Form Review

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What is a Form Review?

The Form Review is a one time 45 minute conference call between your team (up to 3 people) and a Customer Success Manager to review a single form and prepare it for launch, or review the form after it has been in production for awhile. During this call, we review the form's setup and expected outcomes, and also address any final concerns you have on making your form live.

*If you would like the call to be recorded, please let us know beforehand and we will record the Form Review for you and your team.

An annual Form Review is included as part of our **Priority Support Package**. To purchase additional Form Reviews, contact your Customer Success Manager.

New Priority Support Customers, your first Form Review should be completed within your first 90 days.

Call Structure

1. Introductions
2. Testing and current outcome.
3. Review and address form builder concerns.
4. Review and address form processing concerns.

5. Review and address connector concerns.
6. Questions.

How do I schedule my Form Review?

Contact your Customer Success Manager or Account Manager to purchase a Form Review a minimum of 3 weeks before you would like the review completed. You can also fill out our services request form.

We'll start with a 10 minute scoping call to go over the process and a basic form overview.

Priority Support Customers

If you are a new Priority Support Customer, talk to your Customer Success Manager during your Welcome Call about your projects and the best time to schedule your first Form Review.

Before the Call

While you are working on your form, reach out to our support team and they will answer your questions, offer suggestions, and help resolve errors.

To get the most out of the Form Review:

- The form must be 75% complete to prior to the review.
- If you are preparing a form for launch, complete the review a minimum of 2 weeks prior to your go live date.

Send the details below to your CSM a minimum of 3 days before the call to ensure

there is time to review and test your form.

1. Form link
    - Send the form's link. This is found in the Publishing Details page.
2. Confirm access has been granted to your account.
    - Learn how to grant access to our team.
3. Outcome expected
    - Outline the process you are trying to accomplish with this form.
4. Points of concern
    - Note any of the setup that you're not confident about, or particular areas that you wish were stronger.
5. Testing information
    - Make note of accounts, like a Salesforce Communities or SAML authentication, testing details, and any other details that will make the testing process more realistic.

During the Call

On the call, together we will

1. Test form to look at overall process.
2. Go over response processing.
3. Look at points of concern.
4. Discuss options to improve the form process.

After the Call

We will follow up by email, summarizing the findings and additional tasks to be

completed before going live with your form.

You can continue to ask our team questions anytime, before and after this call, through our email and chat support.

We look forward to working with you!