this **Contacts**.

Adding Custom List

Pick a name

You can add this app multiple times to your site. Give it a unique name.

Name:

Advanced Options

Create

Cancel

15. Feedback.stp – Name this **Feedback**.

Adding Form Library

Pick a name

You can add this app multiple times to your site. Give it a unique name.

Name:

Advanced Options

Create

Cancel

14. Contact Us – External.stp – Name this **Contact Us – External**.

Adding Form Library

Pick a name

You can add this app multiple times to your site. Give it a unique name.

Name:

Advanced Options

Create

Cancel

Here's how your lists and libraries should look like:

Appointments (List):



Contact Us - Appointments

2018

Jan	Feb	Mar
Apr	May	Jun
Jul	Aug	Sep
Oct	Nov	Dec

Today is Wednesday, January 17, 2018

Calendars in View

Contact Us - Appointments

January 2018

SUNDAY	MONDAY	TUESDAY	WEDNESDAY
31	1	2	3
7	8	9	10
14	15	16	17

Support Time Slots (List):

Support Time Slots

Slot ▾	Start Time ▾	End Time ▾
Slot 1	05:00:00	06:00:00
Slot 2	06:00:00	07:00:00
Slot 3	09:00:00	10:00:00
Slot 4	10:00:00	11:00:00

Support Slots (List):

Support Slots

Day ▾	Time Slot ▾
1	Slot 1
1	Slot 2
1	Slot 3
1	Slot 4

Support Resources (List):

Support Resources

Slot ▾	Resource ▾	Email ▾	Role ▾
Slot 1	Aimel Clemente	Aimel.Clemente@Qdabra.com	Support
Slot 1	Don Lambatin	don.lambatin@qdabra.com	Support
Slot 1	Himanshu Nigam	himanshu.nigam@daffodilsw.com	Support

Contacts (List):

Contacts

[+ new item](#) or [edit](#) this list

[All contacts](#) ...



Last Name

First Name

Company

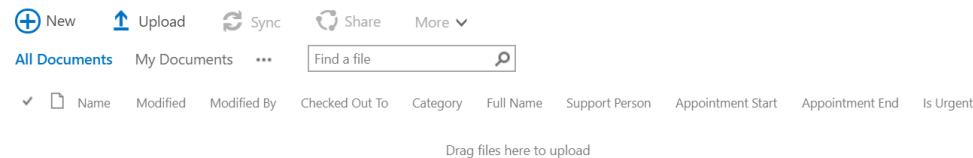
Business Phone

Home Phone

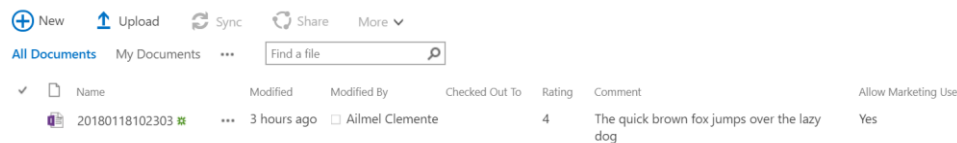
Email Address

There are no items to show in this view of the "Contacts" list.

Contact Us - External (Library):



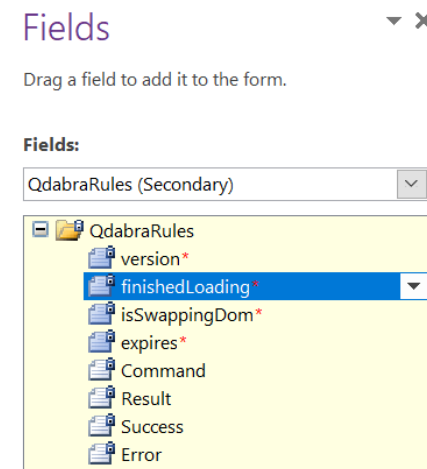
Feedback (Library):



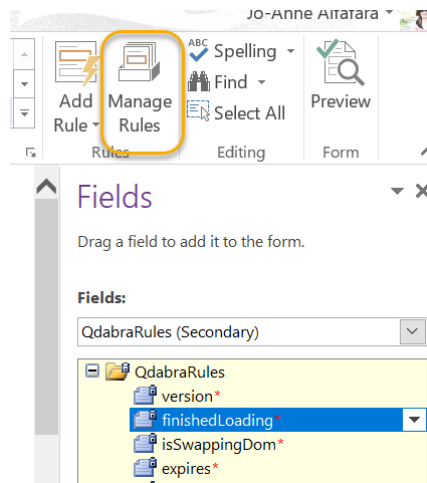
MODIFY THE CONTACT US FORM

The Contact Us form has data connections that points to the Qdabra site. We added a placeholder in the form's rule that you can edit so you don't have to modify the data connections. The form has a rule that fixes up the data connection and makes use of the qRules command called ChangeConnectionUrl. To learn more about qRules, you can check information from this [link](#).

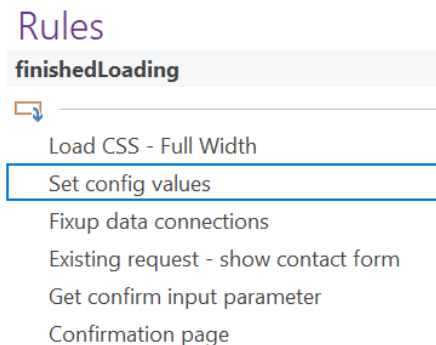
1. Open the Contact Us - Schedule Appointments XSN in InfoPath design mode.
2. In the Fields task pane, select the QdabraRules data connection and click the finishedLoading field:



3. Click **Manage Rules** from the Home tab.



4. Select the rule “Set config values”:



5. Modify the configuration to place values of your own –

- SiteUrl
- Twilio Account Id
- Twilio Phone Number

Details for:

Set config values

Condition:

None - Rule runs when field changes

Rule type:

Action

Run these actions: *

Set a field's value: SiteUrl = "https://YourSharePointSite/"

Set a field's value: TwilioAccountId = "YourTwilioAccountIDGoesHere"

Set a field's value: TwilioPhoneNumber = "YourTwilioPhoneNumberGoesHere"

☐ Don't run remaining rules if the condition of this rule is met

It is **important** to include a slash (/) at the end of the SiteUrl.

Examples of SiteUrl:

- <https://TestServer/>
- <https://TestServer/toplevelsite/subsite/>

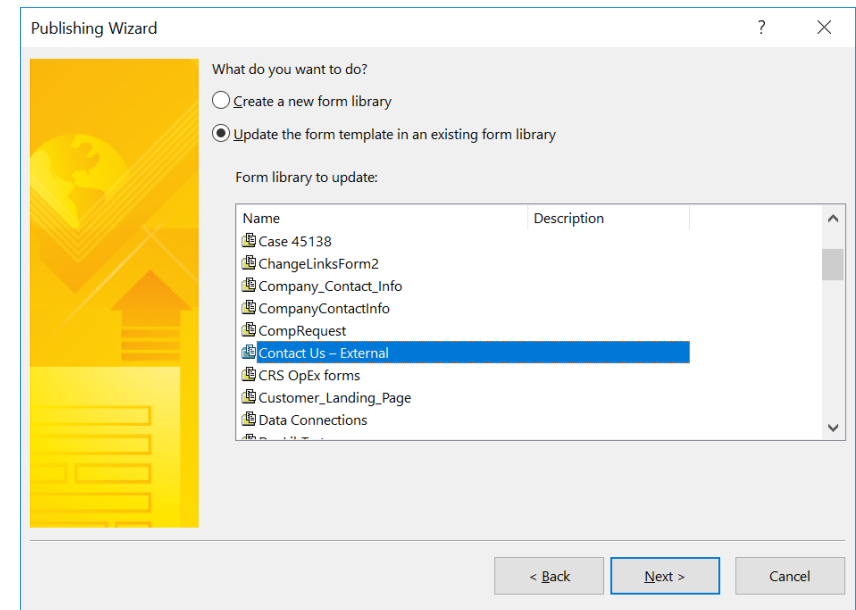
Your Twilio number must have a + sign at the beginning, followed by the country code and phone number, with no spaces or punctuation. For example:

+14151234567

6. Save the form changes.

PUBLISH THE CONTACT US FORM TO THE FORM LIBRARY

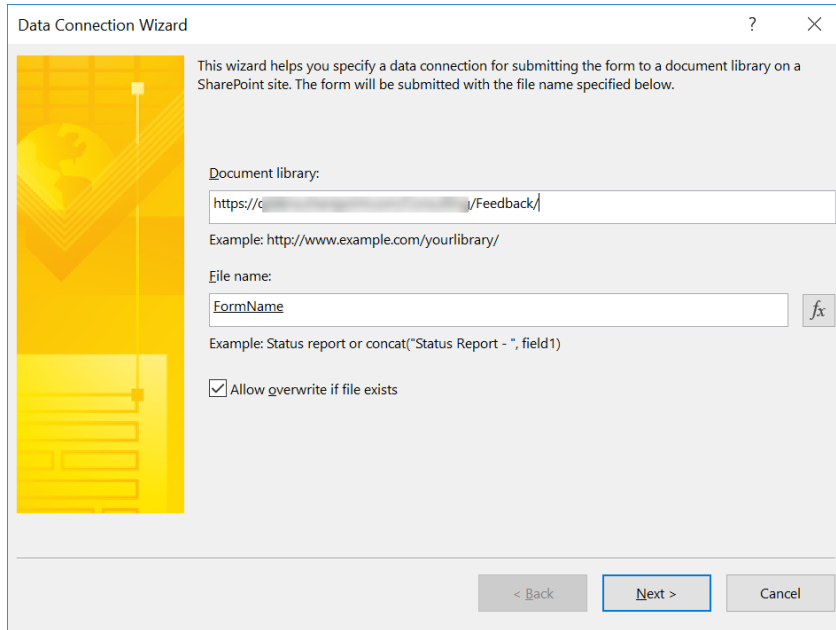
1. After saving the form, click **File > Publish > SharePoint Server**.
2. Enter the SharePoint site.
3. Select Form Library.
4. In the Publishing Wizard, select the option to update the form template in an existing form library.
5. Then, select the Contact Us – External form library.



6. Click Next twice and **Publish**.
7. Close the form.

MODIFY THE FEEDBACK FORM

1. Open the Feedback XSN in InfoPath design mode.
2. In the Data tab, click Data Connections. This form is easier to modify since it only has a single data connection that submits the form to the Feedback form library.
3. Modify this data connection to point to the Feedback library.



Data Connection Wizard

This wizard helps you specify a data connection for submitting the form to a document library on a SharePoint site. The form will be submitted with the file name specified below.

Document library:

 Example: http://www.example.com/yourlibrary/

File name:
 
 Example: Status report or concat("Status Report - ", field1)

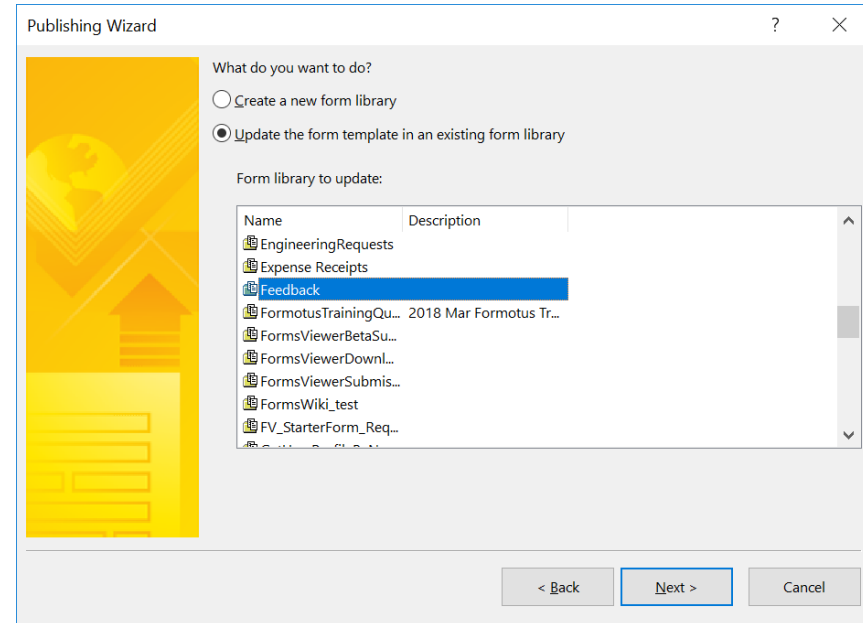
☒ Allow overwrite if file exists

< Back Next > Cancel

4. Finish the wizard and save your form changes.

PUBLISH THE FEEDBACK FORM TO THE FORM LIBRARY

1. After saving the form, click **File > Publish > SharePoint Server**.
2. Enter the SharePoint site.
3. Select Form Library.
4. In the Publishing Wizard, select the option to update the form template in an existing form library and then select the Feedback form library.



Publishing Wizard

What do you want to do?

☐ Create a new form library

☒ Update the form template in an existing form library

Form library to update:

Name	Description
EngineeringRequests	
Expense Receipts	
Feedback	
FormotusTrainingQu...	2018 Mar Formotus Tr...
FormsViewerBetaSu...	
FormsViewerDownl...	
FormsViewerSubmis...	
FormsWiki_test	
FV_StarterForm_Req...	

< Back Next > Cancel

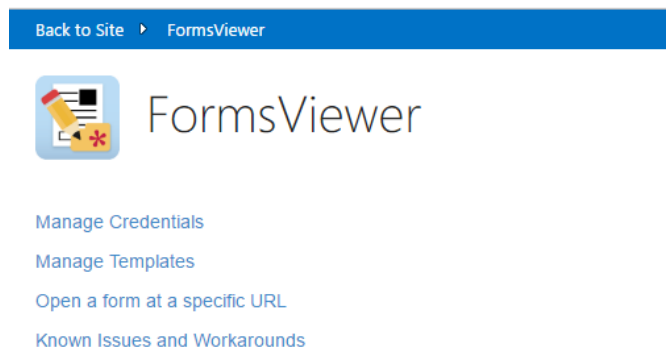
8. Click Next twice and **Publish**.

9. Close the form.

UPLOAD THE FORM TEMPLATES TO FORMSVIEWER

Next, have your forms ready and we'll upload them to FormsViewer.

1. Open the FormsViewer App in the list of apps in Site Contents. This should open the app and show a page like this:



2. Click on **Manage Templates**.
3. Click the **Upload a New Template** button.
4. In the Form Name field, enter a name.
5. In the Form Template field, Drop or browse the form template file you just downloaded in the previous section.
6. Click **Upload**.
7. If the upload completes successfully, you should see an **Open Form** button and **Open Form (anonymous)** button appear at the top of the page.

8. Click the Open Form button. This should open a new browser tab, and form should open in this tab

In Manage Templates, you should have something like this:

Manage Templates

Upload a New Template

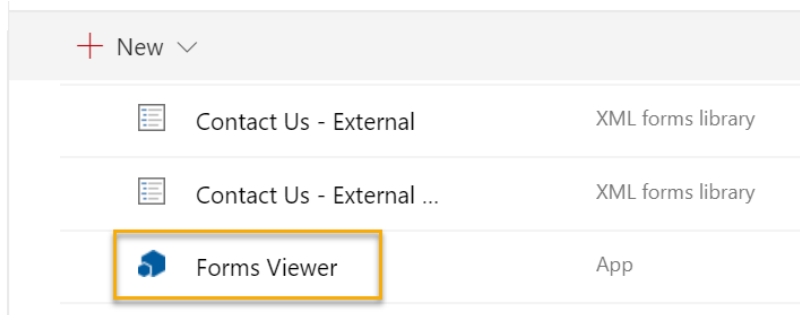
Template Name	Current Version	Open Form Link	Open Form Link (anonymous)
Appointments (2)			
Contact Us - Schedule Appointments	1.0.0.146	Open	Open
Feedback	1.0.0.10	Open	Open

CONFIGURE LIBRARIES TO OPEN LINKS IN FORMSVIEWER

Next, we will configure these libraries to have links which open in the browser. These are the steps:

1. Locate the FVLinks.js file in the package and open in a text editor, such as Notepad.

2. In your browser, go to the site that contains the form library or list you want to use, and click **Site Content**.
3. Click the FormsViewer icon to open FormsViewer.



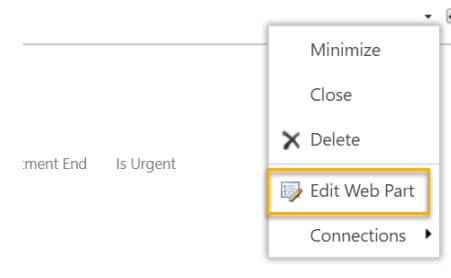
4. Once FormsViewer is opened, copy everything after the ? mark in your browser's address bar.
5. Paste the value from step 4 between the single quotation marks on line 3 of FVLinks.js. The resulting line should look something like this:

```
// REQUIRED: This is the portion of the URL after the ?
var queryString = 'SPHostUrl=https%3A%2F%2Fdomain%2Esha
```

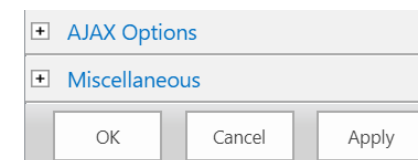
6. Place your template's name between the single quotation marks in line 5 of the file. This template name should match the template's name from FormsViewer's Manage Templates page. The result should look something like this:

```
// REQUIRED: Specify the name of the template
var templateName = 'Contact Us - External';
```

7. Re-save to ContactUs.js file.
8. Login to your SharePoint site, go to the Style Library or Site Assets for that site and upload the file you have prepared.
9. Navigate to the form library.
10. Click the gear icon in the top right and click Edit Page.
11. Edit the library web part.

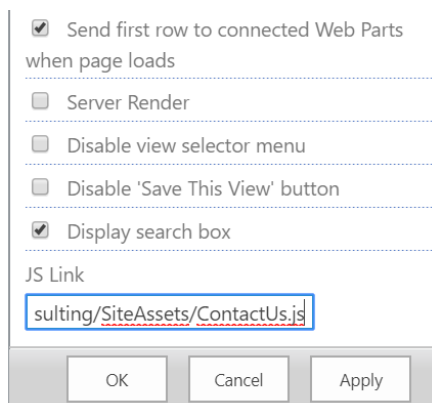


12. Expand the Miscellaneous section and go to the JS Link property



13. For the JS Link property enter the location of the file you uploaded in step 8 depending on where it is located, using a ~site or ~sitecollection placeholder.

For example, if you uploaded the file with the name ContactUs.js to the Site Assets library of the site where you want to use it, you can use ~site/SiteAssets/ContactUs.js.



☒ Send first row to connected Web Parts when page loads

☐ Server Render

☐ Disable view selector menu

☐ Disable 'Save This View' button

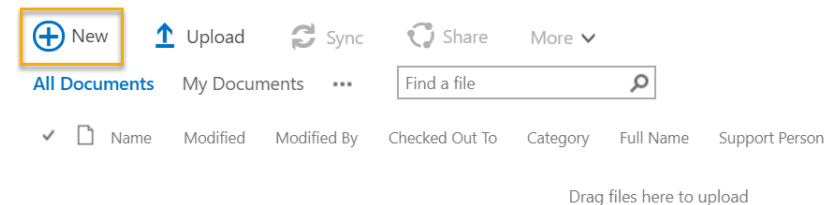
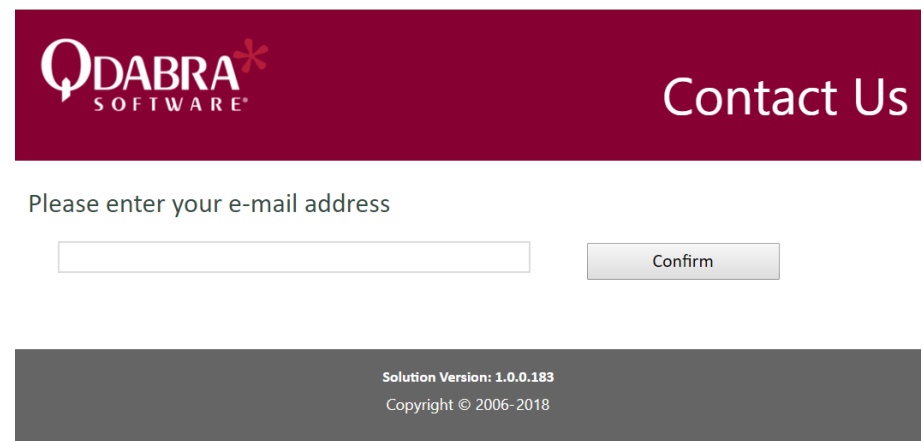
☒ Display search box

JS Link
~site/SiteAssets/ContactUs.js

OK Cancel Apply

Hint: You can use ~sitecollection to refer to the root of the current site collection or ~site to refer to the root of the site.

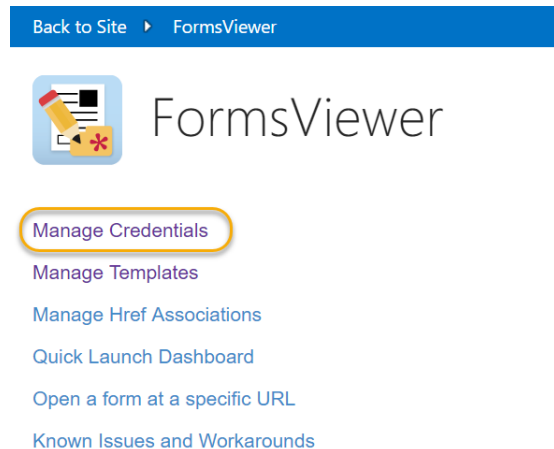
14. Click **OK** to confirm your changes.
15. In **PAGE** tab of the ribbon, click **Stop Editing**.
16. Click +New and the form should open in the browser.

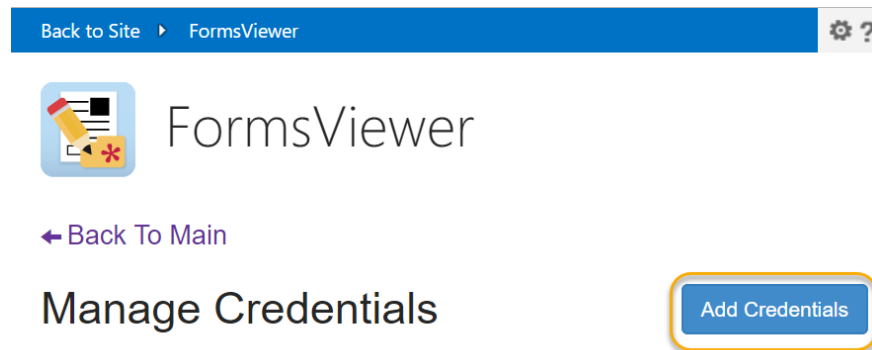
17. The Feedback form should also open in your browser. Repeat the same steps. On step 7, rename it to Feedback.js and upload to your site.

SETTING UP YOUR TWILIO CREDENTIALS IN FORMSVIEWER

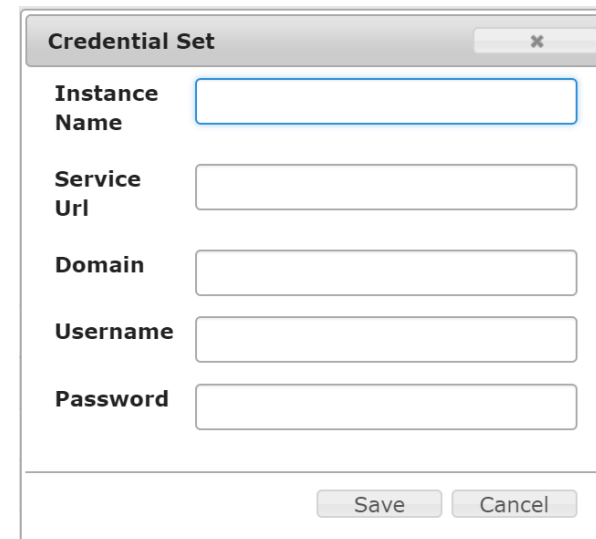
1. In the FormsViewer app, click **Manage Credentials**.



2. Click **Add Credentials**.



3. Provide information for the following:



Instance Name: Twilio
Service Url: <https://api.twilio.com/2010-04-01/>
Domain: [Leave this blank]
Username: Your Twilio account SID
Password: Your Twilio auth token

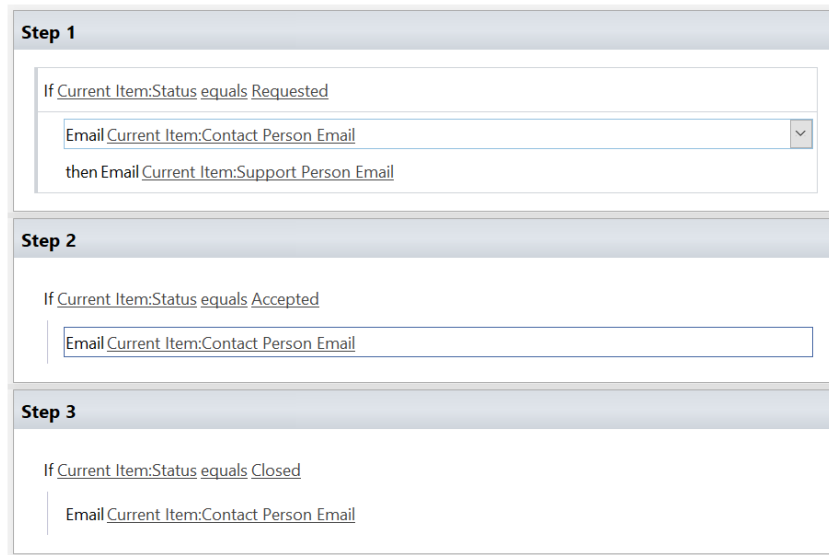
4. Click **Save**.

CREATE EMAIL WORKFLOWS

This workflow sends an email to

- Notify the customer about the request submitted
- Notify the support resource that a request has been submitted, sends a link to open the form and accept the appointment
- Notify the customer that the resource has accepted the appointment

Here's a quick preview:



Step 1

If Current Item:Status equals Requested

Email Current Item:Contact Person Email

then Email Current Item:Support Person Email

Step 2

If Current Item:Status equals Accepted

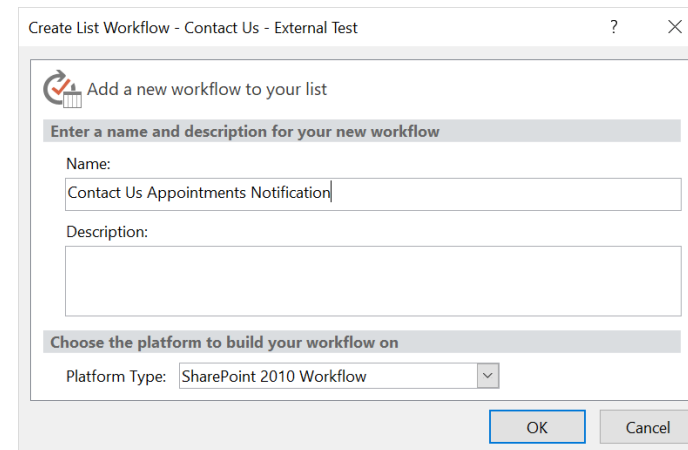
Email Current Item:Contact Person Email

Step 3

If Current Item:Status equals Closed

Email Current Item:Contact Person Email

1. Open the site in SharePoint Designer.
2. In the navigation pane, select **Lists and Libraries**.
3. Select the Contact Us – External library.
4. In the menu from the header, click **List Workflow**.
5. Enter a name and click **OK**.



Create List Workflow - Contact Us - External Test

Add a new workflow to your list

Enter a name and description for your new workflow

Name: Contact Us Appointments Notification

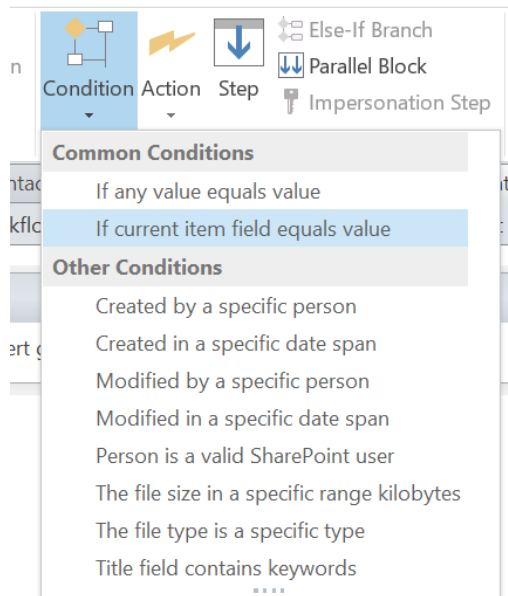
Description:

Choose the platform to build your workflow on

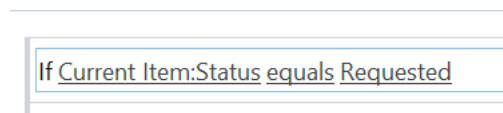
Platform Type: SharePoint 2010 Workflow

OK Cancel

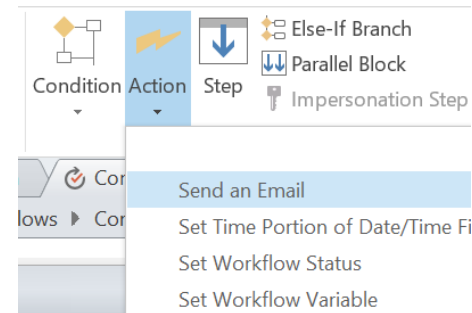
6. Select Condition – If current item equals value.



7. Set the condition to perform a look up for the **Status** field where value is equal to **Requested**:



8. Next, add an Action to send an email.



9. Define the email message. This is the email the customer will receive.

Define E-mail Message

To: Current Item:Contact Person Email

CC:

Subject: Qdabra Contact Us Request - [%Current Item:Appointment Start%] at [%Current Item:Appointment Start%]

Segoe UI 3 B I U

Hi [%Current Item:Full Name%],

Thank you for contacting us!

We have received your request for an appointment with [%Current Item:Support Person%].

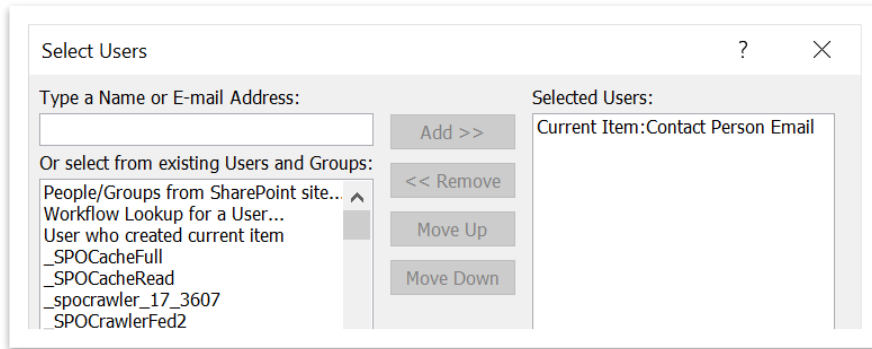
A confirmation email will be sent as soon as the requested appointment has been accepted.

Kind regards,

Qdabra Software

Add or Change Lookup OK Cancel

To:



Select Users

Type a Name or E-mail Address:

Add >>

Or select from existing Users and Groups:

People/Groups from SharePoint site...
Workflow Lookup for a User...
User who created current item
_SPOCacheFull
_SPOCacheRead
_spocrawler_17_3607
_SPOCrawlerFed2

<< Remove

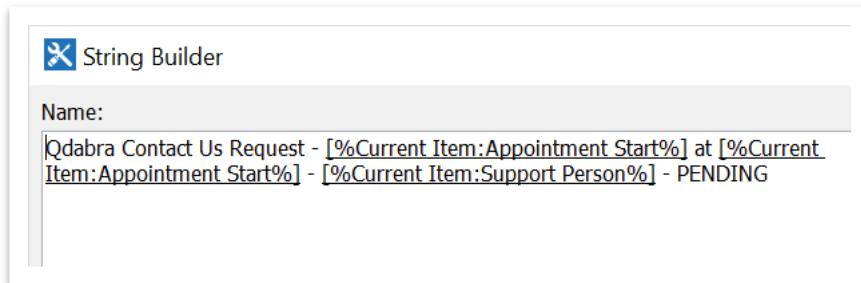
Move Up

Move Down

Selected Users:

Current Item:Contact Person Email

Subject:

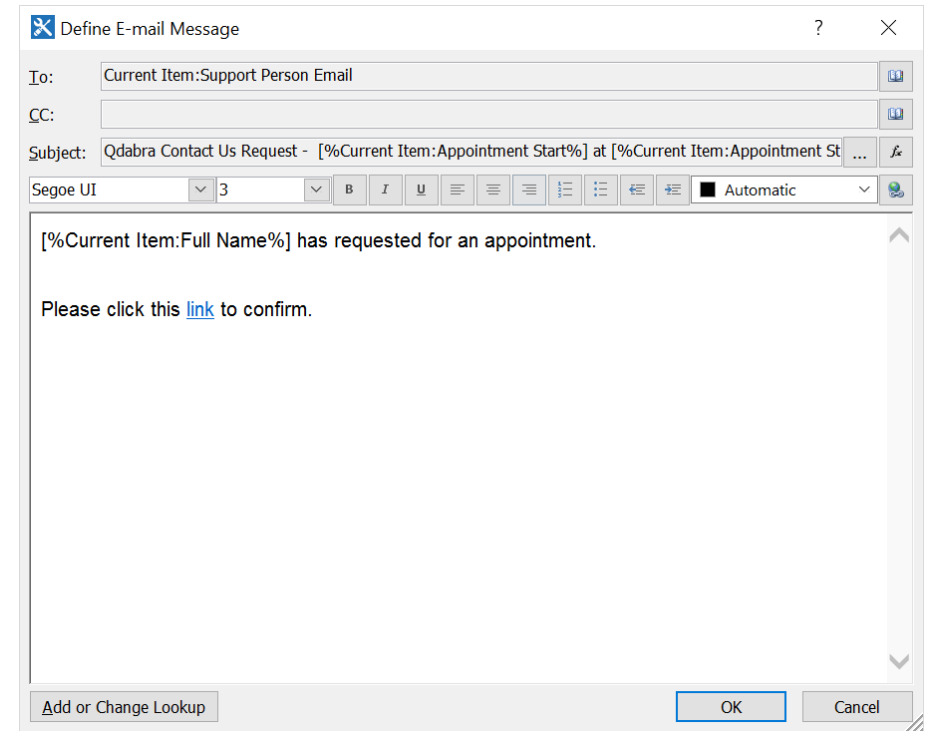


String Builder

Name:

Qdabra Contact Us Request - [%Current Item:Appointment Start%] at [%Current Item:Appointment Start%] - [%Current Item:Support Person%] - PENDING

10. Add another action to send an email. This time the resource is notified that the customer has requested an appointment.



Define E-mail Message

To: Current Item:Support Person Email

CC:

Subject: Qdabra Contact Us Request - [%Current Item:Appointment Start%] at [%Current Item:Appointment Start%] ...

Segoe UI 3 B I U

Automatic

[%Current Item:Full Name%] has requested for an appointment.

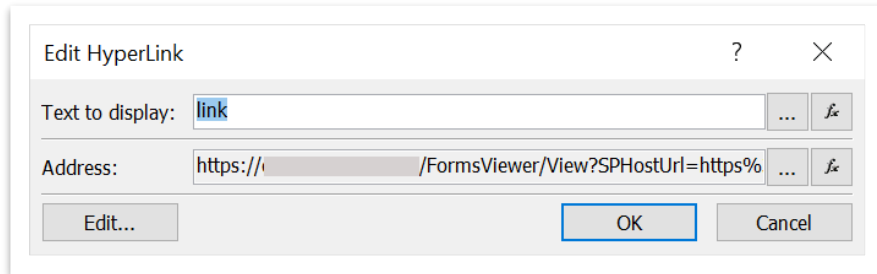
Please click this [link](#) to confirm.

Add or Change Lookup

OK

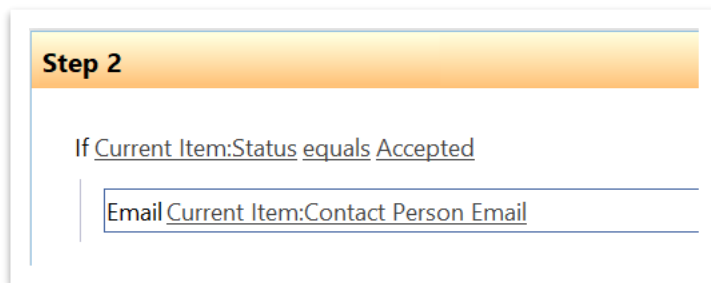
Cancel

Link: This is a hyperlink which directs the user to open the form in FormsViewer.



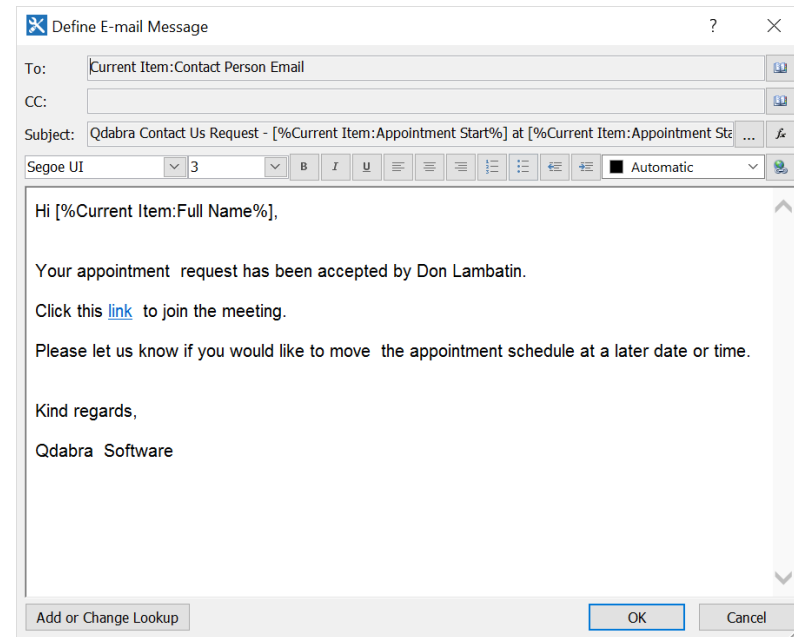
Dialog box titled "Edit HyperLink". It contains two input fields: "Text to display:" with the value "link" and "Address:" with the value "https://.../FormsViewer/View?SPHostUrl=https%". There are "Edit...", "OK", and "Cancel" buttons at the bottom.

11. Using the same logic, add another Step which checks if **Status** is **Accepted**.



Step 2 configuration window. It shows a condition: "If Current Item:Status equals Accepted". Below the condition is an action: "Email Current Item:Contact Person Email".

12. Add an Action to send an email to the customer.
13. Define the email message.



Dialog box titled "Define E-mail Message". It contains fields for "To:" (Current Item:Contact Person Email), "CC:", and "Subject:" (Qdabra Contact Us Request - [%Current Item:Appointment Start%] at [%Current Item:Appointment Start%]). There is a "Segoe UI" font dropdown and a "3" size dropdown. The email body text is: "Hi [%Current Item:Full Name%],

Your appointment request has been accepted by Don Lambatin.

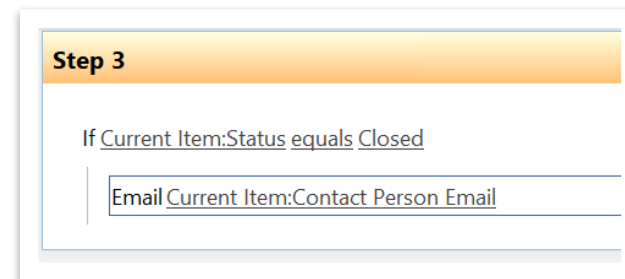
Click this link to join the meeting.

Please let us know if you would like to move the appointment schedule at a later date or time.

Kind regards,

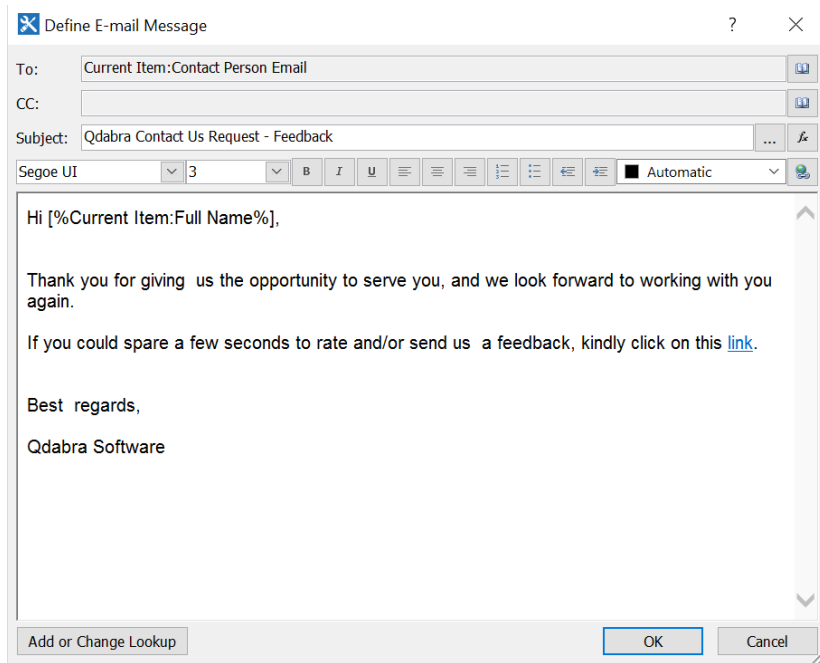
Qdabra Software". There are "Add or Change Lookup", "OK", and "Cancel" buttons at the bottom.

14. Add the last step of our workflow. This will check if **Status** is **Closed**.



Step 3 configuration window. It shows a condition: "If Current Item:Status equals Closed". Below the condition is an action: "Email Current Item:Contact Person Email".

15. Define the email message.



Define E-mail Message

To: Current Item:Contact Person Email

CC:

Subject: Qdabra Contact Us Request - Feedback

Segoe UI 3 Automatic

Hi [%Current Item:Full Name%],

Thank you for giving us the opportunity to serve you, and we look forward to working with you again.

If you could spare a few seconds to rate and/or send us a feedback, kindly click on this [link](#).

Best regards,

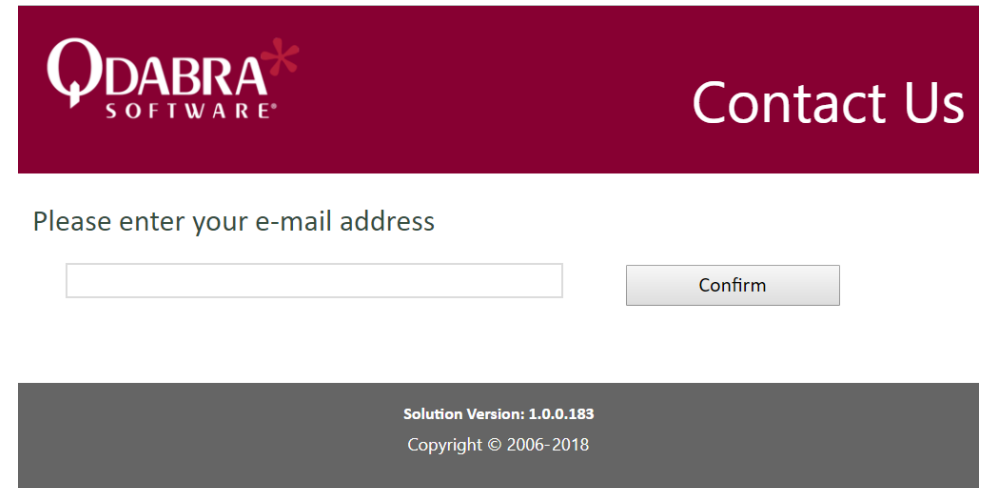
Qdabra Software

Add or Change Lookup OK Cancel

16. Save and Publish the workflow.

TEST THE FORM

1. Open the Contact Us form in the form library.
2. Enter your email address.



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Contact Us

Please enter your e-mail address

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3. Fill out the form.



Contact Us

Please provide your contact information

Your First Name:		Your Last Name:	
Your Job Title:		Your Company:	
Your Country Code:	US (+1)	Your Phone Number (mobile - omit any leading 1s or 0s):	

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- Click Confirm.
- A verification code will be sent to your number by SMS. When you receive this, enter the code in the field provided and click **Verify**.



Contact Us

A verification code has been sent to your phone number ending in ...477 by SMS. Please enter it below.

	Verify
	Go Back

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- If the code expired, a pop-up message will be displayed:

Your verification code has expired. Please enter your code within two minutes after it is sent.

- If your code is still valid, you will be directed to the page where you can proceed to set an appointment:



Contact Us

How can we help you?
 Support - I have prepaid hours on file

Do you need immediate assistance?
☐

Your Name:
Jo-Anne Alfafara

Your Job Title:
Tester

Your Email:
Jo-Anne.Alfafara@Qdabra.com

Your Company:
Qdabra

Your Phone Number:

Set an Appointment

Submit

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8. Click **Set an Appointment** button.
9. Choose a free slot (in green).

What time (in the Pacific Timezone) works best for you?

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9-10am - FREE	9-10am - FREE	9-10am - FREE	9-10am - FREE	9-10am - FREE
10-11am - FREE	10-11am - FREE	10-11am - FREE	10-11am - FREE	10-11am - FREE
5-6am - FREE	5-6am - FREE	5-6am - FREE	5-6am - FREE	5-6am - FREE
6-7am - FREE	6-7am - FREE	6-7am - FREE	6-7am - FREE	6-7am - FREE

Submit

10. Select a resource.

Who would you like to talk to?

Hilary Stoupa - Support

Jennifer Lindsay - Support

Jim Cantwell - Support

Kaoru Okumura - Consulting

Patrick Halstead - Sales

11. Click **Submit**.

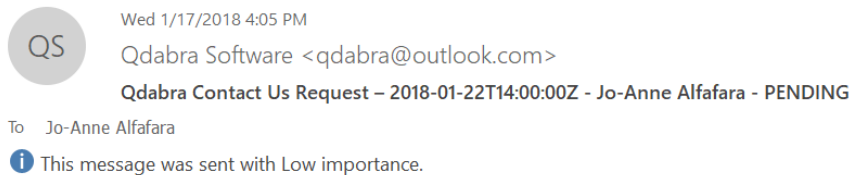


We have received your request. Thank you for contacting us!

Close

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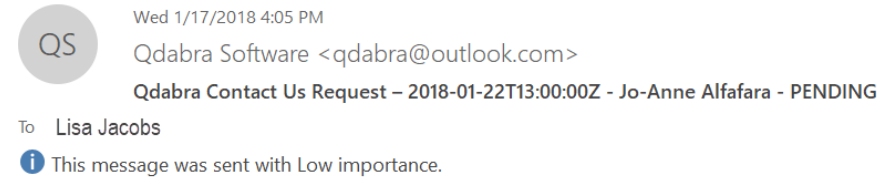
Sample email the resource will receive:



GXP Holdings: Lisa Jacobs has requested for an appointment on 2018-01-22T14:00:00Z.

Please click this [link](#) to confirm the request.

Customer will receive this email:



Hi Lisa,

Thank you for contacting us!

We have received your request for an appointment with Jo-Anne Alfafara.

A confirmation email will be sent as soon as the requested appointment has been accepted.

Kind regards,

Qdabra Software

Sample view of form the resource will receive to accept a request:



QDABRA SOFTWARE Contact Us

Jack Wagner has requested contact at 6am on January 23 to discuss Support. Please click the button below to confirm.

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[Footer Goes Here] Copyright © 2006-2018

After appointment is done, email is sent to the customer to ask for Feedback with link to the Feedback form:



QDABRA SOFTWARE Feedback Form

How would you rate the engagement from our resource?

★★★★★

Comments / Suggestions:

Can we use your feedback and your first name for our marketing quotes in the future? ☒

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CONTACT INFORMATION

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