



Cobalt Forms

Cobalt Portal Forms and Mapping allow you to customize processes where you ask for customer data without code development. Forms can be linked to application, registration, and profile update processes so that you can collect additional data without code changes. The mapping functionality allows you to add data from these responses directly your records in Dynamics 365, or you can access the information through the form response records, or a report.

COURSE OBJECTIVE: Create unique forms to collect additional data from users when completing standard system processes.

LESSON 1: Identify the Portal Form Entities

Task 1: List the entities and understand their relationship

Task 2: View an existing form to see each entity

LESSON 2: Using the Form Designer

Task 1: Setting up a Process Form or a Stand-Alone Form

Task 2: Understand the Page Types

Task 3: Configure a question page

Task 4: Create mapped questions

Task 5: Create sections and unmapped questions

Task 6: Explore question types

LESSON 3: Create Conditional Questions

Task 1: Create a child question

Task 2: Understand the hide function

LESSON 4: Link Portal Forms to a Process and Test

Task 1: Locate where to link a portal form for all potential processes

Task 2: Test form on the portal

Task 3: Locate form responses