

## Extra Data Objects are now Custom Forms

Extra Data Objects allowed you to create your own sub-objects that hold data for leads, accounts, contacts, projects, and cases. However, all of that data had to be entered by users. The new Custom Forms enable you to send out save time by sending out these forms to your contacts, automatically capturing their responses in BlueCamroo, you can even use them as surveys.

### Key



**New Feature**



**Change to Existing Feature**



**Setup Instructions**

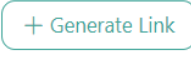

### Custom Forms


The screenshot shows the BlueCamroo CRM interface. The main content area displays a record for 'Acme Industries' with a table of equipment. The table has columns for 'Equipment', 'Serial Number', 'Date Acquired', and 'Cost'. The sidebar menu on the left includes 'Info' and 'Address' sections. The right sidebar menu includes 'Contacts (11)', 'Subsidiaries (1)', 'Opportunities (0)', 'Projects (19)', 'Sales Orders (4)', 'Cases (13)', 'Campaigns', 'Billing', 'Custom Forms', 'Slack', 'Wave', and 'Products and Services'. The 'Custom Forms' section is expanded, showing 'Sales Questionnaire' and 'Company Equipment'.

Equipment	Serial Number	Date Acquired	Cost
<input type="checkbox"/> Dell Computer	DGF-0685	Sun Jun 21 2020	\$899
<input type="checkbox"/> Dell Monitor	DGM-4827	Sun Jun 21 2020	\$379
<input type="checkbox"/> Insignia Wireless Keyboard	17C02F	Sun Jun 21 2020	\$60
<input type="checkbox"/> Insignia Wireless Mouse	57G05L	Sun Jun 21 2020	\$30
<input type="checkbox"/> dell	232323	Mon Oct 10 2022	100
<input type="checkbox"/> dell	232323	Mon Oct 10 2022	100

Custom Forms allow you to create groups of new fields together to simplify and streamline data capture. Now that they are not just static data, but are instead interactive forms that can be filled in by your contacts, we thought that updating the name to Custom Forms was more fitting, as it truly describes their purpose.

While the Custom Forms will still allow you to customize the data in your CRM, the more important change is that you will now be able to send a link to your clients so they can enter the data themselves.

When inside a record, in the Quick Panel menu on the right you will find the **Custom Forms**. Click on the form you would like to send. You can click , and that will copy the link into your clipboard. You can alternatively click on  to enter the data manually.

**Note:** The  button, as seen on the screenshot above, will change based on the name of the Custom Form.

The screenshot shows a BlueCamroo Custom Form for 'Company Equipment'. The form has the BlueCamroo logo at the top. Below the logo is an 'Email' field with the value 'Amy@MyCompany.com'. There are four input fields: 'Equipment' with the value 'Blue Widget', 'Serial Number' with the value '1434922', 'Date Acquired' with the value '10/26/2022', and 'Cost' with the value '\$4,142.99'. A 'Save' button is located at the bottom right of the form.

## Custom Forms Setup

<input type="checkbox"/>	Name	Used In	Fields	
<input type="checkbox"/>	Company Equipment	Organization, Person, Contact, Opportunity, Project		
<input type="checkbox"/>	Sales Questionnaire	Organization, Person, Contact		
<input type="checkbox"/>	Favorite Restaurants	Organization, Person, Contact, Opportunity, Project, Case, Sales...		

You will find the Custom Forms area of the setup the same place Extra Data Objects were, under the **Configuration** section.

You will see **three** new areas in the Custom Forms setup area:

### Online Form Page

Here you can adjust how the form page will look when one of your contacts click on their Custom Form link.

### Email Autoresponder Page

You can send out an email every time someone fills out the form to confirm that their information has been received. In this section you can adjust the content of that email.

### Form Submitted Page

Here you can adjust what the Contact will see on the page once they have submitted the Custom Form.

We hope you will enjoy BlueCamroo 8.3.10, if you have any questions about this release, or if you have any suggestions or comments, please send an email to [support@bluecamroo.com](mailto:support@bluecamroo.com). We'll be glad to help!

**The BlueCamroo Team**